

Request for Taxpayer Identification Number and Certification

**Give form to the
requester. Do not
send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
	List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number
or
Employer identification number

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

ASSIGNMENT OF THE CONTRACT OR INTEREST IN IT

(for new owner)

“The owner may not assign the HAP contract to a new owner without the prior written consent of the PHA. If the owner requests PHA consent to assign the HAP contract to a new owner, the owner shall supply any information as required by the PHA pertinent to the proposed assignment.”

-Excerpt from the Housing Assistance Payment Contract, Part B, Section 14. (3/2000)

I, _____, the new owner of (print
property address) _____

have read and agree to comply with all of the terms and conditions of the contract between (print
name of previous owner) _____

and the Housing Authority of Clackamas County, Oregon.

The effective date of this transfer is _____

Signature: _____ Date: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone No.: _____ FAX No.: _____

E-mail address: _____

Tax ID # or Social Security #: _____

Make Housing Assistance Payments payable to: _____

(This name must match the name associated with the Tax ID # or Social Security # on IRS form W-9).

Payment Mailing Address: _____

Correspondence Address: _____

Address for Form 1099: _____

ASSIGNMENT OF THE CONTRACT OR INTEREST IN IT

(for current owner)

“The owner may not assign the HAP contract to a new owner without the prior written consent of the PHA. If the owner requests PHA consent to assign the HAP contract to a new owner, the owner shall supply any information as required by the PHA pertinent to the proposed assignment.”

-Excerpt from the Housing Assistance Payment Contract, Part B, Section 14. (3/2000)

I, _____, am transferring

my interest in the property located at _____

effective _____, 20_____. Please issue all Housing Assistance Payments checks after that date to (please print name of new owner):

Signature

Address

City State ZIP Code

Phone Number

Date

**HOUSING AUTHORITY OF CLACKAMAS COUNTY
AUTHORIZATION AGREEMENT FOR DIRECT DEPOSITS (ACH)**

Direct Deposit via Automated Clearing House ("ACH") is the deposit of funds into a vendor's account. After submission of this ACH Form, the first payment will be made by check. This ACH Form is for starting, changing, or cancelling of ACH payments with the Housing Authority of Clackamas County.

Action: START CHANGE CANCEL

Vendor Information

Vendor Name:	Phone Number:
Street/PO Box:	
City:	State: Zip:
Vendor Email:	
Social Security Number OR Tax Reporting Number:	

Financial Institution Information

Bank Name:	Name on Account:
Account #:	Routing #:
Checking <input type="checkbox"/>	Savings <input type="checkbox"/>

*****PLEASE ATTACH A VOIDED CHECK FROM THIS ACCOUNT*****

Authorization

I authorize Clackamas County Housing Authority (HACC) to deposit payment for rent provided to HACC clients directly into my account at the financial institution listed above, which may only be an institution in the United States. Deposit advice will be available through our online portal. If HACC erroneously deposits funds into said account, I authorize HACC and the financial institution to initiate the transaction(s) necessary to correct the effort. This authorization will remain in effect until HACC has received written notification from me of its termination and HACC has had reasonable opportunity to act upon it. I understand that HACC is relying on the accuracy of account information provided and HACC will not be held responsible if the information on this Form is inaccurate.

Print Name of Authorizing Official

Authorizer's Signature:

Date:

PLEASE SUBMIT THIS COMPLETED FORM TO: landlordservices@clackamas.us

The completed Form may also be mailed to:
Clackamas County Housing Authority, PO Box 1510, Oregon City, OR 97045

Questions, please call: 503-650-3150

INTERNAL USE ONLY

Vendor ID #

Date Processed:

Accounts Payable Initials:

June 4, 2012

Attention Landlords

Effective July 1, 2012, all HAP check payments will no longer be mailed.

If you did not sign up for Direct Deposit you will need to pick up checks in person at the Housing Authority. Payments will be available for pick up on the 2nd business day of each month between the hours of 8a.m.-6p.m. Monday through Thursday (*note: we are closed on Fridays*). Please be prepared to show photo identification when picking up your check.

Sign up for direct deposit now using the form on the back. Complete section 1 (A B, D and E) and attach a voided check or take it to your financial institution to complete Section 3. Please mail or hand deliver forms to:

***Housing Authority of Clackamas County
ATTN: Toni Karter
P.O. Box 1510
13930 S. Gain Street
Oregon City, OR 97045-0510***

Direct deposit paperwork received by June 21st will be processed for July HAP payments.

After signing up for direct deposit, HAP will be electronically deposited into your checking or savings account each month. No change to your present banking relationship is necessary for this service.

Each landlord will need to register at **www.hmsforweb.com/pal** and set up a user account. After successful registration, you can log in and check your payment history and print out individual payment information. You will need an e-mail address to complete the on-line process. You can opt to receive email notifications that a recent payment has been posted to the web, by clicking on "Email Settings" in the left HMS PAL menu. If you have any questions about how to use HMS PAL, please check the FAQ (Frequently asked Questions) link provided throughout the HMS PAL website. If you have technical problems with the HMS PAL site, you can email **support@hmsforweb.com** for assistance.

If you have questions about payment dates, amounts, etc, you should continue to contact the Housing Authority directly.

News for Landlords

New to Direct Deposit?

Follow these steps to access your electronic payment detail.

1. Go to: www.hmsforweb.com/pal

Erase the https:// and type in the above site address to go directly to the web page.

2. Your screen will look like this:

Welcome to HMS PAL™ (Payment Access for Landlords). If you are a Landlord who receives Housing Assistance Payments (HAP) from a Housing Authority, and you have been directed to this site by a Housing Authority who uses HAB INC software, then you can use this site to look up your payment history, turn on email notifications of payments, check your most recent payment, etc. If this is your first visit to HMS PAL™, you must set up an account by clicking "Register" below. If you have already set your account up, please log in below. Visit the FAQ link below for answers to common questions.

HMS PAL™ Login

Username:	<input type="text"/>
Password:	<input type="password"/>
<input type="submit" value="Submit"/>	
Register	
Forgot password?	
Frequently Asked Questions	
Confused? Email Support@HMSforWeb.com	


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Click on "[Register](#)"

3. Your screen now looks like this:

Register

Username:	<input type="text"/>	*
Password:	<input type="text"/>	*
Re-enter password:	<input type="text"/>	*
Email:	<input type="text"/>	*
Re-enter Email:	<input type="text"/>	*
Tax ID or SSN: (numbers only, no dashes or spaces)	<input type="text"/>	*



Type the code you see above:

[Back to login page](#)
[Frequently Asked Questions](#)

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Complete the boxes and then choose: "**Submit**"

HMS Pal will respond: **Registration Successful.**

Return to the login page and enter your username and password then click on [Submit]

You should see up to 18 months of electronic deposit history including the payment number, date and amount.

On this screen you may choose to see Payment Details or change your Email Settings to receive an email when an electronic payment is deposited.

Common problems include using the same email account of more than one tax id number (or Social Security number) and discrepancies with the tax id/SS#.

Contact: support@hmsforweb.com for additional help.

Please do not contact HACC for website assistance.