Third-Party Vendor Housing Problem-Solving Program Information and Checklist

Sacramento Steps Forward (SSF) is a non-profit organization who manages the Housing Problem-Solving Program, which provides once-in-a lifetime financial assistance to eligible households who are either at-risk of or currently experiencing homelessness. We partner with non-profits who work directly with the household and a third-party vendor (i.e. landlord, moving company, etc.) to help end their housing crisis. Below are the steps SSF takes to process a funding request:

Request Process

1. Non-profit submits required documentation to SSF
2. SSF reviews and approves or denies within 7 business days
3. If approved, a check and email notification are sent to Vendor
4. SSF sends check to Vendor within 7 business days (from approval)

Approximately 2 weeks total – may be longer if documentation not available

Section 1: Checklist

Required Documentation for All Requests	Additional Required Documentation
☐ **W-9** • This form filled out entirely (Sections 2-4) **OR** • A current [IRS W-9 form](#) (dated 2018 or newer), **and** • Section 2 of this form ***Important:*** *The name and address on this form is where the check will be mailed.*	**For household facing evictions** ☐ **Letter or email confirming client can stay in home** ○ *Include the following:* *I agree to let [client name] stay in the property located at [address] if they pay [$ amount required] by [date] and continue to meet all contract obligations in the lease agreement.* ☐ **Proof of debt from property owner or landlord** (only if household is being evicted) ○ *Ledger documenting rental arrears owed if full amount is not included in the Eviction Notice.* **Services only (i.e car repairs, moving costs, etc.)** ☐ **Invoice or estimate** ○ *Must include the service or product to be purchased and include the client's name and address*

Frequently Asked Questions

What makes a request approvable?
The non-profit organization will check the household's eligibility and ensure required documentation is submitted before being reviewed by SSF. This includes the required documentation listed above.

Who can I contact if I have a question?
Please contact the non-profit who requested the assistance or if it's related to the approval or check, contact SSF at psaps@sacstepsforward.org.

Who can I contact for tenant-landlord dispute resolution?
Contact Project Sentinel at http://housing.org or (408) 720-9888 or toll free at (800) 339-6043.

SACRAMENTO STEPS FORWARD
Ending Homelessness. Starting Fresh.

Sacramento Steps Forward (SSF) W-9 Form

Section 2: Contact Information

Business Name (check payable to): ______________________________

Remittance Address (where the check will be sent):

Street: ______________________________

City: ______________________________

State: ______________ Zip Code: ______________

Name (as shown on tax return): ______________________________

Phone: ______________________________

Email Address: ______________________________

Section 3: W-9 Tax Information (Skip this section if an IRS W-9 will be provided)

1. Federal Taxpayer Identification Number (TIN)*

____

* Must match name on line 3 to avoid backup withholding

TIN Type: (Check One)

☐ Social Security Number (SSN)

☐ Employer Identification Number (EIN)

2. Federal Tax Classification (Check One)

☐ Individual or Sole Proprietorship or Single Member LLC ☐ Partnership ☐ Trust/Estate

☐ S Corporation ☐ C Corporation ☐ Other, please specify: ______________

3. Limited liability company, enter the tax classification (C=C Corporation, S=S Corporation, P=Partnership): ______________

4. Exemptions

Exempt Payee code (if any): ______________

Exemption from FATAC reporting code (if any): ______________

Section 4: 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 back up 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; and
4. The FACTA code(s) entered on this form (if any) indicating that I am exempt from FACTA reporting is correct.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding. An ink signature is required for this form to be processed. SSF's policy does not accept W-9 forms with electronic signatures. Please sign with an ink signature below.

Name (Print): ______________ Title: ______________

Signature of a U.S. person: ______________ Date: ______________

Section 5: Additional instructions

1. **Business Name** (who the check will be payable to). This field should only include exactly what needs to be on the face of the check. If the check will be written to a property management company, then include the property management company's name. If it there is a DBA, then include the DBA name. The tax-related information is included in items 3-10.
2. **Remittance Address** (where the check will be mailed). Include the address where the check will be mailed. If it needs to go to an apartment complex or care of a manger name then, include that information.
3. **Name** (As shown on income tax return). This is the name that will be used on tax documents. If it is same as item 1, then leave it blank. If it is different, add it. This name must match the TIN in item 7.
4. **Business Address** (If different from check mailing address). Include the company's official address for tax purposes. If it is the same as item 2 leave it blank.
5. **Phone.** Include the phone number Sacramento Steps Forward may contact if there are questions regarding the W-9 or payment.
6. **Email.** Add the email address Sacramento Steps Forward may contact if there are any questions and to notify when the check is sent.
7. **Federal Tax Identification Number (TIN).** This field must be filled out and it must be a nine-digit number corresponding to the EIN or SSN of the Name in item 3.
8. **Items 8-10.** Include additional entity-specific tax information.