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## CDC+ Connection – Your Monthly Source of Updates and Helpful Information

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### Change in Vendor Packet Requirements

As all CDC+ participants know, whenever you plan to receive services from a business entity, you must complete a Vendor Packet. The information in that packet links that vendor to you in APD's records for payroll and tax reporting purposes.

As a household business, it is your responsibility to know the type of business you are hiring so that the correct tax documents can be sent to the IRS. The way this works in CDC+ is that you obtain the correct information on the Vendor Packet and submit that packet – with the purchasing plan on which the vendor's name first appears – to your consultant. Your consultant sends the complete purchasing plan and accompanying documents to the APD area office for approval, and the area office submits the forms to APD central office for processing. The vendor forms are logged in and forwarded to the F/EA unit. Then the F/EA has the information it needs to submit the correct tax information to the IRS on your behalf.

You have always been required to submit a completed IRS Form W-9 for your businesses that are independent contractors.

**Effective immediately**, you must submit a Form W-9 for all other businesses **except for businesses that are corporations**. The people you do business with will be able to tell you if the business is incorporated or not. If they are not incorporated, you must ask them to complete an IRS Form W-9.

A new Vendor Information Form showing this change has been placed on the CDC+ Web site for your use. If you do not have access to the Web, please ask your consultant to provide you with a copy.

### Tips on Completing Your Purchasing Plan

When completing your purchasing plan, please keep in mind these important rules:

1. If you wish to use your own money to make a purchase and then request reimbursement from your CDC+ account, the following criteria must be met:
  - The entity from which you make such a purchase must be a corporation. It cannot be a partnership, limited liability company, or independent contractor.

- The item can only be listed in the Savings, OTE, or STE sections of your Purchasing Plan. You cannot be reimbursed for regular monthly services. Regular monthly services are to be listed in the Services, Supplies, and Cash sections of your Purchasing Plan.
  - When you list an item you plan to pay for out of pocket and request reimbursement, you must identify the **name of the provider** in the "Provider" column and write the word "Reimbursement" after the provider's name. If the provider will be Wal Mart, K-Mart, CVS pharmacy or some other national retail chain, you do not have to write "Inc." after the store name. However, it is your responsibility to write the correct name, including "Inc." for all other providers you will be paying and then requesting reimbursement.
  - As with all payment documentation, you are required to maintain copies of all of your receipts for everything you purchase with CDC+ funds. They must be retained for six years from the date of purchase.
2. You must always use the most recently released version of the CDC+ Purchasing Plan. The version you have been using is 2.0-F. The current version is now 3.0-B, and has been released and posted on the CDC+ Web site. You must begin using it for all Purchasing Plan Updates and Changes having a February 1, 2010 effective date.
  3. Your consultant is required to complete the lower section of Page 1 of the Purchasing Plan to confirm the reason the Purchasing Plan is being submitted. Please note that on Purchasing Plan Version 3.0-B, several boxes and lines have an asterisk (\*) next to them. The CDC+ participant (representative) must complete those items before sending the plan to the consultant for review.

### All New Forms Now on CDC+ Web Site

You will soon be receiving a hard copy of the Participant Notebook, the Appendix, and all updated pages of the Notebook. In the meantime, you can download current forms from the CDC+ Web site. Go to the Quick Links Menu, click on "Participants," and then click on "Appendix."