



# **INDEPENDENT CONTRACTOR VENDOR MANUAL**

# CORNETTE PROPERTY MANAGEMENT

## TABLE OF CONTENTS

<b>Welcome New Vendor .....</b>	<b>4</b>
Peak Mission Statement.....	4
Peak General Policy.....	4
<b>Communication .....</b>	<b>5</b>
Telephone Calls during Office Hours .....	5
Email.....	5
Web Site .....	5
<b>General Office Information.....</b>	<b>5</b>
Address information .....	5
Telephone .....	5
Internet.....	5
Office Hours .....	5
<b>Vendor Requirements .....</b>	<b>6</b>
Required Vendor Forms .....	6
Other Vendor Forms.....	6
▪ Change of Information Form.....	6
▪ Vendor Incident Report.....	6
Licenses.....	6
▪ Contractor's license or Handyman license.....	6
Insurance .....	6
▪ Worker's Compensation .....	6
▪ General liability insurance.....	6
Social Security/Tax ID .....	7
▪ Social Security requirements .....	7
▪ Tax ID requirements .....	7
Change of Information: .....	7
▪ Company name .....	7
▪ Address .....	7
▪ Business telephone .....	7
▪ Cellular telephone.....	7
▪ Email address.....	7
▪ Insurance information .....	7
▪ Change of social security number to Tax ID# .....	7
Worker's Compensation .....	7
▪ Competent Worker's Compensation .....	7
▪ Contract labor .....	7
Vehicles .....	7
▪ Vendor supplied vehicles.....	7
▪ Vehicle expense .....	7
▪ Vehicle maintenance .....	7
Vendor Communication.....	8
▪ Cellular phone .....	8
▪ Business phone .....	8
▪ E-mail .....	8
▪ Text .....	8
▪ Emergency contact number for vendor.....	8

Vendor Vacation.....	8
▪ Vacation Notification.....	8
<b>Keys/Entry.....</b>	<b>8</b>
Vacant properties .....	8
Occupied Properties .....	9
<b>Work Order Procedures.....</b>	<b>9</b>
CPM Work Orders.....	9
Vendor Estimates.....	9
<b>Policies Regarding Vendors Working with Tenants .....</b>	<b>9</b>
Appointments with Tenants .....	9
▪ Making the Tenant Appointment.....	9
▪ The Appointment.....	10
▪ During the Appointment.....	10
Completing the Appointment .....	10
▪ Vendor repairs communication with tenants .....	10
▪ Additional work requested by tenants .....	10
▪ Tenant behavior.....	10
Inability to Complete Work.....	10
Completion of Work.....	10
<b>Billing Procedures .....</b>	<b>11</b>
Payment procedures .....	11
▪ Vendor invoices/billings .....	11
▪ Disbursement of vendor payments .....	11
Year End Procedures .....	11
▪ 1099 miscellaneous.....	11
<b>Conclusion .....</b>	<b>11</b>

## Welcome New Vendor

We have approved using your company to perform work on our property's managed by our company. It is our intent that this business relationship is a success for both Peak Residential, Inc. (Peak) and your company. Peak is an abbreviation used in lieu of the full company name Peak Residential, Inc. and is used throughout this manual.

Enclosed with this information, please find a copy of the signed Peak Vendor Agreement for your records. We recommend you keep this document with this information booklet.

Peak has prepared the *Peak Vendor Manual* to assist you in achieving success working with Peak Residential, Inc. You will find useful information such as office numbers, business address, email address, personnel names, and more. Please keep this document where you can access the information you need when you want it. Full understanding and communication from both your business and Peak increases the success of the vendor/company relationship.

Information contained in the *Peak Vendor Manual* is to provide you with the Peak requirements and expectations of vendors. It is also to prepare you for working with Peak tenants. Working with tenants can be a challenge and Peak wants to ensure your success.

Before starting work with Peak, we require that you complete several forms for our records. You will find them with this information. The forms will establish a vendor file and payment account in our accounting system. This ensures that Peak pays invoices correctly in accordance with our bookkeeping schedule.

If at any time you have questions on any of the material in the *Peak Vendor Manual*, please contact the Peak team as soon as possible, so that we can assist you.

Peak Residential, Inc is a property management company headquartered in Orangevale, California specializing in full-service property management.

### Peak Mission Statement

Our mission is to better the lives of our employees, property owner's, residents, and vendors by providing outstanding customer service and exceptional property management.

### Peak General Policy

Peak adheres to the following policies:

- ❖ Peak is an Equal Opportunity Employer.
- ❖ Peak supports the laws and guidelines of Fair Housing.
- ❖ Peak has a drug-free policy for all Peak personnel, vendors, and tenants.
- ❖ Peak follows the rules and regulations of the California Department of Real Estate
- ❖ Peak strictly forbids any sexual harassment of personnel, vendors, tenants, or applicants.
- ❖ Peak does not pay maintenance invoices from Peak operating funds.
- ❖ Owners are financially responsible for payment of maintenance to vendors, not Peak.
- ❖ Vendors receive payment through the Peak trust account or directly from the property owner.

## Communication

Communication works both ways. We need detailed communication from you, the vendor. It is important that you let us know when you have encountered tenant difficulties, if you have a problem with payments, if your social security number has changed to a Tax ID, etc.

Later in the *Peak Vendor Manual*, there is detailed information on work orders and payment. Peak wants to provide you with the information you need to avoid conflict or confusion.

### Telephone Calls during Office Hours

During office hours, listed below, there is always a live person to answer your call. If our maintenance team or property manager is unavailable you will be prompted to leave your name, phone number and reason for the call on our voicemail system. If your call is an Emergency let our team member know and they will contact the appropriate person.

### Email

Peak encourages all vendors to use email to contact us quickly. When using email, we request that you put the property address and work order number in the subject line. This helps us identify the importance of your message and avoids oversights or deletions.

### Website

The Peak website, [www.peakresidential.com](http://www.peakresidential.com) contains important information for vendors.

## General Office Information

Address Information	
Mailing Address	5655 Walnut Avenue
	Orangevale, CA 95662
Street Address	5655 Walnut Avenue
	Orangevale, CA 95662
Telephone	
Main Office	(916) 988-5357
Vacant Maintenance	(916) 597-2009
Occupied Maintenance	(916) 597-2010
Email	
Main Office	info@peakresidential.com
Vacant Maintenance	monica@peakresidential.com
Occupied Maintenance	maintenance@peakresidential.com
Office Hours	
Monday – Friday	8am -5pm, Closed 12pm -1pm
Saturday – Sunday	Closed

# Vendor Requirements

## Required Vendor Forms

Peak requires all vendors to complete the following forms prior to commencing work for Peak.

- 1) Vendor Application, with W-9, Business License and Proof of Insurance
- 2) Vendor Agreement

## Other Vendor Forms

Peak has also supplied the following example forms to be used when necessary in the future:

- 1) Change of Information Form

## Licenses

Contractor's license or Handyman license

- 1) Peak requires all vendors to have a contractor's license or handyman's license if California requires licensing to complete work. If your work does require a license, please attach a copy to the Vendor Information Form.
- 2) Examples of licensed contractors are plumbers, electricians, general contractors, etc.
- 3) Examples of licensed handyman contractors are handyman, cleaners, etc.

## Confidentiality

Vendors are to keep all information on Peak Residential, Inc., property owners, tenants, and any other property information confidential.

- 1) Vendors are not to post ANY information or pictures on any social media, such as Facebook, Twitter, YouTube, or any other media at any time.

## Insurance

Worker's Compensation

- 1) Peak requires all vendors to carry current Worker's Compensation (this includes single person companies showing owner exemption.)
- 2) Peak requires the vendor notify their Worker's Compensation Company and request them to furnish CPM with an original endorsement of the policy.
- 3) Peak requires an original endorsement of all yearly renewals going forward.
- 4) Peak requires notification if the insurance company changes.
- 5) General liability insurance
  - a) Peak requires that vendors carry a minimum \$1,000,000.00 of current general liability insurance.
  - b) Peak requires an original endorsement of the current liability insurance policy.
  - c) Peak requires an original endorsement of all yearly renewals going forward.
  - d) Peak requires notification if the insurance company changes.

**CPM is audited annually by our insurance carrier to confirm all vendors have the required coverages.**

## Social Security/Tax ID

Peak requires that all vendors have a social security number or Tax ID, no exceptions. It is the responsibility of the vendor to supply Peak with accurate information.

- 1) Social Security requirements:  
Personal names are required with social security numbers on 1099s
- 2) Tax ID requirements  
Company names and personal names are required with Tax ID numbers for 1099s

## Change of Information:

It is the responsibility of the vendor to notify Peak of any changes to the following – the Change of Information Form can be found on our Website under the Preferred Vendor Tab.

- ❖ Company name
- ❖ Address
- ❖ Business telephone
- ❖ Cellular telephone
- ❖ Email address
- ❖ Insurance information
- ❖ Change of social security number to Tax ID#

## Workmanship

- 1) Competent workmanship
  - a) Peak requires the vendor to supply competent work.
  - b) The vendor guarantees they will redo the work to the reasonable satisfaction of Peak, if necessary.
- 2) Contract labor
  - a) The work is on a “contract labor” basis.
  - b) Peak does not treat any vendor as an employee.
  - c) The vendor is responsible for reporting their income to government agencies (IRS & Franchise Tax Board.)
  - d) Peak issues 1099s for work exceeding \$600 as required by the Internal Revenue Service.

## Vehicles

The Peak policy on vendor vehicles is as follows:

- 1) Vendor supplied vehicles
- 2) All vendors must supply their own vehicles.
- 3) Vendors cannot use any Peak owned company vehicles.
- 4) Vendors must carry appropriate insurance for their vehicles.
- 5) Peak does not reimburse vendors for any vehicle expense.
- 6) Vendors are responsible for maintaining their own vehicles.
- 7) Continual mechanical problems with vehicles causing cancellation of tenant appointments can be the cause for removal from the Peak vendor service list.
- 8) Unless it is necessary to park in the driveway to perform work, vendors are to park in front of the property.
- 9) If a vendor's vehicle causes damage, such as an oil leak, it is the vendor's responsibility to repair the damage immediately.

## Vendor Communication

Peak requires all vendors to communicate by using the following:

- ❖ Cellular phone
- ❖ Business phone
- ❖ E-mail
- ❖ Text

Emergency contact number for vendor

- 1) All vendors are to supply an emergency contact number.

## Vendor Vacation Notification

Peak requests that vendors notify Peak of vacations of a week or more.

# Keys/Entry

## Vacant properties

Peak uses a lockbox system on most vacant properties and vendors are to be responsible to the system:

- 1) Use the key in lockbox when requested.
- 2) When using the lockbox, do not leave the key in the door to prevent theft.
- 3) When finished with the lockbox, replace the key in the lockbox then close and scramble the code, and confirm that the lockbox is locked and secure.
- 4) If a vendor accidentally takes a key, they are required to return it to the lockbox immediately.
- 5) Report any missing or malfunctioning lockboxes to Peak.
- 6) Do not turn AC down or Heat up and then leave on when work is complete, and you are gone.

## Occupied Properties

Peak does not issue keys to vendors when tenants occupy properties unless there are extenuating circumstances, such as an emergency/disaster.

- 1) If this happens, a Peak Property Manager must authorize the vendor to pick up a key from the Peak office.
- 2) If the vendor has obtained a key to an occupied property, it is the responsibility of the vendor to return all keys to Peak when completing work and NOT to the tenant.

# Work Order Procedures

## Peak Work Orders

- 1) Peak issues routine work orders by hand delivery, email or texting them to the vendor.
- 2) Additionally, Peak can issue a work order by telephone when warranted by the maintenance situation.
- 3) If Peak has issued a work order by telephone, the Peak office will also email a work order to the vendor to complete his billing.
- 4) Peak has a limit for work requests with the owner and cannot exceed this amount without owner authorization.
- 5) Vendors are to notify Peak immediately if the problem exceeds the authorized amount on the work order.
- 6) The vendor is responsible for paying for all parts and materials required for the work order, unless there are special arrangements authorized by Peak.



## **Vendor Estimates**

Some work requires estimates by the vendor and then approval by the owner. The Peak procedures for estimates are to be received within 5 business days:

- 1) Peak sends an estimate request on the standard work order form, labeled Estimate.
- 2) Vendors are to notify Peak if they are aware, they will be unable to offer an estimate and complete the work in a timely manner.
- 3) When Peak receives the approval or denial from the owner, Peak will notify the vendor by telephone or email.
- 4) If the owner approves the estimate, Peak will contact the vendor and send an updated work order.
- 5) If the owner does not approve the estimate, Peak will notify the vendor.

## **Policies Regarding Vendors Working with Tenants**

### **Appointments with Tenants**

- 1) Making the Tenant Appointment
- 2) Peak informs the tenant when taking a work order that a vendor will contact them directly.
- 3) Peak requires vendors to set specific appointments with tenants after receiving a work order request. Vendor has 2 business days to contact the tenant.
- 4) If vendors have difficulty reaching the tenant, they are to notify the Peak office.

### **The Appointment**

- 1) Vendors are to appear clean and dressed appropriately for maintenance work.
- 2) Vendors are encouraged, but not required to wear clothing that identifies their company.
- 3) Vendors are to carry identification to show the tenant if necessary.
- 4) Vendors are to arrive at the appointed time or within 15 minutes.
- 5) If vendors experience a delay in arriving on time, they are to contact the tenant. If they cannot reach the tenant, they are to contact the Peak office
- 6) Vendors are to knock on the door or ring the doorbell.
- 7) Vendors are not to enter properties unless a resident is there and given permission to enter.
- 8) Vendors are not to enter a property unless there is a responsible party present. A responsible party cannot be under the age of 18 years.
- 9) If the tenant fails to meet the appointment, vendors are to notify the Peak office.
- 10) Peak will contact the tenant to find out the problem for the cancelled appointment and then advise the vendor.

### **During the Appointment**

- 1) Vendors are to avoid moving tenant possessions unless necessary to perform maintenance.
- 2) Vendors are to avoid moving tenant possessions unless necessary to perform maintenance.
- 3) Vendors are to request the tenant to move their possessions whenever possible.
- 4) Vendors are always to be courteous and professional.
- 5) Vendors are to clean up their work in the property.
- 6) Vendors are not to use the tenant's garbage can to dispose of items, it must be taken with the vendor when leaving

### **Completing the Appointment**

- 1) Vendor repairs communication with tenants
  - a) Vendors are not to make comments on repairs, lack of repairs, or the condition of the property to tenants.
  - b) Vendors are not to discuss in detail the repairs and only give out appropriate information
  - c) Vendors are not to make promises to tenants unless it is within the work order request.
- 2) Additional work requested by tenants
  - a) Vendors are to call Peak from the property if necessary, to clarify the work or request permission to do additional maintenance they see is required relating to the work order.
  - b) Peak requests vendors use their cellular phones when calling from a tenant residence.
  - c) However, if it is necessary to use the tenant's telephone, the vendor is to request permission from the tenant.
  - d) If tenants request other work, the vendor is to instruct them to call Peak and place a work order.
- 3) Tenant behavior
  - a) If tenants pose a threat, vendors are to immediately leave the property and notify Peak as soon as possible with an incident report.

### **Inability to Complete Work**

- 1) The vendor is to notify Peak immediately if there is a delay or obstruction in the completion of the work order.
- 2) Peak will then decide on the completion of the work request.

### **Completion of Work**

- 1) Vendors are to notify Peak that work is complete so the work order can be verified and closed.
- 2) Vendor is to submit the invoice within 15 days of completion of the maintenance repair.

## Billing Procedures

### Payment procedures

- 1) Vendor invoices/billings
  - a) Vendors are to turn in invoices within seven (7) calendar days of finishing the job
  - b) If invoices are not received within forty-five (45) calendar days of finishing the job, the invoices will not be paid.
  - c) Upon receiving the vendor invoice/billing, Peak will forward it to the appropriate Peak Team member to begin the close out of the work order.
  - d) When closed out and completed, the Team member sends the invoice to the Accounting Division.
  - e) The bookkeeper will issue the funds to the vendor during the normal 30-day bookkeeping cycle.
  - f) If there is a question on the bill, the Peak Management Team will contact the vendor to discuss any discrepancy.
- 2) Disbursement of vendor payments
  - a) Peak disburses vendor payments every 30 days.
  - b) It is the Peak policy to pay Vendors promptly in the 30-day cycle.
  - c) Peak disburses payments bi-weekly.
  - d) Peak does not pay vendors in cash, and Peak does not keep cash in the office.
  - e) Peak cannot make payments if funds are unavailable in the owner's account within the Peak Trust Account.
  - f) If there is a delay in owner funds, Peak will notify the Vendor and make necessary contact with the owner for the funds.
  - g) If the vendor does not receive funds within 30 days of submitting invoices to the office, the vendor must contact the office within 15 days.
  - h) Peak will keep the vendor apprised of the status of incoming funds.
  - i) Peak will notify the vendor if the owner is disbursing the payment directly to the vendor.
  - j) Peak mails payments to vendors unless the vendor contacts Peak to pick up funds.
  - k) Peak complies with any court ordered deductions for vendors.
  - l) Peak will notify the vendor if Peak receives a court order.

### Year End Procedures

#### 1099 miscellaneous

- 1) Peak issues the Internal Revenue Service 1099-miscellaneous to all vendors who exceed work above \$600.00 by January 31 of the following year.
- 2) It is the vendor's responsibility to report any discrepancies to Peak as soon as possible so that Peak can correct the 1099.
- 3) Peak requests that vendors review their 1099s immediately and report any discrepancies by February 20 before CPM files 1099s with the Internal Revenue Service.

## Conclusion

We hope that you have found the *Peak Independent Contractor Vendor Manual* useful. Please let us know if there are questions or concerns on any of the enclosed information. The intent of the manual is to clarify the working relationship between vendor and Cornette Property Management and prevent future misconceptions or problems. Please provide all required vendor forms to avoid delays in payments.

# Independent Contractor Vendor Guideline for Photos

## Work Order Photos Requirements

Photos will be required on any work order/repair requiring a permit, replacing an old item with new/used item and/or charging a tenant due to negligence. For example, installation of fences, appliances, windows, hot water heaters, etc.

**Photos must be attached with invoice submitted to get paid.** No photo will cause invoice to be rejected until submitted complete with a before and after photo per line item on work order (matching photo angle, height, distance.) If work order has 3 items to address, you must have 6 photos total with your invoice, or it will not be accepted and processed until Peak Residential, Inc. has the photos.

## Examples: Before Photo

Clear to show area that will be repaired, replaced, cleaned, installed, etc. Must be able to see from the angle the photo is taken the exact issue and location to address. Take multiple photos if necessary.



Sticky strips in shower



Window removed

## Examples: After Photo

Take photo of same location as the “before” photo, use the exact same angle, height, and distance for a better side by side comparison. Peak Residential, Inc. will share with owners that work has been completed. You must be able to visually see a difference and that work was completed per the work order instructions.



Strips removed



Window installed