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FINANCIAL MANAGEMENT SERVICES
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MILWAUKEE COUNTY CLTS DIRECT CARE PROFESSIONAL CHECKLIST

DOCUMENT NAME	REQUIRED/OPTIONAL
Milwaukee County CLTS Direct Care Professional Set-Up Form	Required
Form I-9: Employment Eligibility Verification	Required
Form W-4	Required
Form WT-4	Required
Form F-82064: Background Information Disclosure (BID)	Required
Milwaukee County CLTS Relationship Form	Required
Milwaukee County CLTS Payment Election Form	Required
Daily Living Skills Training Acknowledgement	Required
Mentoring Provider Training Acknowledgement	Required
Personal Supports Provider Training Acknowledgment	Required
Respite Provider Training Acknowledgement	Required

Note:
Please ensure all REQUIRED documents are filled out accurately before submitting them for processing.

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MILWAUKEE COUNTY CLTS DOCUMENT DEFINITIONS

DOCUMENT NAME	DEFINITION
Milwaukee County CLTS Direct Care Professional Set-Up Form	Provides PremierFMS the information needed to set the Direct Care Professional up in the system.
Form I-9: Employment Eligibility Verification	Used to verify the identity and employment authorization of new and current employees in the United States.
Form W-4	Provides the employer the correct amount of federal tax to withhold from the employee's paycheck.
Form WT-4	Used by the employer to determine the amount of Wisconsin income tax to be withheld from employee's paychecks.
Form F-82064	Gathers information as required by the Wisconsin Caregiver Background Check Law to help employers and governmental regulatory agencies make employment, contract, residency, and regulatory decisions
Milwaukee County CLTS Relationship Form	Provides PremierFMS the relationship between the participant and the employee as needed for tax purposes.
Milwaukee County CLTS Payment Election Form	Provides PremierFMS the information as to how and where the employee would like to receive their paycheck.

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MILWAUKEE COUNTY CLTS DIRECT CARE PROFESSIONAL SET-UP FORM

Instructions: Please complete **all** information in Sections 1 and 2. Both the Direct Care Professional and the participant, or the participant's representative (Legal Guardian or POA), must sign and date the bottom in order to be considered complete. For any questions or concerns, please contact our office at **855.423.1521**. Please submit the completed form to PremierFMS via one of the following options:

Mail
10425 W North Ave
Suite 345
Milwaukee, WI 53226

Email
PremierEnrollment@Premier-FMS.com

SECTION 1: DIRECT CARE PROFESSIONAL INFORMATION

First Name: _____ Middle Initial: _____ Last Name: _____

Mailing Address: _____ City: _____ State: _____ Zip: _____

Home Phone: _____ Mobile Phone: _____ Work Phone: _____

Email Address: _____

Date of Birth: _____ / _____ / _____ Social Security Number: _____ - _____ - _____

SECTION 2: PARTICIPANT INFORMATION

First Name: _____ Middle Initial: _____ Last Name: _____

Mailing Address: _____ City: _____ State: _____ Zip: _____

Home Phone: _____ Mobile Phone: _____ Work Phone: _____

Email Address: _____ Date of Birth: _____ / _____ / _____

By signing below, you certify that the information on this form is accurate and that you have all supporting documentation that may be needed to verify your selection. For any questions or concerns, please contact our office at **855.423-1521**.

Direct Care Professional Signature: _____ Date: _____ / _____ / _____

Participant Signature: _____ Date: _____ / _____ / _____

Employment Eligibility Verification

Department of Homeland Security

U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No.1615-0047

Expires 07/31/2026

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 Instructions.

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 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 (if any)	Other Last Names Used (if any)

Address (Street Number and Name)	Apt. Number (if any)	City or Town	State	ZIP Code

Date of Birth (mm/dd/yyyy)	U.S. Social Security Number	Employee's Email Address	Employee's Telephone Number
/ /			

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.):

- ☐ 1. A citizen of the United States
- ☐ 2. A noncitizen national of the United States (See Instructions.)
- ☐ 3. A lawful permanent resident (Enter USCIS or A-Number.)
- ☐ 4. A noncitizen (other than **Item Numbers 2.** and **3.** above) authorized to work until (exp. date, if any)

If you check **Item Number 4.**, enter one of these:

USCIS A-Number	OR	Form I-94 Admission Number	OR	Foreign Passport Number and Country of Issuance

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

If a preparer and/or translator assisted you in completing Section 1, that person MUST complete the Preparer and/or Translator Certification on Page 3.

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 Additional Information box; see Instructions.

	List A	OR	List B	AND	List C
Document Title 1					
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)					
Document Title 2 (if any)					
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)					

Additional Information

☐ Check here if you used an alternative procedure authorized by DHS to examine documents.

Certification: I attest, under penalty of perjury, that (1) I have examined the documentation presented by the above-named employee, (2) the above-listed documentation appears 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.

First Day of Employment (mm/dd/yyyy):

Last Name, First Name and Title of Employer or Authorized Representative	Signature of Employer or Authorized Representative	Today's Date (mm/dd/yyyy)
Participant		

Employer's Business or Organization Name	Employer's Business or Organization Address, City or Town, State, ZIP Code

For reverification or rehire, complete Supplement B, Reverification and Rehire on Page 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	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 an individual temporarily authorized to work for a specific employer because of his or her status or parole: **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 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.		**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 For examples, see **Section 7** and **Section 13** of the M-274 on **uscis.gov/i-9-central**. The Form I-766, Employment Authorization Document, is a List A, **Item Number 4.** document, not a List C document.
		8. Native American tribal document		
		9. Driver's license issued by a Canadian government authority		
		For persons under age 18 who are unable to present a document listed above:		
		10. School record or report card		
		11. Clinic, doctor, or hospital record		
		12. Day-care or nursery school record		
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI				

Acceptable Receipts

May be presented in lieu of a document listed above for a temporary period.
For receipt validity dates, see the M-274.

• 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.	**OR**	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 **I-9 Central** 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 *(mm/dd/yyyy)*
Last Name *(Family Name)*	First Name *(Given Name)*		Middle Initial *(if any)*
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 *(if any)*
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 *(if any)*
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 *(if any)*
Address *(Street Number and Name)*	City or Town	State	ZIP Code

Supplement B,
Reverification and Rehire (formerly Section 3)

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

USCIS Form I-9 Supplement B
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 replaces Section 3 on the previous version of Form I-9. Only use this page if your employee requires reverification, is rehired within three years of the date the original Form I-9 was completed, or provides proof of a legal name change. Enter the employee's name in the fields above. Use a new section for each reverification or rehire. Review the Form I-9 instructions before completing this page. Keep this page as part of the employee's Form I-9 record. Additional guidance can be found in the Handbook for Employers: Guidance for Completing Form I-9 (M-274)

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

Reverification: If the employee requires reverification, your employee can choose to present any acceptable List A or List C documentation to show continued employment authorization. Enter the document information in the spaces below.

Document Title	Document Number (if any)	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 documentation, the documentation I examined appears to be genuine and to relate to the individual who presented it.

Name of Employer or Authorized Representative	Signature of Employer or Authorized Representative	Today's Date *(mm/dd/yyyy)*

Additional Information (Initial and date each notation.)

☐ Check here if you used an alternative procedure authorized by DHS to examine documents.

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

Reverification: If the employee requires reverification, your employee can choose to present any acceptable List A or List C documentation to show continued employment authorization. Enter the document information in the spaces below.

Document Title	Document Number (if any)	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 documentation, the documentation I examined appears to be genuine and to relate to the individual who presented it.

Name of Employer or Authorized Representative	Signature of Employer or Authorized Representative	Today's Date *(mm/dd/yyyy)*

Additional Information (Initial and date each notation.)

☐ Check here if you used an alternative procedure authorized by DHS to examine documents.

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

Reverification: If the employee requires reverification, your employee can choose to present any acceptable List A or List C documentation to show continued employment authorization. Enter the document information in the spaces below.

Document Title	Document Number (if any)	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 documentation, the documentation I examined appears to be genuine and to relate to the individual who presented it.

Name of Employer or Authorized Representative	Signature of Employer or Authorized Representative	Today's Date *(mm/dd/yyyy)*

Additional Information (Initial and date each notation.)

☐ Check here if you used an alternative procedure authorized by DHS to examine documents.

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

2025

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 surviving spouse**
☐ **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.)

TIP: Consider using the estimator at *www.irs.gov/W4App* to determine the most accurate withholding for the rest of the year if: you are completing this form after the beginning of the year; expect to work only part of the year; or have changes during the year in your marital status, number of jobs for you (and/or your spouse if married filing jointly), dependents, other income (not from jobs), deductions, or credits. Have your most recent pay stub(s) from this year available when using the estimator. At the beginning of next year, use the estimator again to recheck your withholding.

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, and when to use the estimator at *www.irs.gov/W4App*.

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 the most accurate withholding for this step (and Steps 3–4). If you or your spouse have self-employment income, use this option; **or**

(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 . . . . . ☐

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 Dependent and Other Credits

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 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): 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 unless otherwise noted.

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 2025 if you meet both of the following conditions: you had no federal income tax liability in 2024 **and** you expect to have no federal income tax liability in 2025. You had no federal income tax liability in 2024 if (1) your total tax on line 24 on your 2024 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 2025 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 17, 2026.

Your privacy. Steps 2(c) and 4(a) ask for information regarding income you received from sources other than the job associated with this Form W-4. If you have concerns with providing the information asked for in Step 2(c), you may choose Step 2(b) as an alternative; if you have concerns with providing the information asked for in Step 4(a), you may enter an additional amount you want withheld per pay period in Step 4(c) as an alternative.

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

1. Are submitting this form after the beginning of the year;

2. Expect to work only part of the year;

3. Have changes during the year in your marital status, number of jobs for you (and/or your spouse if married filing jointly), or number of dependents, or changes in your deductions or credits;

4. Receive dividends, capital gains, social security, bonuses, or business income, or are subject to the Additional Medicare Tax or Net Investment Income Tax; or

5. Prefer the most accurate withholding for multiple job situations.

TIP: Have your most recent pay stub(s) from this year available when using the estimator to account for federal income tax that has already been withheld this year. At the beginning of next year, use the estimator again to recheck your withholding.

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. Submit a separate Form W-4 for each job.

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

Instead, 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 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 2025 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; 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 2025 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:
- $30,000 if you're married filing jointly or a qualifying surviving spouse
- $22,500 if you're head of household
- $15,000 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.

Married Filing Jointly or Qualifying Surviving Spouse

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	$0	$700	$850	$910	$1,020	$1,020	$1,020	$1,020	$1,020	$1,020	$1,020
$10,000 - 19,999	0	700	1,700	1,910	2,110	2,220	2,220	2,220	2,220	2,220	2,220	3,220
$20,000 - 29,999	700	1,700	2,760	3,110	3,310	3,420	3,420	3,420	3,420	3,420	4,420	5,420
$30,000 - 39,999	850	1,910	3,110	3,460	3,660	3,770	3,770	3,770	3,770	4,770	5,770	6,770
$40,000 - 49,999	910	2,110	3,310	3,660	3,860	3,970	3,970	3,970	4,970	5,970	6,970	7,970
$50,000 - 59,999	1,020	2,220	3,420	3,770	3,970	4,080	4,080	5,080	6,080	7,080	8,080	9,080
$60,000 - 69,999	1,020	2,220	3,420	3,770	3,970	4,080	5,080	6,080	7,080	8,080	9,080	10,080
$70,000 - 79,999	1,020	2,220	3,420	3,770	3,970	5,080	6,080	7,080	8,080	9,080	10,080	11,080
$80,000 - 99,999	1,020	2,220	3,420	4,620	5,820	6,930	7,930	8,930	9,930	10,930	11,930	12,930
$100,000 - 149,999	1,870	4,070	6,270	7,620	8,820	9,930	10,930	11,930	12,930	14,010	15,210	16,410
$150,000 - 239,999	1,870	4,240	6,640	8,190	9,590	10,890	12,090	13,290	14,490	15,690	16,890	18,090
$240,000 - 259,999	2,040	4,440	6,840	8,390	9,790	11,100	12,300	13,500	14,700	15,900	17,100	18,300
$260,000 - 279,999	2,040	4,440	6,840	8,390	9,790	11,100	12,300	13,500	14,700	15,900	17,100	18,300
$280,000 - 299,999	2,040	4,440	6,840	8,390	9,790	11,100	12,300	13,500	14,700	15,900	17,100	18,300
$300,000 - 319,999	2,040	4,440	6,840	8,390	9,790	11,100	12,300	13,500	14,700	15,900	17,170	19,170
$320,000 - 364,999	2,040	4,440	6,840	8,390	9,790	11,100	12,470	14,470	16,470	18,470	20,470	22,470
$365,000 - 524,999	2,790	6,290	9,790	12,440	14,940	17,350	19,650	21,950	24,250	26,550	28,850	31,150
$525,000 and over	3,140	6,840	10,540	13,390	16,090	18,700	21,200	23,700	26,200	28,700	31,200	33,700

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	$200	$850	$1,020	$1,020	$1,020	$1,370	$1,870	$1,870	$1,870	$1,870	$1,870	$2,040
$10,000 - 19,999	850	1,700	1,870	1,870	2,220	3,220	3,720	3,720	3,720	3,720	3,890	4,090
$20,000 - 29,999	1,020	1,870	2,040	2,390	3,390	4,390	4,890	4,890	4,890	5,060	5,260	5,460
$30,000 - 39,999	1,020	1,870	2,390	3,390	4,390	5,390	5,890	5,890	6,060	6,260	6,460	6,660
$40,000 - 59,999	1,220	3,070	4,240	5,240	6,240	7,240	7,880	8,080	8,280	8,480	8,680	8,880
$60,000 - 79,999	1,870	3,720	4,890	5,890	7,030	8,230	8,930	9,130	9,330	9,530	9,730	9,930
$80,000 - 99,999	1,870	3,720	5,030	6,230	7,430	8,630	9,330	9,530	9,730	9,930	10,130	10,580
$100,000 - 124,999	2,040	4,090	5,460	6,660	7,860	9,060	9,760	9,960	10,160	10,950	11,950	12,950
$125,000 - 149,999	2,040	4,090	5,460	6,660	7,860	9,060	9,950	10,950	11,950	12,950	13,950	14,950
$150,000 - 174,999	2,040	4,090	5,460	6,660	8,450	10,450	11,950	12,950	13,950	15,080	16,380	17,680
$175,000 - 199,999	2,040	4,290	6,450	8,450	10,450	12,450	13,950	15,230	16,530	17,830	19,130	20,430
$200,000 - 249,999	2,720	5,570	7,900	10,200	12,500	14,800	16,600	17,900	19,200	20,500	21,800	23,100
$250,000 - 399,999	2,970	6,120	8,590	10,890	13,190	15,490	17,290	18,590	19,890	21,190	22,490	23,790
$400,000 - 449,999	2,970	6,120	8,590	10,890	13,190	15,490	17,290	18,590	19,890	21,190	22,490	23,790
$450,000 and over	3,140	6,490	9,160	11,660	14,160	16,660	18,660	20,160	21,660	23,160	24,660	26,160

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	$450	$850	$1,000	$1,020	$1,020	$1,020	$1,020	$1,870	$1,870	$1,870	$1,890
$10,000 - 19,999	450	1,450	2,000	2,200	2,220	2,220	2,220	3,180	4,070	4,070	4,090	4,290
$20,000 - 29,999	850	2,000	2,600	2,800	2,820	2,820	3,780	4,780	5,670	5,690	5,890	6,090
$30,000 - 39,999	1,000	2,200	2,800	3,000	3,020	3,980	4,980	5,980	6,890	7,090	7,290	7,490
$40,000 - 59,999	1,020	2,220	2,820	3,830	4,850	5,850	6,850	8,050	9,130	9,330	9,530	9,730
$60,000 - 79,999	1,020	3,030	4,630	5,830	6,850	8,050	9,250	10,450	11,530	11,730	11,930	12,130
$80,000 - 99,999	1,870	4,070	5,670	7,060	8,280	9,480	10,680	11,880	12,970	13,170	13,370	13,570
$100,000 - 124,999	1,950	4,350	6,150	7,550	8,770	9,970	11,170	12,370	13,450	13,650	14,650	15,650
$125,000 - 149,999	2,040	4,440	6,240	7,640	8,860	10,060	11,260	12,860	14,740	15,740	16,740	17,740
$150,000 - 174,999	2,040	4,440	6,240	7,640	8,860	10,860	12,860	14,860	16,740	17,740	18,940	20,240
$175,000 - 199,999	2,040	4,440	6,640	8,840	10,860	12,860	14,860	16,910	19,090	20,390	21,690	22,990
$200,000 - 249,999	2,720	5,920	8,520	10,960	13,280	15,580	17,880	20,180	22,360	23,660	24,960	26,260
$250,000 - 449,999	2,970	6,470	9,370	11,870	14,190	16,490	18,790	21,090	23,280	24,580	25,880	27,180
$450,000 and over	3,140	6,840	9,940	12,640	15,160	17,660	20,160	22,660	25,050	26,550	28,050	29,550

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.

Applicable Laws and Rules

This document provides statements or interpretations of the following laws and regulations enacted as of August 23, 2023: sec. 71.66, Wis. Stats., and sec. Tax 2.92, Wis. Adm. Code.

The address will be displayed appropriately in a left window envelope.

DEPARTMENT OF WORKFORCE DEVELOPMENT
NEW HIRE REPORTING
PO BOX 14431
MADISON WI 53708-0431

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.

Reset

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

Premier
FINANCIAL MANAGEMENT SERVICES
Part of the AssuranceSD family

MILWAUKEE COUNTY CLTS RELATIONSHIP FORM

Instructions: Please complete all the information in Section 1 and select the correct relationship in Section 2. Both the Direct Care Professional and the participant, or the participant's representative (Legal Guardian or POA), must sign and date the bottom in order to be considered complete. Please submit the completed form to PremierFMS via one of the following options:

Mail
10425 W North Ave
Suite 345
Milwaukee, WI 53226

Email
PremierEnrollment@Premier-FMS.com

SECTION 1:

DCP/Worker Name: _____ Date of Birth: ____ / ____ / _____

Participant Name: _____

SECTION 2: *(Please select your legal relationship to the participant)*

☐ Friend ☐ Worker ☐ Grandparent*

☐ Sibling ☐ Neighbor ☐ Other

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

By signing below, you certify that the information on this form is accurate and that you have all supporting documentation that may be needed to verify your selection. Please be aware that if any changes occur in the relationship you are required to complete a new form and submit the new form to PremierFMS. For any questions or concerns, please contact our office at **855.423.1521**.

Direct Care Professional Signature: _____ Date: _____ / _____ / _____

Participant Signature: _____ Date: _____ / _____ / _____

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FINANCIAL MANAGEMENT SERVICES
Part of the AssuranceSD family

MILWAUKEE COUNTY CLTS DIRECT CARE PROFESSIONAL PAYMENT ELECTION FORM

Instructions: Please check the appropriate box in Section 1 and fill out any information in Section 2, where applicable. If paycard box is checked, skip Section 3. If paycard box is not selected, please proceed to fill out Sections 3 and 4. After entering the Financial Institution information in Section 3, please attach the required documentation as listed. Review Section 4, then sign and date. The form must be signed and dated at the bottom to be considered complete. For any questions or concerns, please contact our office at **855.423-1521**. Please submit the completed form to PremierFMS via one of the following options:

Mail
10425 W North Ave
Suite 345
Milwaukee, WI 53226

Email
PremierEnrollment@Premier-FMS.com

SECTION 1 *(Check one box ONLY)*

Effective Date: ____ / ____ / _____

☐ New Direct Deposit Set-Up ☐ New Paycard Set-Up ☐ Existing Paycard Set-Up

SECTION 2 *(Please print clearly)*

Participant Information

Participant Name: _____ Medicaid #: _____

Direct Care Professional Information

Direct Care Professional Name: _____ ID Number: _____

Last 4 Digits of SSN: _____ Participant Name: _____

Vendor Information

Vendor Name: _____ Contact Number: _____

Contact Name: _____ Email Address: _____

SECTION 3

Name of Financial Institution: _____

Type of Account: ☐ Checking ☐ Savings Percentage: _____%

For Checking Account
Tape a voided check here.
(No starter check or deposit slip.)

For Savings Account
Attach letter from bank with routing and account numbers.
(Letter must be typed on bank's letterhead.)

See Other Side

Premier
FINANCIAL MANAGEMENT SERVICES
Part of the AssuranceSD family

MILWAUKEE COUNTY CLTS DIRECT CARE PROFESSIONAL PAYMENT ELECTION FORM

Optional for split deposit

Name of Financial Institution: _____

Type of Account: ☐ Checking ☐ Savings Percentage: _____%

For Checking Account
Tape a voided check here.
(No starter check or deposit slip.)

For Savings Account
Attach a letter from bank with routing and account numbers.
(Letter must be typed on bank's letterhead.)

SECTION 5 *(Check one box ONLY)*

Authorization for Set-Up, Change or Cancellation

☐ I hereby authorize Premier Financial Management Services (PremierFMS) to **deposit** any amount owed to me for wages and/or reimbursements. PremierFMS is not responsible for any erroneous information provided. Also, I grant PremierFMS permission to correct and/or adjust any electronic funds transfer resulting from an erroneous overpayment by debiting my account. This authorization is to remain in full force and effect until PremierFMS receives written notification from me to terminate the agreement.

☐ I hereby elect and consent to receive my wages to a **paycard** by electronic transfer. I also grant Premier Financial Management Services (PremierFMS) permission to correct and/or adjust any electronic funds transfer resulting from an erroneous overpayment by debiting my account. I acknowledge I have received a copy of the terms, conditions, and fees associated with using the aforementioned paycard. This authorization is to remain in full force and effect until PremierFMS receives written notification from me to terminate the agreement.

Direct Care Professional Name: _____

Direct Care Professional Signature: _____ Date: ____ / ____ / _____

Paycard Number:
(For office use only)

MILWAUKEE COUNTY
DEPARTMENT OF HEALTH
& HUMAN SERVICES
CHILDREN, YOUTH
& FAMILY SERVICES

Shakita LaGrant-McClain • Director DHHS
Kelly Pethke • CYFS Administrator
Anouvong Chanthavixay • Director

Children's Long-Term Support Waiver Program

Daily Living Skills Training Acknowledgement

Participant Information	
Name *(Last, First)*:	**Parent/Legal Guardian/Foster Parent:**

Employee Information	
Name *(Last, First)*:	**Start Date:** / /

Daily living skills training (*DLST*) services provide education and skill development or training to support the participant's ability to independently perform routine daily activities and effectively use community resources. As a DLST provider you agree to and understand the following:

Employee Requirements:

1. Complete and pass a Criminal and Caregiver Background Check. This background check will be documented and must be completed once every four years.
2. Employee will have a minimum of two years' experience working with the target population *or* complete child specific training that is well documented and received prior to working with the child.

Training:

1. Employees providing DLST will receive training from parent/caregiver on the subjects pertaining to the individual participant as noted in the Home and Community Based Services Waiver Manual for the CLTS Waiver Program (*Waiver Manual*).
2. DLST employees shall adhere to all service criteria and standards listed in Chapter 4.6.10 of the Waiver Manual.

Parent/legal guardian, as the employer, accepts responsibility for training and warrants that training and standards meet all criteria listed in the Waiver Manual. Parent/legal guardian further accepts responsibility for following all criteria for this SPC code per the Waiver Manual.

By signing below, the employee (*provider*) and the parent/legal guardian (*employer*) agree that no DLST services will be provided until the training acknowledgement is signed, confirming that child-specific training has been completed. If this form is not signed prior to the commencement of employment or within 30 days of employment, the employee's pay will be withheld until the acknowledgment is signed.

☐ Employee and Parent/Guardian has received and agrees to all allowable services standards (*below*).
☐ Employee will provide progress notes to the Support and Service Coordinator (*SSC*) on a minimum basis of once every 6 months.

_____ / /
Parent/Legal Guardian/Employer Signature **date**

_____ / /
Employee Signature **date**

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Anouvong Chanthavixay • Director

Daily Living Skills Provider Training

DLST employee training should include:

- An understanding of the child's diagnosis, strengths, and areas that need additional support.
- Information about any applicable behaviors support plans in place for the participant, any unique medical needs, and aspects of the participant's culture.
- Expectations and goals established by parent and submission of progress notes at a minimum of two times per year.
- Emergency and Safety Plans established for (*but not limited to*):
    - Medical Emergencies
    - Fires Escape Plan
    - Tornado Safety Plan
    - Power Outages
- Schedule
- Electronic time sheet

DLST service expectations and responsibilities include:

- Providing the participant with instructional services that focus on skill development. Skill development can include, but is not limited to, the following:
    - Personal hygiene tasks (*ex: bathing, grooming, dressing, etc.*)
    - Food preparation
    - Home upkeep and maintenance
    - Money management
    - Accessing and using community resources
    - Community mobility
    - Computer and technology usage and safety
    - Driving evaluation, lessons, and other related fees (*upon review and approval of SSC*)
    - Public transportation access and usage
- Providing the participant with educational or training services that are of a direct benefit to the participant. All skill development building and training must be age appropriate and goal oriented.
- Reporting any critical incidents to the participants Support and Service Coordinator.

The following activities are not allowed under DLST:

- Educational-related services provided to the participant that should otherwise be available under the Individuals with Disabilities Education Act (*IDEA*) or other relevant funding source.
- The cost for transporting a participant during the provision of DLST.
- The cost of registration fees or the cost of recreational activities.
- DLST is not intended to be provided on a continuous, long-term basis as part of daily services that would enable the unpaid caregiver to go to work or to attend school.
- DLST is not intended to be used to provide services to a participant while the participant is attending school.
- DLST must not duplicate any other service being provided under the participant's Individual Service Plan (*including ABA Therapy, Mentoring, Personal Supports, or Respite*)
- Services furnished to a minor by a parent(s), stepparent(s), or legal guardian.
- DLST services start following the approved authorization and completion of background check.
- DLST providers are not eligible for backpay, paid for over time, or paid for unauthorized hours.
- Paper time sheets are not allowable.

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Children's Long-Term Support Waiver Program

Mentoring Provider Training Acknowledgement

Participant Information	
Name *(Last, First)*:	**Parent/Legal Guardian/Foster Parent:**

Employee Information	
Name *(Last, First)*:	**Start Date:** / /

Mentoring services improve the participant's ability to interact in their community in socially advantageous ways. As a mentor provider you agree to the following:

Employee Requirements:

1. Complete and pass a Criminal and Caregiver Background Check. This background check will be documented and must be completed once every four years.

Training:

1. Employees providing Mentoring will receive training from parent/caregiver on the subjects pertaining to the individual participant as noted in the Home and Community Based Services Waiver Manual for the CLTS Waiver Program (*Waiver Manual*).
2. Mentoring employees shall adhere to all service criteria and standards listed in Chapter 4.6.20 of the Waiver Manual.

Parent/caregiver, as the employer, accepts responsibility for training and warrants that training and standards meet criteria as listed in the Waiver Manual. Parent/caregiver further accepts responsibility for following all criteria for this SPC code per the Waiver Manual.

By signing below, the employee (*provider*) and the parent/legal guardian (*employer*) agree that no mentoring services will be provided until the training acknowledgement is signed, confirming that child-specific training has been completed. If this form is not signed prior to the commencement of employment or within 30 days of employment, the employee's pay will be withheld until the acknowledgment is signed.

☐ Employee and Parent/Guardian has received and agrees to all allowable service standards (*below*).

_____ / /

Parent/Legal Guardian/Employer Signature **Date**

_____ / /

Employee Signature **Date**

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Mentor Provider Training

Mentoring Provider Training Should Include:

- An understanding of the child's diagnosis, strengths, and areas that need additional support.
- Expectations for how mentoring time will be utilized.
- Emergency and Safety Plans established for:
  - Medical Emergencies
  - Fires Escape Plan
  - Tornado Safety Plan
  - Power Outages
- Schedule
- Electronic Time Sheet

Mentoring Service Expectations and Responsibilities include:

- Providing the participant with experiences in social peer interactions.
- Providing the participant with experiences in recreational activities.
- Assisting the participant with employability skill-building experiences in real-life situations.
- Implementing learning opportunities by guiding and shadowing the participant in the community.
- Modeling interaction and social skills.
- Supervision/support of the participant.
- Attending quarterly team meetings to review Mentoring goals and progress.
- Reporting any critical incidents to the participants Support and Service Coordinator.

The following activities are not allowed under Mentoring services:

- The cost for transporting a participant.
- The cost of registration fees or the cost of recreational activities.
- Mentoring is not intended to be provided on a continuous, long-term basis as part of daily services that would enable the unpaid caregiver to go to work or to attend school.
- Mentoring shall not be used to provide services to an individual while the participant is attending school.
- Mentoring must not duplicate any other service being provided under the participant's Individual Service Plan including ABA Therapy, Respite Care, Personal Supports, or Daily Living Skills Training.
- Services furnished to a minor by a parent(s), stepparent(s), or legal guardian.
- Mentoring services start following the approved authorization and completion of background check.
- Mentoring services are not eligible for backpay, paid for over time, or paid for unauthorized hours.
- Paper time sheets are not allowable.

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Children's Long-Term Support Waiver Program

Personal Supports Provider Training Acknowledgment

Participant Information	
Name *(Last, First)*:	**Parent/Legal Guardian/Foster Parent:**

Employee Information	
Name *(Last, First)*:	**Start Date:** / /

Personal Supports (*previously known as Supportive Home Care*) directly and indirectly assists the participant with daily living activities and personal needs to promote improved functioning and safety in their home and community. Personal Supports may be provided in the participant's home or in a community setting. As a Personal Supports provider, you agree to the following:

Employee Requirements:

1. Complete and pass a Criminal and Caregiver Background Check. This background check will be documented and must be completed once every four years.

Training:

2. Employees providing Personal Supports will receive training from parent/caregiver on the subjects pertaining to the individual participant as noted in the Home and Community Based Services Waiver Manual for the CLTS Waiver Program (*Waiver Manual*).
3. Personal Supports employees shall adhere to all service criteria and standards listed in Chapter 4.6.24 of the Waiver Manual.

Parent/Legal Guardian, as the employer, accepts responsibility for training and warrants that training and standards meet criteria as listed in the Waiver Manual. Parent/Legal Guardian further accepts responsibility for following all criteria for this SPC code per the Waiver Manual.

By signing below, the employee (*provider*) and the parent/legal guardian (*employer*) agree that no personal support services will be provided until the training acknowledgement is signed, confirming that child-specific training has been completed. If this form is not signed prior to the commencement of employment or within 30 days of employment, the employee's pay will be withheld until the acknowledgment is signed.

☐ Employee and Parent/Legal Guardian has received and agrees to all allowable services standards (*below*).

_____ / /

Parent/Legal Guardian /Employer Signature **Date**

_____ / /

Employee Signature **Date**

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Personal Supports Training

Personal Supports employee training should include:

- An understanding of the child's diagnosis, strengths, and areas that need additional support.
- Expectations for how Personal Support services will be utilized.
- Emergency and Safety Plans established for:
  - Medical Emergencies
  - Fires Escape Plan
  - Tornado Safety Plan
  - Power Outages
- Schedule
- Electronic Time Sheet

Personal Support Service expectations and responsibilities include:

- Assisting participants with functional skills and tasks. These tasks include, but are not limited to the following:
  - Appropriate social behaviors (such as checking out library books, ordering food from a menu, and paying for tickets to events).
  - Communication skills (such as assistance with communication)
  - Medication and health management (such as appropriate self-administration of medications)
  - Mobility (such as arranging and using transportation)
  - Money management (such as bill paying and other aspects of money management)
- Proving the supervision necessary to increase the participant's independence while ensuring safety at home and in the community.
- Teaching participants to better understand and comprehend cause and effects of behavior and consequences.
- The performance of basic and intermittent household tasks within the participant's primary residence (maybe seasonally or due to emergency).
  - This assistance must be due to the participant's disability that results in additional household tasks and increases the parent and/or caregiver's ability to provide care needed by the participant.
- Reporting any critical incidents to the participants Support and Service Coordinator.

The following activities are not allowed under Personal Supports:

- Services provided to an individual living in a licensed facility-based setting or services already provided by a Personal Care Worker. Personal Supports should not be used to replace skilled nursing services that should be provided under the Medicaid state plan.
- Personal supports are limited to assistance with tasks the participant is unable to do without assistance and are not intended to teach skill acquisition.
- Personal Supports do not include provision of supervision that would customarily be provided by the parent or guardian of a child without a disability.
- The cost of registration fees or the cost of recreational activities.
- Personal Supports are not intended to be provided on a continuous, long-term basis as part of daily services that would enable the unpaid caregiver to go to work or to attend school.
- Personal supports shall not be used to provide services to an individual while the participant is attending school.
- The cost of transportation.
- Personal supports must not duplicate any other service being provided under the participant's Individual Service Plan including ABA Therapy, Respite. Mentoring, or Daily Living Skills Training.
- Services furnished to a minor by a parent(s), stepparent(s), or legal guardian.

- This service excludes household maintenance that changes the physical structure of the home, general home maintenance activities including painting, plumbing or electrical repairs, and exterior maintenance.
- Personal Supports services begin following the approved authorization and completion of background check.
- Personal support services are not eligible for backpay, paid for over time, or paid for unauthorized hours.
- Paper time sheets are not allowable.

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Children's Long-Term Support Waiver Program

Respite Provider Training Acknowledgement

Participant Information	
Name:	**Parent/Legal Guardian:**

Employee Information	
Name:	**Start Date:** / /

Respite care services maintain and strengthen the participant's natural supports by easing the daily stress and care demands for their family, or other primary caregiver(s), on a short-term basis. As a respite provider you agree to the following:

Employee Requirements:

1. Complete and pass a Criminal and Caregiver Background Check. This background check will be documented and must be completed once every four years.

Training:

1. Employees providing Respite Care will receive training from parent/legal guardian on the subjects pertaining to the individual participant as noted in the Home and Community Based Services Waiver Manual for the CLTS Waiver Program (*Waiver Manual*).
2. Respite Care employees shall adhere to all service criteria and standards listed in Chapter 4.6.26 of the Waiver Manual.

Parent/Legal Guardian, as the employer, accepts responsibility for training and warrants that training and standards meet criteria listed in the Waiver Manual. Parent/Legal Guardian further accepts responsibility for following all criteria for this SPC code per the Waiver Manual.

By signing below, the employee (*provider*) and the parent/legal guardian (*employer*) agree that no respite services will be provided until the training acknowledgement is signed, confirming that child-specific training has been completed. If this form is not signed prior to the commencement of employment or within 30 days of employment, the employee's pay will be withheld until the acknowledgment is signed.

☐ Employee and Parent/Guardian has received and agrees to all allowable services standards (*below*).

_____ / /

Parent/Legal Guardian/Employer Signature **Date**

_____ / /

Employee Signature **Date**

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Respite Provider Training

Respite Provider Training Should Include:

- An understanding of the child's diagnosis, strengths, and areas that need additional support.
- Expectations for how respite time will be utilized.
- Emergency and Safety Plan Established For:
  - Medical Emergencies
  - Fires Escape Plan
  - Tornado Safety Plan
  - Power Outages
- Schedule
- Electronic Time Sheet
- Completion of online respite provider training: 100: Respite Care Provider Training (100-WI) (talentlms.com) *(Not mandatory, but highly encouraged)*

Respite Service Expectations and Responsibilities Include:

- Providing a level of care and supervision appropriate to the participant's needs while their family or other primary caregiver(s) are temporarily relieved from daily caregiving demands.
- Care and supervision of a participant may include, but is not limited to, the following:
  - Assistance with toileting and feeding.
  - Assistance with daily living skills, including assistance with accessing the community and community activities.
  - Assistance with grooming and personal hygiene.
  - Meal preparation, serving, and cleanup.
  - Administration of medications.
  - Supervision and support.
- Reporting any critical incidents to the participants Support and Service Coordinator.

The following activities are not allowed under respite care:

- Reimbursement for room and board.
- Respite care stays may not exceed 28 consecutive days.
- The cost of registration fees or the cost of recreational activities.
- Respite care is not intended to be provided on a continuous, long-term basis as part of daily services that would enable the unpaid caregiver to go to work or to attend school.
- Respite care shall not be used to provide services to an individual while the participant is attending school.
- Respite care shall not be used to replace skilled nursing services or a Personal Care Worker that should be provided under the Medicaid state plan.
- Respite care must not duplicate any other service being provided under the participant's Individual Service Plan including ABA Therapy, Mentoring, Personal Supports or Daily Living Skills Training.
- Services furnished to a minor by a parent(s), stepparent(s), or legal guardian.
- Respite care services begin following the approved authorization and completion of background check.
- Respite services are not eligible for backpay, paid for over time, or paid for unauthorized hours.
- Paper time sheets are not allowable.