

	Employee Information	n		
Name:				
First	Middle		Last	
Physical Address:				
Street	Apt/Unit #	City	State	Zip Code
Mailing Address:         (if different than physical address)         Street/PO Box	c Apt/Unit #	City	State	Zip Code
Phone #: Home () Co	ell ()			
Email:				
Gender:  Male  Female Date of B	Social Securit	ty#:		
E	mployment Relationsh	nips		
Name of Participant (Child Receiving Ser	rvices):			
Name of Child's Parent/Guardian:				
Employee's relationship to Child/Employ	yer*:			
$\Box$ Yes $\Box$ No – I am currently employed	d by another Participant	in the Idaho Se	lf Direction P	Program.
*The child receiving services is the Emplo guardian of the program recipient (child Directed Services option.		-		

**Please Read Carefully:** If you complete an employment agreement you become an employee of the <u>Participant's family</u>. You will not be an employee of Consumer Direct Care Network.

Employee	Signature
----------	-----------

Date





Employee Name	Estimated Start Date	Child's Name

Welcome to Consumer Direct Care Network (CDCN)!

Please complete the forms as indicated in the lists below and submit to CDCN. The Employee is not approved to begin work until all forms have been reviewed by CDCN, and results of the Criminal Background check have been received (unless specifically waived). Upon approval, CDCN will notify the Employer and issue the Employee an ID number for use when submitting timesheets.

Instructions and additional information for completing these forms is available online at www.consumerdirectid.com.

The Family Representative should check each item in the lists below as they are completed.

### Mandatory Forms - all new Employees

- 1. 🗌 Employee Data Form
- 2. D New Employee Checklist (this form)
- 3. 

   Employee-Participant Live-in Determination
- 4. 
  I-9 Form Additional I-9 instructions are available on the CDCN Idaho website under the Resources tab
- 5. 🛛 W-4 Employee's Withholding Allowance Certificate (federal)
- 6. D ID W-4 Employee's Withholding Allowance Certificate (state)
- 7. D Pay Selection Form Attachment may be required, see form instructions
- 8. 

  Participant-Community Support Worker Employment Agreement
- 10. 🗌 Criminal History Check Waiver of Liability Assumption of Risk

Forms Required only if Employer waives certain Criminal History Check requirements

1. Criminal History Check – Waiver of Liability – Assumption of Risk – Failed Criminal History Check

I have reviewed these forms and agree that they are complete and readable.

Parent/Legal Rep. Signature

Date

Printed Name

Date submitted to CDCN: \_\_\_\_/\_\_\_/\_\_\_\_





### **EMPLOYEE-PARTICIPANT LIVE-IN DETERMINATION**



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

Employee Name	Participant Name

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

### Employee-Participant Live-in Status

Employee answers below with Yes or No

□ Yes □ No - Do you live permanently in the same home as the above-named Participant, or temporarily, but for extended periods of time (at least 120 hours per week or 5 consecutive days or nights per week)?

If you answered YES:

- Overtime hours worked are paid at the regular pay rate.
- Declare your Difficulty of Care income tax exemption status.

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

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

If you answered NO:

• You cannot work overtime (more than 40 hours per week) per Idaho Medicaid rules unless you submit a Companionship Services exemption form.

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

Employee Signature

Date

Participant/Legal G. Signature

Date





# **Instructions for Completing Form I-9 Section 1**

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

**Employee:** Complete Section 1 of Form I-9 no later than your first day of work for pay. Print clearly. Sign and date when you are finished. Numbered explanations below are shown in the pictured example.

- ① Print your full legal name: Last, First and Middle Initial. Provide any other last names used, such as maiden name. Enter "N/A" if you have never had another name.
- <sup>2</sup> Print your physical address. A PO Box is not allowed. Enter "N/A" if you have no apartment number.
- ③ Print your Date of Birth.
- 4 Print your Social Security Number.
- <sup>5</sup> Print your Email Address or print "N/A" if you choose to not provide it.
- <sup>6</sup> Print your Telephone Number or print "N/A" if you choose to not provide it.
- Check one box that describes your citizenship or immigration status in the United States. Enter additional information if you check boxes 3 or 4.
- 8 Sign and 9 date the form. **No later than first day of work for pay.**
- 10 Submit Supplement A (*Preparer and/or Translator Certification*) if a preparer or translator assisted you.

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

Section 1. Employee Information and day of employment, but not before acc		must complete and sign S	ection 1 of F	orm I-9 no l	later than the <b>first</b>		
Last Name (Family Name)	First Name (Given Name)	Middle Initial (if ar	iy) Other Las	t Names Used	(if any)		
1 Doe	Jane	R	N/A				
Address (Street Number and Name)	Apt. Number (if any)	City or Town		State	ZIP Code		
2 123 Main St.	N/A	Anytown		10	85032		
Date of Birth (mm/dd/yyyy) U.S. Social Sec	curity Number Employee'	s Email Address		Employee's	Telephone Number		
<b>3</b> 03/13/1964 <b>4</b> 1 2 3 4	56789 (5) em	ployee Qemail.com		6 555-12.	3-4567		
I am aware that federal law provides for imprisonment and/or fines for false statements, or the use of false documents, in connection with the completion of this form. I attest, under penalty of perjury, that this information, including my selection of the box attesting to my citizenship or immigration status, is true and correct.       Check one of the following boxes to attest to your citizenship or immigration status (See page 2 and 3 of the instructions.):         Image: Im							
Signature of Employee     Today's Date (mm/dd/yyyy)       Image: Signature of Employee     Image: Signature of Employee       Image: Signature of Employee     Image: Signature of Signature of Employee       Image: Signature of Employee     Image: Signature of Sig							
If a preparer and/or translator assisted you	i in completing Section 1, that	person MUST complete the Pre	parer and/or Tr	ranslator Certi	i <mark>fication</mark> on Page 3.		

Note: Refer to Form I-9 Instructions for detailed information.

# Instructions for Completing Form I-9 Section 2

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

- **Employee:** Present original, unexpired documents to your employer to verify your identity and authorization to work in the United States. See LISTS OF ACCEPTABLE DOCUMENTS.
- **Employer:** Examine and record the documents your employee provides. The employee must be present while you examine them. Numbered explanations below are shown in the pictured example.
- ① Examine each document. Print the details in the appropriate List column(s). Only accept unexpired, original documents (no photocopies).

You may accept one document from List A **OR** one from List B and one from List C.

- 2 Print the date of the employee's first day of work.
- ③ Print your last name, first name and title. Title is "Employer."
- 4 Sign and 5 date the form. Must be completed and signed within 3 days of employee's first day of work.
- 6 Print your first and last name.
- Print physical address where services are provided (the Participant's home).

Section 2. Employer Review and Verification: Employers or their authorized representative must complete and sign Section 2 within three business days after the employee's first day of employment, and must physically examine, or examine consistent with an alternative procedure authorized by the Secretary of DHS, documentation from List A OR a combination of documentation from List B and List C. Enter any additional

documentation in the Ad	iditional information box; see insi	ructions.			
	List A	OR	List B	AND	List C
Document Title 1		<b>1</b> <i>i</i>	Driver's License	Social Se	carity Card
Issuing Authority			State of Residence	SSA	
Document Number (if any)		6	)123456789abcde	123-45-6	5789
Expiration Date (if any)		6	08/17/2027	N/A	
Document Title 2 (if any)		Addit	tional Information		
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)					
Document Title 3 (if any)	EX 2	T	nple		
Issuing Authority			ihic		
Document Number (if any)			Do not check. You	must physically	examine documents.
Expiration Date (if any)			<b>-</b>		I by DHS to examine documents.
employee, (2) the above-li	er penalty of perjury, that (1) I have sted documentation appears to be employee is authorized to work ir	genuine and to	o relate to the employee name	the above-halled	First Day of Employment (mm/dd/yyyy): 2 09/15/2023
Last Name, First Name and	Title of Employer or Authorized Repr	esentative	Signature of Employer or Aut	horized Representative	Today's Date (mm/dd/yyyy)
3 Smith, Ronald Emp	rloyer		4 Ronald Smith		<b>(5)</b> 09/15/2023
Employer's Business or Org 6 <i>Ronald Smith</i>	anization Name		usiness or Organization Addres		P Code
	For reverification or rehire,	complete <mark>Su</mark>	upplement B, Reverificatio	n and Rehire on Pag	e 4.
Form I.O. Edition 08/0					Page 1 of

Form I-9 Edition 08/01/23

Page 1 of 4

Note: Refer to Form I-9 Instructions for detailed information.



### **Employment Eligibility Verification**

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

START HERE: Employers must ensure the form instructions are available to employees when completing this form. Employers are liable for failing to comply with the requirements for completing this form. See below and the <u>Instructions</u>.

**ANTI-DISCRIMINATION NOTICE:** All employees can choose which acceptable documentation to present for Form I-9. Employers cannot ask employees for documentation to verify information in **Section 1**, or specify which acceptable documentation employees must present for **Section 2** or Supplement B, Reverification and Rehire. Treating employees differently based on their citizenship, immigration status, or national origin may be illegal.

Section 1. Employee day of employment,	<b>Info</b> but n	rmation ot befor	<b>1 and</b> re acc	Attesta epting a	<b>ition:</b> Er	nplo r.	oye	es must compl	lete ar	nd si	gn Sect	ion 1 of F	orm I-9 n	io lat	er than the <b>first</b>
Last Name (Family Name)	st Name (Family Name) First Name (Given Name) Middle Initial (if any) Other I					Other Last	Names Us	ed (if	any)						
Address (Street Number an	nd Nar	ne)	Apt. Number (if any) City or Town							State		ZIP Code			
Date of Birth (mm/dd/yyyy)		U.S. So	cial Sec	curity Num	ıber	Em	ploy	vee's Email Addres	S				Employee	s Tele	ephone Number
I am aware that federa provides for imprison fines for false stateme use of false document connection with the co this form. I attest, unc of perjury, that this inf including my selectior attesting to my citizen immigration status, is correct. Signature of Employee	ment ints, o is, in omple ler pe forma or th ship true	or the etion of enalty ation, he box or and	If you	1. A citiz 2. A non- 3. A lawf 4. A non- check Ite SCIS A-N	en of the U citizen nati iul permane citizen (oth <b>m Number</b>	Inited onal ent ro er th r 4.,	d St of ti esid nan I ente	he United States (S lent (Enter USCIS o <b>Item Numbers 2.</b> a er one of these: orm I-94 Admissio	See Inst or A-Nu and <b>3.</b> a	truction mber.) bove) nber	ns.) authorize OR Form ay's Date	ed to work un eign Passpo (mm/dd/yyy	til (exp. dat ort Number	te, if al	יעי Country of Issuance
Section 2. Employer				· ·			<i>.</i>		_		_				Ŭ
business days after the e authorized by the Secret documentation in the Add	emplo ary of	yee's firs DHS_do	st day o ocume	of employ ntation fr	yment, an om List A	d m	ust Rad	physically exam combination of d	ine, or ocume	exan	nine con on from l	sistent with List B and L	an altern ist C. En	ative ter ar	procedure ny additional
			List	A		OR	2	Lis	st B			AND		Lis	t C
Document Title 1															
Issuing Authority															
Document Number (if any)															
Expiration Date (if any)															
Document Title 2 (if any)						A	ddi	tional Informati	on						
Issuing Authority															
Document Number (if any)															
Expiration Date (if any)															
Document Title 3 (if any)															
Issuing Authority															
Document Number (if any)															
Expiration Date (if any)							] CI	heck here if you us	ed an a	Iterna	tive proce	dure authori	zed by DHS	S to ex	amine documents.
Certification: I attest, unde employee, (2) the above-lis best of my knowledge, the	sted d	ocumenta	ation a	opears to	be genuir	ne ar	nd t	o relate to the em					First Da (mm/dd/		mployment
Last Name, First Name and	Title o	f Employe	er or Au	thorized R	epresenta	tive		Signature of Em	ployer	or Aut	horized R	epresentativ	e	Toda	y's Date (mm/dd/yyyy)
Employer's Business or Orga	anizati	ion Name			Emp	loye	r's B	I Business or Organiz	zation A	ddres	s, City or	Town, State	, ZIP Code		
	Fo	or reveri	ficatio	n or reh	ire, comp	olete	e <mark>Sı</mark>	upplement B, R	everifi	catio	n and R	ehire on P	age 4.		
Form I-9 Edition 08/07	1/23											114	13		Page 1 of 4

# LISTS OF ACCEPTABLE DOCUMENTS

All documents containing an expiration date must be unexpired.

\* Documents extended by the issuing authority are considered unexpired.

Employees may present one selection from List A or a

combination of one selection from List B and one selection from List C.

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

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity AN	LIST C Documents that Establish Employment Authorization
<ol> <li>U.S. Passport or U.S. Passport Card</li> <li>Permanent Resident Card or Alien Registration Receipt Card (Form I-551)</li> <li>Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine- readable immigrant visa</li> <li>Employment Authorization Document that contains a photograph (Form I-766)</li> <li>For an individual temporarily authorized to work for a specific employer because of his or her status or parole:         <ul> <li>Foreign passport; and</li> </ul> </li> </ol>		<ol> <li>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</li> <li>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</li> <li>School ID card with a photograph</li> <li>Voter's registration card</li> <li>U.S. Military card or draft record</li> </ol>	<ol> <li>A Social Security Account Number card, unless the card includes one of the following restrictions:         <ol> <li>NOT VALID FOR EMPLOYMENT</li> <li>VALID FOR WORK ONLY WITH INS AUTHORIZATION</li> <li>VALID FOR WORK ONLY WITH DHS AUTHORIZATION</li> </ol> </li> <li>VALID FOR WORK ONLY WITH DHS AUTHORIZATION</li> <li>Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)</li> <li>Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States</li> </ol>
<ul> <li>b. Form I-94 or Form I-94A that has the following: <ol> <li>The same name as the passport; and</li> <li>An endorsement of the individual's status or parole 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.</li> </ol> </li> <li>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</li> </ul>		<ul> <li>6. Military dependent's ID card</li> <li>7. U.S. Coast Guard Merchant Mariner Card</li> <li>8. Native American tribal document</li> <li>9. Driver's license issued by a Canadian government authority</li> <li>For persons under age 18 who are unable to present a document listed above:</li> <li>10. School record or report card</li> <li>11. Clinic, doctor, or hospital record</li> <li>12. Day-care or nursery school record</li> </ul>	<ul> <li>4. Native American tribal document</li> <li>5. U.S. Citizen ID Card (Form I-197)</li> <li>6. Identification Card for Use of Resident Citizen in the United States (Form I-179)</li> <li>7. Employment authorization document issued by the Department of Homeland Security</li> <li>For examples, see <u>Section 7</u> and <u>Section 13</u> of the M-274 on <u>uscis.gov/i-9-central</u>.</li> <li>The Form I-766, Employment Authorization Document, is a List A, Item Number 4. document, not a List C document.</li> </ul>
May be prese Receipt for a replacement of a lost, stolen, or damaged List A document. Form I-94 issued to a lawful permanent resident that contains an I-551 stamp and a photograph of the individual. Form I-94 with "RE" notation or refugee stamp issued to a refugee.		Acceptable Receipts If in lieu of a document listed above for a ter For receipt validity dates, see the M-274. Receipt for a replacement of a lost, stolen, or damaged List B document.	Receipt for a replacement of a lost, stolen, or damaged List C document.

\*Refer to the Employment Authorization Extensions page on <u>I-9 Central</u> for more information.





### Supplement A, Preparer and/or Translator Certification for Section 1

**Department of Homeland Security** 

U.S. Citizenship and Immigration Services

USCIS Form I-9 Supplement A OMB No. 1615-0047 Expires 07/31/2026

Last Name (Family Name) from Section 1.	First Name (Given Name) from Section 1.	Middle initial (if any) from Section 1.

Instructions: This supplement must be completed by any preparer and/or translator who assists an employee in completing Section 1 of Form I-9. The preparer and/or translator must enter the employee's name in the spaces provided above. Each preparer or translator must complete, sign, and date a separate certification area. Employers must retain completed supplement sheets with the employee's completed Form I-9.

#### 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	Date ( <i>mm/dd/yyyy</i> )				
Last Name (Family Name)	e) First Name <i>(Given Name)</i>				Middle Initial <i>(if any)</i>
Address (Street Number and Name)		City or Town		State	ZIP Code

#### 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.

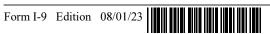
Signature of Preparer or Translator	Date (mm	/dd/yyyy)			
Last Name (Family Name)     First Name (Given Name)					Middle Initial <i>(if any)</i>
Address (Street Number and Name)	•	City or Town		State	ZIP Code

#### 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.

		Date (mm	/dd/yyyy)	
Last Name (Family Name)     First Name (Given Name)				Middle Initial <i>(if any)</i>
	City or Town		State	ZIP Code
	First	First Name <i>(Given Name)</i>	First Name (Given Name)	

#### 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			Date (mn	n/dd/yyyy)	
Last Name (Family Name)	First I	Name (Given Name)	I		Middle Initial <i>(if any)</i>
Address (Street Number and Name)		City or Town		State	ZIP Code



Form W-4

OMB No. 1545-0074

**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.

Department of the Treasury
Internal Revenue Service

Your withholding is subject to review by the IRS

Step 1:	(a) F	irst name and middle initial	Last name	(b) Social security number
Enter Personal Information	Addr		Does your name match the name on your social security card? If not, to ensure you get	
	City	or town, state, and ZIP code		credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.
	(c)	Single or Married filing separately		
		Married filing jointly or Qualifying surviv	ving spouse	
		Head of household (Check only if you're u	unmarried and pay more than half the costs of keeping up a home for y	ourself 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, other details, and privacy.

Step 2:	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse
Multiple Jobs	also works. The correct amount of withholding depends on income earned from all of these jobs.
or Spouse	Do <b>only one</b> of the following.
Works	(a) Reserved for future use.
	(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; 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 generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the

higher paying job. Otherwise, (b) is more accurate 

TIP: If you have self-employment income, see page 2.

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:	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):		
Claim	Multiply the number of qualifying children under age 17 by \$2,000 \$		
Dependent and Other	Multiply the number of other dependents by \$500		
Credits	Add the amounts above for qualifying children and other dependents. You may add to this the amount of any other credits. Enter the total here	3	\$
Step 4 (optional):	(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)	\$
Other Adjustments	(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)					

For Privacy Act and Paperwork Reduction Act Notice, see page 3.

Cat. No. 10220Q

Form **W-4** (2023)



### **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 2023 if you meet both of the following conditions: you had no federal income tax liability in 2022 and you expect to have no federal income tax liability in 2023. You had no federal income tax liability in 2022 if (1) your total tax on line 24 on your 2022 Form 1040 or 1040-SR is zero (or less than the sum of lines 27, 28, and 29), 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 2023 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, 2024.

**Your privacy.** 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).

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 income and self-employment taxes through withholding from your wages, you should enter the self-employment income on Step 4(a). Then compute your self-employment tax, divide that tax by the number of pay periods remaining in the year, and include that resulting amount per pay period on Step 4(c). You can also add half of the annual amount of self-employment tax to Step 4(b) as a deduction. To calculate self-employment tax, you generally multiply the self-employment income by 14.13% (this rate is a quick way to figure your selfemployment tax and equals the sum of the 12.4% social security tax and the 2.9% Medicare tax multiplied by 0.9235). See Pub. 505 for more information, especially if the sum of self-employment income multiplied by 0.9235 and wages exceeds \$160,200 for a given individual.

**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.

If you (and your spouse) have a total of only two jobs, you may 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 2023 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. To be accurate, submit a new Form W-4 for all other jobs if you have not updated your withholding since 2019.

**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.

1	<b>Two jobs.</b> 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, <b>skip</b> to line 3	1	\$
2	<b>Three jobs.</b> 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.		
	<b>a</b> 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>b</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	<b>Divide</b> the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in <b>Step 4(c)</b> 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 2023 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: { • \$27,700 if you're married filing jointly or a qualifying surviving spouse • \$20,800 if you're head of household • \$13,850 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 territories 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.



Form W-4 (2023)

### Married Filing Jointly or Qualifying Surviving Spouse

Higher Paying Job				Lowe	er Paying	Job Annua	al Taxable	Wage & S	Salary			
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	\$0	\$850	\$850	\$1,000	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,020	\$1,870
\$10,000 - 19,999	0	930	1,850	2,000	2,200	2,220	2,220	2,220	2,220	2,220	3,200	4,070
\$20,000 - 29,999	850	1,850	2,920	3,120	3,320	3,340	3,340	3,340	3,340	4,320	5,320	6,190
\$30,000 - 39,999	850	2,000	3,120	3,320	3,520	3,540	3,540	3,540	4,520	5,520	6,520	7,390
\$40,000 - 49,999	1,000	2,200	3,320	3,520	3,720	3,740	3,740	4,720	5,720	6,720	7,720	8,590
\$50,000 - 59,999	1,020	2,220	3,340	3,540	3,740	3,760	4,750	5,750	6,750	7,750	8,750	9,610
\$60,000 - 69,999	1,020	2,220	3,340	3,540	3,740	4,750	5,750	6,750	7,750	8,750	9,750	10,610
\$70,000 - 79,999	1,020	2,220	3,340	3,540	4,720	5,750	6,750	7,750	8,750	9,750	10,750	11,610
\$80,000 - 99,999	1,020	2,220	4,170	5,370	6,570	7,600	8,600	9,600	10,600	11,600	12,600	13,460
\$100,000 - 149,999	1,870	4,070	6,190	7,390	8,590	9,610	10,610	11,660	12,860	14,060	15,260	16,330
\$150,000 - 239,999	2,040	4,440	6,760	8,160	9,560	10,780	11,980	13,180	14,380	15,580	16,780	17,850
\$240,000 - 259,999	2,040	4,440	6,760	8,160	9,560	10,780	11,980	13,180	14,380	15,580	16,780	17,850
\$260,000 - 279,999	2,040	4,440	6,760	8,160	9,560	10,780	11,980	13,180	14,380	15,580	16,780	18,140
\$280,000 - 299,999	2,040	4,440	6,760	8,160	9,560	10,780	11,980	13,180	14,380	15,870	17,870	19,740
\$300,000 - 319,999	2,040	4,440	6,760	8,160	9,560	10,780	11,980	13,470	15,470	17,470	19,470	21,340
\$320,000 - 364,999	2,040	4,440	6,760	8,550	10,750	12,770	14,770	16,770	18,770	20,770	22,770	24,640
\$365,000 - 524,999	2,970	6,470	9,890	12,390	14,890	17,220	19,520	21,820	24,120	26,420	28,720	30,880
\$525,000 and over	3,140	6,840	10,460	13,160	15,860	18,390	20,890	23,390	25,890	28,390	30,890	33,250
				Single o	r Married	d Filing S	Separate	ly				

	gher Paving Job Lower Paving Job Annual Taxable Wage & Salary												
Higher Pay	ing Job				Lowe	er Paying	Job Annua	al Taxable	Wage & S	Salary			
Annual Ta Wage & S		\$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	\$310	\$890	\$1,020	\$1,020	\$1,020	\$1,860	\$1,870	\$1,870	\$1,870	\$1,870	\$2,030	\$2,040
\$10,000 -	19,999	890	1,630	1,750	1,750	2,600	3,600	3,600	3,600	3,600	3,760	3,960	3,970
\$20,000 -	29,999	1,020	1,750	1,880	2,720	3,720	4,720	4,730	4,730	4,890	5,090	5,290	5,300
\$30,000 -	39,999	1,020	1,750	2,720	3,720	4,720	5,720	5,730	5,890	6,090	6,290	6,490	6,500
\$40,000 -	59,999	1,710	3,450	4,570	5,570	6,570	7,700	7,910	8,110	8,310	8,510	8,710	8,720
\$60,000 -	79,999	1,870	3,600	4,730	5,860	7,060	8,260	8,460	8,660	8,860	9,060	9,260	9,280
\$80,000 -	99,999	1,870	3,730	5,060	6,260	7,460	8,660	8,860	9,060	9,260	9,460	10,430	11,240
\$100,000 -	124,999	2,040	3,970	5,300	6,500	7,700	8,900	9,110	9,610	10,610	11,610	12,610	13,430
\$125,000 -	149,999	2,040	3,970	5,300	6,500	7,700	9,610	10,610	11,610	12,610	13,610	14,900	16,020
\$150,000 -	174,999	2,040	3,970	5,610	7,610	9,610	11,610	12,610	13,750	15,050	16,350	17,650	18,770
\$175,000 -	199,999	2,720	5,450	7,580	9,580	11,580	13,870	15,180	16,480	17,780	19,080	20,380	21,490
\$200,000 - 2	249,999	2,900	5,930	8,360	10,660	12,960	15,260	16,570	17,870	19,170	20,470	21,770	22,880
\$250,000 - 3	399,999	2,970	6,010	8,440	10,740	13,040	15,340	16,640	17,940	19,240	20,540	21,840	22,960
\$400,000 - 4	449,999	2,970	6,010	8,440	10,740	13,040	15,340	16,640	17,940	19,240	20,540	21,840	22,960
\$450,000 ar	nd over	3,140	6,380	9,010	11,510	14,010	16,510	18,010	19,510	21,010	22,510	24,010	25,330

Head of Household

Higher Pay	ying Job	b Lower Paying Job Annual Taxable Wage & Salary											
Annual T Wage &		\$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	\$620	\$860	\$1,020	\$1,020	\$1,020	\$1,020	\$1,650	\$1,870	\$1,870	\$1,890	\$2,040
\$10,000 -	19,999	620	1,630	2,060	2,220	2,220	2,220	2,850	3,850	4,070	4,090	4,290	4,440
\$20,000 -	29,999	860	2,060	2,490	2,650	2,650	3,280	4,280	5,280	5,520	5,720	5,920	6,070
\$30,000 -	39,999	1,020	2,220	2,650	2,810	3,440	4,440	5,440	6,460	6,880	7,080	7,280	7,430
\$40,000 -	59,999	1,020	2,220	3,130	4,290	5,290	6,290	7,480	8,680	9,100	9,300	9,500	9,650
\$60,000 -	79,999	1,500	3,700	5,130	6,290	7,480	8,680	9,880	11,080	11,500	11,700	11,900	12,050
\$80,000 -	99,999	1,870	4,070	5,690	7,050	8,250	9,450	10,650	11,850	12,260	12,460	12,870	13,820
\$100,000 -	124,999	2,040	4,440	6,070	7,430	8,630	9,830	11,030	12,230	13,190	14,190	15,190	16,150
\$125,000 -	149,999	2,040	4,440	6,070	7,430	8,630	9,980	11,980	13,980	15,190	16,190	17,270	18,530
\$150,000 -	174,999	2,040	4,440	6,070	7,980	9,980	11,980	13,980	15,980	17,420	18,720	20,020	21,280
\$175,000 -	199,999	2,190	5,390	7,820	9,980	11,980	14,060	16,360	18,660	20,170	21,470	22,770	24,030
\$200,000 -	249,999	2,720	6,190	8,920	11,380	13,680	15,980	18,280	20,580	22,090	23,390	24,690	25,950
\$250,000 -	449,999	2,970	6,470	9,200	11,660	13,960	16,260	18,560	20,860	22,380	23,680	24,980	26,230
\$450,000 a	nd over	3,140	6,840	9,770	12,430	14,930	17,430	19,930	22,430	24,150	25,650	27,150	28,600



Page 4

Complete Form ID W-4 so your employer can withhold the correct amount of state income tax from your paycheck. Sign the form and give it to your employer. **Use the information on the back** to calculate your Idaho allowances and any additional amount you need withheld from each paycheck. If you plan to itemize deductions, use the worksheet at tax.idaho.gov/w4.

### Withholding Status

Check the "A" box (Single) if you're:

- · Single with one job or single with multiple jobs
- Filing as head of household

Check the "B" box (Married) if you're:

- · Married filing jointly with one job and your spouse doesn't work
- A qualifying widow(er)

Check the "C" box (Married, but withhold at Single rate) if you're:

- Married filing jointly and both people work (or you have multiple jobs)
- Married filing separately

State Tax Commission Form ID W-4 Employee's Withholding Allowance Certificate										
WITHHOLDING STATUS (see info	rmation above)									
A (Single) B (Married)	C 🗌 (Married, but withhold at Sir	ngle rate)								
1. Total number of Idaho allowances you're claiming										
1. Total number of Idaho allowances y	you're claiming									
<ol> <li>Total number of Idaho allowances y</li> <li>Additional amount (if any) you need</li> </ol>										
2. Additional amount (if any) you need		nter whole dollars)								
	d withheld from each paycheck (Er	nter whole dollars)								

allowances on line 1 above.

Your signature	Date
EFO00307 09-15-2021	10221 Page 1 of 2

### 1. Total number of allowances you're claiming.

Enter the number of children in your household age 16 or under as of December 31, 2022. If you have no qualifying children, enter "0." If your filing status will be head of household on your tax return, add "2" to the number of qualifying children. **Don't claim allowances for you or your spouse**. You can claim fewer allowances but not more.

If you're married, claim your allowances on the W-4 for the highest-paying job for the most accurate withholding. If you're married filing jointly, only one of you should claim the allowances. The other should claim zero allowances.

If you work for more than one employer at the same time, you should claim zero allowances on your W-4 with any employer other than your principal employer.

Write **Exempt** on line 1 if you meet **both** of the following conditions:

- · Last year I had no Idaho income tax liability and
- · This year I expect to have no Idaho income tax liability

### Nonresident Aliens

**Exempt income.** If you're a nonresident alien and all your income is exempt from withholding, write "Exempt" on line 1.

**Exempt income from a treaty.** If a treaty exempts a portion of your income from withholding, complete federal Form 8233 to claim your treaty benefits, and complete the Idaho W-4 to withhold on income that's not exempt by your treaty.

Idaho taxable income. If you're a nonresident alien and have Idaho taxable income, do all of these:

- 1. Check the "Single" withholding status box regardless of your marital status.
- 2. Enter 0 on line 1.
- 3. Using the Pay Period table below, enter the additional amount of income tax to be withheld for each pay period on line 2. *Exception*: If you're a student or business apprentice from India, report \$0 on line 2.

Pay Period Table				
If your pay period is:	Weekly	Biweekly	Semimonthly	Monthly
Enter this amount on line 2:	\$16	\$31	\$34	\$68

The withholding table calculations for employers include the standard deduction. Because nonresident aliens don't qualify for the standard deduction, the Pay Period table helps ensure that employers withhold enough.

### 2. Additional amount, if any, you need withheld from each paycheck.

If you're single or married filing separately and have more than one job at a time, complete the worksheet below to calculate any additional amount you need withheld from each paycheck.

1.	Other than your primary job, how many jobs do you expect to have at the same time during 2022? (Don't count your primary job.)	
2.	Multiply the number on line 1 by \$12,550	
3.	Enter an estimate of your 2022 income from other jobs (not including your primary job)	
4.	Enter the smaller of lines 2 or 3	
5.	If you completed the itemized deduction worksheet for Idaho ( <b>tax.idaho.gov/w4</b> ), enter the number from line 4. Otherwise, enter "0"	
6.	Multiply the number on line 5 by \$3,154	
7.	Subtract line 6 from line 4	
8.	Multiply line 7 by 6.5% (.065). This is the additional amount you need to withhold annually	
9.	Divide the amount on line 8 by the number of your remaining pay periods in 2022. Enter the number on line 2 of the W-4 as the additional amount you need withheld from each paycheck	

Contact us: In the Boise area: (208) 334-7660 | Toll free: (800) 972-7660 Hearing impaired (TDD) (800) 377-3529 tax.idaho.gov/contact



### **PAY SELECTION FORM**



Employee Name:

Date of Birth:

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

### Please check one pay option below.

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

Direct Deposit to a Wisely Pay Card Account. I authorize CDCN to issue me a Wisely Pay card. The card will be tied to my identification on file. CDCN will make payroll deposits to my card account. I will receive the card in 7 to 10 business days after initial processing.

Direct Deposit to an Existing Checking, Savings or Pay Card Account. I authorize CDCN to initiate payroll deposits to my bank or financial institution.

The Name of my bank is: The Account Type is (check one): Checking Savings Pay Card

\_\_\_\_\_ AN ATTACHMENT IS REQUIRED.

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

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

\*<u>Do not submit a deposit slip</u>. The routing numbers differ from direct deposit routing numbers. \_\_\_\_\_

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

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

Employee Signature

Date







# Financial control: You've got it!



# A Wisely<sup>®</sup> digital account<sup>1</sup> puts you in charge of your money.

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### **Get paid early**<sup>2</sup>

Whether you need to pay a bill or get money for last-minute plans, Wisely could help you get paid up to 2 days early.<sup>2</sup>

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The Wisely card is a prepaid card. References to a digital account refer to the management and servicing of your prepaid card online digitally or through a mobile app. The Wisely card is not a credit card and does not build credit.

<sup>2</sup>You must log in to the myWisely app or mywisely.com to opt-in to early direct deposit. Early direct deposit of funds is not guaranteed and is subject to the timing of payor's payment instruction. Faster funding claim is based on a comparison of our policy of making funds available upon our receipt of payment instruction with the typical banking practice of posting funds at settlement. Please see full disclosures on mywisely.com or the myWisely app. If you have a Wisely Pay or Wisely Cash card (see back of your card), this feature requires an upgrade which may not be available to all cardholders. Please allow up to 3 weeks after your initial setup of direct deposit for your pay to start loading to your card.

<sup>3</sup> Amounts transferred to your savings envelope will no longer appear in your available balance. You can transfer money from your savings envelope back to your available balance at any time using the myWisely app or at mywisely.com.

<sup>4</sup> The number of fee-free ATM transactions may be limited. Please log in to the myWisely app or mywisely.com and see your cardholder agreement and list of all fees for more information. The Wisely Pay Visa<sup>®</sup> is issued by Fifth Third Bank, N.A., Member FDIC or Pathward, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. The Wisely Pay Mastercard<sup>®</sup> is issued by Fifth Third Bank, N.A., Member FDIC or Pathward, N.A., Member FDIC or Pathward, N.A., Member FDIC or Pathward, A.A., Member FDIC or Pathward, A.A., Member FDIC or Pathward, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. The Wisely Pay Mastercard<sup>®</sup> is issued by Fifth Third Bank, N.A., Member FDIC, pursuant to a license from Visa U.S.A. Inc. The Wisely Pay Visa Card can be used everywhere Visa debit cards are accepted. Visa and the Visa logo are registered trademarks of Visa International Incorporated. ADP is a registered trade and be used where Debit Mastercard international Incorporated. ADP, the ADP logo, Wisely, myWisely, and the Wisely logo are registered trademarks of ADP, Inc. Copyright © 2022 ADP, Inc. All rights reserved.



### PARTICIPANT-COMMUNITY SUPPORT WORKER EMPLOYMENT AGREEMENT

This agreement is hereby made between \_\_\_\_\_\_, a Participant of Participant's Name

a Community Support Worker (CSW).

The Participant desires to engage CSW for services under the FDCS Option. In exchange, the CSW desires to be paid for services provided to the Participant. Both parties understand and agree that payment is made through a fiscal employer agent (FEA), using Medicaid monies and based on time sheets submitted by the CSW and approved by the Participant.

To these mutual purposes, the parties promise and agree as follows:

1. CSW services are to be provided in accordance with the Participant's FDCS Support and Spending Plan, and the Consumer Directed Community Supports rules, outlined in IDAPA 16.03.13, "Consumer-Directed Services."

2. It is mutually understood that CSW is the employee of the Participant, and that the Participant directs, controls and approves the CSW's work.

3. The CSW is hired to assist the Participant and assumes no legal liability for the Participant's conduct.

4. The CSW promises that he/she meets the following minimum qualifications to be a CSW, as outlined in Section 136 of IDAPA 16.03.13, "Consumer-Directed Services."

5. The parties mutually agree that CSW is an employee of the Participant and is not an employee of the FDCS Option or the Fiscal Employer Agent (FEA), and agree that the CSW is not entitled to nor will make claim for any employee benefits from the FDCS Option or the FEA, including but not limited to, worker's compensation, disability, life or health insurance.

6. The CSW agrees to notify the Participant immediately in the event he/she is unable to provide the agreed services due to sickness, injury or personal emergency. The CSW must obtain the Participant's written approval in advance for any pre-planned absence.

7. The Participant shall train the CSW on the duties and responsibilities of the CSW and shall be responsible for approving the accuracy of CSW's time records.





8. The CSW agrees to provide services in a safe, courteous and professional manner. The CSW acknowledges that any physical, sexual or mental abuse or neglect of the Participant by the CSW will result in the immediate termination of this Agreement and a report being made according to the requirements in Section 39-5303, Idaho Code.

9. The CSW agrees to report any observed physical, sexual or mental abuse, exploitation or neglect of Participant to adult protection authorities immediately.

10. The CSW understands and agrees that they cannot provide or bill for services until:

- an authorized Support and Spending Plan has been submitted to the FEA,
- the signed Employment Agreement has been submitted to the FEA
- the signed Medicaid-CSW Agreement has been submitted to the FEA

11. The CSW understands and agrees that no payment for services will be made until both the CSW and the Participant have signed the appropriate time sheets, acknowledging their accuracy, and have submitted them to the FEA.

12. It is mutually understood that Medicaid funding can only pay for services rendered. Under the FDCS option, the CSW will not receive payment for any vacation time, holiday time, overtime or sick time. Medicaid will not pay wages at an hourly amount in excess of this agreement.

# □ Please check this box if the employer is requiring the Community Support Worker to specifically document activities that support billable time in writing in a manner agreed upon between the employer and the Community Support Worker.

More than forty (40) hours per week of paid work are allowed only if the CSW meets the criteria for employees that are exempted from overtime pay and minimum wage requirements as per the Fair Labor Standards Act.

The participant must obtain and follow guidance from the Idaho Department of Labor and Commerce to determine if the CSW is exempt from these requirements. It is the responsibility of the participant to ensure that the CSW is exempt if the participant requires the CSW to work more than forty (40) hours per week.

The CSW will be paid only for the specific services authorized as per the Support and Spending Plan.

The signing of this Employment Agreement by the participant and the CSW signifies that the parties acknowledge that the criteria for exemption from overtime and minimum wage requirements will be met prior to scheduling work hours in excess of forty (40) hours per week or agreeing to wages less than minimum wage standards.



### 13. Terms and conditions of work. Effective Date: \_\_\_\_\_\_.

COLUMN A		В	С	D			E	
Service needed		be of Support one box per row	Number of hours per year OR Number of miles/year		Wage per hour OR Wage per mile		Annual Cost	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation</li> <li>TSS (hourly)</li> <li>Learning LSS</li> </ul>	<ul> <li>Emotional ESS</li> <li>Skilled Nursing SNS</li> <li>Relationship RSS</li> <li>Transportation Mileage Reimbursement (MR)</li> </ul>		x		=	\$ Sub- Total	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation</li> <li>TSS (hourly)</li> <li>Learning LSS</li> <li>Code for</li> <li>second rate of</li> <li>pay/hour</li> </ul>	<ul> <li>Emotional ESS</li> <li>Skilled Nursing SNS</li> <li>Relationship RSS</li> <li>Transportation Mileage Reimbursement (MR)</li> <li>Fill in code</li> </ul>		x		=	\$ Sub- Total	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation TSS (hourly)</li> <li>Learning LSS</li> <li>Code for second rate of pay/hour</li> <li>Code for third rate of pay/hour</li> </ul>	<ul> <li>Emotional ESS</li> <li>Skilled Nursing SNS</li> <li>Relationship RSS</li> <li>Transportation Mileage Reimbursement (MR)</li> <li>Fill in code</li> <li>Fill in code</li> </ul>		x		=	\$ Sub- Total	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation</li> <li>TSS (hourly)</li> <li>Learning LSS</li> <li>Code for second rate of pay/hour</li> <li>Code for third rate of pay/hour</li> </ul>	<ul> <li>Emotional ESS</li> <li>Skilled Nursing SNS</li> <li>Relationship RSS</li> <li>Transportation Mileage Reimbursement (MR)</li> <li>Fill in code</li> <li>Fill in code</li> </ul>		x		=	\$ Sub- Total	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation TSS (hourly)</li> <li>Learning LSS</li> <li>Code for second rate of pay/hour</li> <li>Code for third rate of pay/hour</li> </ul>	Emotional ESS     Skilled Nursing SNS     Relationship RSS     Transportation Mileage     Reimbursement (MR)     Fill in code     Fill in code		x		=	\$ Sub- Total	
	<ul> <li>Personal PSS</li> <li>Job JSS</li> <li>Transportation</li> <li>TSS (hourly)</li> <li>Learning LSS</li> <li>Code for</li> <li>second rate of</li> <li>pay/hour</li> <li>Code for third</li> <li>rate of pay/hour</li> </ul>	Emotional ESS     Skilled Nursing SNS     Relationship RSS     Transportation Mileage     Reimbursement (MR)     Fill in code     Fill in code		x		=	\$ Sub- Total	
		Tota	Cost of	Ag	reemer	nt:	\$	



14. The CSW must meet the following specific qualifications in order to provide the following services including attaching copy of certification/licensure, if applicable, as outlined in IDAPA 16.03.13 Subsections 120.05 and 110.03:

### Age Criteria for CSWs (applies to Non-Waiver and Waiver eligible participants):

- Minimum age of in-home worker, with adult caretaker present: 16
- Minimum age of community support, skill building or behavior management: 18
- Minimum age to transport into community: 18

□ The CSW meets the above age criteria.

15. The CSW agrees to take all actions necessary to become Participant's employee, and to maintain the employment relationship by submitting necessary documents to the FEA, including:

- Completion of W-4, I-9 and other IRS required forms
- A copy of this agreement
- Time sheets approved by Participant recording hours worked.
- Completion of a criminal history check, including clearance in accordance with IDAPA 16.05.06, "Rules Governing Mandatory Criminal History Checks"
  - Unless the Criminal History Background Check is Waived, the CSW has applied for a 0 Criminal History Background Check through the Department of Health and Welfare. The CSW will list the Department as the agency/employer, using identification number 1710.

□ The CSW gives permission to the fiscal employer agent to notify the Participant (Employer) of the results of the Criminal History Background Check.

CSW Signature

□ I am waiving the Criminal History Check requirement. I have completed the attached Waiver of Liability form. I understand that even if CHC is waived the CSW cannot receive Medicaid dollars if he is on a federal or state Medicaid exclusion list.

Parent or Legal Guardian Signature

The provisions of this agreement represent the entirety of the agreement between the parties. It may be amended only in writing with both parties consenting by their signatures. It is mutually understood that this is employment at will. Either party may terminate the employment relationship without cause upon two weeks notice. This agreement may be terminated at any time by the Participant due to unsatisfactory CSW performance.

PARTICIPANT

CSW

LEGAL GUARDIAN (IF APPLICABLE)

Date

Date

Date







# Family-Directed Community Supports Option

### MEDICAID – COMMUNITY SUPPORT WORKER AGREEMENT

This agreement is hereby made between the Family-Directed Community Supports (FDCS) Option, a Medicaid Option administered by the Department of Health and Welfare (Department), and

a Community Support Worker (CSW).	
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This CSW is associated with an Agency. Yes No.

The CSW acknowledges that even though he/she is the employee of a participant in the FDCS Option, the Department, through the Fiscal Employer Agent (FEA) is the source of payment for the CSW's wages for services performed under the FDCS Option. Because of the unique relationships of the participant, the Department, and the FEA the CSW acknowledges and agrees to the following:

1. Services provided to any participant under the FDCS Option will be provided in compliance with the rules contained in IDAPA 16.03.13, "Consumer Directed Services."

2. Payment will not be requested through the FEA or the Department for any service not performed in accordance with the FDCS rules, the employment agreement with the participant of the participant's Support and Spending Plan. It is understood that neither the FEA nor the Department is liable to pay for any service performed that is not in conformance with the FDCS rules, the employment agreement with the participant, and the participant's Support and Spending Plan.

3. The CSW acknowledges that even though he/she is the employee of the Participant, they are also a Medicaid provider under the FDCS Option. As a provider the CSW agrees to accept payment received by the FEA as payment in full for services rendered under the FDCS Option.

4. The CSW acknowledges they are an employee of the participant and not an employee of the Department or the Fiscal/Employer Agent (F/EA) and agrees that the CSW is not entitled to nor will make claim for any employee benefits from the Department of the FEA, including but not limited to, workers' compensation, disability life and/or health insurance.

5. To protect the confidentiality of personal and health information relating to the participant and his participation in the Medicaid Option, and to release that information only on request of the participant or as otherwise allowed by law.

Page 1 of 2





I have read the foregoing agreement, I understand it, and agree to abide by its terms and conditions. I further understand and agree that violation of any of the terms or conditions of this agreement or the rules may result in termination of this Agreement, and thereby the source of payment for my employment to any FDCS participant.

Printed name of CSW

Signature of CSW

Date

Note: Each CSW must sign personally.

		<b>ΝΕΡΔ</b>	RTMENT	0 F
Tim		TH &	WELFA	
Participant Name:		_MID #	Date:	
Waiver: I do not want (name	e of community support worl	ker)	to be subject	to
Criminal History Check requi	rements.			
Relationship to the Participar	nt:			
Description of Service:				
Reason:				
I Will Make Sure I am Health	y and Safe by:			
<b>Release of Liability</b> means t them pay for any costs assoc of my choice.				
Assumption of Risk means neglect and exploitation that happening.				ouse,
I have read the definitions a understand the risks of wh services have a Criminal Hi all such risks.	at could happen if I decide	e not to make the	provider of my Self-Directe	and I d
Signature of Individual	Date	Signature of Le	egal Guardian (if applicable)	Date
I have provided education a waiving a criminal history of			regarding the risl	ks of
Comments:				
Signature of Support Broker			Date	
			00867	

IDHW SDCS CSW Agreement Revised 02/2014



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Criminal History Check

Waiver of Liability - Assumption of Risk – Failed Criminal History Che	ck
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Participant Name:	MI	D#	Date:	
Waiver: I choose to hire (name of	of community support worke	er)	as my com	munity
support worker. I understand that	they have failed the crimination	al history check p	er requirements at IDAPA 1	5.05.06,
"Rules Governing Mandatory Crin	ninal History Checks".			
Relationship to the Participant:				
Description of Service:				
Reason:				
I Will Make Sure I am Healthy and	J Safe by:			
them pay for any costs associated of my choice. Assumption of Risk means that neglect and exploitation that could happening.	I understand that there thin	ngs such as perso	nal injury, property loss, abu	use,
I have read the definitions above understand the risks of what co has a criminal history that wou agree that my choice is volunta	ould happen if I decide to Id be precluded from prov	hire a provider o viding services i	of my Self-Directed service n the Idaho Medicaid prog	es who
Signature of Individual	Date	Signature of Lega	l Guardian (if applicable)	Date
I have provided education and waiving a criminal history chec			regarding the risks	s of
Comments:				







### Notice to Employer and Employee regarding working more than 40 hours a week

In the My Voice, My Choice and Family Directed Services programs, Idaho Medicaid prohibits employees from working more than 40 hours per week unless they are exempted from overtime pay requirements under the Fair Labor Standards Act (FSLA). Please refer to page two of your Participant-CSW Employment Agreement.

Because of this restriction, Consumer Direct Care Network (CDCN) cannot pay an employee for any hours worked beyond 40 in a work week unless they qualify for an FSLA exemption and we have an exemption form on file, signed by both employer and employee.

- If CDCN has an exemption form on file...Employee is eligible to work more than 40 hours in a work week Hours worked beyond 40 are paid at the regular hourly rate.
- If CDCN does not have an exemption form on file...Employee is not eligible to work more than 40 hours in a work week Hours worked beyond 40 will not be paid.

### There are two FSLA overtime pay exemptions for domestic service employees

**1. Companionship Services Exemption** - Congress exempted <u>minimum wage and overtime provisions</u> to domestic service employees who provide "companionship services" to the elderly or to people with illness, injuries, or disabilities who require assistance in caring for themselves.

**Criteria:** Employee must perform at least 80% of their work on one or both or the following:

- Fellowship engages participant in social, physical, and mental activities, such as conversation, reading, games and crafts; and/or accompanying participant on walks, errands, appointments and social events.
- Protection be present with participant in home or accompany participant when outside of home, and monitor participant's safety and well-being.

Note: a *Companionship Services Exemption* form is found on the CDCN Idaho website.

**2.** Live-in Exemption - Congress exempted <u>overtime provisions</u> to domestic service employees who have a "live-in relationship" with their employer. That is, they reside in the household in which they provide services.

**Criteria:** The employee resides in the participant's home either permanently, or for extended periods of time (120 hours or more per week). No family relationship needs to exist.

**Note:** an *Employee-Participant Live-in Determination* form is included in employee enrollment packets for both My Voice, My Choice and Family Directed Services programs.

Guidance on these exemptions is available from the Department of Labor's website at https://www.dol.gov/whd/homecare/homecare\_guide.htm and on the CDCN Idaho website under the resources tab (Look for the link titled: Guide to DOL Home Care Rule).



# Work Opportunity Tax Credits - Consumer Direct Care Network

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

# **Applicant Instructions**

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

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

\*\*If you are unable to screen via the Web Link please contact ADP at 1-800-237-3279 (1-800-ADP-EASY) available 6am-11 pm ET, 7 days a week and enter company code shown below to screen for Tax Credits. IVR CODE: 410849



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# CONSUMER DIRECT

# 2023 Payroll Calendar

Symbol Key: Time Due	Pay Day / Postal and Bank Holiday	<b>-</b>			
JANUARY	FEBRUARY	MARCH			
JANUART Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat			
	1 2 3 4	1 2 3 4			
8 9 10 11 12 (13) 14	5 6 7 8 9 (10) 11	5 6 7 8 9 (10) 11			
	12 13 14 15 16 17 18	12 13 14 15 16 17 18			
22 23 24 25 26 (27) 28	19 <u>/20</u> 21 22 23 (24) 25	19 20 21 22 23 (24) 25			
29 30 31 APRIL	26 27 28 MAY	26 27 28 29 30 31 JUNE			
APKIL Sun Mon Tue Wed Thu Fri Sat	IVIAT Sun Mon Tue Wed Thu Fri Sat	JUNE Sun Mon Tue Wed Thu Fri Sat			
	<u>1</u> 2 3 4 <u>5</u> 6	1 (2) 3			
2 3 4 5 6 (7) 8	7 8 9 10 11 12 13	4 5 6 7 8 9 10			
9 10 11 12 13 14 15	14 15 16 17 18 (19) 20	11 12 13 14 15 (16) 17			
16 17 18 19 20 (21) 22	21 22 23 24 25 26 27	18 <u>19</u> 20 21 22 23 24			
23 <u>24</u> 25 26 27 28 29 30	28 <u>/29</u> 30 31	25 26 27 28 29 (30)			
JULY	AUGUST	SEPTEMBER			
Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat			
$2 \ 3 \ 4 \ 5 \ 6 \ 7 \ 8$ 9 10 11 12 13 14 15	6 7 8 9 10 (11) 12 13 14 15 16 17 18 19	3 <u>4</u> 5 6 7 <u>8</u> 9 10 11 12 13 14 15 16			
9 10 11 12 13 (14) 15 16 17 18 19 20 21 22	13 <u>14</u> 15 16 17 18 19 20 21 22 23 24 25 26	10 <u>11</u> 12 13 14 15 16 17 18 19 20 21 (22) 23			
23 24 25 26 27 28 29	27 28 29 30 31	24 25 26 27 28 29 30			
30 31					
OCTOBER	NOVEMBER	DECEMBER			
Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat	Sun Mon Tue Wed Thu Fri Sat			
1 2 3 4 5 (6) 7 8 9 10 11 12 13 14	1 2 (3) 4 5 6 7 8 9 10 11	(1) 2 3 4 5 6 7 8 9			
$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$	5 6 7 8 9 <u>10</u> 11 12 13 14 15 <u>1</u> 6 17 18	3 4 5 6 7 8 9 10 11 12 13 14 (15) 16			
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23			
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30			
		31			
	2023 Bank & Post Office Holidays				
	Consumer Direct Care Network office closures				
*New Year's Day - Monday, January	•	nday, September 4			
*Martin Luther King, Jr. Day - Monday, January 16Columbus Day - Monday, October 9Presidents Day - Monday, February 20*Veterans Day - Friday, November 10					
*Memorial Day - Monday, May 29	· · · · · · · · · · · · · · · · · · ·	ay - Thursday, November 23			
*Juneteenth - Monday, June 19		- Monday, December 25			
*Independence Day - Tuesday, July	1				

# CARE NETWORK

Work weeks are Sunday through Saturday. Time must be sumbitted by MONDAY at MIDNIGHT following the two-week pay period. Late time or time with mistakes may result in late pay. Thank you!

Two Wee	Pay Period	Timesheet Due	Dave Data
Start Date	End Date	Timesheet Due	Pay Date
Sunday	Saturday	Monday	Friday
12/18/2022	12/31/2022	1/2/2023	1/13/2023
1/1/2023	1/14/2023	1/16/2023	1/27/2023
1/15/2023	1/28/2023	1/30/2023	2/10/2023
1/29/2023	2/11/2023	2/13/2023	2/24/2023
2/12/2023	2/25/2023	2/27/2023	3/10/2023
2/26/2023	3/11/2023	3/13/2023	3/24/2023
3/12/2023	3/25/2023	3/27/2023	4/7/2023
3/26/2023	4/8/2023	4/10/2023	4/21/2023
4/9/2023	4/22/2023	4/24/2023	5/5/2023
4/23/2023	5/6/2023	5/8/2023	5/19/2023
5/7/2023	5/20/2023	5/22/2023	6/2/2023
5/21/2023	6/3/2023	6/5/2023	6/16/2023
6/4/2023	6/17/2023	6/19/2023	6/30/2023
6/18/2023	7/1/2023	7/3/2023	7/14/2023
7/2/2023	7/15/2023	7/17/2023	7/28/2023
7/16/2023	7/29/2023	7/31/2023	8/11/2023
7/30/2023	8/12/2023	8/14/2023	8/25/2023
8/13/2023	8/26/2023	8/28/2023	9/8/2023
8/27/2023	9/9/2023	9/11/2023	9/22/2023
9/10/2023	9/23/2023	9/25/2023	10/6/2023
9/24/2023	10/7/2023	10/9/2023	10/20/2023
10/8/2023	10/21/2023	10/23/2023	11/3/2023
10/22/2023	11/4/2023	11/6/2023	11/17/2023
11/5/2023	11/18/2023	11/20/2023	12/1/2023
11/19/2023	12/2/2023	12/4/2023	12/15/2023
12/3/2023	12/16/2023	12/18/2023	12/29/2023
12/17/2023	12/30/2023	1/1/2024	1/12/2024
12/31/2023	1/13/2024	1/15/2024	1/26/2024
		merDirectCare.com	
ionsumer Direct Care Ne 80 E. Corporate Drive, S Aeridian, ID 83642-2952		w	Phone: 888-898-047 Fax: 877-898-041 www.ConsumerDirectID.con