



CGI Federal Inc.
Tel. 615-206-2110
Email: tnpbca@housing.systems
www.TNPBCA.com

Owner/Agent Instructions for Completing W-9 Form

For the purpose of Edison Vendor Setup and Payment, a W-9 is required when:

1. Registering a new supplier
2. Changing the supplier's legal name (Line 1 on W-9) and/or business type
3. Changing Address ID 1 (1099 Address)

W-9 Form Requirements

- Must be on the current version of the W-9 form <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
 - Must be legible (should not have to guess letters/numbers entered on the form)
 - Must not be altered (data on the form is not modified)
 - Must be completed according to the IRS instructions
 - Must contain a complete address
 - Must be hand-signed (electronic signatures are not accepted)
 - Must be dated within one year of the submission date
 - Must be in a PDF format (no picture formats)
- **(Line 1) Business Name - Must be name on Supplier's income tax return.** Enter the name of the individual or entity who is entitled to receive the payment and shown on income tax return.
 - **(Line 2) DBA Business Name - Supplier's LLC and/or DBA name.** If applicable.
 - **(Line 3) Federal Tax Classification** – Required. Only one box should be checked.
 - If the "Other" box is checked, ensure the supplier has entered their tax-exempt status such as government entity. Example: 501c3. Do NOT simply write "nonprofit".
 - **(Lines 5 and 6) Address** - Required. Referred to as **Address ID 1** in Edison and is the address the Information Return (1099) will be mailed.
 - Only provide one delivery address on the W-9. Dual addresses will be rejected.
 - Must match USPS address standard. Check here <https://tools.usps.com/zip-code-lookup.htm?byaddress>
 - **Part I: Taxpayer Identification Number (TIN)** – Required and only one TIN number should be provided. The TIN provided must match the name provided on **Line 1**. If the Business Name and TIN combination does not match the IRS records, it will not be approved by Edison.
 - **Part II: Certification** Sign and date to complete this section.
 - Note: The W-9 must be hand-signed and dated within one year of the submission date. Electronic signatures will not be accepted.