

7: Manage WOTC

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The Work Opportunity Tax Credit (WOTC) is a federal tax credit available to employers who hire individuals from certain target groups, including veterans, as well as TANF and SNAP recipients who have faced significant barriers to employment. The tax credit amount depends upon the target group of the individual hired and the number of hours the individual worked in the first year. Each year, employers claim over \$1 billion in tax credits under the WOTC program.

The wide variety of target groups include:

- Veterans
- Members of a family that have received temporary assistance or food stamps benefits
- People who have received food stamps (SNAP)
- People with disabilities who receive SSI benefits
- People receiving vocational rehabilitation
- Summer youth employees
- Ex-felons
- People who live in certain low-income communities
- Long-term unemployed

People who would not qualify include:

- Relatives and dependents of the hiring employer
- Current or former employees regardless of how long it has been since they last worked
- Majority owners of the business

Register as a WOTC Employer

The WOTC module allows employers or their agents to manage their WOTC applications online. Both employers and agents self-register on the system and, once approved by staff, have full access to WOTC functionality. When the system also includes recruiting functionality, employers can register for both *Recruiting* and *WOTC* functionality. Registration requirements will vary in accordance with the site and the account type selected. For example, a WOTC registration may require you to enter your UI Employer Account Number.

► **Follow these steps to complete a WOTC registration as an employer or agent:**

- 1 From the Home page, click the [Not Registered?](#) or [Start Here](#) link. (As each system has a unique Home page, you may see additional links for launching a registration.)
- 2 Review your account options on the next screen. Click [Employer](#) to launch the registration wizard for an employer account.
- 3 Employers select Direct Representative of Your Organizations. WOTC agents select Third Party Agents (TPA).

Selecting an Employer Account Type

- 4 Employers can select *WOTC Services* and, if available, *Recruiting Services*. (If you only register *WOTC Services*, you may add *Recruiting Services* later.) After making your selection, click **Continue Registration**.
- 5 Complete each registration panel pictured below. Enter as much information as possible. Be sure to indicate whether the *Employer* or *Agent* will be the Legal Forms Holder. Click [Legal Forms Holder Description](#) to read the on-screen definition.

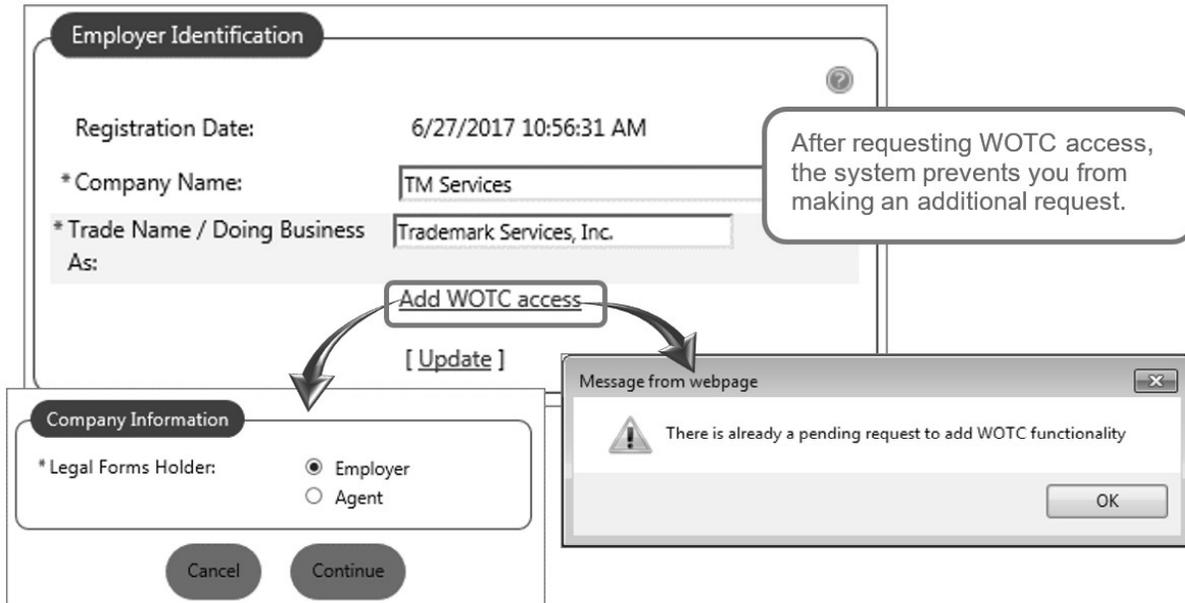
Launching a Combined Recruiting and WOTC Services Registration

Already Registered as a Recruiter?

When a standard employer registration (*Recruiting*) already is established, you can request access to WOTC functions from your employer profile page.

- Select **Employer Profiles** ▶ **Corporate Profile** ▶ **General Information** tab from the Portfolio folders, and select the [Add WOTC Access](#) link.

Once you have requested WOTC access, staff will need to confirm your request.



Requesting WOTC Access When Already Registered as a Recruiter

Already Registered as an Agent?

When an agent registration is already established, you can request access to WOTC functions from your profile page.

- Select **Employer Profiles** ▶ **Corporate Profile** ▶ **General Information** tab from the Portfolio folders.

On the **Employer Identification** panel, you can indicate that you will be applying for WOTC on behalf of your clients.

Employer Identification

Employer Site ID: 12355 🔍

* Company Name:

* Type of Identification: Federal Employer Identification Number
 Social Security Number

* Federal Employer ID Number (EIN) / Federal Tax ID (FEID) or Social Security Number:
Do not enter dashes. Example 999001111

* Confirm Federal ID Number:

* UI Employer Account Number:
Do not enter dashes. Example

* Confirm UI Employer Account Number:

UI Employer Account Type: Not Set

Will you be applying for Work Opportunity Tax Credits for your clients?: Yes
 No

[Update]

Agents need to initiate access to WOTC functionality by responding Yes.

Responding Yes to the WOTC Question on an Agent Account

Upload Multiple Employers

Since agents may represent many WOTC clients, the WOTC module allows agents to upload a file of all their employers using an Excel spreadsheet. Agents should use this option when manually entering each employer would be too cumbersome.

► **To upload multiple employers (as an agent):**

- 1 When logged in as an Agent, select **Employer Profiles** ► **Corporate Profile** ► **Representing Employers** tab from the Portfolio folders.
- 2 Click the [Batch Add Employers](#) link.
- 3 Click the [Download Instructions](#) link to open the instructions in a new browser.
- 4 Click the [Download Blank Spreadsheet with Headers](#) link to save the spreadsheet to your computer and begin entering data on employers.

The screenshot displays the 'Employer Import' section of the WOTC management interface. It features a table with the following data:

Company Name	Contact	Location	Signature Date	Start Date	Ending Date	POA	Status	UID	Action	Select
gsi_wotc 2		Henderson, NV 89002	10/1/2017	10/31/2017	10/1/2017	power_of_attorn ey.docx	Pending		View	<input type="checkbox"/>

Below the table, there are links for 'Manually Add Employers' and 'Batch Add Employers'. A red arrow points from the 'Batch Add Employers' link to the 'Return to Representing Employer Tab' button in the 'Employer Import' sidebar.

Agent Uploading Multiple WOTC Employers into the System

Set WOTC Privileges for Contacts or Agents

Employers can specify WOTC privileges for any contact tied to their account. They can also define WOTC privileges for agents who are completing WOTC applications on their behalf.

► **Follow these steps to define WOTC privileges for an employer contact.**

- 1 Select **Employer Profiles** ► **Corporate Profile** ► **Contacts/Users** tab from the Portfolio folders.
- 2 On the **User Privileges** tab, review the WOTC privileges associated with the contact. You may check or uncheck privileges as needed.
- 3 Scroll to the bottom of the page and click the **Edit** button.

► **Follow these steps to define WOTC privileges for agents completing WOTC applications on your behalf.**

- 1 Select **Employer Profiles** ► **Corporate Profile** ► **Agents** tab from the Portfolio folders

Note: The **Agents** tab only displays when an agent has applied to work with your account and has a *Pending or Approved* status.

- 2 Select an Agent Name link to begin viewing the agent's settings.
- 3 On the **User Privileges** panel, review the WOTC privileges associated with the agent. You may check or uncheck privileges as needed
- 4 Scroll to the bottom of the page and click the **Save** button.

User Privileges

Select All / Un-Select All

Contact: Kevin Kransten

Basic Contact Privileges

User Privileges for Corporate Information

Edit General Information

User Privileges for Locations

WOTC Privileges

User privileges for 8850 Application

Create 8850 application

Edit 8850 application

View 8850 application

Delete 8850 application

View Full SSN

View Partial SSN

Edit SSN

User privileges for 9061 Application

Create 9061 application

Edit 9061 application

View 9061 application

Delete 9061 application

View Full SSN

View Partial SSN

User privileges for adding documents

Add Power of Attorney

Add verification documents

User privileges for appeals

Create appeals

Edit appeals

View appeals

User privileges for Status

Create status

Edit status

View status

Reviewing and Setting WOTC Access Privileges for an Agent

Recruit WOTC Job Applicants

Virtual OneStop offers several opportunities for recruiting employers to indicate their interest in hiring individuals eligible for WOTC. These features are only available when a registration includes *Recruiting Services*. If you only register as a WOTC employer, you may add *Recruiting Services* at any time.

To indicate your interest in hiring WOTC-eligible applicants, enter text in the **Company Profile** section. Individuals will be able to access the information from the job announcement when they view the Company Profile.

- Select **Employer Profiles** ▶ **Corporate Profile** ▶ **General Information** tab from Portfolio folders and scroll down to the **Company Profile** panel and then add WOTC text, as shown below.

Entering WOTC Information in the Company Profile

Employers may also use the Job Order Wizard to inform potential applicants. When defining or editing a job order, select the **Job Application Methods Accepted** feature. Employers often use this section to indicate their commitment to Equal Opportunity Employment. You may also add that you welcome applicants who are eligible for WOTC (*shown below*). Job seekers must review this section just prior to submitting their application for the job.

Adding a WOTC Indication to an Employer Job Order

Job Fair Notification. Employers can now create a job order and associate the job order with an existing job fair. When users enter job fairs in the system, they will display on a dropdown menu in the **Job Application Methods Accepted** panel. When individuals review the panel, the system will notify them of the job fair and provide event information along with a link to register.



Adding Job Fair Information to a Job Order

Complete a WOTC Application

Once registered in the system with WOTC access, employers or their agents can complete and submit WOTC applications online. In order for agents to be able to enter WOTC applications on behalf of employers, the TPA relationship must be active with the following privileges checked: *Create 8850 Application* and *Create 9061 Application*. Other WOTC privileges will determine which WOTC actions a TPA or employer contact may perform. (See the topic [Set WOTC Privileges for Contacts or Agents](#), earlier in Chapter 7.)

Only Two Forms for a WOTC Application. A typical WOTC application begins with IRS Form 8850 and ends with ETA Form 9061 – the only two forms required to complete a WOTC application. By completing the forms online, employers or their agents can work closely with the SWA to make sure the application complies with all deadlines and documentation requirements. Once the SWA verify and approve a WOTC application, employers can file for the tax credit with the IRS using a separate form, typically IRS Form 5884.

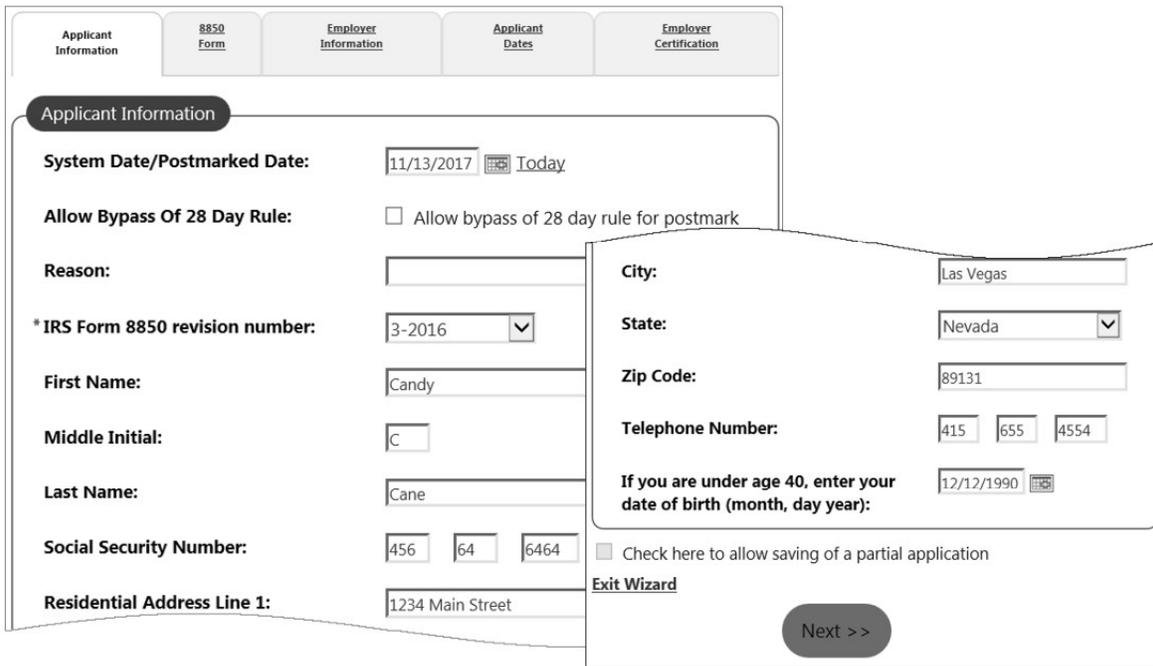
IRS Form 8850

To initiate a WOTC application, employers or their agents complete the IRS Form 8850. Known as the “Pre-Screening Notice,” form 8850 allows employers to make a written request to their SWA to certify their new hire as a member of a WOTC target group.

- Select **Quick Menu** ▶ **WOTC Applications** from the Navigation menu or Directory of Services and then select the [Create Application](#) link.
 - Alternatively, select **Work Opportunity Tax Credit** ▶ **Work Opportunity Tax Credit** ▶ **Application Search** from the Portfolio folders and then select the [Create Application](#) link.

On-Screen Wizard. The system presents IRS Form 8850 in a wizard format consisting of several tabs. To save your entries and advance to the next tab, click the **Next** button at the bottom of the tab. If your

entries fail to meet the requirements, the system will display an alert at the top of the tab. When necessary, you may return to a previous tab using the **Back** button at the bottom of the tab.



Application Information Tab

On the **Application Information** tab, you will see the IRS Form 8850 Revision Number. The most current form revision number will always display as the first selection in the dropdown list. If you change to a different form revision, the WOTC target group questions may be different.

What is the 28 Day Rule? In order for IRS Form 8850 to be considered timely, users must submit the form to the SWA within 28 calendar days after the employee's start date. The SWA will deny all WOTC applications that users do not submitted within 28 calendar days.

On the **8850 Form** tab, you will select the target group that applies to the new hire. Typically, the job applicant provides the information required on this tab.

What is a Conditional Certification? Some job applicants may have received a conditional certification from a participating agency, such as an SWA, a Vocational Rehabilitation agency, a One-Stop Career Center, or an Employment Network for the Ticket to Work program.

Applicant Information	8850 Form	Employer Information	Applicant Dates	Employer Certification
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8850 Questions

Check here if you received a conditional certification from the state workforce agency (SWA) or a participating local agency for the work opportunity credit.

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) (foodstamps) for at least 9 months.
- I was referred here by the state, an employer, or the Department of Workforce Development.
- I am at least age 18 and a member of a family that...

Under penalties of perjury, I declare that 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 of Applicant's Signature:**

Completing the Form 8850 Tab and Entering Job Applicant Signature

The **Employer Information** tab automatically displays your employer information. You need only review the information and click **Next**.

The screenshot shows the 'Employer Information' tab selected. The form contains the following fields:

- Please select worksite location from list:** Wotc employer staff 4
- Employer Name:** Wotc employer staff 4
- Employer Telephone Number:** [Empty]
- Company EIN:** [Empty]
- Company Address:** [Empty]
- Worksite EIN:** [Empty]
- Worksite Location Address:** [Empty]

A callout box titled 'Person to contact, if different from above:' contains the following fields:

- First Name:** [Empty]
- Last Name:** [Empty]
- Telephone Number:** [Empty]
- Street Address:** [Empty]
- City:** [Empty]
- State:** None Selected
- Zip Code:** [Empty]
- If, based on the individual's age and home address, he or she is a member of group 4 or 6 (as described under Members of Targeted Groups in separate instructions), enter that group number (4 or 6):** [Empty]

Entering Employer and Contact Information

On the **Applicant Dates** tab, you must enter all the key dates for the application.

The screenshot shows the 'Applicant Dates' tab selected. The form displays the following dates:

- * Gave Information:** 10/30/2017
- * Was offered Job:** 11/05/2017
- * Was hired:** 11/07/2017
- * Started Job:** 11/07/2017

Applicant Dates Tab

The **Employer Certification** tab concludes the first part of the tax credit application. You need only check the signature box and click **Finish**. The **Print** button is also available here. Alternatively, you may go directly to the second part of the application by clicking the **Continue to Form 9061** button.

Employer Certification Tab

ETA Form 9061

To continue a WOTC application, employers or their agents complete the ETA Form 9061. Known as the “Individual Characteristics” form, employers provide more details of the job and provide documentation of eligibility for a WOTC target group.

- Select **Quick Menu ▶ WOTC Applications** from the Navigation menu or Directory of Services.
 - Alternatively, select **Work Opportunity Tax Credit ▶ Work Opportunity Tax Credit ▶ Application Search** from the Portfolio folders.

To display a list of WOTC applications, enter filter criteria, and then click the [Filter](#) link. For example, you may select *Incomplete Applications* to see which applications still need more information.

Filter WOTC Application
Create Application by Assisting an Employer

[Hide Filter Options](#)

Filter Options

Employer ID (internal only): 0

8850 Control Number:

Applicant First Name:

Applicant Last Name:

Applicant Social Security Number:

Employer FEIN:

Application Status: ▼

Application Date Range: Today to

[Filter | Reset Filter(s)]

Control Number	Applicant Name	SSN	Emp EIN	Application Date	Application Status	Action
2	First Applicant	235-69-5623	777441111	10/31/2017	Incomplete Application	Action
7	WOTC ONE	201-71-1131	552058885	11/13/2017	Incomplete Application	Action
8	Candy Cane	456-64-6464	750685200	11/13/2017	Incomplete Application	Action Edit 8850 Edit 9061 Verify
			552058885	11/13/2017	Incomplete Application	Action

Reviewing WOTC Applications Associated with My Employer Account

From the table, identify the job applicant and select the [Edit 9061](#) link.

The system presents the ETA Form 9061 in a wizard format consisting of several tabs. To save your entries and advance to the next tab, click the **Next** button at the bottom of the tab. If your entries fail to meet the requirements, the system will display an alert at the top of the tab. When necessary, you may return to a previous tab using the **Back** button at the bottom of the tab.

On the **ETA 9061 Information** tab, the system displays basic information for the form, including the Form Revision Number. The ETA 9061 has various revision numbers that correspond to variations in the questions and wording of the eligible target groups. When printing the ETA 9061, the verbiage will

support the specified revision number. The most current form revision number will always display as the first selection in the dropdown list.

ETA 9061 Information	Applicant Information	9061 Target Groups	Signatory Information	Verification Documents Required
ETA 9061 Information				
* ETA 9061 Form Revision Number:		5-2016		
Control Number:		8		
System Date/Postmarked Date:		11/13/2017		
Employer Name:		WOTC Emp TWO		
Employer Address:		369 Test Drive The Lakes, NV 88901		
Employer Telephone Number:		444-444-4444		
Company EIN/Worksite EIN:		750685200		
<input type="checkbox"/> Check here to allow saving of a partial application				
Exit Wizard				
Next >>				

ETA 9061 Information Tab

On the **Applicant Information** tab, the system displays applicant information collected from IRS Form 8850. You must enter all the key dates for the application.

ETA 9061 Information	Applicant Information	9061 Target Groups	Signatory Information	Verification Documents Required
ETA 9061 Information				
Applicant Name:		Cane, Candy C		
Social Security Number:		456-64-6464		
* Have you worked for this employer before?		<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Answered		
Employment Start Date:		11/08/2017		
Starting Hourly Wage:		\$ 12.65		
Position:		Dispatcher		
Occupational Group:		Transportation and Material Moving Occupations		

Applicant Information Tab

On the **9061 Target Groups** tab, the system displays the ETA Form 9061 questions that will allow the applicant to qualify under a WOTC target group.

9061 Target Groups Tab

On the **Signatory Information** tab, the employer need only check the certification boxes, identify the signatory and enter the date the form was completed.

Signatory Information Tab

On the **Verification Documents Required** tab, the system displays the WOTC target categories along with links for attaching the document. The tab specifies the types of documentary evidence that can substantiate WOTC eligibility under the various target groups. Working with the job applicant, employers should provide documentation or names of collateral contacts for each target group associated with the WOTC application.

ETA 9061 Information	Applicant Information	9061 Target Groups	Signatory Information	Verification Documents Required
Verification Documents Required				
Age Verification				[Verify Upload Link]
Veteran Verification:				
a. Veteran Status Verification				[Verify Upload Link]
b. Veteran Receiving SNAP Benefits (Food Stamps)				[Verify Upload Link]
c. Veteran - Disabled - Hired within one year of being Discharged from the military				[Verify Upload Link]
d. Veteran / DV Unemployed for 6 months				
e. Vet Unemployed for 4 weeks but less than 6 months				
TANF - Short Term				
TANF - Long Term				
SNAP Recipient				[Verify Upload Link]
EZ / RRC Address Verification				[Verify Upload Link]
Qualified Long Term Unemployment Recipient				[Verify Upload Link]
Referred Agency VR				[Verify Upload Link]
Referred Agency Ticket to Work				[Verify Upload Link]
Referred Agency Veterans Affairs				[Verify Upload Link]
Ex-Felon				[Verify Upload Link]
SSI Supporting Documentation				[Verify Upload Link]
Exit Wizard				
				<< Back
				Finish

Verification Documents Required Tab

Review WOTC Application Status

The SWA will issue a final determination for each WOTC application. In some cases, the SWA may request additional information or documentation from the employer. In all cases, WOTC employers and their agents will immediately learn of any special requests or determinations immediately through the message center and email account of the legal forms holder. (The system sends the notification to the employer unless they have an active relationship with an agent, in which case the system will send the notification to the agent.)

- Select **Other Services** ► **Communication Center** ► **Message Center** from the Navigation menu or Directory of Services, or use the **My Messages** widget located on the Employer Dashboard.

All message alerts will specify any required action and clearly reference the specific WOTC application. Examples of WOTC message alerts sent to employers or agents include the following:

- Notice of incomplete application (e.g., Form 9061 is missing the certification signature, or the applicant's date of birth)
- Request for more information where SWA staff clearly specify the missing information or documents
- Notice of denial of a WOTC application in which SWA staff provide a clear explanation
- Notice of approval of a WOTC application in which SWA staff specify the WOTC target group used to meet eligibility

		From	Subject	Msg Date	Select
<input checked="" type="checkbox"/>		POSTMASTER	<u>WOTC application Certified</u>	11/15/2017 11:32 AM	<input type="checkbox"/>
<input checked="" type="checkbox"/>		POSTMASTER	<u>WOTC application request for information</u>	11/15/2017 11:32 AM	<input type="checkbox"/>
<input checked="" type="checkbox"/>		POSTMASTER	<u>WOTC 9061 application signatory identification not provided</u>	11/10/2017 07:59 AM	<input type="checkbox"/>
<input checked="" type="checkbox"/>		POSTMASTER	<u>WOTC 9061 application data of birth not provided</u>	11/01/2017 06:09 PM	<input type="checkbox"/>
<input checked="" type="checkbox"/>		POSTMASTER	<u>WOTC application Certified</u>	11/01/2017 06:09 PM	<input type="checkbox"/>

Reviewing Sample WOTC Application Notifications Received in the Message Center

When employers or their agents have many WOTC applications to manage, they can easily search for applications that have a specific status.

- Select **Quick Menu** ▶ **WOTC Applications** from the Navigation menu or Directory of Services.
 - Alternatively, select **Work Opportunity Tax Credit** ▶ **Work Opportunity Tax Credit** ▶ **Application Search** from the Portfolio folders, and then select the Create an Application link.

In the **Filter Options** section, select the Application Status you are interested in, and then click the Filter link. For example, you may select *Incomplete Applications* to see which applications still need more information.

Filter WOTC Application

[Create Application](#)

[Hide Filter Options](#)

Filter Options

Employer ID (internal only): 12268

8850 Control Number:

Applicant First Name:

Applicant Last Name:

Applicant Social Security Number:

Employer FEIN:

Application Status: None Selected

Application Date Range: Today to

[[Filter](#) | [Reset Filter\(s\)](#)]

When you click the **Filter** link, all matching records automatically display. You may add and remove filter criteria as necessary.

Control Number	Applicant Name	SSN	Emp EIN	Application Date	Application Status	Action
37	Henry Hoover	516-56-6526	222584662	11/20/2017	Certified	Action

Page 1 of 1

Rows: 10

Action

- Edit 8850
- Edit 9061
- Verify

Filtering by WOTC Applications by Application Status

Click the Action button to see the options available for a particular application. In most instances, you may complete any of the following tasks:

- Click the [Edit 8850](#) link to open IRS Form 8850 for review or modification.
- Click the [Edit 9061](#) or [Verify](#) link to open ETA Form 9061 to review or add verification information.

WOTC Verification Documents

The WOTC module allows employers or their agents to upload verification documents directly into the system. ETA Form 9061 specifies the types of documentary evidence that can substantiate WOTC eligibility under the various target groups. Working with the job applicant, employers should provide documentation or names of collateral contacts for each target group associated with the WOTC application.

After creating an application, employers can return to the application at any time to upload the necessary documentation.

- Select **Quick Menu** ▶ **WOTC Applications** from the Navigation menu or Directory of Services.
 - Alternatively, select **Work Opportunity Tax Credit** ▶ **Work Opportunity Tax Credit** ▶ **Application Search** from the Portfolio folders.

In the **Filter Options** section, enter the applicant's name or SSN or select *Incomplete Application* for the Application Status. You may also enter a date range. When finished, click the **Search** button.

- Use the [Verify](#) link to go directly to the **Verification Documents Required** tab, which lists the target groups and associated supporting documentation.

Filtering by WOTC Applications by Application Status

For each document category, the **Verification Documents Required** tab allows employers to scan, upload, or link the actual document used for verification. By attaching the document in context of the WOTC application, SWA staff can easily access the document when reviewing the WOTC application.

► **Follow these steps to upload a verification document:**

- 1 Identify the verification category you need based on the target group of the application (*category options shown below may vary*).

- **Age Verification**
- **Veteran Verification:**
 - Veteran Status Verification
 - Veteran Receiving SNAP Benefits (Food Stamps)
 - Veteran - Disabled - Hired within one year of being Discharged from the military
 - Veteran / DV Unemployed for 6 months
 - Vet Unemployed for 4 weeks but less than 6 months
- **TANF - Short Term**
- **TANF - Long Term**
- **SNAP Recipient**
- **EZ / RRC Address Verification**
- **Qualified Long Term Unemployment Recipient**
- **Referred Agency VR**

- Referred Agency Ticket to Work
 - Referred Agency Veterans Affairs
 - Ex-Felon
 - SSI Supporting Documentation
- 2 Click the Verify link to view your document options.
 - a. Select the document type you plan to upload. If you select *Other*, enter a title or description for the document in the textbox provided. The system displays the selected document with a checkmark. You may click the **Reset** button to remove your selection.
 - 3 Click the Upload link and review the **Document Association** and **Document Information** panels. You may enter any Document Tag text designated by your state to facilitate indexing.
 - a. Click the **Browse** button (or **Choose File** button if using a Chrome browser.)
 - b. Select the document from your file directory. The document file path and name will display in the Location field.
 - 4 Click the **Save** button to perform the upload.

The screenshot displays a web interface for uploading verification documents. At the top, a section titled "Verification Documents Required" lists "Age Verification" and "Veteran Verification". Under "Veteran Verification", "a. Veteran Status Verification" is selected, indicated by a checkmark and a "DD 214" label. To the right of this selection is a "Reset" button. Below this, the "Document Association" panel shows "Program:" and "Application:" fields, with "Verification Item:" set to "AED - Veteran Status Verification" and "Verification Type:" set to "DD 214". The "Document Information" panel includes a "Document Tags" text area and "User Accessible:" radio buttons for "Yes" and "No". The "Attach Document" panel shows the "Location:" field with the path "C:\Users\Personal\My DD214.txt" and a "Browse..." button. A callout box on the right contains the text: "Review the Verification Type and be sure it describes the document you are uploading." Arrows indicate the flow from the "Verify" link to the "Veteran Status Verification" selection and then to the "Document Association" panel.

Identifying a Verification Type and Uploading a Document