

Invitation for Bid for Tax Year 2015, 2016, and 2017 W-2 and 1099-MISC Production Vendor Questions and Answers

Posted on: Tuesday, October 20, 2015

Introduction

From the Invitation for Bid (IFB) document:

All questions regarding this IFB must be submitted in writing via email, to DFA by 5:00 PM Central Standard Time (CST) Wednesday, October 14, 2015 to mash@dfa.ms.gov. No questions will be accepted after this deadline. The subject of the email must be "W2 & 1099 Printing."

A summary of all questions and answers and any revision to the IFB will be posted at www.dfa.ms.gov as an addendum located under the Bid and RFP Notice Section, #3160000664 by 5:00 PM CST Tuesday October 20, 2015. Specific references to a vendor will be removed from the questions and answers.

It is the vendor's responsibility to review the answers to the questions. DFA will NOT notify the vendor's when the answers are published.

Listed below are the answers to the questions received. The questions are listed exactly as received with the exception to remove any reference to a vendor's name or a vendor's specific processing.

As the deadline has passed, DFA will no longer be accepting any questions regarding this IFB.

Please review the IFB specification document for instructions and deadlines for proposal submission.

Questions and Answers

Number	Question	Answer
1	I was curious, this is under the code 96636. I was just curious why we did not get an email notification that this was emailed out. Or is the MAGIC system not able to send email notifications out when bids are created. Just curious. Thanks!	It depends on how the information is setup when the vendor is created in MAGIC.
2	Our standalone W2/1099M service only works with our proprietary file layouts. The RFP indicates we must be willing to accept the customer's file layout. Is there a willingness to configure the file to our layout?	No, the vendor must use the file layouts and mapping created by DFA.

**Invitation for Bid for Tax Year 2015, 2016, and 2017
W-2 and 1099-MISC Production
Vendor Questions and Answers**

3	Will the decision be made by mid-November?	It is the State's goal to have the evaluation and award completed by the end of November.
4	How were the W2s/1099Ms produced last year? In-house or outsourced?	The production file(s) were created by DFA. The printing and mailing was outsourced.
5	We offer several other stand-alone services that complement the w2/1099M services. Is there an opportunity to showcase the other services to insure understanding of how they work together to achieve the most efficient and compliant processes?	No, the State is only looking for services that are outlined in the Invitation for Bid documents.
6	Can I receive a sample of the forms that I would be able to submit with this bid?	Vendors interested in receiving a copy of the IFB#3160000664 may access the IFB and sample forms 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 email at david.pitcock@dfa.ms.gov .
7	Does the confidentiality Agreement need to be submitted prior to submitting the bid package or can this be submitted with the entire package?	The confidentiality form can be submitted with the bid. The awarded vendor will be required to have all employees that are involved in the process complete a confidentiality form.
8	What is the State's current E-invoicing Vehicle?	Paymode® is the State's e-Invoicing vehicle.
9	Would it be possible to get a ZIP Code distribution list to be able to get a more accurate estimate for providing a price on postage for this BID?	At this time, the State will not provide a list of ZIP codes. As stated in the bid documents, DFA will pay first class postage. The vendor cannot alter any of the City, Zip code, and Zip + 4 information as well as no alteration of other components of the mailing address before mailing.

**Invitation for Bid for Tax Year 2015, 2016, and 2017
W-2 and 1099-MISC Production
Vendor Questions and Answers**

10	The specification document states that the paper size must be 8 ½ X 14, but the test file provided is for 8 ½ X 11.	See Addendum 1 for additional information regarding printing. A copy of the addendum can be found under IFB #3160000664 at www.dfa.ms.gov or you may submit a written request to David Pitcock, 210 East Capitol Street, Suite 1400, Jackson, MS 39201 or email at david.pitcock@dfa.ms.gov .
11	Does DFA have any preference on geographic proximity or can we produce in any of our plants nationally to find the best solution?	DFA does not have a preference on where the W-2 and 1099-MISC are printed. However, the awarded vendor must adhere to all specifications and deadlines that are outlined in the Invitation for Bid (IFB).
12	How many files will be sent for both the W-2 and 1099 Misc applications? One combined file, two separate files, or more? Please specify if more.	There will be two production files: (1) One for W-2 information (2) One for 1099-MISC information
13	Can vendor assume all prod. files needed for each application will be sent at the same time?	There will only be 1 production file for each separate application. The production file for W-2 may or may not be sent on the same day as the production file for 1099-MISC.
14	What type of file format will DFA provide for these applications?	The files will be sent as text (.txt) files.
15	Is there any way to guarantee actual Production Files to vendor before Jan 25th?	Pending a contract is executed and any unforeseen circumstance (natural disaster, etc.), DFA will provide the production files by the dates listed in the IFB document.
16	Can vendor use our standard W2/1099 programming implementation/templates or does vendor have specific layouts/templates that would need to be developed custom for the State of MS?	The vendor MUST use the file layouts, mapping, and files provided by DFA. Provided the vendor adheres to the DFA layouts/mapping and guidelines outlined in the IFB; DFA does not have a preference on the vendor's internal processing methods.

**Invitation for Bid for Tax Year 2015, 2016, and 2017
W-2 and 1099-MISC Production
Vendor Questions and Answers**

17	<p>How soon could DFA provide sample data files, templates and any required business rules for our Compliance Programming/Development teams?</p>	<p>Pending a successfully contact is executed DFA will be immediately available to start discussions regarding the required work.</p> <p>Pending a successful contract and no unforeseen circumstances the first test files will be available by the date(s) listed in the Production Timeline section of the IFB document.</p>
18	<p>Generally tax forms are digitally Imaged Duplex Black only, can you confirm NO color needed?</p> <p>If color is required, can we pre-print forms (color is static)? And how many colors? Or would we need to digitally Color Image to meet your requirements?</p>	<p>The W-2 and 1099-MISC forms can be printed in only black.</p> <p>Color is not required.</p>
19	<p>Is there a preference by DFA to insert into an envelope or a pressure sealed document?</p>	<p>The W-2 and 1099-MISC forms must be mailed within windowed envelopes where only the return and mail to address is visible.</p>
20	<p>For W2 document, any preferred weight stock (minus PCW requirements)?</p> <p>Assume we need to use our standard W-2 stock set up, which comes pre-printed with standard perforations to create stnd 4-up template?</p>	<p>There is not a preferred weight stock or stock.</p> <p>The printing must meet the requirements outlined in the IFB document.</p> <p>The printing must meet the federal requirements as outlined here.</p>
21	<p>For 1099 documents, any preferred weight stock (minus PCW requirements)?</p> <p>Assume standard 1099 Misc document set-up w/perfs?</p>	<p>There is not a preferred weight stock or stock.</p> <p>The printing must meet the requirements outlined in the IFB document.</p> <p>The printing must meet the federal requirements as outlined here.</p>
22	<p>If any inserting/envelope options are preferred by DFA, please provide OME specs requested...</p>	<p>There is not a preferred preference by DFA.</p> <p>As stated in the IFB document, NO</p>

**Invitation for Bid for Tax Year 2015, 2016, and 2017
W-2 and 1099-MISC Production
Vendor Questions and Answers**

	<ul style="list-style-type: none"> - 24# ww? - Inks? (Can we assume 2/1 (PMS + Black / Stnd Inside Security Tint))? - Single or Double Window 	<p>information (other than the address information) can be visible when the envelope is sealed.</p> <p>The printing must meet the federal requirements as outlined in at the following links: 1099 Publication and W2 Publication.</p>
23	Can we assume indicia will be on either envelope or pressure seal option?	<p>As stated on the Item Specification List, the vendor is responsible for paper stock, envelopes, and postage.</p> <p>It is the vendor's responsibility to work with the postal service to mail the W-2 and 1099-MISC forms by the established deadline using first class postage.</p> <p>Only first class postage is allowed. The vendor cannot mail the forms using bulk rates.</p>
24	Can vendor provide Commingle 1st Class solution/postage rates for additional savings options?	<p>As stated on the Item Specification List, the vendor is responsible for paper stock, envelopes, and postage.</p> <p>It is the vendor's responsibility to work with the postal service to mail the W-2 and 1099-MISC forms by the established deadline using first class postage.</p> <p>Only first class postage is allowed. The vendor cannot mail the forms using bulk rates.</p>