

# INSTRUCTIONS for COMPLETING THE VENDOR AND INDEPENDENT CONTRACTOR PACKET

The Vendor Packet and Independent Contractor Packet consists of the first 2 documents shown below; the 3<sup>rd</sup> document is optional.

Beginning October 1, 2009, IRS Form W-9 is required to be completed by all newly enrolled Vendors who are not incorporated (i.e., all but corporations – businesses that have “Inc.” after their name) and Independent Contractors. The purpose of this form is for your vendors and independent contractors to tell you their correct Tax ID Number (TIN) and the kind of business they operate – self employed, corporation, partnership, or limited liability company. This information tells the APD F/EA Unit whether or not to send the business a Form 1099-MISC at the end of the year on behalf of the consumer’s household business, in accordance with IRS laws. **If APD fails to properly report income because of misinformation provided by the participant or representative, the participant or representative may be personally responsible for paying the fines charged by the IRS.**

Put the appropriate completed packet together in the order shown and submit it to APD along with the purchasing plan on which the vendor or independent contractor first appears. This applies to every vendor and independent contractor listed on the purchasing plan, including vendors and independent contractors who are listed as Emergency Back Ups (EBUs).

If an independent contractor has a NAME change, a Change of Name/Address form AND a new Independent Contractor Packet must be completed and submitted TOGETHER to APD. This will prevent the creation of a duplicate ID number for the provider.

## 1. Vendor / Independent Contractor Information Form

- ◆ This is a 1 page form
  - Fill in all items of this form with the information requested.
  - Make a copy of this form for your files.

## 2. IRS Form W-9

- ◆ This is a 1 page form with 3 additional pages of support material.
- ◆ The Vendor (not corporations) or Independent Contractor completes the form by entering his or her name AND the name of his or her business, if different from his or her name.
  - In Part I, the Vendor or Independent Contractor enters the Tax IT Number (either his or her Social Security Number OR Federal Employer Identification number, but not both! – it depends on how the provider has set up his business with the IRS).
  - Specify vendor provider type – must select one.

- In Part II, the Vendor or Independent Contractor signs and dates the form.
- In the margin at the bottom of the form, print the LAST NAME of the consumer and the consumer's CDC+ ID #. (APD needs to be able to link this paperwork with the consumer in case it becomes separated from the Vendor Information Form.)

### **3. Direct Deposit Form (Optional)**

- ◆ This is a 1 page form
  - Follow the directions on the form
  - Attach a voided check. The voided check must have the vendor's name machine-printed on the check. Cannot accept checks with no names or self-written names. If such a check is not available, you must attach a letter from the bank on bank letterhead confirming that the vendor has an account, and providing the account number.
  - Make a copy of this form for your files.