

# WOTC

Work Opportunity Tax Credits  
Transformed through Automation




*How Walton Management Services, leveraged integrated  
technology solution to streamline and maximize WOTC  
for a popular convenience store group*





# Work Opportunity Tax Credits Transformed through Automation

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## CASE STUDY

### OVERVIEW

For nearly 30 years, the Work Opportunity Tax Credit (WOTC) has promoted the hiring of select target groups, likely to face barriers in securing employment due to many circumstances. Companies that hire and retain WOTC-certified individuals can earn significant tax credits that accumulate throughout the fiscal year and offset federal tax liability.

Like other government-based incentives, WOTC has many moving parts that include strict guidelines and deadlines for companies to follow to earn the credits. As a result, companies often struggle to comply and end up leaving hundreds of thousands of tax credits on the table every year.

This was the case with one of the largest privately-owned convenience-store operating group, operating more than 1,200 stores in nearly half of the states. This employer participated in the WOTC program since early on, earning valuable tax credits every year, administered by Walton; a leading provider of tax credit screening services.

Though initially, the process to screen new hires for WOTC required significant involvement and time commitment from store staff. This was due to the fact the company did not have a

Hiring Management or Applicant Tracking System to automate their hiring or onboarding process. Therefore, every time they hired someone; the store manager had to make sure the employee called a toll-free number to complete the WOTC screening process to determine their potential WOTC eligibility.

While this seemed simple enough on the surface, administering this process for so many hires took time and in the retail world, there are simply too many other competing priorities at the store level. As a result, store managers consistently missed screening nearly half of all new hires, leaving a significant amount of tax credits on the table year over year.

This coupled with other significant challenges they were facing in their hiring process, made it clear they needed to find and implement an automated solution.

***"We realized that not having an automated hiring system in place was costing the company a fortune."***

***– Chief Financial Officer***



# APPROACH

- 1 Realizing the need for an ATS to automate their hiring and onboarding, the Client selected iCIMS, a leading provider of hiring management solutions and a trusted integrated partner of Walton's since 2013.
- 2 Walton successfully demonstrated how seamlessly its integration with iCIMS would automate WOTC, saving store staff significant time every week and maximizing annual tax credits.
- 3 The new process would integrate a short online questionnaire (powered by Walton) within iCIMS' hiring workflow. WOTC-eligible hires electronically sign + file Form 8850 timely with a simple click.

## RESULTS



### Automation

*All manual steps to screen new hires for WOTC were eliminated, giving-back store managers additional time each week.*

BEFORE

**0%**

AFTER

**100%**



### Employee Screening

*Integrating WOTC screening into iCIMS workflow increased employee screening by 41 percentage points.*

BEFORE

**54%**

AFTER

**95%**



### Annual Tax Credits

*After the transformation of the client's WOTC program, tax credits increased by 150% year-over-year.*

BEFORE

**\$1.0M**

AFTER

**\$1.5M**

***"Walton's integrated solution enabled us to fully automate the workflow to screen and optimize WOTC with ease."***

***– VP, Human Resources***

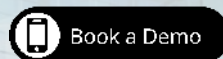


# CONCLUSION

Transforming a company's Work Opportunity Tax Credit program to the point that all screening as well as the administration of all moving parts become entirely automated requires access to a robust tested-and-proven integration.

A simplified user experience and a meticulously streamlined workflow are also crucial to implement a scalable process that is simple to use and delivers maximum results.

Walton's technology platform has successfully combined all these elements to help many companies automate, streamline and maximize tax credits.



## ABOUT WALTON MANAGEMENT SERVICES, INC.

Walton is the largest privately-owned provider of technology solutions proven to automate Point-of-Hire Tax Credits, Verification of Employment + Income and Unemployment Insurance cost reduction.

Walton's solutions deliver a streamlined user-experience powered by an award-winning technology platform and proven best-practices developed and fine-tuned over the last four decades. Walton proudly integrates with a vast ecosystem of trusted business partners to deliver automation and second-to-none service to hundreds of businesses across all industries.

For more information, visit us at: [www.waltonmgt.com](http://www.waltonmgt.com)

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