

## INSTRUCTIONS FOR COMPLETING THE VENDOR AND INDEPENDENT CONTRACTOR PACKET

- A Vendor/Independent Contractor (IC) packet is required for all providers listed on the Purchasing Plan that are an Agency, Vendor, or IC, including Emergency Back Ups (EBU's). **Includes the following 5 forms:**
  1. Vendor / Independent Contractor Information Form
  2. Internal Revenue Service (IRS) Form W – 9\* (for Vendors/IC's, including LLCs)
  3. Background Screening Clearance Letter (sent in for IC's)
  4. Certificate of Good Moral Character (for Vendors/IC's, including LLCs)
  5. ***Direct Deposit Form (EFT) & include a copy of a pre-printed voided check***

\*The IRS Form W-9 is required to be completed by all Independent Contractors and Agency/Vendors who are not a corporation. The purpose of this form is for your providers to tell you their correct Tax ID Number (TIN) and the kind of business they operate – self-employed, partnership, or Limited Liability Company. This information tells the APD F/EA Unit whether to send the business a Form 1099-MISC at the end of the year. **If APD fails to properly report income because of misinformation provided by the consumer/representative, the consumer/representative will be personally responsible for paying the fines charged by the IRS.**

While it is not required that an Agency/Vendor send in a copy of the Background Screening Clearance letter for their employees, the consumer/representative may request a copy of this document for the specific employee(s) that will be providing care.

- Place all documents together in the order shown below, along with an updated Purchasing Plan or Quick Update form and submit to your CDC+ consultant.
- 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.

---

### Vendor / Independent Contractor Information Form (1 page)

- Fill in all items of this form with the information requested.
- Make a copy of this form for your files.

### IRS Form W-9 (1 page with 3 additional pages of support material)

- Have the Vendor or IC (including LLCs) complete all requested information.
  - Only enter a business name if different from his or her name.

- Specify vendor provider type – must select one.
  - Address is the provider’s business address or own address depending on how this information is set up with the IRS.
  - Requestor’s address is the CDC+ consumer’s address.
- Part I: The Vendor or IC enters the Tax ID Number (either his or her Social Security Number OR Federal Employer Identification number, **Do not enter both!** – it depends on how the provider has set up his business with the IRS).
- In Part II: The Vendor or IC signs and dates the form.
- In the margin at the bottom of the form, print the LAST NAME of the consumer and their CDC+ ID #. (APD needs to be able to link this paperwork with the consumer)

### **Direct Deposit Request Form (1 page)**

- Follow the instructions that are printed on the form.
- Attach a preprinted, voided check.
- Make a copy of this form for your files.

### **Certificate of Good Moral Character**

- Agency/Vendor and/or Independent Contractor (including LLCs) signs form.
- Make a copy of the Affidavit for your files.

### **Background Screening Clearance Letter**

- Make a copy of the letter for your files.