

STEP-BY-STEP INSTRUCTIONS

CONSUMER PACKET

1. Informed Consent for F/EA

- ◆ This is a 1 page form
 - Print consumer's name and consumer's CDC+ ID number.
 - Consumer signs and dates the form on the signature line.
 - Witness signs and dates form, if any of the following conditions apply:
 - consumer is a minor (under age 18)
 - consumer is age 18 or older and has a LEGAL GUARDIAN (appointed by the court)
 - consumer signs with an X or a mark
 - Make a copy for your records.
 - Put the original in the return envelope.

2. IRS Form 2678 - Employer Appointment of Agent

- ◆ This is a 2 page form; complete ONLY page 1
 - Leave item #1 blank (APD will complete this for you).
 - Print in capital letters the consumer's complete name in item #2
 - Leave item #3 blank.
 - Print in capital letters the consumer's mailing address in item #4.
 - Leave item #5 blank.
 - Consumer signs in box indicated by an X.
 - Print the consumer's name in box at lower right.
 - Enter phone number in box at lower right.
 - Enter the date signed.
 - Witness signs and dates form, if any of the following conditions apply:
 - consumer is a minor (under age 18)
 - consumer is age 18 or older and has a LEGAL GUARDIAN (appointed by the court)
 - consumer signs with an X or a mark
 - If document needs to be witnessed, make the witness line under the consumer's signature, as follows:
WITNESS: _____ Date: _____
 - Make a copy for your records.
 - Put the original in the return envelope.

3. IRS Form 8821 - Tax Information Authorization

- ◆ This is a 2 page form
 - In Section 1, print in capital letters the consumer's
 - Complete name
 - Mailing address
 - Social Security number
 - Daytime telephone number.
 - Sections 2, 3, and 4 have been completed for you.

- Leave Sections 5 – 6 blank.
- In Section 7, consumer signs on first signature line.
- Enter the date signed.
- Print the name of the consumer below his or her signature.
- In the 5 small boxes below the consumer's printed name, enter any 5 numbers (but not all zeros) so APD can file this form electronically.
- Witness signs and dates form, if any of the following conditions apply:
 - consumer is a minor (under age 18)
 - consumer is age 18 or older and has a LEGAL GUARDIAN (appointed by the court)
 - consumer signs with an X or a mark.
- If document needs to be witnessed, make the witness line under the consumer's signature, as follows:
 WITNESS: _____ Date: _____
- Page 2 has already been completed for you.
- Make a copy for your records.
- Put the original in the return envelope.

4. Direct Deposit Form

- ◆ This is a 1 page form
 - Please complete if Consumer or Representative wishes to receive by direct deposit the monthly cash check or reimbursement for personal funds used to pay vendors in accordance with program policies.
 - Follow the instruction on the form.
 - Make a copy for your records.
 - Put the original(s) in the return envelope.