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## **PLEASE READ CAREFULLY!!**

### **Instructions to Complete Tax Credit Forms**

There are 3 forms that need to be reviewed and completed:

1. "Long-Term Unemployment Recipient Self-Attestation Form"
2. "Tax Credit Questionnaire" (TALX form)
3. Form "8850" (Pre-Screening Notice and Certification Request for the Work Opportunity Credit)

Please complete all the forms by **printing all responses**, and bring them with you when you come to NRI to interview.

Thank you very much!!



U.S. Department Labor  
Employment and Training Administration

OMB Control No. 1205-0371  
Expiration Date: March 31, 2023

**LONG-TERM UNEMPLOYMENT RECIPIENT SELF-ATTESTATION FORM  
Work Opportunity Tax Credit (WOTC) Program**

Instructions: This Self-Attestation Form (SAF) is to be completed, signed, and dated by the new hire only. Employers or consultants submit this SAF to the State Workforce Agency with IRS Form 8850 or if filed separately, with ETA Form 9061 (or ETA Form 9062) for each certification request filed for the new target group.

Under penalties of perjury, I declare that this information is true and correct to the best of my knowledge.

**New Hire's Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

New Hire Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Employer Name: \_\_\_\_\_

**Please check all the statements that apply to you and provide the requested date. Sign and date this form where indicated.**

- I declare that I was in a period of unemployment that is at least 27 consecutive weeks and for all or part of that period I received unemployment compensation.
- I declare that I have been in a period of unemployment since \_\_\_\_\_.  
(Enter start date)

**Privacy Act Notice:** The Internal Revenue Code of 1986, Section 51, as amended and its enacting legislation, P.L. 104-188, specify that the State Workforce Agencies are the "designated" agencies responsible for administering the WOTC certification procedures of this program. The information you have provided completing this form will be disclosed by your employer to the State Workforce Agency. Provision of this information is voluntary; however the information is required to determine your employer's eligibility for the federal tax credit.

**Public Burden Statement:** Persons are not required to respond to this collection of information unless it displays a currently valid OMB control number. Respondents' obligation to complete this form is required to obtain or retain benefits (P.L. 111-5). Public reporting burden is estimated to average 10 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate to the U.S. Department of Labor, Division of National Programs Tools Technical Assistance, Room C-4510, Washington, D.C. 20210 (Paperwork Reduction Project 1205-0371). Please do not submit completed forms to this address.

**TO BE COMPLETED BY EMPLOYER**

Company Name <b>72167 NRI, Inc.</b>	Location Number (If Applicable) <b>NRI</b>	Offer Date <b>/ /</b>	Start Date <b>/ /</b>
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**TAX CREDIT QUESTIONNAIRE**

This form is used to identify federal tax credits and is **NOT** intended to determine your work eligibility.

**TO BE COMPLETED BY EMPLOYEE (Please Print Clearly)**

First Name	Last Name	SSN
Home Address		Date of Birth (if under 40) / /
City	State	Zip Code
Position Applying For	Have You Worked for this Company Before? <input type="radio"/> YES <input type="radio"/> NO	County
		Driver's License or State ID Number State

**1. Within the past 2 years, have you or a member of your household received any form of cash or voucher assistance, such as Aid to Families with Dependent Children (AFDC), Temporary Assistance for Needy Families (TANF), Child Care or Transportation Assistance (CCT) or Food Stamps (FS)?**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:*

Primary Recipient (Name and Social Security Number)	Relation to Yourself	City/ State Where Received
Assistance Type: (Check all that apply) <input type="radio"/> AFDC <input type="radio"/> TANF <input type="radio"/> CCT <input type="radio"/> FS	Date First Received (MM/YY)	Date Last Received (MM/YY)

**2. Have you ever served on active duty in the US Military?**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:*

2b. Are you eligible to receive compensation for a service connected disability?  Yes  No  
 Date Entered (MM/YY)

Branch of Service:  
 Army  Navy  Air Force  Marines  Coast Guard  National Guard  
 Discharge Date (MM/YY)

**3. Have you ever been convicted of a felony? (Do NOT include misdemeanors)**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:*

Parole/ Probation Officer Name	Parole/ Probation Officer Phone Number	Date Convicted (MM/YY)	Date Released (MM/YY)
Offense Type: <input type="radio"/> State <input type="radio"/> Federal	City/State of Conviction	County of Conviction	

**4. Have you ever participated in a State or Veterans Affairs Vocational Rehabilitation Program or have you participated in the Ticket to Work program?**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:*

Agency Name/Rehabilitation Program/Employment Network	Date Completed (MM/YY)
Agency City	Agency State
Agency Phone Number	

Program type:  Vocational Rehabilitation  Veterans Affairs  Ticket to Work

**5. Have you received Supplemental Security Income (SSI) benefits for yourself within the last 3 months? Do NOT include Social Security Disability Income (SSDI).**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:* Date Last Received (MM/YY) \_\_\_\_/\_\_\_\_/\_\_\_\_

**6. Have you been unemployed, received Unemployment Benefits or been eligible to receive Unemployment Benefits during the past year?**  YES  Not Sure  NO  
*If YES or Not Sure, please provide the following information:*  
 How many months in the past year were you unemployed? \_\_\_\_  
 What was your last day of work with your previous employer? (MM/DD/YY) \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Did you receive unemployment compensation?  Yes  No In what state did you receive unemployment compensation? \_\_\_\_

**EMPLOYEE DECLARATION AND RELEASE**

*By signing this voluntary form, I hereby authorize the release to Equifax Workforce Solutions or its agents information held by any parties needed to determine my eligibility for federal and/or state tax credit programs. This includes, but is not limited to, information regarding my criminal history, driver records, military service, SSI benefits, vocational rehabilitation services, unemployment benefits, AFDC/TANF benefits or Food Stamp benefits. I further authorize Equifax Workforce Solutions or its agents to complete on my behalf any forms required to obtain this information, including SSA Form 3288.*

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Review for completeness and mail to:  
**Equifax Workforce Solutions 3470 Rider Trail South Earth City, MO 63045**

**Pre-Screening Notice and Certification Request for  
the Work Opportunity Credit**

► Information about Form 8850 and its separate instructions is at [www.irs.gov/form8850](http://www.irs.gov/form8850).

**Job applicant: Fill in the lines below and check any boxes that apply. Complete only this side.**

Your name \_\_\_\_\_ Social security number ► \_\_\_\_\_

Street address where you live \_\_\_\_\_

City or town, state, and ZIP code \_\_\_\_\_

County \_\_\_\_\_ Telephone number \_\_\_\_\_

If you are under age 40, enter your date of birth (month, day, year) \_\_\_\_ / \_\_\_\_ / \_\_\_\_

- 1  Check here if you received a conditional certification from the state workforce agency (SWA) or a participating local agency for the work opportunity credit.
- 2  Check here if **any** of the following statements apply to you.
- I am a member of a family that has received assistance from Temporary Assistance for Needy Families (TANF) for any 9 months during the past 18 months.
  - I am a veteran and a member of a family that received Supplemental Nutrition Assistance Program (SNAP) benefits (food stamps) for at least a 3-month period during the past 15 months.
  - I was referred here by a rehabilitation agency approved by the state, an employment network under the Ticket to Work program, or the Department of Veterans Affairs.
  - I am at least age 18 but **not** age 40 or older and I am a member of a family that:
    - a.** Received SNAP benefits (food stamps) for the past 6 months; **or**
    - b.** Received SNAP benefits (food stamps) for at least 3 of the past 5 months, **but** is no longer eligible to receive them.
  - During the past year, I was convicted of a felony or released from prison for a felony.
  - I received supplemental security income (SSI) benefits for any month ending during the past 60 days.
  - I am a veteran and I was unemployed for a period or periods totaling at least 4 weeks but less than 6 months during the past year.
- 3  Check here if you are a veteran and you were unemployed for a period or periods totaling at least 6 months during the past year.
- 4  Check here if you are a veteran entitled to compensation for a service-connected disability and you were discharged or released from active duty in the U.S. Armed Forces during the past year.
- 5  Check here if you are a veteran entitled to compensation for a service-connected disability and you were unemployed for a period or periods totaling at least 6 months during the past year.
- 6  Check here if you are a member of a family that:
- Received TANF payments for at least the past 18 months; **or**
  - Received TANF payments for any 18 months beginning after August 5, 1997, **and** the earliest 18-month period beginning after August 5, 1997, ended during the past 2 years; **or**
  - Stopped being eligible for TANF payments during the past 2 years because federal or state law limited the maximum time those payments could be made.
- 7  Check here if you are in a period of unemployment that is at least 27 consecutive weeks and for all or part of that period you received unemployment compensation.

**Signature—All Applicants Must Sign**

Under penalties of perjury, I declare that I gave the above information to the employer on or before the day I was offered a job, and it is, to the best of my knowledge, true, correct, and complete.

Job applicant's signature ► \_\_\_\_\_

Date \_\_\_\_\_