

# Payee Details - Taxpayer Information



Before you can enroll in ePay, you must first complete the *Tax Information* form.

ACH regulations require that ISS knows that we are sending money to the correct person or organization. The way to do that is with a W-9, which is what our *Tax Information* form is.

Completing this form does not mean you will receive tax documents from ISS unless you are providing services that require a 1099. The IRS requires that ISS has proof of who you are so that we do not have to withhold money for taxes.

If you provide services that require a 1099, you must complete the *Tax Information* form in order to receive payment for those services.

From the My Expenses page, select *View Details* to begin enrollment.



Maxine Ellis



Your payee information has not been verified

[View Details](#)

Once the Payee Details window appears, click the blue *Complete Tax Information* button at the bottom right of the screen to begin filling out the *Tax Information* form.

## Payee Details

## Taxpayer Information



ME

Maxine Ellis



Payee  
Unverified



ePay Not  
Enrolled

[Tax Information](#)

[Enroll for ePay](#)

### Payee has not submitted tax information

To become eligible for payments, please enroll using the button below.

[Complete Tax Information](#)

ISS Staff are unable to assist you with the completion of your tax information form. Visit the IRS website at <https://www.irs.gov/forms-pubs/about-form-w-9> for more information and contact your tax or accounting professional if you have any questions.

Fill out the form and select *Continue* on the bottom right to advance to the next page.

### Tax Information

Please enter your **W-9** information.  
Go to [www.irs.gov/FormW9](https://www.irs.gov/FormW9) for instructions and the latest information.

**Profile**

**Name** \* (as shown on your income tax return)

Full legal name

**Business name/disregarded entity name, if different from above** *If you're filling this for an organization*

Check appropriate box for federal tax classification of the person whose name is entered on line 1.  
Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation

☐ S Corporation

☐ Partnership

☐ Trust/Estate

☐ Limited liability company. Enter the tax classification(C=C corp,S=S corp,P=Partnership)

☐ Other

**Exemptions** (codes apply only to certain entities, not individuals; see instructions here)

Exempt payee code (if any) Exemption from FACTA reporting code (if any)

**Address Line 1** \* What is your legal address with the IRS?

**Address Line 2** *Optional*

**City** \* Required **State** \* Required **Zip Code** \* Required


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Continue

Complete the second page of the form. Once finished, click *Submit* at the bottom right of the page.

## Tax Information (continued)

### Taxpayer Identification Number

Please select your TIN type 

☒ SSN - Social Security Number ☐ EIN - Employer Identification Number

#### SSN - Social Security Number *\* Required*

XXX XX XXXX

Enter your Social Security Number

XXX XX XXXX

Confirm Social Security Number

#### Certification *\* Please read and check the following boxes to confirm your enrollment*

Under penalties of perjury, I certify that (check):

- ☐ 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).
- ☐ 4. The FACTA code(s) entered on this form (if any) indicating that I am exempt from FACTA reporting is correct.

#### 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 for Part II, later.

#### Click here to sign *\* Required*

#### Date

MM/DD/YYYY

#### Sign up for Electronic Payments? *\* Choose one*

☐ Yes, sign me up for Electronic Payments ☐ Not now

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Submit

## Once you submit the *Tax Information* form

The IRS will validate the information you provided on the form. If your information matches the IRS' records, your Payee Tax status will change to verified on the Portal.

This usually happens very quickly, but it does depend upon the IRS' e-Services availability, how many times you have tried to submit your information, and how many requests have been made from ISS that day.

## Tips and More Info

- The *Profile* showing at the top of the form is automatically entered based on what ISS has in our system for you. That information is not sent to the IRS.



You will **not** be enrolled to receive electronic payments until both the *Tax Information* and *Electronic Payment Setup* forms are completed and they are both verified as valid.

Updated 07/02/24

*Disclaimer: All names displayed in the above screen shots are fictional characters. No identification with actual persons (living or dead) is intended or should be inferred.*

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