



**FISCAL EMPLOYER AGENT
EMPLOYEE DATA FORM**

Employee Information					
Name: _____					
First		Middle		Last	
Physical Address: _____					
Street		Apt/Unit #	City	State	Zip Code
Mailing Address: _____					
(if different than physical) Street/PO Box		Apt/Unit #	City	State	Zip Code
Phone #: Home _____		Cell _____			
Email*: _____					
Date of Birth: _____		Social Security Number: _____ - _____ - _____			
Emergency Contact: _____					
Name		Phone		Relationship	

**Mandatory. The state of WI will send your unique ID for use with Electronic Visit Verification (EVV) to this email address. Email is also the most reliable and quickest way of communication between you and CDCN.*

Member/Employer Information
Name of Member/Employer of Record: _____
Name of Managing Party/Representative (if exists): _____
Age of Member: ☐ Adult (<i>Employee submits Documentation of Training form F-20972</i>)
☐ Minor under age 18 (<i>Employee submits Children's Long-Term Support (CLTS) Waivers Qualified Provider Standards Verification – for Respite Care</i>)
Name of MCO or County Authorizing the Member's Services: _____
Employee's relationship to the Member/Employer of Record: _____

Please Read Carefully: Neither the acceptance of employee paperwork nor entry into any type of employment relationship or employment agreement with a Member/Managing Party for the consideration of employment shall serve to create an actual or implied contract of employment with Consumer Direct Care Network Wisconsin (CDCN). CDCN serves as the Member's Fiscal Agent. **The Member/Employer of Record listed above is the employer. CDCN is not the employer.**

Employment is conditional until the criminal background check has been received and approved – the results of which may be shared with the approving entity (MCO or county) and/or the Member/Managing Party.

As the Employee, I understand that I cannot begin work until I receive an "Okay to Work" authorization letter from CDCN. This confirms the background check is complete, and all enrollment paperwork has been received and approved by CDCN.

Signature of Applicant: _____

Date: _____





FISCAL EMPLOYER AGENT
NEW EMPLOYEE CHECKLIST

Employee Name	Member Name	Managing Party Name

Welcome to Consumer Direct Care Network (CDCN)!

*Please complete all the forms in the list below including this New Employee Checklist. Send originals to the CDCN Wisconsin office **before** the employee begins work. The Employee may not begin work until all forms are completed, and are received and **approved** by CDCN.*

The Member/Managing Party should check each item as it is completed. The Member/Managing Party should keep a copy of each document and **send the originals to the CDCN Wisconsin office.**

Mandatory Forms - All New Employees:

1. ☐ Employee Data Form
2. ☐ New Employee Checklist (this form)
3. ☐ Provider Directory Enrollment
4. ☐ Employee-Employer Relationship Determination
5. ☐ Employee-Member Live-in Determination
6. ☐ Electronic Visit Verification Live-in Worker Identification (return to CDCN only if applicable)
7. ☐ I-9 - Additional I-9 instructions are available on the CDCN WI website under the Forms tab
8. ☐ W-4 (federal withholding certificate)
9. ☐ WT-4 (state withholding certificate)
10. ☐ Pay Selection Form - Attachment may be required, see form instructions
11. ☐ Wage Memo
12. ☐ Employee Agreement
13. ☐ Wisconsin Medicaid Program Provider Agreement
14. ☐ Documentation of Training – Supportive Home Care (SHC) / Respite
15. ☐ Training Checklist
16. ☐ Background Information Disclosure
17. ☐ Employee Health Questionnaire

We have reviewed and verified the above forms for completeness and all forms are readable.





PROVIDER DIRECTORY ENROLLMENT (OPTIONAL)

Employee Name: _____

Consumer Direct Care Network's (CDCN) Provider Directory, <http://providers.consumerdirectcare.com/> is a website that connects caregivers looking for additional work with CDCN members seeking additional workers.

You have the option to have CDCN create a Provider Directory account for you and post your profile for employers to review and contact you regarding employment opportunities. After your information is posted, CDCN will send you a confirmation email on how to access your account. *Note: caregiver email address and phone number are not displayed in the Provider Directory; communication between potential employer and caregiver is through a third-party email system.*

Accept or Decline Listing in the Provider Directory

Please choose one option below.

- ☐ - **YES**, I consent to have CDCN post my name (first name only), city of residence, and profile on the Provider Directory.

I understand that I will be provided credentials to manage my account after initial setup and that I may cancel my participation at any time. Please complete below.

City of Residence: _____ Zip Code: _____

Email: _____

Profile (Introduction/experience/skills):

Example Profiles:

- *I am a college student providing respite care for two clients and am looking for more hours.*
- *I've worked at XYZ senior living facility for 3 years caring for residents with dementia. I've also worked with stroke and Parkinson disease clients.*
- *I have 10 years experience working as a caregiver in people's homes. I enjoy elder care, and have assisted with cooking, cleaning and personal care.*

- ☐ - **NO**, I do not wish to be listed on the CDCN Provider Directory.

By my signature, I affirm my selection above.

Employee Signature

Date





EMPLOYEE-EMPLOYER RELATIONSHIP DETERMINATION

(Determine if employee is exempt from some payroll taxes)

Employee Name	Member (Employer of Record) Name

Background: Employees providing domestic services may be exempt from some payroll taxes. This is based on the Employee's age and relationship to the Employer of Record (Employer). Consumer Direct Care Network (CDCN) will apply any exemptions based on the relationships identified below. **Incorrectly filling this form out may result in inaccurate tax withholdings.**

Note: If the Employee and Employer qualify for tax exemptions, they must be taken. Exemptions cannot be waived. If the Employee's earnings are exempt from these taxes, they may not qualify for related benefits. An example is unemployment insurance.

Employee-Employer Relationship

Employee select one relationship below.

☐ I am the spouse of the Employer. Exempt from FICA ¹ , FUTA ² , and SUTA ³ .
☐ I am the live-together domestic partner of the Employer. Exempt from SUTA. Subject to FICA and FUTA. Employee must provide supporting documentation.
☐ I am the parent of the Employer (including adoptive and stepparent). If parent checked, check <u>any</u> of the following that apply: ☐ I provide care for the Employer's child or stepchild that lives in the home. ☐ The Employer's child or stepchild is less than 18 years old or requires personal care of an adult for at least 4 straight weeks in 3 months. ☐ The Employer is a widow, widower, divorced or married and lives with a spouse, but the spouse has a physical or medical condition that prevents them from caring for the child at least 4 straight weeks in 3 months. Exempt from FUTA and SUTA. Subject to FICA if all three boxes checked above; else FICA exempt.
☐ I am the grandparent of the Employer. Exempt from SUTA. Subject to FICA and FUTA.
☐ I am the child of the Employer. If child checked, check <u>one</u> option below: ☐ I am 21 years of age or older. Subject to FICA and FUTA. Exempt from SUTA. ☐ I am less than 21 years old. Exempt from FICA, FUTA, and SUTA.
☐ I am the grandchild of the Employer. Exempt from SUTA. Subject to FICA and FUTA.
☐ I am not related to the Employer or my relationship is not described above. Subject to FICA, FUTA, and SUTA.

Acknowledgement: The Employee and Employer agree the relationship selected above is accurate. If this information changes, the Employee must notify CDCN. If CDCN is not notified of changes, the Employee may have to pay back money that should have been withheld from pay.

Employee Signature

Date

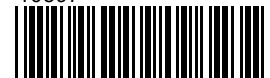
Member/Employer Signature

Date

¹FICA – Federal Insurance Contributions Act (Social Security and Medicare)

²FUTA – Federal Unemployment Tax Act

³SUTA – State Unemployment Tax





EMPLOYEE-MEMBER LIVE-IN DETERMINATION

(Determine if employee is exempt from overtime pay and income tax)

Employee Name	Member (Employer of Record) Name

Domestic service workers may be exempt from overtime pay requirements and from paying income taxes. Consumer Direct Care Network (CDCN) will apply exemptions based on your answers below.

Employee-Member Live-in Status

Employee answers below with Yes or No

1. ☐ Yes ☐ No – **Do you live permanently in the same home as the above-named Member?**

If YES:

- Complete DHS form F-02717 and attach proof of residency documentation as instructed.
- You are exempt from submitting time through Electronic Visit Verification (EVV).

2. ☐ Yes ☐ No – **Do you live temporarily, but for extended periods with the above-named Member (at least 120 hours per week or 5 consecutive days or nights per week)?**

If YES to 1 or 2 above:

- Overtime hours worked are paid at the regular pay rate.
- Declare your Difficulty of Care income tax exemption status.
☐ Yes ☐ No – **I declare under penalties of perjury that I am an individual care provider receiving payments under a state Medicaid Waiver program as defined in IRS Notice 2014-7.** I provide care to the Member named above. The Member resides in my home. I am not required to report income earned under this Medicaid program. Federal and state income taxes should not be withheld from my pay. If non-taxable wages have been reported by CDCN in Box 1 of my Form W-2, I can deduct the nontaxable wages from my taxable income when I file my tax return. If I no longer qualify for IRS Notice 2014-7, I will notify CDCN. At that time, federal and state income tax withholding will resume. If the IRS deems I was not eligible for 2014-7 and taxes were not paid, I agree that I will be liable for any back taxes owed.

Note: IRS Notice 2014-7 directs that payments received under a Home and Community-based Medicaid Waiver program for providing Personal Care or Habilitation services are considered “Difficulty of Care” payments excludable from income taxation when the Medicaid recipient lives in the care provider’s home. Respite and skilled services do not qualify. For more information please refer to <https://www.irs.gov/pub/irs-drop/n-14-07.pdf>.

If NO to both 1 and 2 above :

- Overtime hours worked are paid at 1.5 times the regular pay rate.
- You must submit time worked through an approved EVV method.

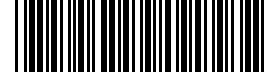
Acknowledgement: The Employee and Employer agree the declaration(s) above are accurate. If living arrangements change, the Employee must notify CDCN. Regardless of overtime status identified above, working overtime requires prior approval.

Employee Signature

Date

Member/Employer Signature

Date



DEPARTMENT OF HEALTH SERVICES

Division of Medicaid Services

F-02717 (02/2022)

STATE OF WISCONSIN

ELECTRONIC VISIT VERIFICATION LIVE-IN WORKER IDENTIFICATION

INSTRUCTIONS: Type or print clearly. This form documents live-in worker identification. Refer to the Electronic Visit Verification Live-In Worker Identification Instructions, F-02717A, for more information on completing this form. Fee-for-service agencies must submit this form and supporting documentation with their prior authorization request. This form may also be used by program payers if they do not require electronic visit verification (EVV) for live-in workers. Completed forms should be kept according to program document retention requirements.

1. Name – Member (Last, First, Middle Initial)	2. Member Medicaid ID Number
3. Name – Live-In Worker (Last, First, Middle Initial)	4. Live-In Worker ForwardHealth ID Number

Note: The live-in worker's name must match both the name entered on the ForwardHealth Portal and the name on the proof submitted.

5. Identification

For the purposes of EVV, a live-in worker is a worker who meets one of the following requirements:

- The worker permanently resides in the same residence as the member or participant receiving services.
- The worker permanently resides in a two-residence dwelling (such as a duplex) where the member or participant receiving services lives in the other half of the dwelling **and** is a relative of the member or participant receiving services. A relative is defined as a person related, of any degree, by blood, adoption, or marriage, to the member or participant.

Permanent residency is determined by the worker being able to produce documentation that shows the worker's name and current residential address. The address must satisfy the requirements for a live-in worker listed above. The worker may use one document from Column A or two types of documents from Column B. Check the box(es) next to the document(s) being submitted as proof of residence.

Column A (Choose **One**)

- ☐ Current and valid State of Wisconsin driver's license or state ID card
- ☐ Other official ID card or license issued by a Wisconsin governmental body or unit
- ☐ Real estate tax bill or receipt for the current year
- ☐ Residential lease for current year
- ☐ Check or other document issued by a unit of government within the last three months

Column B (Choose **Two**)

- ☐ Current or previous month's gas, electric, or phone service statement
- ☐ Current or previous month's bank statement
- ☐ Current or previous month's paycheck or paystub

6. Attestation

- ☐ I have examined the documentation indicated above and attest the worker meets all the requirements of a live-in worker as defined on this form.

7. Name – Representative Verifying Live-In Status	8. SIGNATURE – Representative Verifying Live-In Status
9. Name – Agency Verifying Live-In Status	10. Date Signed



10896



Instructions for Completing Form I-9 Section 1

(On or before employee's first day of work for pay)

Employee: Complete Section 1 of Form I-9. This must be done no later than your first day of work for pay. Please print clearly, and sign and date when you are finished. Refer to the numbered explanations below for additional information.

Employer: Review Section 1, ensuring your employee has completed it properly.

Employee (steps 1-9)

- ① Print your full legal name: Last, First and Middle Initial. Provide any other names used, such as maiden name. Enter "N/A" if you have never had another name.
- ② Print your physical address. Entering a PO Box is not allowed. Enter "N/A" if you have no apartment number.
- ③ Print your date of birth (mm/dd/yyyy).
- ④ Print your Social Security Number.
- ⑤ Print your email address or print "N/A" if you choose to not provide it.
- ⑥ Print your telephone number or print "N/A" if you choose to not provide it.
- ⑦ Check the one box that best describes your citizenship or immigration status in the United States.
- ⑧ Sign and print the date you completed the form. **No later than first day of work for pay.**
- ⑨ Check the box that indicates whether or not you were assisted by a preparer or translator.

Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services				USCIS Form I-9 OMB No. 1615-0047 Expires 08/31/2019	
▶ START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form. ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.					
Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)					
Last Name (Family Name)		First Name (Given Name)		Middle Initial	Other Last Names Used (if any)
① Doe		Jane		Q	N/A
Address (Street Number and Name)		Apt. Number	City or Town		State ZIP Code
② 123 Main St.		N/A	Anytown		WI 54000
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number		Employee's E-mail Address		Employee's Telephone Number
③ 03/13/1964	④ 123 - 45 - 6789		⑤ employee@email.com		⑥ 555-123-4567
I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form. I attest, under penalty of perjury, that I am (check one of the following boxes):					
☒ 1. A citizen of the United States ☐ 2. A noncitizen national of the United States (See instructions) ☐ 3. A lawful permanent resident (Alien Registration Number/USCIS Number) ☐ 4. An alien authorized to work until (expiration date of approval mm/dd/yyyy) Some aliens may write "N/A" in the expiration date field. (See instructions)					
Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.					
1. Alien Registration Number/USCIS Number: _____ OR 2. Form I-94 Admission Number: _____ OR 3. Foreign Passport Number: _____ Country of Issuance: _____					
Signature of Employee ⑧ Jane Doe				Today's Date (mm/dd/yyyy) 02/05/2017	
Preparer and/or Translator Certification (check one): ☒ I did not use a preparer or translator. ☐ A preparer(s) and/or translator(s) assisted the employee in completing Section 1. (Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.) I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.					
Signature of Preparer or Translator				Today's Date (mm/dd/yyyy)	
Last Name (Family Name)		First Name (Given Name)			
Address (Street Number and Name)		City or Town		State	ZIP Code
Employer Completes Next Page					
Form I-9 11/14/2016 N					
Page 1 of 3					

Note: These instructions are for informational purposes only. Refer to pages 1 and 2 of Form I-9 Instructions for detailed information.

Instructions for Completing Form I-9 Section 2

(Any time after employee has accepted job offer, but no later than 3 days after employee's first day of work)

Employee: Present original, unexpired documents to your employer to verify your identity and authorization to work in the United States. The LIST OF ACCEPTABLE DOCUMENTS is found after the Form I-9.

Employer (FEIN holder): Examine the documents your employee provides and record them in Section 2. The employee must be present while you examine them. Refer to the numbered explanations below for additional information.

Employer (steps 1-10)

① Print employee's name from Section 1: Last, First, and Middle Initial.

② Enter the number representing employee's citizenship status checked in Section 1.

③ Examine each document and note the details in the appropriate List column.

one document from List A

OR

one from List B and one from List C

Only accept unexpired, original documents (no photocopies).

④ Print the date of the employee's first day of work.

⑤ Sign the form.

⑥ Print the date you signed the form.

Must be completed and signed within 3 days of employee's first day of work.

⑦ If not pre-populated, print your title as "Employer."

⑧ Print your last then first name.

⑨ Print your first and last name.

⑩ Print physical address where services are provided: street, city, state and zip code.

Section 2. Employer or Authorized Representative Review and Verification				
(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")				
Employee Info from Section 1		Last Name (Family Name)	First Name (Given Name)	M.I.
		Doe	Jane	
				Citizenship/Immigration Status
				2 1
List A Identity and Employment Authorization		OR	List B Identity	AND
				List C Employment Authorization
Document Title		Document Title		Document Title
Issuing Authority		Driver's License		Social Security Card
Document Number		State of Residence		SSN
Expiration Date (if any)(mm/dd/yyyy)		0123456789abcde		123-45-6789
		08/17/2020		N/A
Document Title		Additional Information		QR Code - Sections 2 & 3 Do Not Write In This Space
Issuing Authority				
Document Number				
Expiration Date (if any)(mm/dd/yyyy)				
Document Title				
Issuing Authority				
Document Number				
Expiration Date (if any)(mm/dd/yyyy)				
Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.				
The employee's first day of employment (mm/dd/yyyy): ④ 02/05/2017 (See instructions for exemptions)				
Signature of Employer or Authorized Representative		Today's Date(mm/dd/yyyy)		Title of Employer or Authorized Representative
⑤ Ronald Smith		⑥ 02/05/2017		⑦ Employer
Last Name of Employer or Authorized Representative		First Name of Employer or Authorized Representative		Employer's Business or Organization Name
⑧ Smith		Ronald		⑨ Ronald Smith
Employer's Business or Organization Address (Street Number and Name)		City or Town		State ZIP Code
⑩ 500 Fictional St.		Anytown		WI 54000

Submit form I-9 to Consumer Direct with the Employee Packet

Note: These instructions are for informational purposes only. Refer to pages 6 through 12 of Form I-9 Instructions for detailed information.



Employment Eligibility Verification
Department of Homeland Security
 U.S. Citizenship and Immigration Services

USCIS
Form I-9

OMB No. 1615-0047
 Expires 10/31/2022

► **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation *(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)*

Last Name (Family Name)		First Name (Given Name)		Middle Initial	Other Last Names Used (if any)	
Address (Street Number and Name)			Apt. Number	City or Town		State ZIP Code
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number [][][] - [][] - [][][][]		Employee's E-mail Address		Employee's Telephone Number	

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

☐ 1. A citizen of the United States	
☐ 2. A noncitizen national of the United States <i>(See instructions)</i>	
☐ 3. A lawful permanent resident (Alien Registration Number/USCIS Number): _____	
☐ 4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy): _____ Some aliens may write "N/A" in the expiration date field. <i>(See instructions)</i> <i>Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.</i>	
1. Alien Registration Number/USCIS Number: _____ OR 2. Form I-94 Admission Number: _____ OR 3. Foreign Passport Number: _____ Country of Issuance: _____	QR Code - Section 1 Do Not Write In This Space

Signature of Employee	Today's Date (mm/dd/yyyy)
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Preparer and/or Translator Certification (check one):

☐ I did not use a preparer or translator. ☐ A preparer(s) and/or translator(s) assisted the employee in completing Section 1.
(Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.)

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator		Today's Date (mm/dd/yyyy)	
Last Name (Family Name)		First Name (Given Name)	
Address (Street Number and Name)		City or Town	State ZIP Code



Employer Completes Next Page



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Employment Eligibility Verification
Department of Homeland Security
 U.S. Citizenship and Immigration Services

USCIS
Form I-9
 OMB No. 1615-0047
 Expires 10/31/2022

Section 2. Employer or Authorized Representative Review and Verification

(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1	Last Name (Family Name)	First Name (Given Name)	M.I.	Citizenship/Immigration Status
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List A Identity and Employment Authorization	OR	List B Identity	AND	List C Employment Authorization
Document Title		Document Title		Document Title
Issuing Authority		Issuing Authority		Issuing Authority
Document Number		Document Number		Document Number
Expiration Date (if any) (mm/dd/yyyy)		Expiration Date (if any) (mm/dd/yyyy)		Expiration Date (if any) (mm/dd/yyyy)
Document Title		Additional Information		QR Code - Sections 2 & 3 Do Not Write In This Space
Issuing Authority				
Document Number				
Expiration Date (if any) (mm/dd/yyyy)				
Document Title				
Issuing Authority				
Document Number				
Expiration Date (if any) (mm/dd/yyyy)				

Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): _____ (See instructions for exemptions)

Signature of Employer or Authorized Representative	Today's Date (mm/dd/yyyy)	Title of Employer or Authorized Representative		
Last Name of Employer or Authorized Representative	First Name of Employer or Authorized Representative	Employer's Business or Organization Name		
Employer's Business or Organization Address (Street Number and Name)		City or Town	State	ZIP Code

Section 3. Reverification and Rehires (To be completed and signed by employer or authorized representative.)

A. New Name (if applicable)			B. Date of Rehire (if applicable)
Last Name (Family Name)	First Name (Given Name)	Middle Initial	Date (mm/dd/yyyy)

C. If the employee's previous grant of employment authorization has expired, provide the information for the document or receipt that establishes continuing employment authorization in the space provided below.

Document Title	Document Number	Expiration Date (if any) (mm/dd/yyyy)
----------------	-----------------	---------------------------------------

I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

Signature of Employer or Authorized Representative	Today's Date (mm/dd/yyyy)	Name of Employer or Authorized Representative
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LISTS OF ACCEPTABLE DOCUMENTS**All documents must be UNEXPIRED**

Employees may present one selection from List A
or a combination of one selection from List B and one selection from List C.

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND	LIST C Documents that Establish Employment Authorization
1. U.S. Passport or U.S. Passport Card		1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		1. A Social Security Account Number card, unless the card includes one of the following restrictions: (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)		2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa		3. School ID card with a photograph		3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal
4. Employment Authorization Document that contains a photograph (Form I-766)		4. Voter's registration card		4. Native American tribal document
5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status: a. Foreign passport; and b. Form I-94 or Form I-94A that has the following: (1) The same name as the passport; and (2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.		5. U.S. Military card or draft record		5. U.S. Citizen ID Card (Form I-197)
		6. Military dependent's ID card		6. Identification Card for Use of Resident Citizen in the United States (Form I-179)
		7. U.S. Coast Guard Merchant Mariner Card		7. Employment authorization document issued by the Department of Homeland Security
		8. Native American tribal document		
		9. Driver's license issued by a Canadian government authority		
		For persons under age 18 who are unable to present a document listed above:		
		10. School record or report card		
		11. Clinic, doctor, or hospital record		
		12. Day-care or nursery school record		
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI				

Examples of many of these documents appear in the Handbook for Employers (M-274).

Refer to the instructions for more information about acceptable receipts.



Form **W-4**Department of the Treasury
Internal Revenue Service**Employee's Withholding Certificate**

OMB No. 1545-0074

2022

- ▶ **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**
 ▶ **Give Form W-4 to your employer.**
 ▶ **Your withholding is subject to review by the IRS.**

**Step 1:
Enter
Personal
Information**

(a) First name and middle initial	Last name	(b) Social security number
Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
City or town, state, and ZIP code		
(c) ☐ Single or Married filing separately ☐ Married filing jointly or Qualifying widow(er) ☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

**Step 2:
Multiple Jobs
or Spouse
Works**

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

- (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); **or**
 (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**

- (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . ▶ ☐

TIP: To be accurate, submit a 2022 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

**Step 3:
Claim
Dependents**

If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$

Multiply the number of other dependents by \$500 . . . ▶ \$

Add the amounts above and enter the total here . . . **3** \$

**Step 4
(optional):
Other
Adjustments**

- (a) **Other income (not from jobs).** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . **4(a)** \$

- (b) **Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . **4(b)** \$

- (c) **Extra withholding.** Enter any additional tax you want withheld each **pay period** . . . **4(c)** \$

**Step 5:
Sign
Here**

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

▶ **Employee's signature** (This form is not valid unless you sign it.) ▶ **Date**

**Employers
Only**

Employer's name and address	First date of employment	Employer identification number (EIN)
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02227



General Instructions

Section references are to the Internal Revenue Code.

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, you will generally owe tax when you file your tax return and may owe a penalty. If too much is withheld, you will generally be due a refund. Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505, Tax Withholding and Estimated Tax.

Exemption from withholding. You may claim exemption from withholding for 2022 if you meet both of the following conditions: you had no federal income tax liability in 2021 **and** you expect to have no federal income tax liability in 2022. You had no federal income tax liability in 2021 if (1) your total tax on line 24 on your 2021 Form 1040 or 1040-SR is zero (or less than the sum of lines 27a, 28, 29, and 30), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2022 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c). Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 15, 2023.

Your privacy. If you prefer to limit information provided in Steps 2 through 4, use the online estimator, which will also increase accuracy.

As an alternative to the estimator: if you have concerns with Step 2(c), you may choose Step 2(b); if you have concerns with Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c). If this is the only job in your household, you may instead check the box in Step 2(c), which will increase your withholding and significantly reduce your paycheck (often by thousands of dollars over the year).

When to use the estimator. Consider using the estimator at www.irs.gov/W4App if you:

1. Expect to work only part of the year;
2. Have dividend or capital gain income, or are subject to additional taxes, such as Additional Medicare Tax;
3. Have self-employment income (see below); or
4. Prefer the most accurate withholding for multiple job situations.

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/W4App to figure the amount to have withheld.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you (1) have more than one job at the same time, or (2) are married filing jointly and you and your spouse both work.

Option **(a)** most accurately calculates the additional tax you need to have withheld, while option **(b)** does so with a little less accuracy.

If you (and your spouse) have a total of only two jobs, you may instead check the box in option **(c)**. The box must also be checked on the Form W-4 for the other job. If the box is checked, the standard deduction and tax brackets will be cut in half for each job to calculate withholding. This option is roughly accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld, and this extra amount will be larger the greater the difference in pay is between the two jobs.



Multiple jobs. Complete Steps 3 through 4(b) on only one Form W-4. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. This step provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 501, Dependents, Standard Deduction, and Filing Information. You can also include **other tax credits** for which you are eligible in this step, such as the foreign tax credit and the education tax credits. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs or self-employment. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2022 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

00540



Step 2(b)—Multiple Jobs Worksheet (Keep for your records.)

If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on **only ONE** Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

Note: If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at www.irs.gov/W4App.

- 1 Two jobs.** If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, **skip** to line 3 **1** \$ _____
- 2 Three jobs.** If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.
 - a** Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a **2a** \$ _____
 - b** Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b **2b** \$ _____
 - c** Add the amounts from lines 2a and 2b and enter the result on line 2c **2c** \$ _____
- 3** Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc. **3** _____
- 4 Divide** the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in **Step 4(c)** of Form W-4 for the highest paying job (along with any other additional amount you want withheld) **4** \$ _____

Step 4(b)—Deductions Worksheet (Keep for your records.)

- 1** Enter an estimate of your 2022 itemized deductions (from Schedule A (Form 1040)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 7.5% of your income **1** \$ _____
- 2** Enter: $\left\{ \begin{array}{l} \bullet \$25,900 \text{ if you're married filing jointly or qualifying widow(er)} \\ \bullet \$19,400 \text{ if you're head of household} \\ \bullet \$12,950 \text{ if you're single or married filing separately} \end{array} \right\}$ **2** \$ _____
- 3** If line 1 is greater than line 2, subtract line 2 from line 1 and enter the result here. If line 2 is greater than line 1, enter "-0-" **3** \$ _____
- 4** Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Part II of Schedule 1 (Form 1040)). See Pub. 505 for more information **4** \$ _____
- 5 Add** lines 3 and 4. Enter the result here and in **Step 4(b)** of Form W-4 **5** \$ _____

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

00540



Married Filing Jointly or Qualifying Widow(er)

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$110	\$850	\$860	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,770	\$1,870
\$10,000 - 19,999	110	1,110	1,860	2,060	2,220	2,220	2,220	2,220	2,220	2,970	3,970	4,070
\$20,000 - 29,999	850	1,860	2,800	3,000	3,160	3,160	3,160	3,160	3,910	4,910	5,910	6,010
\$30,000 - 39,999	860	2,060	3,000	3,200	3,360	3,360	3,360	4,110	5,110	6,110	7,110	7,210
\$40,000 - 49,999	1,020	2,220	3,160	3,360	3,520	3,520	4,270	5,270	6,270	7,270	8,270	8,370
\$50,000 - 59,999	1,020	2,220	3,160	3,360	3,520	4,270	5,270	6,270	7,270	8,270	9,270	9,370
\$60,000 - 69,999	1,020	2,220	3,160	3,360	4,270	5,270	6,270	7,270	8,270	9,270	10,270	10,370
\$70,000 - 79,999	1,020	2,220	3,160	4,110	5,270	6,270	7,270	8,270	9,270	10,270	11,270	11,370
\$80,000 - 99,999	1,020	2,820	4,760	5,960	7,120	8,120	9,120	10,120	11,120	12,120	13,150	13,450
\$100,000 - 149,999	1,870	4,070	6,010	7,210	8,370	9,370	10,510	11,710	12,910	14,110	15,310	15,600
\$150,000 - 239,999	2,040	4,440	6,580	7,980	9,340	10,540	11,740	12,940	14,140	15,340	16,540	16,830
\$240,000 - 259,999	2,040	4,440	6,580	7,980	9,340	10,540	11,740	12,940	14,140	15,340	16,540	17,590
\$260,000 - 279,999	2,040	4,440	6,580	7,980	9,340	10,540	11,740	12,940	14,140	16,100	18,100	19,190
\$280,000 - 299,999	2,040	4,440	6,580	7,980	9,340	10,540	11,740	13,700	15,700	17,700	19,700	20,790
\$300,000 - 319,999	2,040	4,440	6,580	7,980	9,340	11,300	13,300	15,300	17,300	19,300	21,300	22,390
\$320,000 - 364,999	2,100	5,300	8,240	10,440	12,600	14,600	16,600	18,600	20,600	22,600	24,870	26,260
\$365,000 - 524,999	2,970	6,470	9,710	12,210	14,670	16,970	19,270	21,570	23,870	26,170	28,470	29,870
\$525,000 and over	3,140	6,840	10,280	12,980	15,640	18,140	20,640	23,140	25,640	28,140	30,640	32,240

Single or Married Filing Separately

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$400	\$930	\$1,020	\$1,020	\$1,250	\$1,870	\$1,870	\$1,870	\$1,870	\$1,970	\$2,040	\$2,040
\$10,000 - 19,999	930	1,570	1,660	1,890	2,890	3,510	3,510	3,510	3,610	3,810	3,880	3,880
\$20,000 - 29,999	1,020	1,660	1,990	2,990	3,990	4,610	4,610	4,710	4,910	5,110	5,180	5,180
\$30,000 - 39,999	1,020	1,890	2,990	3,990	4,990	5,610	5,710	5,910	6,110	6,310	6,380	6,380
\$40,000 - 59,999	1,870	3,510	4,610	5,610	6,680	7,500	7,700	7,900	8,100	8,300	8,370	8,370
\$60,000 - 79,999	1,870	3,510	4,680	5,880	7,080	7,900	8,100	8,300	8,500	8,700	8,970	9,770
\$80,000 - 99,999	1,940	3,780	5,080	6,280	7,480	8,300	8,500	8,700	9,100	10,100	10,970	11,770
\$100,000 - 124,999	2,040	3,880	5,180	6,380	7,580	8,400	9,140	10,140	11,140	12,140	13,040	14,140
\$125,000 - 149,999	2,040	3,880	5,180	6,520	8,520	10,140	11,140	12,140	13,320	14,620	15,790	16,890
\$150,000 - 174,999	2,040	4,420	6,520	8,520	10,520	12,170	13,470	14,770	16,070	17,370	18,540	19,640
\$175,000 - 199,999	2,720	5,360	7,460	9,630	11,930	13,860	15,160	16,460	17,760	19,060	20,230	21,330
\$200,000 - 249,999	2,970	5,920	8,310	10,610	12,910	14,840	16,140	17,440	18,740	20,040	21,210	22,310
\$250,000 - 399,999	2,970	5,920	8,310	10,610	12,910	14,840	16,140	17,440	18,740	20,040	21,210	22,310
\$400,000 - 449,999	2,970	5,920	8,310	10,610	12,910	14,840	16,140	17,440	18,740	20,040	21,210	22,470
\$450,000 and over	3,140	6,290	8,880	11,380	13,880	16,010	17,510	19,010	20,510	22,010	23,380	24,680

Head of Household

Higher Paying Job Annual Taxable Wage & Salary	Lower Paying Job Annual Taxable Wage & Salary											
	\$0 - 9,999	\$10,000 - 19,999	\$20,000 - 29,999	\$30,000 - 39,999	\$40,000 - 49,999	\$50,000 - 59,999	\$60,000 - 69,999	\$70,000 - 79,999	\$80,000 - 89,999	\$90,000 - 99,999	\$100,000 - 109,999	\$110,000 - 120,000
\$0 - 9,999	\$0	\$760	\$910	\$1,020	\$1,020	\$1,020	\$1,190	\$1,870	\$1,870	\$1,870	\$2,040	\$2,040
\$10,000 - 19,999	760	1,820	2,110	2,220	2,220	2,390	3,390	4,070	4,070	4,240	4,440	4,440
\$20,000 - 29,999	910	2,110	2,400	2,510	2,680	3,680	4,680	5,360	5,530	5,730	5,930	5,930
\$30,000 - 39,999	1,020	2,220	2,510	2,790	3,790	4,790	5,790	6,640	6,840	7,040	7,240	7,240
\$40,000 - 59,999	1,020	2,240	3,530	4,640	5,640	6,780	7,980	8,860	9,060	9,260	9,460	9,460
\$60,000 - 79,999	1,870	4,070	5,360	6,610	7,810	9,010	10,210	11,090	11,290	11,490	11,690	12,170
\$80,000 - 99,999	1,870	4,210	5,700	7,010	8,210	9,410	10,610	11,490	11,690	12,380	13,370	14,170
\$100,000 - 124,999	2,040	4,440	5,930	7,240	8,440	9,640	10,860	12,540	13,540	14,540	15,540	16,480
\$125,000 - 149,999	2,040	4,440	5,930	7,240	8,860	10,860	12,860	14,540	15,540	16,830	18,130	19,230
\$150,000 - 174,999	2,040	4,460	6,750	8,860	10,860	12,860	15,000	16,980	18,280	19,580	20,880	21,980
\$175,000 - 199,999	2,720	5,920	8,210	10,320	12,600	14,900	17,200	19,180	20,480	21,780	23,080	24,180
\$200,000 - 449,999	2,970	6,470	9,060	11,480	13,780	16,080	18,380	20,360	21,660	22,960	24,250	25,360
\$450,000 and over	3,140	6,840	9,630	12,250	14,750	17,250	19,750	21,930	23,430	24,930	26,420	27,730



Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting

WT-4

Employee's Section (Print clearly)

Employee's legal name (<i>first name, middle initial, last name</i>)			Social security number	☐ Single ☐ Married ☐ Married, but withhold at higher Single rate. Note: If married, but legally separated, check the Single box.
Employee's address (<i>number and street</i>)			Date of birth	
City	State	Zip code	Date of hire	

FIGURE YOUR TOTAL WITHHOLDING EXEMPTIONS BELOW

Complete Lines 1 through 3

1. (a) Exemption for yourself – enter 1 _____
- (b) Exemption for your spouse – enter 1 _____
- (c) Exemption(s) for dependent(s) – you are entitled to claim an exemption for each dependent _____
- (d) Total – add lines (a) through (c)
2. Additional amount per pay period you want deducted (if your employer agrees) _____
3. I claim complete exemption from withholding (see instructions). Enter "Exempt" _____

I CERTIFY that the number of withholding exemptions claimed on this certificate does not exceed the number to which I am entitled. If claiming complete exemption from withholding, I certify that I incurred no liability for Wisconsin income tax for last year and that I anticipate that I will incur no liability for Wisconsin income tax for this year.

Signature _____ Date Signed _____ , _____

EMPLOYEE INSTRUCTIONS:

• WHO MUST COMPLETE:

Effective on or after January 1, 2020, every newly-hired employee is required to provide a completed Form WT-4 to each of his or her employers. Form WT-4 will be used by your employer to determine the amount of Wisconsin income tax to be withheld from your paychecks. If you have more than one employer, you should claim a smaller number or no exemptions on each Form WT-4 provided to employers other than your principal employer so that the total amount withheld will be closer to your actual income tax liability.

You must complete and provide your employer a new Form WT-4 within 10 days if the number of exemptions previously claimed DECREASES.

You may complete and provide to your employer a new form WT-4 at any time if the number of your exemptions INCREASES.

Your employer may also require you to complete this form to report your hiring to the Department of Workforce Development.

• UNDER WITHHOLDING:

If sufficient tax is not withheld from your wages, you may incur additional interest charges under the tax laws. In general, 90% of the net tax shown on your income tax return should be withheld.

• OVER WITHHOLDING:

If you are using Form WT-4 to claim the maximum number of exemptions to which you are entitled and your withholding exceeds your expected income tax liability, you may use Form WT-4A to minimize the over withholding.

WT-4 Instructions – Provide your information in the employee section.

• LINE 1:

(a)-(c) Number of exemptions – Do not claim more than the correct number of exemptions. If you expect to owe more income tax for the year than will

be withheld if you claim every exemption to which you are entitled, you may increase your withholding by claiming a smaller number of exemptions on lines 1(a)-(c) or you may enter into an agreement with your employer to have additional amounts withheld (see instruction for line 2).

(c) Dependents – Those persons who qualify as your dependents for federal income tax purposes may also be claimed as dependents for Wisconsin purposes. The term "dependents" does not include you or your spouse. Indicate the number of dependents that you are claiming in the space provided.

• LINE 2:

Additional withholding – If you have claimed "zero" exemptions on line 1, but still expect to have a balance due on your tax return for the year, you may wish to request your employer to withhold an additional amount of tax for each pay period. If your employer agrees to this additional withholding, enter the additional amount you want deducted from each of your paychecks on line 2.

• LINE 3:

Exemption from withholding – You may claim exemption from withholding of Wisconsin income tax if you had no liability for income tax for last year, and you expect to incur no liability for income tax for this year. You may not claim exemption if your return shows tax liability before the allowance of any credit for income tax withheld. If you are exempt, your employer will not withhold Wisconsin income tax from your wages.

You must revoke this exemption (1) within 10 days from the time you expect to incur income tax liability for the year or (2) on or before December 1 if you expect to incur Wisconsin income tax liabilities for the next year. If you want to stop or are required to revoke this exemption, you must complete and provide a new Form WT-4 to your employer showing the number of withholding exemptions you are entitled to claim. This certificate for exemption from withholding will expire on April 30 of next year unless a new Form WT-4 is completed and provided to your employer before that date.

Employer's Section

Employer's name			Federal Employer ID Number	
Employer's payroll address (<i>number and street</i>)		City	State	Zip code
Completed by	Title	Phone number ()	Email	

EMPLOYER INSTRUCTIONS for Department of Revenue:

- If you do not have a Federal Employer Identification Number (FEIN), contact the Internal Revenue Service to obtain a FEIN.
- If the Employee has claimed more than 10 exemptions OR has claimed complete exemption from withholding and earns more than \$200.00 a week or is believed to have claimed more exemptions than he or she is entitled to, mail a copy of this certificate to: Wisconsin Department of Revenue, Audit Bureau, PO Box 8906, Madison WI 53708 or fax (608) 267-0834.
- Keep a copy of this certificate with your records. If you have questions about the Department of Revenue requirements, call (608) 266-2772 or (608) 266-2776.

EMPLOYER INSTRUCTIONS for New Hire Reporting:

- This report contains the required information for reporting a New Hire to Wisconsin. If you are reporting new hires electronically, you do not need to forward a copy of this report to the Department of Workforce Development. Visit <https://dwd.wi.gov/uinh/> to report new hires.
- If you do not report new hires electronically, mail the original form to the Department of Workforce Development, New Hire Reporting, PO Box 14431, Madison WI 53708-0431 or fax toll free to 1-800-277-8075.
- If you have questions about New Hire requirements, call toll free (888) 300-HIRE (888-300-4473). Visit dwd.wi.gov/uinh/ for more information.





PAY SELECTION FORM

Employee Name: _____

Date of Birth: _____

Consumer Direct Care Network (CDCN) issues pay by direct deposit to a bank account or pay card. Pay stubs and W-2s are sent to you by mail to your address on file or electronically.

Please check one pay option below.

Note: You will be enrolled in the Wisely Pay card option if (1) you make no selection below, or (2) you select direct deposit to a bank account but provide invalid account information or your account is closed.

- ☐ **Direct Deposit to a Wisely Pay Card Account.** I authorize CDCN to issue me a Wisely Pay card. The card will be tied to my identification on file. CDCN will make payroll deposits to my card account. I will receive the card in 7 to 10 business days after initial processing.
- ☐ **Direct Deposit to an Existing Checking, Savings or Pay Card Account.** I authorize CDCN to initiate payroll deposits to my bank or financial institution.

The Name of my bank is: _____

The Account Type is (check one): ☐ Checking ☐ Savings ☐ Pay Card

AN ATTACHMENT IS REQUIRED.

For a Checking Account. Please attach a voided check. This is preferred. A bank-issued direct deposit form or bank letter* is ok too.

For a Savings Account or Pay Card. Please attach a bank-issued direct deposit form or bank letter.*

**Do not submit a deposit slip. The routing numbers differ from direct deposit routing numbers.*

Acknowledgement. I authorize CDCN to process my selected method of pay. I understand that:

- CDCN reserves the right to refuse any direct deposit request.
- I am responsible to confirm that each deposit has occurred. I must pay any fees caused by overdrafts on my account.
- All direct deposits are made through an Automated Clearing House (ACH). Processing is subject to ACH terms. The terms of my bank also apply.
- If funds are deposited to my account in error, or an improper payment is made, I authorize CDCN to debit my account to correct the error. If my account cannot be debited due to closure or insufficient balance, then CDCN may withhold future payments until the erroneous deposited amounts are repaid.
- I may receive a paper check while my selected method of pay is being set up.
- I must submit a new Pay Selection Form to CDCN if I wish to change my Direct Deposit option.

Employee Signature

Date





The Wisely logo, featuring the word "wisely" in a white, lowercase, sans-serif font with a small icon of three dots above the 'i'.

Sign up for the Wisely® Pay card today!

It's a reloadable prepaid pay card that's **yours to keep no matter where you work**.¹ There's no fee to sign up, and there's **no credit check** to get the Wisely Pay card because it's not a credit card.²

Enjoy these great benefits when you activate your Wisely Pay card account.



Shop and Pay Bills — In stores, by phone, or online, everywhere Visa debit cards are accepted and where Debit Mastercard is accepted.³ Pay with a single touch anywhere Apple Pay®, Samsung Pay®, or Google Pay™ is accepted.



No Charge for Direct Deposit — Get paid up to 2 days early⁴ for your pay and other sources of income.⁵ A no-fee⁶ upgrade is required.⁷



Safe and Secure — Balance is protected from fraud if the card is lost or stolen, and is FDIC insured.⁸



Manage your Money — Save for a rainy day, plan your budget, and track your spending to boost your financial wellness with myWisely® app.⁹

¹ Adding funds from other sources requires additional cardholder identification verification.

² Wisely Pay is not a credit card and does not build credit.

³ Additional terms and third-party fees may apply.

⁴ You must opt into early direct deposit on myWisely.com/pay or myWisely mobile app. Early direct deposit of funds is not guaranteed and is subject to payer's support and the timing of payer's payment instruction. Faster-funding claim is based on a comparison of our policy of making funds available upon our receipt of payment instruction with the typical banking practice of posting funds at settlement. Please see full disclosures on myWisely.com or myWisely app. Please allow up to 3 weeks for funds to be loaded to the card after initial setup of direct deposit to your card.

⁵ Please allow up to 3 weeks for your pay to be loaded to the card after initial setup of direct deposit to your card.

⁶ While this feature is available at no additional charge, certain other transaction fees and costs, terms, and conditions are associated with the use of this Card. See the cardholder agreement for more details.

⁷ Additional verification required and may not be available to all cardholders.

⁸ You must notify us immediately and assist us in our investigation if your card is lost or stolen or you believe someone is using your card without your permission.

⁹ Standard text message fees and data rates may apply.

The Wisely Pay Mastercard® is issued by Fifth Third Bank N.A., Member FDIC, or MetaBank®, N.A., Member FDIC, pursuant to license by Mastercard International Incorporated. The Wisely Pay Visa® is issued by Fifth Third Bank N.A., Member FDIC, or MetaBank®, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. ADP and the ADP logo are registered trademarks of ADP, Inc. Wisely, myWisely, and the Wisely logo are registered trademarks of ADP, Inc. Apple, the Apple logo, and Apple Pay are registered trademarks of Apple Inc. App Store is a service mark of Apple Inc., registered in the U.S. and other countries. Google Pay, Google Play, and the Google Play logo are trademarks of Google LLC. Samsung Pay is a registered trademark of Samsung Electronics Co., Ltd. All other marks are the property of their respective owners. Copyright © 2020 ADP, Inc. All rights reserved.

**WAGE MEMO**

Employee Name	Member Name	Member CDCN ID #

MCO/Authorizing Entity:

Authorized Services:

Service Code	Wage or Reimbursement	Rate	
	\$ _____	☐ hour	☐ session
		☐ day	☐ mile
	\$ _____	☐ hour	☐ session
		☐ day	☐ mile
	\$ _____	☐ hour	☐ session
		☐ day	☐ mile
	\$ _____	☐ hour	☐ session
		☐ day	☐ mile
	\$ _____	☐ hour	☐ session
		☐ day	☐ mile

Effective Date:

Overtime: Overtime, defined as working more than forty (40) hours in a work week, is generally not allowed. Any exception must be approved in advance by the Consumer Direct Care Network (CDCN) office. Overtime hours submitted without prior authorization will not be paid.

*Employee Signature*_____
*Date*_____
CDCN Representative Name_____
*CDCN Representative Signature*_____
Date



**FISCAL EMPLOYER AGENT
EMPLOYEE AGREEMENT**

I, _____, referred to as the ("Employee") in this agreement ("Agreement"), agree to and acknowledge the following: _____ or _____,
(Member) (Member's Authorized Representative)

collectively referred to as ("Managing Party"), has elected to hire me to perform care services for _____ the ("Member") in accordance with Wisconsin's self-directed services program. The Member is an individual who's services are authorized by _____ a Managed Care Organization or County ("Approving Entity").

I understand that Consumer Direct for Wisconsin, LLC doing business as Consumer Direct Care Network Wisconsin ("CDCN") is the Fiscal Employer Agent that assists the Member/Managing Party with employer related tasks and IS NOT my employer. The Member/Managing Party named above is my Employer.

1. **Enrollment:** I have received the New Employee Packet that contains mandatory forms to become the Managing Party's employee. I am responsible for completing all documents. I agree to review and complete trainings described on the Training Checklist, and other training that may be required by the Managing Party. This includes items from the Employer Handbook left with the Managing Party, such as HIPAA Privacy; Exposure Control; Abuse, Neglect and Exploitation; and Fraud Prevention.

2. **Payment:**

- a. CDCN will pay the Employee for services provided to the Member at rates established by the Approving Entity and identified in a wage memo.
- b. CDCN will issue payment to the Employee on a biweekly basis. CDCN offers two direct deposit pay options, either to a bank account specified by the Employee or to a pay card. Pay stubs (a summary of pay) and W-2s are sent by first class mail to the Employee's address on file or electronically.
- c. Employee must submit time for each shift worked using an approved Electronic Visit Verification method. Paper timesheets or web portal time must also be received by midnight on Monday of the following week. All compensation is subject to applicable withholding. Submittal of work-time records after this deadline may experience a delay in payment, in which case payment will be issued on the following scheduled pay date. Anytime there is alleged misrepresentation on a time sheet, CDCN has the right to withhold future payment until the issue is resolved.
- d. I understand that CDCN is not financially responsible for payment of services I provide to the Member in situations where:
 - The Member becomes ineligible for service provided by the Approving Entity or Medicaid;
 - The Approving Entity has not issued an active authorization; or
 - The Managing Party allows me to do tasks that are not approved or work more hours than what is approved by the Approving Entity's Case Manager.
- e. CDCN will file all required amended payroll tax returns in instances where there have been over-collected social security and Medicare taxes from employees' compensation. The Employee will receive refunds of over-collected social security and Medicare taxes directly from CDCN if earnings are less than the IRS threshold published in Circular E for the current tax year. Refunds will be paid to the Employee in January immediately following year-end. The Employee agrees





**FISCAL EMPLOYER AGENT
EMPLOYEE AGREEMENT**

that they will not file a claim for refund of over-collected Medicare or Social Security with the IRS.

3. **Effective Date:** Employment will be effective upon notice from CDCN that the Employee Packet has been received and approved. I must receive a written "Okay to Work" authorization from CDCN before I can begin work. If I start working prior to receiving an "Okay to Work", I understand I may not be paid.
4. **My Responsibilities as an Employee Include:**
 - Perform duties as assigned by the Managing Party and only perform tasks and hours approved by the Approving Entity and as outlined in the Member's individual service plan.
 - Maintain program compliance (follow all guidelines of the program)
 - Provide accurate recording of time worked (includes reporting of no-shows)
 - Keep Member information confidential
 - Provide Status Change Notification (as necessary)
 - Refuse gifts and other forms of payments for services
 - Notify appropriate authorities if concerned about abuse, neglect or exploitation (see Abuse and Neglect section in the Employer Handbook)
 - Utilize all appropriate safeguards and universal health precautions, assuming at all times the possible presence of communicable disease
 - Perform job duties in an ethical manner, preserving and respecting the rights and dignity of the Member
5. **Supervision:** The Managing Party is responsible for training, managing and supervising the Employee and controlling the Employee's workplace activities. The Managing Party is solely responsible for the decisions to hire and retain or not retain an employee.
6. **Reporting Requirements:**
 - a. The Employee must immediately report all incidents, accidents and work place injuries involving the Employee or the Member. Incidents and accidents should be reported immediately to the Managing Party. **Work place injuries must be reported to the CDCN Injury Hotline at 1-888-541-1701 within 24 hours.**
 - b. The Employee must report possible neglect, abuse or exploitation of a Member to their County Adult or Elder Abuse reporting line.
 - c. Suspected Medicaid Fraud must be reported to CDCN's Fraud Hotline 1-877-532-8530.
7. **Contact Person:** The Employee has been recruited and hired by and will receive orientation and direction from the Managing Party, who shall control the Employee's workplace activities. In addition to acting as payroll administrator on behalf of the Managing Party, CDCN acts as a consultant to the Managing Party in connection with a number of services that are intended to ensure compliance with applicable laws and regulations. Both the Employee and the Managing Party have access to CDCN staff for information and clarification. The person at CDCN to be contacted is the Service Coordinator at 1-877-785-9991.

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**FISCAL EMPLOYER AGENT
EMPLOYEE AGREEMENT**

8. **Medical Administration Procedures:** The Employee will learn all medical administration procedures required in the performance of his or her job duties. Instructions for those procedures will come from the Managing Party or the Managing Party's designee and not CDCN.

9. **Insurance:** The Employee will be covered by worker's compensation insurance. The Employee has reviewed and understands the Employer Handbook section related to Employee Injury Reporting.

The Managing Party and the Employee agree to maintain auto insurance that meets the State's minimum guidelines for auto insurance coverage on any and all vehicles used to provide services under this Agreement, and agree that any vehicles used to provide services will be operated in a lawful manner.

10. **Non-Emergent Care:** Services provided under this program are not designed to be an emergency or acute medical service plan. I understand that any potentially risky health situation should be reported to the Member's attending physician or to emergency services (911), as appropriate.

11. **Acknowledgement** - I acknowledge the following:

- A Status Change Form is included in the Employer Handbook left with the Managing Party and is available online at www.consumerdirectwi.com. I am responsible for notifying CDCN and Managing Party within ten (10) days of any change in name, addresses, telephone number, or any pending criminal charges not previously disclosed since my hire date.
- A current CDCN Pay Schedule is included with enrollment materials, and is available online at www.consumerdirectwi.com.

Signatures:

Employee Signature

Date

Member or Managing Party Signature

Date



**WISCONSIN MEDICAID PROGRAM PROVIDER AGREEMENT AND
ACKNOWLEDGEMENT OF TERMS OF PARTICIPATION
FOR WAIVER SERVICE PROVIDER AGENCIES OR INDIVIDUALS**

Completion of this form is required under Federal Law by the Centers for Medicare & Medicaid Services, Department of Health and Human Services, under the Code of Federal Regulations 42 CFR 431.107.

Name of Provider (Typed or Printed—Must exactly match name used on all other documents)		Phone Number	
Address – Street	City	State	Zip Code

The above-referenced provider of home and community-based waiver services under Wisconsin's Medicaid program, hereinafter referred to as the provider, hereby agrees and acknowledges as follows:

1. To provide only the items or services authorized by the managed care organization or IRIS program.
2. To accept the payment issued by the managed care organization or IRIS program as payment in full for provided items or services.
3. To make no additional claims or charges for provided items or services.
4. To refund any overpayment to the managed care organization or IRIS program.
5. To keep any records necessary to disclose the extent of services provided consistent with the provider's business type.
6. To provide, upon request by the managed care organization, the IRIS program, or the Department of Health Services (DHS) or its designee, information regarding the items or services provided.
7. To comply with all other applicable federal and state laws, regulations, and policies relating to providing home and community-based waiver services under Wisconsin's Medicaid program including the caregiver background check law.
8. Medicaid Confidentiality Policies and Procedures: To maintain the confidentiality of all records or other information relating to each participant's status as a waiver participant and items or services the participant receives from the Provider.
9. To respect and comply with the waiver participant's right to refuse medication and treatment and other rights granted the participant under federal and state law.
10. Medicaid Fraud Prevention Policies and Procedures (including records retention): To keep records necessary to disclose the extent of services provided to waiver participants **for a period of ten (10) years** and to furnish upon request to the DHS, the federal Department of Health and Human Services, or the state Medicaid Fraud Control Unit, any information regarding services provided and payments claimed by the Provider for furnishing services under the Wisconsin Medicaid Program. This requirement includes retaining all records and documents according to the terms provided by Wis. Admin. Code § DHS 106.02(a)-(d); (f)-(g).
11. The provider agrees to comply with the disclosure requirements of 42 CFR Part 455, Subpart B, as now in effect or as may be amended. To meet those requirements and address real or potential conflict of interest that may influence service provision, among other things the provider shall furnish to the managed care organization and upon request, to the Department in writing:
 - a) The names and addresses of all vendors of drugs, medical supplies or transportation, or other providers in which it has a controlling interest or ownership;
 - b) The names and addresses of all persons who have a controlling interest in the provider;



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DEPARTMENT OF HEALTH SERVICES

Division of Medicaid Services
F-00180C (07/2017)

STATE OF WISCONSIN

42 CFR 431.107 & 42 CFR 438.602(b)

- c) Whether any of the persons named in compliance with (a) and (b) above are related to any owner or to a person with a controlling interest as spouse, parent, child or sibling;
 - d) The names and addresses of any subcontractors who have had business transactions with the provider;
 - e) The identity of any person named in compliance with (a) and (b) above, who has been convicted of a criminal offense related to that person's involvement in any program under Medicare, Medicaid, or Title XX services programs since the inception of those programs.
12. To provide to the DHS identifying information, including name, specialty, date of birth, Social Security number, national provider identifier, (NPI) (if eligible for an NPI), Federal taxpayer identification number, and State license or certification for purposes of enrollment with the State Medicaid program.
13. To include its NPI (if eligible for an NPI) on all claims submitted under the Medicaid program.
14. To comply with the advance directives requirements specified in 42 CFR Part 489, Subpart I.

Modifications to this agreement cannot and will not be agreed to. Altering this agreement in any way voids the Department of Health Services' signature. This agreement is not transferable or assignable.

Name – Provider (Typed or Printed)

SIGNATURE – Provider

Date Signed

FOR DMS USE ONLY (DO NOT WRITE BELOW THIS LINE)

SIGNATURE – Department of Health Services

Date Signed



8/14/17



DOCUMENTATION OF TRAINING – SUPPORTIVE HOME CARE (SHC) / RESPITE

This is a voluntary form. If this form is not used, you must ensure that the information requested is on file in another format.

Name – County Waiver Agency

Name –

Date – Initial Employment

Name – Employer (SHC Agency or Participant)

The following information outlines the required minimum training to be completed by the person providing SHC/Respite services, based on the actual services to be provided. Check the appropriate box(s) to indicate training that was completed for the applicable services.

☐ **Personal Services – Required Training**

1. Orientation to County and SHC Agency Policies
2. Safe Provision of Services
3. Recognizing and Responding to Emergencies
4. Participant Specific Information
5. General Target Group Information
6. Working Effectively with Participants
7. Homemaking/Household Services

☐ **Required Training Completed (1, 2, 3, 4)**

Date:

☐ **Training Completed (5, 6, 7)**

Date:

☐ **Training Exempted (5, 6, 7)—Provider has previous/ comparable experience. List and attach documentation.**

☐ **Household/Chore Services – Required Training**

1. Orientation to County and SHC Agency Policies
2. Safe Provision of Services
3. Recognizing and Responding to Emergencies
4. Participant Specific Information

☐ **Required Training Completed (1, 2, 3, 4)**

Date:

☐ **Respite Services – Required Training**

1. Orientation to County and SHC Agency Policies
2. Safe Provision of Services
3. Recognizing and Responding to Emergencies
4. Participant Specific Information
5. General Target Group Information
6. Working Effectively with Participants
7. Homemaking/Household Services (if provided)

☐ **Required Training Completed (1, 2, 3, 4)**

Date:

☐ **Training Completed (5, 6, 7)**

Date:

☐ **Training Exempted (5, 6, 7)—Provider has previous/ comparable experience. List and attach documentation.**

☐ Required Caregiver Background Check completed (if applicable)

Date Completed

SIGNATURE – SHC / Respite Provider

Date Signed

SIGNATURE – SHC Agency Supervisor

Date Signed

SIGNATURE – Participant as Employer

Date Signed

SIGNATURE – County Agency Care Manager

Date Signed



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FISCAL EMPLOYER AGENT
EMPLOYEE TRAINING CHECKLIST

Employee Name	Member Name	Managing Party Name

Please complete the following trainings and include the date each training module was completed.

Date Completed

___/___/___ Employee has read and understands the following workplace-related policies and procedures outlined in the Employer Handbook left with the Managing Party:

- Workplace Harassment
- Alcohol and Drug Free Workplace
- Employee Safety and Accident Prevention
- Employee Injury Reporting (CDCN Injury Hotline: 1-888-541-1701)
- Medicaid Fraud (CDCN Fraud Hotline: 1- 877-532-8530)

___/___/___ Employee reviewed and understands the “Lifting and Moving” booklet training.

___/___/___ Employee reviewed and understands the “Infection Control Guidelines” booklet training.

___/___/___ Employee reviewed and understands the “HIPAA Guide” training information.

___/___/___ Employee reviewed and understands the “Abuse, Neglect & Exploitation” training information.

___/___/___ Employee has received orientation to the Member by the Managing Party.

Signatures:

Both Employee and Member/Managing Party sign below to acknowledge training was completed on the dates listed above.

<i>Employee Signature</i>	<i>Date</i>	<i>Member or Managing Party Signature</i>	<i>Date</i>



DEPARTMENT OF HEALTH SERVICES

Division of Quality Assurance
F-82064A (02/2021)

STATE OF WISCONSIN

Wis. Stat. § 50.065
Wis. Admin. Code § DHS 12.05(4)

BACKGROUND INFORMATION DISCLOSURE (BID) INSTRUCTIONS

- The *Background Information Disclosure* (form F-82064) gathers information as required by the Wisconsin Caregiver Background Check Law to help employers and governmental regulatory agencies make employment, contract, residency, and regulatory decisions.
- Complete and return the entire form and attach explanations as specified by employer or governmental regulatory agency.
- **NOTE:** If you are an owner, operator, board member, or non-client resident of a facility regulated by the Division of Quality Assurance (DQA), complete the *BID*, [F-82064](#), and the *BID Appendix*, [F-82069](#), and submit both forms to the address noted in the *BID Appendix Instructions*.

CAREGIVER BACKGROUND CHECK LAW

In accordance with the provisions of Wis. Stat. § 50.065, for persons who have been convicted of certain acts, crimes, or offenses:

1. The Department of Health Services (DHS) may not license, certify, or register the person or entity.
**Note: Employers and Care Providers are referred to as "entities."*
2. An entity may not employ, contract with, or permit persons to reside at the entity.

The list of offenses affecting caregiver eligibility that require rehabilitation review is available from the regulatory agencies or through the Internet at <https://www.dhs.wisconsin.gov/publications/p0/p00274.pdf>.

The Caregiver Law covers the following EMPLOYERS / CARE PROVIDERS (aka ENTITIES) regulated under Wis. Stat. §§ 50, 51, and 146:

- | | |
|--|---|
| • Adult Family Homes (3-4 Bed) | • Intermediate Care Facility for Individuals with Intellectual Disabilities |
| • Ambulance Service Providers | • Home Health Agencies, including those that provide personal care services |
| • AODA Services | • Hospices |
| • Community Based-Residential Facilities | • Hospitals |
| • Community Mental Health Programs | • Mental Health Day Treatment Services for Children |
| • Community Support Programs (CSP) | • Nursing Homes |
| • Developmental Disabilities | • Residential Care Apartment Complexes |
| • Emergency Mental Health Service Programs | • Rural Medical Centers |

The Caregiver Law covers the following PERSONS:

- Anyone employed by or contracting with a covered entity who has access to the clients served, except if the access is infrequent or sporadic and service is not directly related to care of the client. Exception: Emergency medical technicians and first responders are not covered under the Caregiver Law.
- Anyone who lives on the premises of a covered entity and is 10 years old or over, but is not a client ("non-client resident").
- Anyone who is licensed by DHS.
- Anyone certified by DHS.
- Anyone registered by DHS.
- Anyone who is a board member or corporate officer who has access to the clients served.

FAIR EMPLOYMENT ACT

Wisconsin's Fair Employment Law, Wis. Stat. §§ 111.31 – 111.395, prohibits discrimination because of a criminal record or pending charge. However, it is not discrimination to decline to hire or license a person based on the person's arrest or conviction record if the arrest or conviction is substantially related to the circumstances of the particular job or licensed activity.

PERSONALLY IDENTIFIABLE INFORMATION

This information is used to obtain relevant data as required by the provisions set forth by the Wisconsin Caregiver Background Check Law. Providing your social security number is voluntary; however, your social security number is one of the unique identifiers used to prevent incorrect matches. For example, the Department of Justice uses social security numbers, names, gender, race, and date of birth to prevent incorrect matches of persons with criminal convictions. The Department of Health Services' Caregiver Misconduct Registry uses social security numbers as one identifier to prevent incorrect matches of persons with findings of abuse or neglect of a client or misappropriation of a client's property.



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DEPARTMENT OF HEALTH SERVICES

Division of Quality Assurance

F-82064 (07/2018)

STATE OF WISCONSIN

Wis. Stat. § 50.065

Wis. Admin. Code § DHS 12.05(4)

Page 1 of 2

BACKGROUND INFORMATION DISCLOSURE (BID)

- **PENALTY: Knowingly providing false information or omitting information may result in a forfeiture of up to \$1,000 and other sanctions as provided in Wis. Admin. Code § DHS 12.05(4).**
- Completion of this form is required under the provisions of Wis. Stat. § 50.065. Failure to comply may result in a denial or revocation of your license, certification, or registration, or denial or termination of your employment or contract.
- Providing your social security number is voluntary; however, your social security number is one of the unique identifiers used to prevent incorrect matches.
- Refer to DQA form F-82064A, *BID Instructions*, for additional information.

Check the box that applies to you.

- ☐ Employee / Contractor (including new applicant)
 ☐ Household member (lives on premises, but is not a client)
- ☐ Applicant for a license, certification, or registration (including continuation or renewal)
 ☐ Other – Specify: _____

NOTE: If you are an owner, operator, board member, or non-client resident of a facility regulated by the Division of Quality Assurance (DQA), complete the BID, F-82064 and the [Appendix, F-82069](#), and submit both forms to the address noted in the Appendix Instructions.

Full Legal Name – <i>First</i>		<i>Middle</i>	<i>Last</i>	
Position Title (Complete only if a prospective or current employee or contractor.)			Birth Date (MM/dd/yyyy)	Sex ☐ Male ☐ Female
Any Other Names By Which You Have Been Known (Including Maiden Name)				
Race / Ethnicity (Check ONLY one.) ☐ American Indian or Alaskan Native ☐ Asian or Pacific Islander ☐ Black ☐ White ☐ Unknown				Social Security Number
Home Address		City	State	Zip Code
Business Name and Address – Employer or Care Provider (Entity)				

A “NO” answer to all questions does not guarantee employment, residency, a contract, or regulatory approval.

Note: The areas below that are designated for responses are expandable.

SECTION A – ACTS, CRIMES, AND OFFENSES THAT MAY ACT AS A BAR OR RESTRICTION

- Do you have any criminal charges pending against you, including in federal, state, local, military, and tribal courts?
 If **Yes**, list each charge, when it occurred or the date of the charge, and the city and state where the court is located.
 You may be asked to supply additional information, including a copy of the criminal complaint or any other relevant court or police documents.

Yes	No
☐	☐
- Were you ever convicted of any crime anywhere, including in federal, state, local, military, and tribal courts?
 If **Yes**, list each crime, when it occurred or the date of the conviction, and the city and state where the court is located.
 You may be asked to supply additional information including a certified copy of the judgment of conviction, a copy of the criminal complaint, or any other relevant court or police documents.

Yes	No
☐	☐
- IMPORTANT: Read before completing item 3.**
Wis. Stat. § 48.981 Abused and neglected children and abused unborn children. (7)(a) CONFIDENTIALITY. “All reports made under this section, notices provided under sub. (3) (bm), and records maintained by an agency and other persons, officials, and institutions shall be confidential.” Reports and records may be disclosed only to the persons identified in this section.
☐ **If you are the employer or prospective employer of the person completing this form and are entitled to obtain this information per the above, check this box.**
 Has any government or regulatory agency (other than the police) ever found that you committed child abuse or neglect?
 If the above box has been checked, provide an explanation below, including when and where the incident(s) occurred.

Yes	No
☐	☐



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- | | | |
|--|--------------------------|--------------------------|
| <p>4. Has any government or regulatory agency (other than the police) ever found that you abused or neglected any person or client?</p> <p>If Yes, explain, including when and where it happened.</p> | Yes | No |
| | ☐ | ☐ |
| <p>5. Has any government or regulatory agency (other than the police) ever found that you misappropriated (improperly took or used) the property of a person or client?</p> <p>If Yes, explain, including when and where it happened.</p> | Yes | No |
| | ☐ | ☐ |
| <p>6. Has any government or regulatory agency (other than the police) ever found that you abused an elderly person?</p> <p>If Yes, explain, including when and where it happened.</p> | Yes | No |
| | ☐ | ☐ |
| <p>7. Do you have a government issued credential that is not current or is limited so as to restrict you from providing care to clients?</p> <p>If Yes, explain, including credential name, limitations or restrictions, and time period.</p> | Yes | No |
| | ☐ | ☐ |

SECTION B – OTHER REQUIRED INFORMATION

- | | | |
|--|--------------------------|--------------------------|
| <p>1. Has any government or regulatory agency ever limited, denied, or revoked your license, certification, or registration to provide care, treatment, or educational services?</p> <p>If Yes, explain, including when and where it happened.</p> | Yes | No |
| | ☐ | ☐ |
| <p>2. Has any government or regulatory agency ever denied you permission or restricted your ability to live on the premises of a care providing facility?</p> <p>If Yes, explain, including when and where it happened and the reason.</p> | Yes | No |
| | ☐ | ☐ |
| <p>3. Have you been discharged from a branch of the US Armed Forces, including any reserve component?</p> <p>If Yes, indicate the year of discharge: _____</p> <p>Attach a copy of your DD214, if you were discharged within the last three (3) years.</p> | Yes | No |
| | ☐ | ☐ |
| <p>4. Have you resided outside of Wisconsin in the last three (3) years?</p> <p>If Yes, list each state and the dates you resided there.</p> | Yes | No |
| | ☐ | ☐ |
| <p>5. If you are employed by or applying for the State of Wisconsin, have you resided outside of Wisconsin in the last seven (7) years?</p> <p>If Yes, list each state and the dates you resided there.</p> | Yes | No |
| | ☐ | ☐ |
| <p>6. Have you had a caregiver background check done within the last four (4) years?</p> <p>If Yes, list the date of each check, and the name, address, and phone number of the person, facility, or government agency that conducted each check.</p> | Yes | No |
| | ☐ | ☐ |
| <p>7. Have you ever requested a rehabilitation review with the Wisconsin Department of Health Services, a county department, a private child placing agency, school board, or DHS-designated tribe?</p> <p>If Yes, list the review date and the review result. You may be asked to provide a copy of the review decision.</p> | Yes | No |
| | ☐ | ☐ |

Read and initial the following statement.

_____ I have completed and reviewed this form (F-82064, BID) and affirm that the information is true and correct as of today's date.

Name – Person Completing This Form

Date Submitted





EMPLOYEE HEALTH QUESTIONNAIRE

Employee Name: _____
(please print)

Background: You have been conditionally hired to provide services for the service recipient in accordance with their authorized plan of care. You may be required to perform physical tasks. The purpose of this Health Questionnaire is to assess your ability to safely perform the authorized tasks. The information provided on this Questionnaire will be used to help manage your employment in a safe manner. Your responses are considered *Confidential*.

Instructions: Respond to each item as to whether you have a medical or physical activity restriction or limitation. Please explain each "Yes" answer on the backside of this form and attach additional information as necessary.

Return this completed form and other employment forms to the Consumer Direct Care Network (CDCN) office.

	Do you currently have a Physical Activity Restriction for:	NO	YES
1	Sitting		
2	Stationary Standing		
3	Walking		
4	Ability to be Mobile		
5	Crouching (bending at knee)		
6	Kneeling/Crawling		
7	Stooping (bending at waist)		
8	Twisting (knees/waist/neck)		
9	Turning/Pivoting		
10	Climbing		
11	Balancing		
12	Reaching overhead		
13	Reaching extension		
14	Grasping		
15	Pushing/Pulling		
16	Lifting/Carrying		
17	Whole/Partial Loss of Hearing		
18	Blindness (partial or complete) or Eye Problems		
19	Have you ever been advised by a health care professional to restrict your physical activities in any way?		
	Personal Medical History – In the past 5 years, have you had or been treated for:	NO	YES
20	Epilepsy		
21	Fainting/Dizzy Spells		
22	Hernia		
23	Muscular Strain		
24	Neck or Back Injury		
25	Ruptured Intervertebral Disc		
26	Joint Injury or Pain		
27	Fractures		
28	Tuberculosis or Non-Negative TB Test		
29	Lung Problems/Disease		
30	Head Injury		
31	Other Current Problems, Diseases, Conditions		
32	Have you been hospitalized or undergone surgery, other than for childbirth?		
33	Have you refused a recommended surgical procedure?		
34	Are you currently taking any medication or drugs, whether by prescription or not, that could impair your judgment?		



Do you currently have, or have you ever been told by a health care professional that you have any physical limitations related to the list below?							
		NO	YES			NO	YES
A	Back			H	Arm		
B	Shoulder			I	Hip		
C	Neck			J	Knee		
D	Elbow			K	Ankle		
E	Wrist			L	Foot		
F	Hand			M	Leg		
G	Finger			N	Other		

Please explain any "Yes" answers from page 1 and 2 in detail below and note the associated number or letter. Also, include the dates of injuries & surgeries. Use additional pages, if necessary:

[illegible]

Employee Signature: _____ Date: ____/____/____

State Office/Location: _____ Risk Mgr Review: [_____] Date _____ / _____ / _____





2022 Payroll Calendar

Symbol Key: Time Due Pay Day Postal and Bank Holiday

JANUARY							FEBRUARY							MARCH						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1			1	2	3	4	5			1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28						27	28	29	30	31		
30	31																			
APRIL							MAY							JUNE						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2	1	2	3	4	5	6	7				1	2	3	4
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25
24	25	26	27	28	29	30	29	30	31					26	27	28	29	30		
JULY							AUGUST							SEPTEMBER						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2		1	2	3	4	5	6					1	2	3
3	4	5	6	7	8	9	7	8	9	10	11	12	13	4	5	6	7	8	9	10
10	11	12	13	14	15	16	14	15	16	17	18	19	20	11	12	13	14	15	16	17
17	18	19	20	21	22	23	21	22	23	24	25	26	27	18	19	20	21	22	23	24
24	25	26	27	28	29	30	28	29	30	31				25	26	27	28	29	30	
31																				
OCTOBER							NOVEMBER							DECEMBER						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1			1	2	3	4	5					1	2	3
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24
23	24	25	26	27	28	29	27	28	29	30				25	26	27	28	29	30	31
30	31																			

2022 Bank & Post Office Holidays

*Consumer Direct Care Network office closures

*New Year's Day - Friday, December 31, 2021

*Martin Luther King, Jr. Day - Monday, January 17

Presidents Day - Monday, February 21

*Memorial Day - Monday, May 30

Juneteenth - Monday, June 20

*Independence Day - Monday, July 4

*Labor Day - Monday, September 5

Columbus Day - Monday, October 10

Veterans Day - Friday, November 11

*Thanksgiving Day - Thursday, November 24

*Christmas Day - Monday, December 26



Work weeks are Sunday through Saturday. Paper time sheet or web portal time must be submitted by MONDAY at MIDNIGHT. You must also clock-in and clock-out for each shift using an approved Electronic Visit Verification (EVV) method. Late time or time with mistakes may result in late pay. Thank you!

Pay Period - Week 1 Sunday through Saturday	Pay Period - Week 2 Sunday through Saturday	Pay Date
12/19/2021 to 12/25/2021	12/26/2021 to 1/1/2022	1/14/2022
1/2/2022 to 1/8/2022	1/9/2022 to 1/15/2022	1/28/2022
1/16/2022 to 1/22/2022	1/23/2022 to 1/29/2022	2/11/2022
1/30/2022 to 2/5/2022	2/6/2022 to 2/12/2022	2/25/2022
2/13/2022 to 2/19/2022	2/20/2022 to 2/26/2022	3/11/2022
2/27/2022 to 3/5/2022	3/6/2022 to 3/12/2022	3/25/2022
3/13/2022 to 3/19/2022	3/20/2022 to 3/26/2022	4/8/2022
3/27/2022 to 4/2/2022	4/3/2022 to 4/9/2022	4/22/2022
4/10/2022 to 4/16/2022	4/17/2022 to 4/23/2022	5/6/2022
4/24/2022 to 4/30/2022	5/1/2022 to 5/7/2022	5/20/2022
5/8/2022 to 5/14/2022	5/15/2022 to 5/21/2022	6/3/2022
5/22/2022 to 5/28/2022	5/29/2022 to 6/4/2022	6/17/2022
6/5/2022 to 6/11/2022	6/12/2022 to 6/18/2022	7/1/2022
6/19/2022 to 6/25/2022	6/26/2022 to 7/2/2022	7/15/2022
7/3/2022 to 7/9/2022	7/10/2022 to 7/16/2022	7/29/2022
7/17/2022 to 7/23/2022	7/24/2022 to 7/30/2022	8/12/2022
7/31/2022 to 8/6/2022	8/7/2022 to 8/13/2022	8/26/2022
8/14/2022 to 8/20/2022	8/21/2022 to 8/27/2022	9/9/2022
8/28/2022 to 9/3/2022	9/4/2022 to 9/10/2022	9/23/2022
9/11/2022 to 9/17/2022	9/18/2022 to 9/24/2022	10/7/2022
9/25/2022 to 10/1/2022	10/2/2022 to 10/8/2022	10/21/2022
10/9/2022 to 10/15/2022	10/16/2022 to 10/22/2022	11/4/2022
10/23/2022 to 10/29/2022	10/30/2022 to 11/5/2022	11/18/2022
11/6/2022 to 11/12/2022	11/13/2022 to 11/19/2022	12/2/2022
11/20/2022 to 11/26/2022	11/27/2022 to 12/3/2022	12/16/2022
12/4/2022 to 12/10/2022	12/11/2022 to 12/17/2022	12/30/2022
12/18/2022 to 12/24/2022	12/25/2022 to 12/31/2022	1/13/2023

CDWITimesheets@ConsumerDirectCare.com

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Fax: 877-785-9992
www.ConsumerDirectWI.com



Work Opportunity Tax Credits - Consumer Direct Care Network

Consumer Direct Care Network (CDCN) participates in the Work Opportunity Tax Credit (WOTC) program. ADP administers WOTC on behalf of CDCN. Please follow the steps listed below to screen for the WOTC program. We appreciate your cooperation.

Applicant Instructions

- Open <https://tcs.adp.com/consumerdirectcare> or scan the QR code below.
***Note: If using a shared screening device, ensure the device does not have an autofill/auto complete function enabled*
- Please answer each question to complete the voluntary screening.
- Eligible applicants will be asked to **Electronically Sign and click Submit** to complete the screening.
- Ineligible applicants will be asked to click **Submit** to finish the screening. You will not be asked to electronically sign.

****ADP will contact WOTC-eligible new hires via email or text to request proof of age or address documentation, when needed.***

*****If you are unable to screen via the Web Link please contact ADP at 1-800-237-3279 (1-800-ADP-EASY) available 6am-11 pm ET, 7 days a week and enter company code shown below to screen for Tax Credits.***

IVR CODE: 410849



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