



Chapter 2

Tax Credits Screening Details and Best Practices

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Tax Credits Screening Details and Best Practices

Point of Screening

A WOTC Screening must take place on or before the Job Offer date per IRS guidelines. There are two typical placements of the screening process:

1. As part of the application. This can be in-line with the application and presented as another portion or section of the client's application or it can be at the end of the application where a candidate is then launched into the ADP screening.
2. As part of the application workflow. This is generally after an application is complete and automatically initiated based on a trigger that a candidate reaches. The candidate may be requested to screen via an email or invited to return to the application system to complete tasks. The most popular triggers include:
 1. Interview
 2. Candidate considered
 3. Pre-Offer eligibility check



Note

ADP's Best Practice recommendation is to offer multiple Points of Screening to a client. Each client can choose based on business need and culture to use one or the other or a combination of both methods.

Screening Launch Requirement

To receive maximum benefit from the WOTC program the launch into the ADP screening process should be required to complete the application. The program is voluntary and ADP provides each candidate the opportunity to "Opt Out" of the screening. A restriction to prevent a system user to make a Job Offer can also be created; however, this restriction should allow for an easy method to present the screening to the candidate so that no delay in the Offer process is encountered.



Note

ADP's Best Practice recommendation is to offer the launch of the ADP WOTC Screening as required for a completed application since ADP will provide the applicant with the option to not participate. Some clients may choose to not activate this configuration and ADP will work with them to understand the impact to their WOTC program.

Multiple Applications

It is common practice for applicants to apply to more than one position. The launch of the screening, especially when it is in-line with the application should be considered. ADP has logic that can recognize previously employed or previously applied candidates within a pre-determined amount of time. The ADP system will adjust the experience to meet the program and applicant circumstances. However, be aware ADP will assign a unique Interaction ID to each requested screening regardless of the time span for the exact candidate. This functionality is only applicable if the applicant supplies their SSN at time of the WOTC screening.



Note

ADP's Best Practice recommendation is for the ATS to track the candidate's WOTC information and apply it to all applicable requisitions or move it along with the candidate should the candidate be moved to different requisition within 30 days of the original WOTC screening. If this is not possible, the client should understand the WOTC screening will be presented each time it is requested by the ATS and based on the client configuration ADP may be able to shorten the subsequent screenings.

Initiate Tax Credit Screening: Request

For a successful API call to initiate a Tax Credit screening, all screening subject (candidate/applicant) information is optional to provide. However, it is encouraged that any of the available fields that have already been collected by the ATS should be included in the Initiate Tax Credit Screening Request Details so that this data is pre-populated within the screening to prevent data reentry for the screening subject resulting in an improved application experience. Not all the fields available in the API call may be asked during the WOTC screening; the screening process is responsive and optimized based on the subject's answers. Any required information not provided by the initiate call will be collected by ADP during the screening process.

The screening subject data for this integration fall into two main categories:

1. Optional in API call but required in screening- providing this in the initiate call will pre-populate the screening with this information to eliminate screening subject data reentry.
2. Optional in API call- not collected during screening unless needed based on the screening subject's answers to the screening questions, is collected by ADP if sent in the API call.

Please see SSN Collection Section for full explanation of when SSN needs to be provided and the options for collection.

Initiate Tax Credit Screening: Request Details

Information	Field	Required?	Notes
OrganizationID	organizationID	Required	Provided by ADP
SSN	taxID	See SSN Section	See SSN Collection Section
Name	givenName	Optional in API call but required in screening	
	middleName	Optional in API call	
	familyName1	Optional in API call but required in screening	
DOB	birthDate	Optional in API call	May be required during screening depending on screening answers
Address	lineOne	Optional in API call	Street address only
	cityName	Optional in API call	
	codeValue	Optional in API call	
	shortName	Optional in API call	
	subdivisionType	Optional in API call	State

	countryCode	Optional in API call	US
	postalCode	Optional in API call but required in screening	
Communication	areaDialing	Optional in API call	
	dialNumber	Optional in API call	Mobile number is preferred
	emailUri	Optional in API call	
Expected Work Location	codeValue	Optional in API call	
Redirect URL	taxCreditRedirectURI		This is the URL the candidate will be redirected to after the screening is complete

Initiate Tax Credit Screening: Response

The `/events/tax/v1/tax-credit-screening.initiate` response from ADP will include the newly initiated screening unique identifier (also referred to as Screening GUID, credit-screening-id, or screening ID) and the URL to complete the screening process which will be utilized in subsequent steps.

Initiate Tax Credit Screening: Response Details

Information	Field	Note
Screening GUID	taxCredit Screening itemID	Unique identifier of screening
Screening Link URL	"edit-form" link"	URL to be presented to the candidate

The Screening GUID returned in the response is the unique identifier for the screening and will be used to either obtain eligibility results of that specific screening or match eligibility results obtained from the queue to the correct screening.

The ATS will present the Screening Link URL obtained from the `/events/tax/v1/tax-credit-screening.initiate` response to the screening subject. The URL provided by ADP brings the screening subject into the ADP Screening Application to complete the Tax Credits Screening. Once the screening is completed by the screening subject, they will be redirected to the redirect URL provided in the screening initiate post.