

Invitation for Bid for Tax Year 2015, 2016, and 2017

Tax Form 1095-C Production

Addendum 1 – For Tax Form 1095-B

Posted on: Thursday, November 19, 2015

Addendum 1 Overview

The Department of Finance and Administration (DFA) is issuing this Addendum #1 to Invitation for Bid (IFB) # 3160000738 to add requirements for the production printing and mailing of the State of Mississippi 1095-B tax forms for tax years 2015, 2016, and 2017.

THE REQUIREMENTS FOR TAX FORM 1095-C, AS OUTLINED IN THE IFB SPECIFICATION DOCUMENT, HAVE NOT CHANGED.

The winning vendor will be responsible for printing both tax forms 1095-C and 1095-B.

Original, Updated, and New Proposal Requirements

- (1) The documents (and sections) listed below will not be updated to reflect the addition of tax form 1095-B; however, the vendor **MUST** acknowledge that they will meet the requirements listed below for **BOTH** tax forms 1095-C and 1095-B.

Document Name	Page Number	Section Heading
Attachment – Item Specification Document	1	Specifications
	2	Vendor's Proposal (1 st page)
	6	Recycled Materials
	7	Production Timeline
	8	IFB Vendor Questions
	8	Proposal Submission Deadline
Attachment – (Finalized 2015) DFA Personal Service Contract Template 5K – 75K_0	Entire Document	

- (2) The documents (and sections) listed below have not changed with the addition of tax form 1095-C. If potential changes are needed for these documents (sections) they will be listed in the Questions and Answers document and/or additional addendums.

Document Name	Page Number	Section Heading
Attachment – Item Specification Document	3	Vendor's Proposal (2 nd page)
	4	Vendor's Proposal (3 rd page)
	5	Vendor's Proposal (4 th page)
Attachment – Example Form 1095-C Form Address Flap	Entire Document	
Attachment – Form 1094-C Mapping	Entire Document	
Attachment – Form 1094-C Scheme	Entire Document	
Attachment – Form 1095-C Mapping	Entire Document	
Attachment – Form 1095-C Scheme	Entire Document	

Invitation for Bid for Tax Year 2015, 2016, and 2017
Tax Form 1095-C Production
Addendum 1 – For Tax Form 1095-B

- (3) The documents listed below have changed with the addition of tax form 1095-C. The vendor should use the new documents.

Previous Document Name	New Document Name
Attachment – IFB Checklist	Attachment – IFB Checklist – UPDATED
Attachment – Item Specification List	Attachment – Item Specification List – UPDATED
Attachment – Confidentiality Agreement	Attachment – Confidentiality Agreement - UPDATED

- (4) The new requirements for Tax Form 1095-B are listed in this document under the “Tax Form 1095-B Printing Requirements” section. Vendor must respond to all requirements in this section.

A copy of all the documents listed above can be found by searching IFB #3160000738 at www.dfa.ms.gov, under the Bid and RFP Notices Section or you may submit a written request to:

David Pitcock
210 East Capitol Street, Suite 1400
Jackson, MS 39201

or

via email at david.pitcock@dfa.ms.gov

Invitation for Bid for Tax Year 2015, 2016, and 2017
Tax Form 1095-C Production
Addendum 1 – For Tax Form 1095-B

Tax Form 1095-B Printing Requirements

Vendor must acknowledge the requirements listed below for the printing of tax form 1095-B:

- Vendor must acknowledge they will print the 1095-B information using the file layouts and mapping provided by DFA.
- Vendor must acknowledge they can accept XML and text files.
- Vendor must acknowledge that because of Federal Regulations each file size can only be 100 mega-bytes; therefore, the vendor will receive multiple files for processing.
 - The State is not aware of the number of files at this time.
- Vendor must acknowledge that they understand depending on the number of covered individuals that need to be reported for an employee; there may not be enough lines on Part IV of page 1. If additional lines are needed, page 3 of the 1095-B form must be used.
 - The State is not aware of the number of employees that will need page 3 at this time.
- Vendor must acknowledge that if page 3 is used it must be included in the sealed mailing envelope with page 1 and 2 for that employee and only the address will be visible when the envelope is sealed.
- Vendor must acknowledge that if page 3 is not needed a blank page 3 will NOT be included in that employees sealed mailing envelope.
- Vendor must acknowledge the following paper size guidelines:
 - All forms must be printed on 8 ½ X 14 paper.
 - The bottom 8 ½ X 11 includes of the paper should be used to print the actual front and back side of the 1095-B forms. These areas must adhere to the established mapping.
 - The top three inches of the 8 ½ X 14 printing should be used for the return and mail address flap.
 - There is no specific mapping for this section.
 - As stated in the Item Specification List, the information must appear through a windowed envelope.
 - The vendor may adjust the font size to allow it to fit through the window; however, the vendor must receive final approval from DFA before the production files are processed.
 - **NO** information (other than the address information) can be visible when the envelope is sealed.
 - The following rules must be used for all 1095-B forms return and mailing address information:

Return Address

Should be the information EXACTLY as it appears in box 10, 12, 13, 14, and 15 of the 1095-B.

The information should be in this format:

Employer name

Street address (including room or suite no.)

City or town, State or providence, Country and ZIP or foreign postal code

Invitation for Bid for Tax Year 2015, 2016, and 2017
Tax Form 1095-C Production
Addendum 1 – For Tax Form 1095-B

Mailing Address
Should be the information EXACTLY as it appears in box 1, 4, 5, 6, and 7 of the 1095-B.
The information should be in this format:
Name of responsible individual
Street address (including room or suite no.)
City or town, State or providence, Country and ZIP or foreign postal code

- Vendor must acknowledge that they will fold all 1095-B forms to ensure that **NO** information (other than the address information) is visible when the envelope is sealed.
- Vendor must acknowledge that they will ensure the 1095-B forms are post marked by the federal statute guidelines and the timelines established by DFA. DFA acknowledges they will provide the final production files to the awarded vendor on or before the established deadlines in the “Production Timeline” of the Item Specification Document.
- Vendor must acknowledge that if all 1095-B forms are not post marked by the federal statute guidelines that they will be required to pay the penalties established by the federal statute and will not invoice DFA for such penalties. DFA acknowledges they will provide the final production files to the awarded vendor on or before the established deadlines in the “Production Timeline” of the Item Specification Document.
- Vendor must acknowledge all employees and subcontractors involved in any aspect of the project will be required to execute the attached signed confidentiality form(s) and that the form(s) will be part of the contract with the winning vendor. The confidentiality form guarantees that all the data and information will be safeguarded and will not be shared with any entity or person without the written consent of DFA.
- Vendor must supply three (3) verifiable references for printing tax forms. The references must include the company name, contact person name, contact person phone number and email address.
- If awarded the contract, the vendors must acknowledge they will be available for regularly scheduled status meetings via conference calls.
- Vendors must submit a sample printing (front and back) of:
 - 1095-B forms using the attached format.

DFA will **ONLY** accept samples from the test file(s) sent to the vendor by DFA.

To request test file(s), using the IRS specified layout for electronic submission and/or modified version, please send an email to mash@dfa.ms.gov. The subject of the email must be “1095-C Tax Form IFB.”

All sample, test, and production printing must be of the highest quality with accurate registration, uniform ink coverage and no bleed through.

DFA reserves the right to reject any bid that does not submit a sample printing that meets the printing specifications.

Invitation for Bid for Tax Year 2015, 2016, and 2017

Tax Form 1095-C Production

Addendum 1 – For Tax Form 1095-B

Failure to meet the bid specifications may be considered breach of contract with the State and may be cause for removal from State of Mississippi bidders list for a period of 24 months.

To aid in the printing, DFA will also provide a copy of the IRS regulations upon request.

- DFA reserves the right to reject any or all bids.

Appendix A: Signature Page & Cost Proposal

Vendor must complete the Appendix A: Signature Page & Cost Proposal document and submit with their proposal.