BDS FISCAL

associated with

broadscope
DISABILITY SERVICES

Employee Handbook

WASHINGTON COUNTY

Washington Employee Handbook Instructions

Background Check *(pages 4-8)*

The Wisconsin Caregiver Law requires employers of individuals involved in the home or personal care of others to conduct an extensive caregiver criminal background check of those considered for employment. To complete this, fill out pages 5-6. Information about and instructions for this disclosure are on page 4.

Additionally, if you have lived outside of Wisconsin during the last three years, an out-of-state background check is required. To complete this, fill out and sign pages 7-8. To review your rights under the Fair Credit Reporting Act, visit https://www.consumer.ftc.gov/articles/pdf-0096-fair-credit-reporting-act.pdf (BDS Fiscal will not check your credit).

I-9, W-4, WT-4 *(pages 9-18)*

Full I-9 instructions are available at https://www.uscis.gov/i-9 and a sample is included. If you are unable to access these instructions electronically and need a printed copy, please contact BDS Fiscal. You will complete Section 1 of the I-9 as the employee. Check the appropriate box to indicate whether you used a preparer or translator.

Section 2 of the I-9 will be completed by the parent/employer after you present them with your documents (the physical items – not copies or pictures). It can also be completed by BDS Fiscal if you bring your documents to our office for us to inspect. See the List of Acceptable Documents for what may be used for this process.

W-4 and WT-4 instructions are provided on the form itself. All of these documents are required for employment in the state of Wisconsin.

Employee & Employer Forms *(pages 19-29)*

It is best to complete this section side by side with the parent. The forms on pages 19-27 require the signatures of both you (the employee) and the parent/employer and reviewing the information together will ensure mutual understanding.

Page 28, Authorization for Release and/or Exchange of Protected Health Information, is a consent form to allow you and Washington County to share information about the Employer. Fill in the child's information as name of client, enter your information as agency/individual, and fill in the dates of records/services (date of hire to one year from date signed). The parent will then sign at the bottom.

Page 29, BDS Fiscal Consent for the Release of Confidential Information, is a consent form to allow you and BDS Fiscal to share information about the Employer. Fill in the name of the child and your name in the appropriate blanks. The parent will then print and sign their name. The parent may check additional boxes or add information to the form to alter its constraints if desired (not required).

Employee Set-Up Forms *(pages 30-35)*

Direct deposit is required for all employees. BDS Fiscal does not distribute payroll via paper checks. Complete page 30 and attach the necessary bank information as described. If you do not have a bank account and need assistance setting one up, visit www.consumerfinance.gov/consumer-tools/bank-accounts for resources and guidance.

Employees are required to complete training with the employer before beginning work with a client (page 31).

A sample timesheet, a blank timesheet, and the payroll schedule for BDS Fiscal are provided on pages 32-34. Contact BDS if you have questions on how to properly fill out your timesheets.

Optional: submit page 35, Additional Employment Interests, if you would like to work with more families.

BDS Fiscal Contact Information

Broadscope Disability Services, 6102 W Layton Avenue, Greenfield, WI 53220 ♦ www.broadscope.org

Phone: 414-329-4500 ♦ Fax: 414-329-4510 ♦ Email for documents/scans: bdsfiscal@broadscope.org

Reference the Forms Checklist (page 3) to ensure all necessary forms and attachments are included with your employee paperwork. Then, submit to BDS Fiscal as directed on page 3.

Washington Employee Forms Checklist

Please return ALL of the forms listed below, including this checklist, and the required attachments to BDS Fiscal. Each form will have the heading 'Send to BDS' in the upper right corner and may be returned via mail, fax, or email. You cannot start and will not be paid until all paperwork is completed and processed. You are encouraged to make copies of anything you sign before mailing. If you need copies later, contact BDS Fiscal.

BDS Fiscal
c/o Broadscope Disability Services
6102 West Layton Avenue
Greenfield, WI 53220

Fax: 414-329-4510

Email: bdsfiscal@broadscope.org
Scans or pictures of your documents need to be clearly legible

- ❑ Forms Checklist – page 3
- ❑ Wisconsin Background Information Disclosure (BID) – pages 5-6
- ❑ Disclosure Regarding and Acknowledgement & Authorization of Background Check – pages 7-8
  ***If applicable**
- ❑ Employment Eligibility Verification (Form I-9) – pages 10 & 12
- ❑ Form W-4, Employee's Withholding Allowance Certificate – page 14
- ❑ Form WT-4, Employee's Wisconsin Withholding Exemption Certificate – page 18
- ❑ BDS Fiscal New Employee Set Up Form – page 19
- ❑ Relationship Disclosure Form – page 20
- ❑ Fiscal Agent Statement of Understanding – page 22
- ❑ Fraud Notice – page 23
- ❑ Service Definitions – page 25
- ❑ Critical Incident Reporting Overview Agreement – page 27
- ❑ Authorization for Release and/or Exchange of Protected Health Information – page 28
- ❑ BDS Fiscal Consent for the Release of Confidential Information – page 29
- ❑ Direct Deposit Authorization – page 30
  ***Attach a voided check OR letter from bank (not handwritten) confirming account number**
- ❑ Participant Specific Training Certification – page 31
- ❑ Additional Employment Interests (Optional) – page 35

My signature verifies that all the above forms are filled out completely and accurately and will be returned with attachments to BDS Fiscal via the contact information listed above. Additionally, by signing, I acknowledge that any convictions found in my background check will be shared with the Employer/Client.

EMPLOYEE NAME _____ EMPLOYEE SIGNATURE _____ DATE _____

EMAIL ADDRESS _____ PHONE NUMBER _____

BACKGROUND INFORMATION DISCLOSURE (BID) FOR ENTITY EMPLOYEES AND CONTRACTORS: INSTRUCTIONS

PURPOSE

- The *Background Information Disclosure for Employees and Contractors* (form F-82064) gathers information required by Wis. Stat. § 50.065 and Wis. Admin. Code ch. DHS 12 for entities to conduct caregiver background checks for prospective and existing employees and contractors. This form may also be used by entities to conduct background checks for students and volunteers that are expected to have regular and direct contact with clients.
- **NOTE:** Form F-82064 should not be used by applicants for *entity operator approval* or by entities requesting approval for an individual to reside in entity facilities as a *non-client resident*. Applicants for *entity operator approval* or for a *non-client resident* background check must request an *entity* background check from the Division of Quality Assurance.

CAREGIVER BACKGROUND CHECK LAW

Entities must conduct background checks to verify initial and renewal eligibility of employees and contractors to serve as *caregivers*. Pursuant to Wis. Stat. § 50.065 and Wis. Admin. Code ch. DHS 12, an entity may not employ or contract with an individual to serve as a "caregiver," if the individual has certain governmental findings or criminal convictions affecting eligibility. See Offenses Affecting Eligibility for Employment or Contract in Roles with Client Contact.

APPLICATION

Caregiver Background Checks are required for prospective and existing employees and contractors of entities. The term *entity* includes, but is not limited to:

- Adult Day Care Centers
- Adult Family Homes
- Alcohol and Other Drug Abuse Treatment Programs
- Ambulance Service Providers
- AODA Services
- Community Based-Residential Facilities
- Community Mental Health Programs
- Community Support Programs
- Comprehensive Community Services
- Corporate Guardianships
- Facilities Serving People with Developmental Disabilities
- Emergency Mental Health Service Programs
- Home Health Agencies
- Hospices
- Hospitals
- Mental Health Day Treatment Services for Children
- Nursing Homes
- Outpatient Mental Health Clinics
- Personal Care Agencies
- Residential Care Apartment Complexes
- Rural Medical Centers
- Youth Crisis Stabilization Facilities
- Programs regulated by ch. DHS 75

FAIR EMPLOYMENT ACT & ELIGIBILITY REQUIREMENTS

Wisconsin 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. In addition, Wisconsin law establishes conditions of eligibility for employment or contract to work in roles with regular and direct client/patient contact.

Wis. Stat. § 50.065(4m)(b) reads:
Notwithstanding s. 111.335, and except as provided in sub. (5), an entity may not employ or contract with a caregiver or permit to reside at the entity a nonclient resident, if the entity knows or should have known any of the following:

1. That the person has been convicted of a serious crime.
2. That a unit of government or a state agency, as defined in s. 16.61 (2) (d), has made a finding that the person has abused or neglected any client or misappropriated the property of any client.
3. That a final determination has been made under s. 48.981 (3) (c) 5m. or, if a contested case hearing is held on such a determination, a final decision has been made under s. 48.981 (3) (c) 5p. that the person has abused or neglected a child.
4. That, in the case of a position for which the person must be credentialed by the department of safety and professional services, the person's credential is not current or is limited so as to restrict the person from providing adequate care to a client.

See Offenses Affecting Eligibility for guidance.

DEPARTMENT OF HEALTH SERVICES
Division of Quality Assurance
F-82064 (01/2022)

SEND TO BDS

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

BACKGROUND INFORMATION DISCLOSURE (BID) FOR ENTITY EMPLOYEES AND CONTRACTORS

- **PENALTY:** A person who provides false information on this form may be subject to forfeiture and sanctions, as provided in Wis. Stat. § 50.065(6)(c) and Wis. Admin Code § DHS 12.05(4).
- Completion of this form to verify your eligibility for employment/service as a "caregiver" is required by Wis. Stat. § 50.065 and Wis. Admin Code ch. DHS 12. Failure to complete this form may result in denial or termination of your employment, contract or service agreement.

Refer to DQA form F-82064A, *Instructions*, for additional information.

Check the box that applies to you.

☐ Applicant / Employee ☐ Student / Volunteer

☐ Contractor ☐ Other – Specify:

NOTE: This form should NOT be used by applicants for *entity operator approval* (license, certification, registration or other DHS approval) or by entities requesting approval for an individual to reside in entity facilities as a *non-client resident*. Applicants for *entity operator approval* or for a *non-client resident* background check must request an *entity* background check from the Division of Quality Assurance.

Full Legal Name – *First*	*Middle*	*Last*

Other Names (including prior to marriage)

Position Title (applied for or existing)	Birth Date *(MM/DD/YYYY)*	Sex ☐ Male ☐ Female

Home Address	City	State	Zip Code

Business Name and Address – Employer (Entity)

Answering "NO" to all questions does not guarantee employment, a contract, or service agreement.
If more space is required, attach additional documentation to this form and indicate "see attached" in your answer.

SECTION A – DISCLOSURES

1. 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 ☐

2. 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 ☐

3. Please note that Wis. Stat. § 48.981, *Abused or neglected children and abused unborn children*, may apply to information concerning findings of child abuse and neglect.
   Has any government or regulatory agency (other than the police) ever found that you committed **child** abuse or neglect?
   Provide an explanation below, including when and where the incident(s) occurred.
   Yes ☐ No ☐

4. Has any government or regulatory agency (other than the police) ever found that you abused or neglected **any person or client**?
   If **Yes,** explain, including when and where it happened.
   Yes ☐ No ☐

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? Yes ☐ No ☐
   If **Yes**, explain, including when and where it happened.

6. Has any government or regulatory agency (other than the police) ever found that you abused an **elderly person**? Yes ☐ No ☐
   If **Yes**, explain, including when and where it happened.

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? Yes ☐ No ☐
   If **Yes**, explain, including credential name, limitations or restrictions, and time period.

SECTION B – OTHER REQUIRED INFORMATION

1. Has any government or regulatory agency ever limited, denied, or revoked your license, certification, or registration to provide care, treatment, or educational services? Yes ☐ No ☐
   If **Yes,** explain, including when and where it happened.

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? Yes ☐ No ☐
   If **Yes,** explain, including when and where it happened and the reason.

3. Have you been discharged from a branch of the US Armed Forces, including any reserve component? Yes ☐ No ☐
   If **Yes**, indicate the year of discharge:
   Attach a copy of your DD214, if you were discharged within the last three (3) years.

4. Have you resided outside of Wisconsin in the last three (3) years? Yes ☐ No ☐
   If **Yes**, list each state and the dates you resided there.

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? Yes ☐ No ☐
   If **Yes**, list each state and the dates you resided there.

6. Have you had a caregiver background check done within the last four (4) years? Yes ☐ No ☐
   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.

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? Yes ☐ No ☐
   If **Yes**, list the review date and the review result. You may be asked to provide a copy of the review decision.

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

ATTENTION: Broadscope Disability Services, Inc. is obtaining your background information on behalf of the family(s) for whom you will be working. By submitting this form, you acknowledge any convictions or pending charges found in your criminal history will be shared with the parent/guardian(s).

Disclosure Regarding Background Investigation

Broadscope Disability Services, Inc. may obtain information about you from a third party consumer reporting agency for employment purposes. Thus, you may be the subject of a "consumer report" which may include information about your character, general reputation, personal characteristics, and/or mode of living. These reports may contain information regarding your criminal history, social security verification, motor vehicle records ("driving records"), verification of your education or employment history, or other background checks. Broadscope Disability Services, Inc. will obtain this information on behalf of and share this information with the family for whom you will be working.

These searches will be conducted by InCheck, Inc., 7500 W State Street, Suite 200, Wauwatosa, WI 53213, 414-727-1718 / 866-265-9426, www.inchecksolutions.com.

Please provide the following information in full:

First Name	Middle Name (FULL)	Last Name
Social Security Number		Date of Birth

Print all home addresses resided in **outside the state of Wisconsin** in the past three years. Include any other names/aliases by which you were LEGALLY known during that time:

Street Address		City	State
Zip Code	Dates resided	Name(s) by which you were known	

Street Address		City	State
Zip Code	Dates resided	Name(s) by which you were known	

Street Address		City	State
Zip Code	Dates resided	Name(s) by which you were known	

Street Address		City	State
Zip Code	Dates resided	Name(s) by which you were known	

Acknowledgment and Authorization for Background Check

I acknowledge receipt of the separate documents entitled DISCLOSURE REGARDING BACKGROUND INVESTIGATION and A SUMMARY OF YOUR RIGHTS UNDER THE FAIR CREDIT REPORTING ACT and certify that I have read and understand both of those documents. I hereby authorize the obtaining of "consumer reports" by Broadscope Disability Services, Inc. at any time after receipt of this authorization and throughout my employment, if applicable. To this end, I hereby authorize, without reservation, any law enforcement agency, administrator, state or federal agency, institution, school or university (public or private), information service bureau, employer, or insurance company to furnish any and all background information requested by InCheck, Inc., 7500 W State Street, Suite 200, Wauwatosa, WI 53213, telephone number (866) 265-9426, www.inchecksolutions.com and/or Broadscope Disability Services, Inc. I agree that a facsimile ("fax"), electronic or photographic copy of this Authorization shall be as valid as the original.

If signing electronically, I agree my electronic signature is the legal equivalent of my manual signature on this Authorization.

Residents of California, Minnesota, New York, Oklahoma, and Washington state: You have the right to receive a copy of any report furnished by InCheck, Inc., 7500 W State Street, Suite 200, Wauwatosa, WI 53213, 414-727-1718/866-265-9426, www.inchecksolutions.com/privacy-policy to Broadscope Disability Services, Inc. pursuant to your authorization. Check this box if you would like to receive a copy: ☐

Signature: _____ Date: _____

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)*
Doe	John	P	

Address *(Street Number and Name)*	Apt. Number	City or Town	State	ZIP Code
123 Sesame St		Milwaukee	WI	53000

Date of Birth *(mm/dd/yyyy)*	U.S. Social Security Number	Employee's E-mail Address	Employee's Telephone Number
10/10/1900	000-00-0000	jdoe@email.com	414-000-0000

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, if applicable, 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: _____

QR Code - Section 1
Do Not Write In This Space

Signature of Employee	Today's Date *(mm/dd/yyyy)*
John Doe	1/10/2019

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

STOP *Employer Completes Next Page* STOP

Employment Eligibility Verification

Department of Homeland Security
U.S. Citizenship and Immigration Services

SEND TO BDS **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 *(See instructions)*

☐ 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. *(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: _____

QR Code - Section 1
Do Not Write In This Space

Signature of Employee	Today's Date *(mm/dd/yyyy)*

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

STOP *Employer Completes Next Page* STOP

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

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
	DOE	JOHN	P	1

List A OR	List B AND	List C
Identity and Employment Authorization	**Identity**	**Employment Authorization**
Document Title	Document Title: Driver's license	Document Title: Social Security Card
Issuing Authority	Issuing Authority: State of Wisconsin	Issuing Authority: Social Security Administration
Document Number	Document Number: B123-4567-8900-00	Document Number: 000-00-0000
Expiration Date *(if any)(mm/dd/yyyy)*	Expiration Date *(if any)(mm/dd/yyyy)*: 4/5/2025	Expiration Date *(if any)(mm/dd/yyyy)*: N/A
Document Title		
Issuing Authority		
Document Number		
Expiration Date *(if any)(mm/dd/yyyy)*		
Document Title		
Issuing Authority		
Document Number		
Expiration Date *(if any)(mm/dd/yyyy)*		

Additional Information

QR Code - Sections 2 & 3
Do Not Write In This Space

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)*: 06/14/2019 ***(See instructions for exemptions)***

Signature of Employer or Authorized Representative	Today's Date *(mm/dd/yyyy)*	Title of Employer or Authorized Representative
Jane Smith	06/10/2019	Employer

Last Name of Employer or Authorized Representative	First Name of Employer or Authorized Representative	Employer's Business or Organization Name
SMITH	JANE	

Employer's Business or Organization Address (Street Number and Name)	City or Town	State	ZIP Code
456 W. Sesame Street	Milwaukee	WI	53000

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

Employment Eligibility Verification

Department of Homeland Security
U.S. Citizenship and Immigration Services

SEND TO BDS **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

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				
Issuing Authority				
Document Number				
Expiration Date *(if any) (mm/dd/yyyy)*				
Document Title				
Issuing Authority				
Document Number				
Expiration Date *(if any) (mm/dd/yyyy)*				

Additional Information

QR Code - Sections 2 & 3
Do Not Write In This Space

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

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:		
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		**10.** School record or report card		
		11. Clinic, doctor, or hospital record		
		12. Day-care or nursery school record		

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

Refer to the instructions for more information about acceptable receipts.

SEND TO BDS

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

▶ **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.**

OMB No. 1545-0074

2022

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)

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.

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:
- $25,900 if you're married filing jointly or qualifying widow(er)
- $19,400 if you're head of household
- $12,950 if you're single or married filing separately

. . . . . **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.

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

SEND TO BDS

Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting

WT-4

Employee's Section (Print clearly)

Employee's legal name *(first name, middle initial, last name)*			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 *(number and street)*			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 their 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 *(number and street)*		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 they are 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.

SEND TO BDS

BDS Fiscal New Employee Set-Up Form

Employee Section

Employee name (print): _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Phone Number: (_____) _____ - _____ ☐ Male ☐ Female ☐ Other

Email address: _____

THIS EMAIL WILL BE USED TO SET UP ACCESS TO YOUR PAYSTUBS & W-2

Birthdate: _____/_____/_____ Social Security Number: _____-_____-_____

Employer/Client Section

Child receiving services (employer/participant): _____

Employer Representative/Parent/Guardian: _____

By signing below, I agree that the information on this form is accurate.

_____ _____ _____

Parent/Employer Signature Employee Signature Date

SEND TO BDS

Relationship Disclosure Form

Employee name (print): _____

Employee Date of Birth: _____/_____/_____

Name of child receiving services (Employer/Client): _____

Check one box to indicate your legal relationship to the Employer/Client. For example, if the Employer/Client is your grandchild, you are the Employer/Client's grandparent.

Relative

- ❑ Grandparent ***see below***
- ❑ Sibling
- ❑ Uncle / Aunt
- ❑ Nephew / Niece
- ❑ Cousin
- ❑ Step Sibling
- ❑ Parent-in-Law
- ❑ Sibling-in-Law
- ❑ Other _____

Non-Related Relationships

- ❑ Friend
- ❑ Neighbor
- ❑ Worker
- ❑ Other _____

*Grandparent: Due to your relationship with the Employer/Client and current legislation, you are exempt from payroll taxes for unemployment insurance (SUTA). If your employment with the Employer/Client is terminated, you will not receive unemployment benefits.

Residency Disclosure

Does the Employer/Client receiving nonmedical care live in the Employee's home? ❑ Yes ❑ No

Note: It is the Employee's responsibility to notify BDS Fiscal should their living situation change.

By signing below, I agree that the information on this form is accurate.

_____	_____	_____
Parent/Employer Signature	Employee Signature	Date

Choosing a Fiscal Agent: Statement of Understanding

Using the Fiscal Agent method of employing one or more individuals to work with a child receiving CLTS Waiver services makes the child the employer. BDS Fiscal does **not** have any authority over the job performance of any such employee – nor does the county authorizing the child's CLTS services (hereafter known as the CLTS Waiver Agency). That means the child's parent/guardian will act as the employer representative and must voluntarily accept the responsibilities that an employer would have. Those include:

- ❑ Recruiting, interviewing, and hiring the employee
- ❑ Providing initial and ongoing training regarding the care needs of the child and their job-related responsibilities
- ❑ Providing training regarding confidentiality concerns and expectations
- ❑ Setting the employee's wage (within the limits of what the waiver will reimburse for the particular service the employee performs and with the approval of BDS Fiscal and the CLTS Waiver Agency), realizing that wages will be withheld if employee and parent/employer representative are not compliant with BDS Fiscal and CLTS guidelines and timelines
- ❑ Supervising employee performance, providing feedback as appropriate
- ❑ Setting and enforcing expectations with regard to professionalism in the home, scheduling changes or conflicts, types of acceptable communication, amount of notice requested for vacating the position, etc.
- ❑ Preparing a back-up plan in the event that the scheduled employee is not able to meet the needs of the child/family
- ❑ **Ensuring that the employee does NOT work over 40 hours/week**
  (unless employee is authorized to provide full day respite at day rate)
- ❑ Disciplining and terminating the employee, if parent/employer feels that to be appropriate and necessary
- ❑ Considering insurance coverage/implications in the event that the employee is injured while providing care. Employees will be eligible for Worker's Compensation under BDS Fiscal.
- ❑ Ensuring that all paperwork (both employer's and employee's) is submitted to BDS Fiscal and approved by BDS Fiscal prior to the employee's first date of service to the child
  ****No services provided prior to BDS Fiscal's approval date will be paid.**

Please be clear that neither BDS Fiscal nor the CLTS Waiver Agency is the employer. In many cases, BDS Fiscal and the CLTS Waiver agency do not even know these prospective privately retained service providers. BDS Fiscal and the CLTS Waiver agency do not hire, train, supervise, discipline, or terminate these individuals; nor do they verify the employment history or check references of these individuals. It is up to the family hiring the individual to ask for references (personal and professional) and to verify those references prior to employment.

Parent/guardian: If BDS Fiscal or your CLTS Service Coordinator provides you with names of people who are willing to work in your community, it remains your responsibility to interview them and make your own judgment as to their appropriateness to work in your home with your child. Neither BDS Fiscal nor your Service Coordinator are endorsing or recommending these people for employment. Rather, they are merely putting you in touch with individuals who have expressed a willingness to work with children with disabilities.

BDS Fiscal's role is limited to completing the employee's criminal background check, ensuring the employee's ongoing training is completed, processing the employee's payroll, and completing end of year federal tax processes for the employee. The CLTS Service Coordinator's role is to determine the authorized number of hours for the child.

Employers are not able to offer benefits such as vacation, sick time, etc. The waiver can only reimburse for hours actually provided to the recipient. Additionally, the employer is responsible for the final approval of hours worked by the employee to be paid through BDS Fiscal. Employers should verify hours worked as listed on the timesheet before signing it. **The employee cannot work more than 40 hours for the same employer/child in a work week (Sunday-Saturday).**

Parent/guardian and service provider: If you have any questions about any of these responsibilities, or about using BDS Fiscal, please contact BDS Fiscal or the CLTS Service Coordinator. If you have any questions that are of a legal nature about the employer/employee relationship, you are encouraged to seek the advice of an attorney.

As an employer-representative of a fiscal agent worker, I understand the stated information and accept responsibility. **I understand that all employee paperwork including the 'Participant Specific Training Certification' must be completed and received by BDS Fiscal PRIOR to working with the client.

**As an employee, I understand the role of my employer and the CLTS Waiver requirements.

_____	_____	_____
Parent/Employer Signature	Employee Signature	Date

_____
Name of child receiving services

SEND TO BDS

Fraud Notice

Misuse of Children's Long Term Support (CLTS) funding is fraud. Due to being a Medicaid funded program, this would be **Medicaid fraud**, which is a federal offense. The following information is provided with the intent of educating and informing parents and providers regarding the use of these funds, and to ensure understanding and compliance with their intended use.

Please initial the beginning of each paragraph as you read.

EMPLOYEE EMPLOYER

_____ _____ CLTS monies are to be used only for the benefit of the child who has qualified for services. Any use of acceptance of money for anything other than goods or services to the eligible child is considered fraud.

_____ _____ Timesheets for in-home workers should reflect the number of service hours actually provided to the eligible child. Any alteration of the timesheet to inflate or misrepresent the number of hours provided to that child is considered fraud.

_____ _____ Families cannot benefit financially from providers other than by the direct benefit of the service that their eligible child receives. A provider giving a "kickback" to a parent is considered fraud.

_____ _____ CLTS funds can only be used for allowable services that are pre-approved by the child's Service Coordinator. Misrepresentation of a service that you provide or receive in order to claim reimbursement for non-allowable services is considered fraud.

_____ _____ If you are aware or become aware of a situation involving misuse of CLTS Waiver funds, please immediately contact either the Service Coordinator assigned to the case or Sarah Witte, Youth Treatment Team Supervisor of the Washington County Human Services Department, at 262-335-4592. In the interest of good stewardship of public funds; and to maintain public trust, program continuation, and adherence to program objectives, Washington County will aggressively follow up on any such report if sufficient information is offered. If the initial review suggests intentionality, Washington County would be obligated to report such suspicion to law enforcement for further investigation.

My signature below indicates that I have read and understand the statements made above. If I have any questions about those statements, I know that I can contact my CLTS Service Coordinator directly.

_____ _____ _____

Parent/Employer Signature | Employee Signature | Date

_____

Name of child receiving services

Service Definitions

Service definitions apply to independent workers paid through BDS Fiscal. This document is intended to describe the employee's responsibilities/tasks for CLTS Waiver purposes. Please refer to the current CLTS Waiver Manual or contact your CLTS Service Coordinator for full definitions & exclusions of each service.

Requirements to provide these services include showing proof of at least two years of experience working with children with disabilities and child specific training.

Please note: **Employees are not allowed to work over 40 hours in a work week (Sunday-Saturday).**

- **Child Care** - Child care services ensure the child or youth's exceptional physical, emotional, behavioral, or personal care needs are met during times when their family members are working, pursuing education or employment goals, or participating in training to strengthen the family's capacity to care for their child.

  Children under 12 years of age: this service includes the supplemental cost of child care to meet the child's exceptional care needs. This includes staffing necessary to meet the child's care needs above and beyond the cost of basic child care that all families with young children may incur. The basic cost of child care is the rate charged by and paid to a child care provider for children who do not have special needs. The basic cost of child care does not include the provision of supplementary staffing, which may be covered by this service.

  Children 12 years of age and older: the total cost of child care may be included. The total cost of child care is available when the child has aged out of their traditional child care settings (typically available up to age 12), but due to a disability the child continues to require care or supervision.

- **Daily Living Skills Training** – Daily living skills training (DLST) services provide education and skill development or training to support the child or youth's ability to independently perform routine daily activities and effectively use community resources. These instructional services, provided by qualified professionals, focus on skill development and include personal hygiene, food preparation, home upkeep, money management, and accessing & using community resources.

  DLST does NOT include activities recreational in nature, social skill training, educational related services, behavior modification, or substitute task performance. An initial goal setting report is required at the start of services with progress reports every six months.

- **Mentoring** - Mentoring services improve the child or youth's ability to interact in their community in socially advantageous ways. The mentor provides the child or youth with experiences in peer interaction, social and/or recreational activities, and employability skill-building opportunities during spontaneous and real-life situations, rather than in a segregated or classroom-type environment. The mentor implements learning opportunities by guiding and shadowing the child or youth in the community while practicing and modeling interaction skills.

  Providers must develop a written plan documenting the objectives for the child and the objectives for the mentor. A written summary of the progress toward and changes to the objectives for the child or youth and their mentor is required every three months. At a minimum, team review meetings are held quarterly.

- **Respite Care** – Respite care services maintain and strengthen the child or youth's natural supports by easing the daily stress and care demands for their family, or other primary caregiver(s), on a short-term basis. These services provide a level of care and supervision appropriate to the child or youth's needs while their family or other primary caregiver(s) are temporarily relieved from daily caregiving demands.

  Home-based respite may be used for overnight stays or partial day stays for the child or youth, in their primary residence or at the home of a caregiver. The provider is required to receive training specific for the child or youth's support and care needs.

  Respite care group rates may apply if respite is being provided for more than one child at the same time.

- **Supportive Home Care** – Supportive home care (SHC) directly assists the child or youth with daily living activities and personal needs, to promote improved functioning and safety in their home and community. SHC may be provided in the child or youth's home or in a community setting.

  Services include direct assistance with instrumental activities of daily living, observation or cueing of the child to safely & appropriately complete activities of daily living and instrumental activities of daily living, supervision necessary for safety at home and in the community (e.g. observation to assure appropriate self-administration of medications, money management, assistance with communication, arranging and using transportation, checking out library books, ordering food from a menu); and intermittent major household tasks that must be performed seasonally or in response to a natural or other periodic event for reasons of health and safety or the need to assure the youth's continued community living.

- **Transportation** – Transportation maintains or improves the child's mobility and increases their inclusion, independence, and participation in the community. This service funds the child's or youth's nonmedical, nonemergency transportation needs related to engaging with their community—with the people, places, and resources that are meaningful for their self-determination—and to meet their goals and daily needs. If needed, transportation charges for an attendant (including parent/guardian) to accompany the child or youth when accessing the community are included.

  Providers are required to have a current driver's license issued by the Department of Transportation and current insurance and must provide copies of both to BDS Fiscal. Vehicles used to provide transportation must be insured and in good repair, with all operating and safety systems functioning.

Please check all <u>authorized</u> service(s) the employee will provide for the employer/participant:

✓	Service Type	Pay Rate	Hours or Days per Month
	Child Care		
	Daily Living Skills Training		
	Mentoring		
	Respite Care		
	Respite Care Group		
	Supportive Home Care		
	Transportation		

By signing below, I demonstrate that I understand and accept the above responsibilities. Both parties understand that we may not charge in excess of the amount authorized on the Child/Participant's plan. After the Employee has performed the services per this agreement, timesheets are due to BDS Fiscal according to the Payment Schedule. Both signers agree to only submit timesheets within the hours authorized. Without prior approval, excess hours claimed above authorization may be rejected for payment.

_____ _____ _____

Parent/Employer Signature Employee Signature Date

_____

Name of child receiving services

CRITICAL INCIDENT REPORTING OVERVIEW

What is a critical incident?

A critical incident is any actual or alleged event or situation that creates a significant risk or serious harm to the physical, mental health, safety, or well being of your child. The critical incidents that must be reported to your Support and Service Coordinator include:

- Any abuse or neglect of the child known or suspected
- Errors in medical or medication management that result in a significant adverse reaction that requires medical attention
- The initiation of an investigation by law enforcement of an event or allegation regarding a child as either a perpetrator or victim, unless such action is a component of an approved crisis or treatment plan.
- Significant and substantial damage to the residence of the child or service provider.
- Use of isolation, seclusion, or restraint by a service provider which is not included and approved as part of a behavior support plan.
- An unexpected event or behavior that causes a serious injury or risk to the child; which may include running away, setting a fire, violence, hospitalization resulting from an accident, suspected or confirmed suicide attempts, or death of the child.

If any of these incidents occur please contact your Support & Service Coordinator.

Contact Name & Phone Number: Washington County Human Services Department, division of Children & Families: 262-335-4610

Why is a critical incident reported?

- The assurance of health, safety, and welfare of the child is a condition of all Medicaid Waivers by the federal Centers for Medicare and Medicaid Services.
- One of the ways both the State and contracted agents assure health, safety, and welfare of the child is by individually reporting, monitoring, and resolving critical incidents.
- To address incidents as they occur and decrease the likelihood of a recurrence.

How is a critical incident reported?

- As soon as possible families and providers are required to report critical incidents to their agency Support and Service Coordinator.
- Agency Support and Service Coordinators are required to immediately report critical incidents to the State staff responsible for the CLTS Waiver program to ensure necessary steps have been taken to protect the child and assure safety.
- Agency Support & Service Coordinators are required to submit a final report within 30 days of the incident.

What happens after a critical incident is reported?

- Support and Service Coordinators are expected to address and resolve situations and implement systems to decrease the likelihood of a recurrence.
- The State staff responsible for the CLTS Waiver program will use information collected in critical incident reports to identify statewide or regional trends, which will then allow for the development of training or interventions to decrease the likelihood of recurrence.

If a critical incident occurs, families and providers should seek all necessary care and assistance from medical or emergency personnel as appropriate. This reporting procedure does not provide an immediate response or replace other mandatory reporting expected of agency personnel.

Critical Incident Reporting Overview Agreement

Employee:

I have received a copy of the Children's Long Term Support (CLTS) Waiver Critical Incident Reporting Overview in writing and have reviewed the information it contains. I understand that as a service provider, if a critical incident occurs when I am providing a CLTS Waiver-funded service to a child, I must follow the critical incident reporting procedure and contact the child's CLTS Support and Service Coordinator. I also understand that I should seek all necessary care and assistance from medical or emergency personnel as appropriate, including mandated reporting. If I have questions about critical incident reporting, I can contact the child's Support and Service Coordinator.

If I do not have contact for the child's Support and Service Coordinator, I understand that I should instead contact Washington County's Human Services Department at 262-335-4610.

I also understand that as a service provider, I am a mandated reporter and I must report known or suspected abuse or neglect of a child under the age of 18 immediately to either child protection services or law enforcement (for more information, see Chapter 48.981(2) of the Wisconsin State Statutes).

_____ _____

Employee/Provider Signature Date

Employer:

I have received a copy of the Children's Long Term Support (CLTS) Waiver Critical Incident Reporting Overview in writing and have reviewed the information it contains. I understand that if a critical incident occurs while my child is receiving a CLTS Waiver-funded service, the employee/provider must follow the critical incident reporting procedure and contact my child's CLTS Support and Service Coordinator. If I have questions about critical incident reporting, I can contact my child's Support and Service Coordinator.

_____ _____

Employer/Parent Signature Date

_____

Name of child receiving services

SEND TO BDS

WASHINGTON COUNTY HEALTH AND HUMAN SERVICES DEPARTMENT
333 E. WASHINGTON STREET, PO BOX 2003, WEST BEND WI 53095-2003
Suite 2100 Phone 262-335-4600 Fax 262-335-6827
Acute Care Fax 262-365-6559
Suite 2100 Phone 262-335-4610 Fax 262-335-4700

AUTHORIZATION FOR RELEASE AND/OR EXCHANGE OF PROTECTED HEALTH INFORMATION
HUMAN SERVICES DIVISION

Full Name of Client/Subject of Records (Print): _____

Former Name(s) if Applicable (Print): _____ Date of Birth: _____ Phone: _____

Address: _____ City: _____ State: _____ Zip Code: _____

I hereby authorize Washington County Human Services Department to (check all that applies):

__x__ Release To __x__ Obtain From In these Formats: __x__ Verbal __x__ Written

Agency/Individual (Print): _____ Relationship: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone: _____ Fax #: _____ (Only forms will be faxed, records will be sent via U.S. Mail)

Print Full Name of Staff making this request: _____

With this authorization, I understand that the Washington County Human Services Department can share written and/or verbal information regarding services I have received with the above named agency/individual. I understand that the sub-units of Washington County Human Services Department, which are subject to state and federal confidentiality laws including HIPAA may exchange information internally as needed pertaining to specific work activities.

Dates of Requested Records/Services MUST be specified: From: _____ (Month/Year) To: _____ (Month/Year)

PURPOSE FOR RELEASE OF INFORMATION:

☐ Attorney/Legal ☐ Insurance Claims/Billing ☒ Continuity of Care ☐ Transfer of Services
☐ Request of individual ☐ Chapter 51/55 Monitoring Other: info specific to CLTS

HUMAN SERVICES DIVISION/PROGRAM

☐ Adult Protective Services ☐ Acute Care Services ☐ Economic Support
☐ Behavioral Health ☐ Family Court ☐ Youth Justice
☐ Child Protective Services ☐ Insurance Claims/Billing ☒ Children's Long Term Support

SPECIFIC INFORMATION TO BE RELEASED

☒ Clinical Assessment ☒ Discharge Summary ☐ Psychiatric Evaluation ☒ Other (Please Indicate) verbal information about CLTS services
☒ Insurance/Funding Info ☒ Letter/Memo ☒ Treatment Plans
☒ Medication(s) ☒ Progress Notes ☐ Alcohol/Drug Abuse _____

This authorization will expire one year from the date of signature unless otherwise specified: _____

I authorize the release of copies of any service records accumulated after my signature through the expiration date of this consent form.

Signature of Subject: _____ Date: _____

Print Name of Legal Representative: _____ Relationship to Subject of Record: Parent/Guardian

Signature of Legal Representative: _____ Date: _____

You must have proof of legal authority attached to this authorization before any records will be released.

REVOCATION OF THIS AUTHORIZATION OF RELEASING INFORMATION

Print name of Individual revoking authorization: _____

Signature Revoking Authorization: _____ Date: _____

SEND TO BDS

BDS Fiscal Consent for the Release of Confidential Information

As the Parent/Guardian and Employer Representative for _____,
name of Employer/Client (child)

I authorize BDS Fiscal to disclose to _____ the following information:
name of Employee/Provider

- ☑ The above Employee's pay rates, hours, and payment amounts
- ☐ My budget details, including pay rates and services
- ☐ All details regarding my Employer/Client-directed services from BDS Fiscal
- ☐ Other information as described in detail: _____

_____

_____

I understand that I may revoke this consent at any time except to the extent that action has been taken in reliance on it, and that in any event this consent expires automatically as follows:

- ☑ Upon my termination from receiving Employer/Client-directed services from BDS Fiscal
- ☑ Upon the termination of my relationship with the person/agency written above
- ☐ Upon other circumstances as described in detail: _____

_____

_____

_____
Employer's Representative/Parent Name – Printed

_____ _____
Employer's Representative/Parent Signature Date

Direct Deposit Authorization

In order to receive payment through BDS Fiscal, you must enroll in direct deposit. BDS Fiscal does not distribute payroll via paper checks or any method other than direct deposit. For guidance about opening and managing a bank account, visit www.consumerfinance.gov/consumer-tools/bank-accounts.

To set up your direct deposit, complete this form and attach the required documents. Please note that funds will be deposited into your account by our accounting firm, **O'Leary & Anick**.

ATTENTION: Your first paystub will be mailed to you with instructions on how to view all future paystubs and your W-2 online. Paystubs and W-2s are available online only. **Your W-2 will not be mailed to you.**

Employee name (print): _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Name of Financial Institution: _____

Type of Account: ☐ Checking ☐ Savings

Required Documents

Attach either a voided check or a letter/form from your bank with the account and routing numbers for verification of your account information.

- Deposit tickets or starter checks **may not** be used.
- Handwritten information will not be accepted.
- Bank letters must be printed on bank letterhead and state the account number, routing number, type of account (checking or savings), and account holder's name.
- The employee's name must be listed on the account.

I hereby authorize Broadscope Disability Services, Inc., hereafter known as BDS Fiscal, to initiate credit entries and, if necessary, debit entries and adjustments for any credit entries in error to my bank account at the financial institution noted above. This authorization will remain in effect until BDS Fiscal receives written notice from me of its modification or termination, in such time and manner as to allow BDS Fiscal and the financial institution a reasonable opportunity to act on it.

_____ _____

Employee Signature Date

_____

Employer/Child Name

Participant Specific Training Certification

This form is completed for those who provide in-home services such as Child Care, Daily Living Skills, Mentoring, and/or Respite. The Parent/Employer is to train the Employee/Provider on the below topics.

Based on experience, education, and/or training, _____ ***(employee)*** meets the knowledge and skill level required for direct services through a fiscal agent to enable them to competently work with the Participant to meet the objectives and goals.

Please check the boxes below to indicate the training completed. Any box/skill left blank must result in training before employment may start.

	Knowledge/skill level required
Yes	Policies, procedures, and expectations of the employer, including training on participant and provider rights and responsibilities; record keeping and reporting; and other information deemed necessary and appropriate.
Yes	Information specific to disabilities, abilities, needs, functional deficits, and strengths of the population to be served. This training should be person-specific for the child or youth to be served and generally focused.
Yes	Recognizing and appropriately responding to all conditions that might adversely affect the person's health and safety including how to respond to emergencies and critical incidents.
Yes	Developing interpersonal and communications skills that are appropriate and effective for working with the population to be served. These skills include understanding the principles of person-centered services; person rights; respect for age; cultural, linguistic, and ethnic differences; active listening, responding with emotional support and empathy; ethics in dealings with people including: family and other providers; conflict resolution skills; ability to deal with death and dying; and other topics relevant to the specific population to be served.
Yes	Understanding of all confidentiality and privacy laws and rules.
Yes	Understanding of procedures for handling complaints.
Yes	Understanding of the person who needs support, including personal hygiene needs, preferences, and techniques for assisting with activities of daily living including, where relevant, bathing, grooming, skin care, transfer, ambulation, exercise, feeding, dressing, and use of adaptive aids and equipment.
Yes	Understanding the personal health and wellness-related needs of the person needing supports including nutrition, dietary needs, exercise needs, and weight monitoring and control.
List relevant training & two years' experience (attach additional sheet if needed):	

We the Employer and Employee agree that the above training has been completed.

_____ _____ _____

Parent/Employer Signature Employee Signature Date

_____

Name of child receiving services

BDS Fiscal 2022 Payroll Payment Schedule

Pay Period Dates 12:00am start date thru 11:59pm end date				DEADLINE: Timesheets received by:	Pay Date Will be paid on:
P1:	12/16/2021	-	12/31/2021	**Tuesday, January 4th**	1/14/2022
P2:	1/1/2022	-	1/15/2022	**Tuesday, January 18th**	1/31/2022
P3:	1/16/2022	-	1/31/2022	**Thursday, February 3rd**	2/15/2022
P4:	2/1/2022	-	2/15/2022	**Thursday, February 17th**	2/28/2022
P5:	2/16/2022	-	2/28/2022	**Thursday, March 3rd**	3/15/2022
P6:	3/1/2022	-	3/15/2022	**Friday, March 18th**	3/31/2022
P7:	3/16/2022	-	3/31/2022	**Monday, April 4th**	4/15/2022
P8:	4/1/2022	-	4/15/2022	**Monday, April 18th**	4/29/2022
P9:	4/16/2022	-	4/30/2022	**Tuesday, May 3rd**	5/13/2022
P10:	5/1/2022	-	5/15/2022	**Wednesday, May 18th**	5/31/2022
P11:	5/16/2022	-	5/31/2022	**Friday, June 3rd**	6/15/2022
P12:	6/1/2022	-	6/15/2022	**Friday, June 17th**	6/30/2022
P13:	6/16/2022	-	6/30/2022	**Tuesday, July 5th**	7/15/2022
P14:	7/1/2022	-	7/15/2022	**Monday, July 18th**	7/29/2022
P15:	7/16/2022	-	7/31/2022	**Wednesday, August 3rd**	8/15/2022
P16:	8/1/2022	-	8/15/2022	**Wednesday, August 17th**	8/31/2022
P17:	8/16/2022	-	8/31/2022	**Tuesday, September 6th**	9/15/2022
P18:	9/1/2022	-	9/15/2022	**Monday, September 19th**	9/30/2022
P19:	9/16/2022	-	9/30/2022	**Tuesday, October 4th**	10/14/2022
P20:	10/1/2022	-	10/15/2022	**Tuesday, October 18th**	10/31/2022
P21:	10/16/2022	-	10/31/2022	**Thursday, November 3rd**	11/15/2022
P22:	11/1/2022	-	11/15/2022	**Thursday, November 17th**	11/30/2022
P23:	11/16/2022	-	11/30/2022	**Monday, December 5th**	12/15/2022
P24:	12/1/2022	-	12/15/2022	**Friday, December 16th**	12/30/2022

- **PAY PERIODS:** the 1st–15th and the 16th–last day of each month from 12:00am (midnight) to 11:59pm.
- **DEADLINE:** timesheets must be received by this date in order to be paid on the next Pay Date (no exceptions).
- **PAY DATES:** the 15th/last day of the month, or the business day before if falling on a weekend or holiday.

How to submit your timesheet: Text: 262-373-9870 ♦ Fax: 414-329-4510 ♦ bdsfiscal@broadscope.org

Timesheets may also be mailed to our office: 6102 W Layton Ave, Greenfield, WI 53220. Drop off during business hours only. BDS Fiscal is associated with Broadscope Disability Services, Inc. and can be reached at 414-329-4500.

SAMPLE

BDS FISCAL

Fiscal Agent Employee Timesheet

John Doe
Employee/Provider Name

Jane Smith
Employer/Service Recipient (Child) Name

Pay Period: 1/20/19 (Sunday) to 2/2/19 (Saturday)

Waukesha
Employer/Service Recipient County of Residence

•• ATTENTION ••

- ONLY ONE PAY PERIOD PER TIMESHEET. TIMESHEETS MUST BE SUBMITTED WITHIN 60 DAYS OF SERVICE.
- ROUND TO NEAREST 15-MINUTE INCREMENT FOR HOUR TOTALS (15MIN = .25, 30MIN = .5, 45MIN = .75)
- TIMESHEETS RECEIVED AFTER THE DUE DATE ON THE PAYMENT SCHEDULE WILL BE PAID ON THE FOLLOWING PAY DATE.
- NEITHER BDS FISCAL NOR THE CLTS WAIVER PROGRAM ARE RESPONSIBLE FOR PAYING FOR HOURS SUBMITTED AFTER 60 DAYS OR HOURS THAT EXCEED THE NUMBER OF AUTHORIZED HOURS.

Date	Service	Start	End	# Hours	Full Day
1/22/19	R	3:30 AM (PM)	6:30 AM (PM)	3	
1/25/19	R	11:00 (AM) PM	4:30 AM (PM)	5.5	
1/31/19	DLS	12:15 AM (PM)	2:30 AM (PM)	2.25	
2/1/19	R	10:00 (AM) PM	10:00 AM (PM)		1
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
		AM PM	AM PM		
Service types: Child Care = **CC** Daily Living Skills = **DLS** Respite Care = **R** Mentoring = **M**			**Totals:**	10.75	1

I/We certify that the information provided on this form is a true and accurate statement of the services provided, that the services were provided in accordance with the care plan, and that the Client/Service Recipient was not hospitalized during the time services were provided. I/We understand that payment for services provided are subject to payroll taxes and that falsification of this timesheet is considered Medicaid fraud and may result in dismissal from employment and/or criminal prosecution.

John Doe — Employee/Provider Signature — 2/5/19 — Date

Mary Smith — Employer/Client/Representative Signature — 2/5/19 — Date

Timesheets may be submitted to BDS Fiscal via the following methods:

Mail: 6102 W Layton Avenue, Greenfield, WI 53220 • Fax: 414-329-4500
Email: bdsfiscal@broadscope.org • Text: 262-373-9870

For questions concerning payroll matters or how to fill out this form, call BDS Fiscal at 414-329-4500.
BDS Fiscal is associated with Broadscope Disability Services, Inc.

BDS FISCAL

Fiscal Agent Employee Timesheet

Employee/Provider Name *(one per timesheet)*

Employer/Service Recipient Name *(child's name)*

Pay Period: _____/_____/_____ *to* _____/_____/_____

Employer/Service Recipient County of Residence

ATTENTION

- One pay period per timesheet.
- Round to nearest 15-minute increment for hour totals (15min = .25 30min = .5 45min = .75).
- Must have authorization from county to use full days.
- Neither BDS Fiscal nor the CLTS Waiver program are responsible for paying for hours submitted after 60 days, hours that exceed 40 per week (Sun-Sat), or hours that exceed the amount authorized.

Date	Service	Start	End	# Hours *9 max per day*	Check if full day
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
		AM PM	AM PM		☐
Service types: Child Care = **CC**, Daily Living Skills = **DLS**, Supportive Home Care = **SHC**, Respite Care = **R**, Respite Group = **RG**, Mentoring = **M**				**Totals:**	

I/We certify that the information provided on this form is a true and accurate statement of the services provided, that the services were provided in accordance with the care plan, and that the Client/Service Recipient was not hospitalized during the time services were provided. I/We understand that payment for services provided are subject to payroll taxes and that falsification of this timesheet is considered Medicaid fraud and may result in dismissal from employment and/or criminal prosecution.

Employee/Provider Signature _____ Date _____

Employer Representative/Parent Signature _____ Date _____

Timesheets must be submitted to BDS Fiscal within 60 days of service via one of the following methods:

Mail: 6102 W Layton Avenue, Greenfield, WI 53220 ♦ Fax: 414-329-4510
Email: bdsfiscal@broadscope.org ♦ Text: 262-373-9870

For questions concerning payroll matters or how to fill out this form, call BDS Fiscal at 414-329-4500.
Refer to current payroll schedule for pay dates. BDS Fiscal is associated with Broadscope Disability Services, Inc.

SEND TO BDS (optional)

Additional Employment Interests – Washington County

Please complete the following if you are interested in having your name included on a list of providers that will be shared with other parents in the Washington County CLTS Waiver program. If you sign this, your contact information will be given to the parents seeking providers. The list will be maintained by BDS Fiscal.

Name: _____ Phone: (_____) _____-_____

Email: _____ Current child: _____

Services I can provide:

- ❑ Child Care
- ❑ Daily Living Skills Training
- ❑ Mentoring
- ❑ Respite Care

I am willing to work with

- ❑ Children age 0-12
- ❑ Teens age 13-18
- ❑ Siblings

I am available on short notice

- ❑ Yes
- ❑ No
- ❑ Possibly

I am trained in

- ❑ CPR
- ❑ First Aid
- ❑ Sign language
- ❑ Handling special cares *(e.g. diapers, G-tubes, seizures)*

I am willing to work

- ❑ Mon-Fri days
- ❑ Mon-Fri evenings
- ❑ Sat-Sun days
- ❑ Sat-Sun evenings
- ❑ Overnight
- ❑ Holidays

Comments on training or availability: _____

_____

Check all cities/towns you are willing to drive to and work within:

- ❑ Addison
- ❑ Barton
- ❑ Colgate
- ❑ Farmington
- ❑ Germantown
- ❑ Hartford
- ❑ Hubertus
- ❑ Jackson
- ❑ Kewaskum
- ❑ Kohlsville
- ❑ Newburg
- ❑ Polk
- ❑ Richfield
- ❑ Slinger
- ❑ Thompson
- ❑ Trenton
- ❑ Wayne
- ❑ West Bend

I give permission to put my name on the list of available care providers maintained by BDS Fiscal. I understand my name and contact information will be released to parents/guardians seeking providers in the counties I indicated above, and they may call or email me. I understand that this release will remain valid until I contact BDS Fiscal and request my name be removed from the list.

_____ _____

Employee Signature Date