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## **WOTC Tax Credit Overview**

**Legislative Update & Best Practices  
from Successful Companies**

**An ADP Webcast**

Wednesday, August 24, 2011

1 PM Eastern



**HR. Payroll. Benefits.**

# Housekeeping

- This is one of a number of complimentary webinars that ADP offers to Finance and HR professionals each year.
- Today's webinar will last for 60 minutes, ending at 2 pm Eastern.
- The last 10 minutes of today's program have been reserved for Q&A.
- A .pdf copy of today's slides is available right now for download.
- CPE and/or RCH certificates will be emailed to those who qualify within 30 days of today's broadcast.
- Please participate in our brief survey at the conclusion of today's webinar.



# About ADP

Over 570,000 clients  
worldwide

Pays 1 out of 6 in the U.S.  
33M worldwide



Founded in 1949  
Went public in 1961

45,000 Associates  
In 60+ Countries

- Revenues of approximately \$10 Billion
- Market capitalization of >\$23 Billion

Electronically 'moving'  
\$1 Trillion annually

1 of 4 AAA Rated U.S. Industrial Companies  
(by Standard & Poor's & Moody's)

**One of the world's leading providers of  
technology-based SaaS solutions to employers**



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  - A. CPE Credit Only
  - B. RCH Credit Only
  - C. Both CPE & RCH Credits
  - D. No
  - E. Not Applicable

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# Today's Panel



**Jody Goodwin**  
Clear Choice  
Health Care



**Bill Meiser**  
YUM! Brands



**Frank Lawrence**  
ADP



# Agenda

- **WOTC Program Overview**
- **Recent Legislative Updates**
- **Panel: Best Practices from Successful Companies**



# Tax Credits & Incentives are Constantly Evolving and Are Impacted by External Factors

## U.S. and global metrics reveal value of credits and incentives

- In the U.S., HIRE Act contributed to job creation - ADP alone certified over 1.8M new hires
- Increased foreign direct investment in the U.S. will lead to increased credits to capture those jobs
- U.S. unemployment rate is now at 9.1% - with companies recently announcing additional job reduction plans
- Nearly 44 million people in the U.S. are now receiving food stamps

## Uncertainty in Federal and State budgets can make/break opportunity

- Deficits at both the Federal and State levels have created more compliance uncertainty around credits
- Two WOTC categories (Disconnected Youth & Unemployed Veterans) were not renewed in 2011
- Louisiana and Wisconsin expand incentive programs to lure new jobs to their states
- Federal Renewal Communities credit was not renewed in 2011, but President proposed 20 new U.S. Growth Zones
- New York State extended Excelsior Jobs Program funding for 5 more years through 2024

## Today, employers are trying to maximize profits and maintain compliance

- Employers are looking to tax credits as a way to reduce their ETR (Effective Tax Rate)
- Employers are having a more difficult time staying on top of the increasing pace of legislative changes
- Employers are looking for a wider-range of credit types to contribute to their bottom line



# Overview: Federal Employment Tax Credits

## ■ Federal Programs

- Work Opportunity Tax Credit (includes Welfare-to-Work)
- Federal Empowerment Zone
- Federal Indian Employment Credit

## ■ Work Opportunity Tax Credit (WOTC)

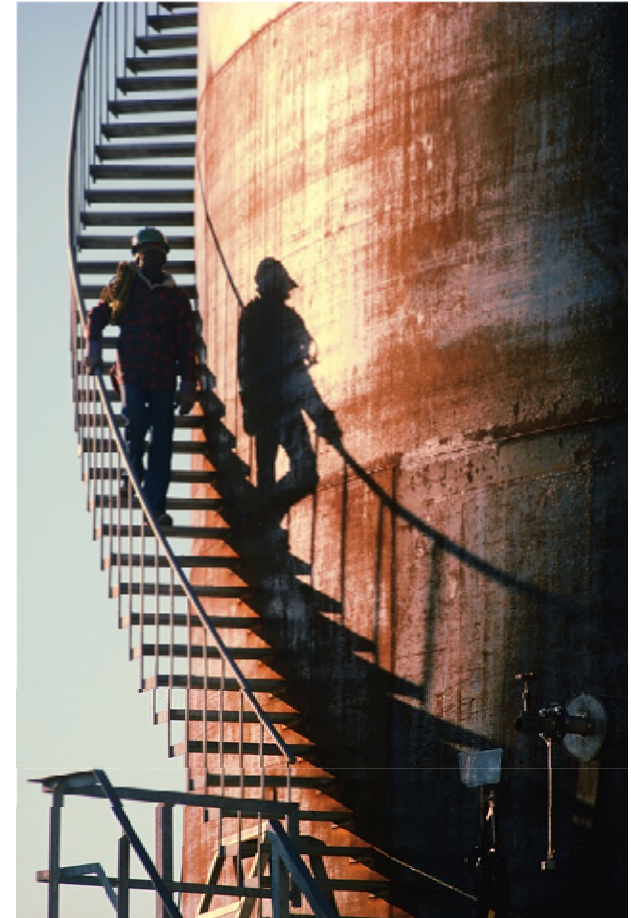
- WOTC – Credit to encourage employers to hire individuals from 1 of 10 targeted groups
- WtW – Financial incentive for employers to hire long-term family assistance recipients (added to WOTC)

## ■ Qualification Criteria

- WOTC - Employees must be a new hire, be a member of one of the targeted groups, have completed the IRS Form 8850 on or before date of hire, work a minimum of 120 hours
- WtW – Employee must be a long-term assistance recipient, have completed IRS form 8850 on or before date of hire and work a minimum of 400 hours.

## ■ Value

- **WOTC: Up to \$2,400 per certified employee for the first year of employment only**
- **WtW: Up to \$9,000 per certified employee for the first two years of employment only**





# Work Opportunity Tax Credit Basics

## ■ Screen Applicants and/or New Hires

- Screening consists of asking questions to complete the IRS Form 8850 to determine eligibility
- If a screened applicant does not meet the criteria, then no further filing action is necessary
- If a screened applicant does meet the criteria, then the 8850 form is completed, any supporting paperwork is gathered, and it is submitted to the state agency for processing
- **These steps must be completed within 28 days from date of hire**
- The state agency will issue a certification which allows the company to calculate the credit value for that employee and capture that credit

## ■ WOTC is a Federal Program Which is Administered by the States

- For a multi-state company, the screening process for all applicants/new hires is the same, but the filing and certification process will vary from state to state
- The backlog of requests waiting for processing is quite long in many states and is not uncommon to be at least 1 year
- This creates a tracking and filing issue around pending credits – especially for multi-state companies with large numbers of new hires each year

## ■ Credit Value Determination

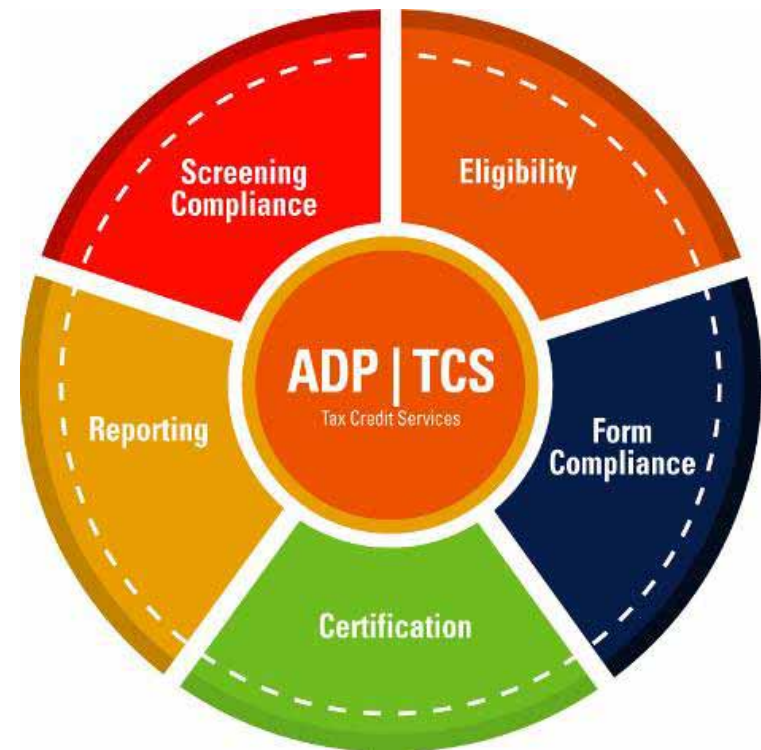
- Once certification is received – leveraging payroll records to determine qualifying hours and wage rates will determine ultimate credit value
- Due to state processing backlogs, it is possible that an employee may no longer be employed at a company when they receive the certification and calculate the credit

# Work Opportunity Tax Credit Target Groups

- **WOTC offers employers an incentive to hire and retain employees who qualify as a member of a target group**
- **Target Groups**
  - Hurricane Katrina Employees
  - Long Term Family Assistance Recipient
  - Qualified & Disabled Veterans
  - Supplemental Security Income Recipients
  - Ex-Felons
  - Qualified Summer Youth
  - Vocational Rehabilitation Referrals
  - Food Stamp Recipients 18–39 Years of Age
  - Designated Community Residents age 18-39
  - Other TANF Recipient

# Successful WOTC Program Process Benchmarks

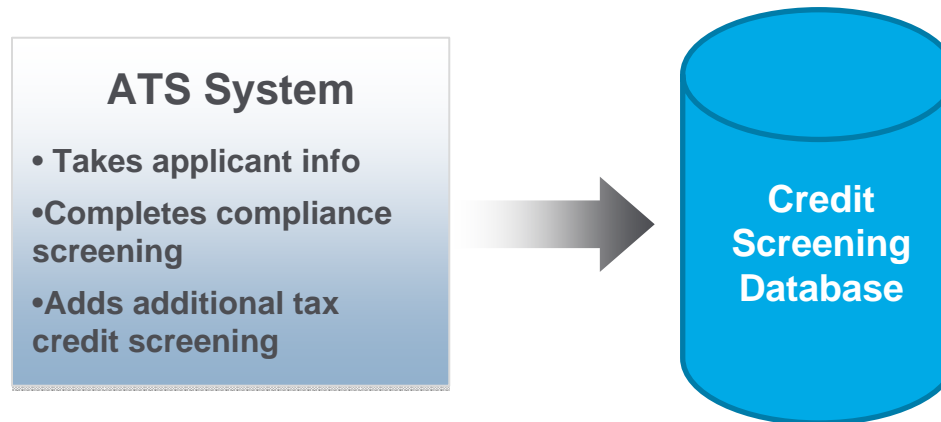
- Due to the 28-day screening time limit, paperwork required, and varying lengths of time by state in returning certifications, a sound process is essential to all successful WOTC programs
- Key Process Benchmarks:
  - Screening Compliance
  - Eligibility
  - Form Compliance
  - Certification
  - Reporting – Program Metrics



ADP WOTC Process Wheel

*\*July 2009-June 2010 - official total of all certifications reported by the IRS and the number of certifications in the same period completed by ADP*

# Applicant Tracking System (ATS) Integration



- **To help control the screening process, many HR applicant tracking/talent management systems will offer integrations to complete WOTC screenings as part of the application process**
- **Benefits of this approach:**
  - Ensures high rates of applicant screening
  - Efficient data transfers
  - Leaves more time to submit within 28-day window

# Polling Question 1

- **How familiar are you with Federal WOTC or credits and incentives in your state, or in another state where your company does business?**
  - A. We screen new hires for WOTC, but don't use state credits
  - B. We use state credits & incentives – but don't have a WOTC program
  - C. We take advantage of both federal and state credits
  - D. We currently don't capture any credits

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# *Legislative Update*



# A Look Back to Congressional Activity in 2010

- **Jobs drove most of the new programs enacted by Congress in 2009-2010**
- **Expansion of Federal WOTC Categories to 12**
  - Unemployed Veterans
  - Disconnected Youth
- **HIRE Act Legislation**
  - Employer FICA Payroll Holiday
- **Lame Duck Session:**
  - Results of the November Election
  - Budget Deficits
  - Unemployment Levels
  - Bush Tax Cuts & Estate Tax Legislation



## 2010 Tax Bill Effect on Tax Credits

- **During the Lame Duck session – legislative compromises moved quickly through the final days of the 111<sup>th</sup> Congress**
  - Renewals for popular programs were pushed – but not all made the cut
    - Katrina WOTC credits
    - All of the 2010 new WOTC categories
    - Federal Renewal Community programs
    - Employer FICA Payroll Holiday HIRE Act
  - Federal EZ and Indian Employment Credit (IEC) renewed
  - Employee FICA Payroll Holiday enacted
  - Compromises made to get the bill passed
    - Estate Tax Legislation
  - President Obama signed it into law on December 17, 2010

# Congressional Activity in 2011

- On June 1, 2011 Representatives Aaron Schock (R-Illinois) and Charles Rangel (D-New York), both Members of the Committee on Ways and Means, introduced the “Work Opportunity Credit Improvement Act”. The legislative language of H.B. 2082 can be found at: <http://www.gpo.gov/fdsys/pkg/BILLS-112hr2082ih/pdf/BILLS-112hr2082ih.pdf>
- **The Bill would:**
  - 1) extend WOTC for three years (through the end of 2014);
  - 2) provide for alternative certification for six WOTC categories (under which employers must complete the request for certification and collect back-up documents but need not file them with the state workforce agencies);
  - 3) establish a new category for recently discharged veterans (essentially as proposed by Senate Finance Committee Chairman Max Baucus (D-Montana));  
and
  - 4) re-instate the disconnected youth category, which is to be renamed “high risk youth.”

# Congressional Activity in 2011

- **This legislation has taken a back seat to recent debt negotiations, but may come back as part of the post-summer recess work Congress takes up as they shift to a focus on job creation.**
- **President Obama on August 8 spoke at the Washington DC Naval Yard and made proposals for new credits for veterans – it is currently not clear if these will be in anyway connected to WOTC or not.**
- **The President’s proposals include:**
  - The Wounded Warrior Tax Credit will double the existing tax credit for long-term unemployed veterans with service-connected disabilities
  - A new credit of 40 percent of the first \$24,000 of wages (up to \$9,600) for firms that hire veterans with service-connected disabilities who have been unemployed longer than 6 months
  - The paperwork process for claiming these credits will be simplified by streamlining the burdensome certification that firms had to undertake to claim previous credit
- **Please click the following link for details of the President's message**
  - <http://www.whitehouse.gov/the-press-office/2011/08/05/fact-sheet-president-obama-s-commitment-employingamerica-s-veterans>

## Polling Question 2

- **How do you keep up with legislative changes to tax, tax credit, and incentive programs?**
  - A. Have an internal team that actively manages updates
  - B. Have advisory members in Congress or state capitals
  - C. Use an outside news service
  - D. No system in place

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# Best Practices Panel

## Introducing our panel guests:



### **Jody Goodwin, Clear Choice Health Care**

- Clear Choice Health Care is a health care management company. It is our mission to provide compassionate care and dedicated rehabilitative services to people in need. Clear Choice Health Care is committed to clearly being the provider of choice for health care and rehabilitative services in every community we serve. We are dedicated to ensuring that quality and compassion are a way of life in each of our centers. We fundamentally believe that caring for the elderly and the disabled is a calling, and we are committed to answering the call...



### **Bill Meiser, YUM! Brands**

- Yum! Brands, Inc., based in Louisville, Ky., is the world's largest restaurant company in terms of system restaurants with nearly 38,000 restaurants in over 110 countries and territories and more than 1 million associates. Leading YUM! brands include Pizza Hut, Taco Bell and KFC.

## Panel Question 1

- Tax credits and the WOTC program specifically are used by many companies each year generating tax credits that help reduce their ETR (Effective Tax Rate).
- What were some of the decision factors each of your companies considered when you decided to take advantage of WOTC?
- There may have been financial, location-based, and cross organizational readiness considerations – if you can describe the process your company went through and some of the key decision points that had to be worked out?



# Program Key Internal Decision Process



- **Evaluate Incentive Programs**
  - Performance
  - Key Program Components
- **SWOT Analysis**
- **Build Business Case/ROI**
- **Obtain Senior Management Approvals**
- **Interview Vendors**
  - **Utilize Decision Matrix Analysis**
  - Evaluate Strengths & Weaknesses
- **Make Selection**



# Decision Matrix Key Factors



- **Cultural Fit**
- **Customer Service**
- **Eligibility/Certification Performance**
- **Reporting**
- **Field Follow-up**
- **State Government Interaction**
- **Rollout**
- **Cost/Benefit**

# Key Organizational Decision Factors

- **Money – the greatest reason we did want to participate in WOTC**
  - Business considered it low-hanging fruit financially
- **Organizational employee demographics were key to our decision**
  - Employee population is a better match for WOTC categories than other businesses
- **Type of patients that we service drives the economics of the business – the business felt there would be a match to the WOTC program**



## Panel Question 2

- As you were beginning the program at your company, what were the goals that you set out as success criteria?
- Was there a process of setting goals and increasing them each year...or was your process focused on attaining a single maximum goal and maintaining that level?
- If you can describe the goal setting process, why those were the best goals for your business, and how the anticipated timeline to reach them?



# Key Goals for Program



- **At YUM! we knew there would be value in a tax credit program – but we had a few internal metrics to help guide how the program would be established – we knew these would impact the results**
  - Partner Characteristics
  - Cultural Fit – ability to connect and learn
  - Customer Service – commitment to quality service
  - Results Driven – application of best practices
  - Client Relationships – understanding roles, responsibilities, and strategic plans
  
- **Tax Credit Opportunities and Challenges**
  - Improve Social Goodwill
  - Secure Financial Benefits
  
- **Efficiency and Simplification**
  - Communications - clear and effective; between provider, corporate contacts and all field locations
  - Reporting – relevant, accurate, and timely
  - Accountability – understanding roles and responsibilities, delivering results
  - Processes – minimize field operators time. Keep it simple!

# Program Goals

- **Top goal is to maximize our credit value capture**
- **Clear Choice did not use a stepped approach – facility owners set the goal at 100% for screening**
  - This was the best way to be sure that we felt that we were capturing the maximum possible amount of credits available



## Polling Question 3

- **For your current (or future) WOTC tax credit program – what are the organizational keys to success for your firm?**
  - A. Maximizing credit value captured (financial)
  - B. Ensuring that all new hired employees are part of process
  - C. Simplicity of implementation and management
  - D. Establishing social goodwill
  - E. All of the above

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## Panel Question 3

- With your programs up and running – there are always unexpected operational challenges that arise that affect your success in meeting your goals. Many issues like new locations being included, business expansion or contraction, or legislative changes can affect the day-to-day running of your WOTC program.
- For each of your programs will you describe the 3 biggest challenges that have come up and talk about how you worked through them, and the solutions that you came up with?





# Operational Program Challenges

- **One of our main operational challenges is employees not returning after the orientation and in return it was hitting our percentages for screening**
  - We set a process/checklist that has to be completed for each new hire and on the **\*first\*** day of orientation **\*everyone\*** is screened for WOTC
- **New HR personnel un familiar with our screening system created a challenge**
  - We set up training on one of the first days of the employment for the HR personnel with our ADP rep
  - We also trained **\*all\*** of the department heads and explained the importance of the credits and educated everyone
- **Document compliance was an issue**
  - Set up a system of checking the documents due reports and having our ADP rep assist in sending emails of these documents due
  - Internal follow-up was also critical - as soon as there is a document out there – I also follow-up with a request for status on this



# Challenges and Benefits



- **Expected Benefits**
  - Eligibility growth
  - Improved compliance through simplified processes
  - Report accuracy & flexibility to allow for better program management
  - Reduced administrative burden on field operations & corporate
- **Unexpected Benefits**
  - Credit earned significantly above expectations, even fewer locations
- **“Best Practice”**: Application of pre-populated PSN fax-out and email initiative improved performance, simplified process, and sped up the certification process

WOTC Program Statistics		
Description	In-house	2010 Stats
New Hires	170,000	44,000
Eligibility	9%	32%
Flow Through %	2.8%	17.0%+
Screening Compliance	90%	98%
Form Compliance	46%	75%
WOTC/WtW Credit	\$3.2M	\$8.2M
Other Incentive Programs		Fed EZ CAEZ

\* From 8,000 units in 2000 to 2,400 units in 2010

# Learned Best Practices From Challenges



- **Payroll Lockout**
  - Mandatory confirmation numbers for eligibility interviews
- **Internal Competition**
  - Rank locations, areas, regions, and Brands to create a competitive environment
- **Field Communication**
  - Structured communications process to locations and field operations, with escalation requirements
  - Example: Scorecard

## Panel Question 4

- Measuring and maintaining consistent success with your program over time is an important key to maximizing your tax credits. For each of you, how do you measure and monitor success?
- From the initial goals that set – what metrics came from those, and what are the processes you follow to monitor success and identify issues to be corrected?
- How many stakeholders within your organization participate in the monitoring process... or are interested in results?



## Key Program Metrics and Stakeholders

- We monitor our reports closely and I personally keep every close communication with our vendor ADP
- Measure our success to the outcome of the screening and document compliance and then to the states' approvals and credit amounts
- We have finally hit 100% on both screening and documents received two months in a row (May 2011 & June 2011)
- Because of some of our cuts in Medicare reimbursement *\*all\** of the “stakeholders” are interested in the success of the program



# Internal Scorecard

Contact Info and  
“Need more materials”

Quarter Update

Helpful Tips  
& Reminders

Quarterly Results

**Yum Brands, Inc.**

**WOTC News**

Work Opportunity Tax Credit Program 1st Quarter 2007

YUM WOTC Department: Bill Meiser, WOTC Mgr. 602-874-2102

<b>Mailin Forms and DOCS</b> 2206 Enterprise Drive, Suite C PO Box 103850 Florence, SC 29501	<b>Yum WOTC Hotline</b> 800-680-4859 24 hours/day/ 7 days/week	<b>Need WOTC Forms/Envelopes?</b> 877-398-6128	<b>ADP Account Manager</b> Kelly Woodridge 1-866-436-0273
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**Quarter Update**

In Q1, 2007; all brands experienced decreases in Doc Compliance rates, bringing these rates well below the YUM goal of 85%. It is important to remember that valuable P&L credits cannot be secured when all documents have not been sent to ADP. When Doc Compliance declines, credits decline, P&L benefits decline, and lost opportunities increase.

Taco Bell and LJB continue to Improve PSN Compliance, with Taco Bell showing an impressive Q1, 2007 rate of 89.5% (only 1% percent from the goal of 90%)!

**Best Practices:** Restaurants with the greatest PSN and Doc compliance rates send documents to ADP through receipted mail or overnight. Documents sent using receipted mail or overnight have no occurrences of lost documents. We highly recommend using receipted mail or overnight service if a second set of documents need to be sent to ADP.

**Reminders**

- Mail the completed 8850 Form on the same day of the WOTC Interview.
- The New Hire completes pages 1 and 3, while the Manager completes page 2.
- Mail all WOTC related documentation to:  
**ADP Tax Credit Services**  
2206 Enterprise Drive, Suite C  
Florence, SC 29501

**Want Your Restaurant Off the Needs Documentation Report? Want P&L Credits?**

New hires eligible for WOTC credit based of where they live is referred to as "Zone Credit." Approximately 80% of employees listed on the Needs Doc Report fall in this category. Additional documentation requirements include proof of age (e.g. Driver's License, Birth Certificate, or School ID.) and proof of address (W-4). The W4 must match the address on the form 8850. These documents can be faxed to Kelly Woodridge at ADP (843-667-3389). Once the documents are received and processed the employee will dropped from the Needs Doc report and P&L credit for the restaurant becomes possible!

*Important: The PSN (form 8850) must always be mailed to ADP. The PSN cannot be faxed.*

1st Quarter 2007 YTD						Goals
Eligibility	10.3%	14.5%	18.9%	18.8%	10.3%	12%
PSN Completion Rate	71.5% (-8.6)	77.3% (-2.3)	89.5% (+2.7)	85.8% (+0.8)	100%	90%
DOC Completion Rate	52.4% (-18.7)	58.1% (-8.2)	70.1% (-8.3)	79.3% (-3.8)	50% (-38.8)	86%
Actual Tax Credits	\$85,860.39	\$102,314.50	\$484,598.40	\$83,295.08	\$2768.26	
P&L Credits	\$144,000	\$148,500	\$263,000	\$67,000	\$2,000	
Opportunity at Store	\$80,500	\$58,500	\$83,000	\$16,000	\$600	
Opportunity at States	\$88,000	\$726,500	\$1,038,000	\$282,500	\$9,000	
Lost Opportunity at Store	\$77,500	\$46,500	\$35,000	\$11,500	\$0	

- PSN Compliance - PSNs sent to ADP on time (within 20 days of start date)
- DOC Compliance - based on the number of documents received for eligible employees
- Actual Tax Credits - amount the SSM can claim as state credit based on wages earned
- P&L Credits - \$500 P&L benefit for eligible employees who meet minimum requirements
- Opportunity at Store - active eligible employees whose documents have not and in required documents
- Opportunity at States - eligible employees that sent all required docs and are meeting state or location decision
- Lost Opportunity - eligible employees who do not turn in PSN within 20 days or submitted without submitting all documents
- (N/A) change in percentages since the previous quarter

**Q1 Call Center Stats**  
 Avg. Interview time: 4:18 min.  
 Avg. hold time: 55 sec.  
 Avg. abandon time: 2 min 16 sec.

# Reporting



## LONG JOHN SILVER WOTC SUMMARY REPORT YTD Q1 2007

Region	PSN Completion YTD % Rate	Doc Completion YTD % Rate	P&L Credit Earned YTD	P&L Opp At Store YTD	P&L Lost Opp At Store YTD
00001	78.33%	66.67%	\$10,500.00	\$4,000	\$4,000
00002	80.00%	67.50%	\$11,000.00	\$2,500	\$3,500
			\$0.00	\$0	\$0
			\$13,500.00	\$3,000	\$2,000
			\$6,000.00	\$2,000	\$500
			\$3,000.00	\$1,000	\$0
			\$9,500.00	\$2,500	500
			\$3,500.00	0	\$1,000
			\$57,000	\$15,000	\$11,500

BEST PERFORMERS IN Q1 2007						
Area	PSN Completion	DOC Completion	P&L Credit Earned YTD	Total Eligible	P&L Opp At Store YTD	P&L Lost Opp At Store YTD
00710	100.00%	100.00%	\$2,000.00	5	\$0	\$0
00903	100.00%	100.00%	\$500.00	5	\$0	\$0
00111	100.00%	100.00%	\$2,500.00	6	\$0	\$0
00909	100.00%	100.00%	\$500.00	6	\$0	\$0
00905	100.00%	100.00%	\$2,000.00	7	\$0	\$0
00910	100.00%	100.00%	\$1,000.00	7	\$0	\$0
00109	85.71%	85.71%	\$1,000.00	7	\$0	\$500
00901	100.00%	85.71%	\$2,500.00	7	\$2,000	\$0
00110	100.00%	83.33%	\$500.00	6	\$0	\$0
00214	100.00%	83.33%	\$1,000.00	6	\$0	\$0
CORP TOTALS	85.8%	73.3%	\$57,000	232	\$15,000	\$11,500

MOST OPPORTUNITY FOR IMPROVEMENT IN Q1 2007						
Area	PSN Completion	DOC Completion	P&L Credit Earned YTD	Total Eligible	P&L Opp At Store YTD	P&L Lost Opp At Store YTD
00804	100.00%	80.00%	\$500.00	5	\$0	\$0
00908	100.00%	80.00%	\$1,000.00	5	\$500	\$0
00105	88.89%	77.78%	\$1,000.00	9	\$500	\$0
00114	80.00%	70.00%	\$0.00	10	\$0	\$1,000
00609	88.89%	66.67%	\$1,500.00	9	\$0	\$500
00612	88.89%	66.67%	\$2,000.00	9	\$500	\$0
00713	75.00%	62.50%	\$1,000.00	8	\$500	\$0
00213	80.00%	60.00%	\$0.00	5	\$500	\$500
00103	100.00%	60.00%	\$1,000.00	5	\$0	\$0
00606	42.86%	42.86%	\$2,000.00	7	\$500	\$1,000
CORP TOTALS	85.8%	73.3%	\$57,000	232	\$15,000	\$11,500

## Polling Question 4

- **What do you believe are the key metrics to a successful WOTC program at your company?**
  - A. Maximizing overall company screening average
  - B. Credit value captured
  - C. Comparing screening values at each location
  - D. Buy in and time spent by key stakeholders/vendors
  - E. All of the above

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## Panel Question 5

- Lastly – we appreciate your sharing your ideas and wisdom on running a successful program – for our webinar viewers today – can you highlight your top two best practices that are absolutely key to having a successful program, and tell us why they are critical to success?



## Best Practice Recommendations



- **Commit internally to developing a winning program**
  - If you leverage a partner, choose one with a strong commitment to your business and programs' success
- **Develop structured and effective internal communications**
- **Integrate the tax credit screening process into Talent Management Solutions for reduced administrative burden and improved overall compliance**

## Best Practice Recommendations

- **Training and education is key! If everyone understands the program and the benefits they are more understanding as to the importance of its success**
- **Consistency – I am very involved on an almost daily bases in the reports and credits and I believe that it is very important to use the resources that you have available to you**



# Q&A



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used to improve  
and plan future  
webinars***

***Thank you for attending.***

