



State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
CPR10006

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
KRISTA FERRELL 304-558-2596

RFQ COPY

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

CONSOLIDATED PUBLIC RETIREMENT
BOARD
BUILDING 5, ROOM 1000
1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS		
07/21/2009						
BID OPENING DATE: 08/11/2009		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		966-50		
PRINTING: BOOKS, CATALOGS, MAGAZINES, PAMPHLETS, ETC						
REQUEST FOR QUOTATION (RFQ) OPEN END CONTRACT						
THE WEST VIRGINIA STATE PURCHASING DIVISION FOR THE AGENCY, THE WEST VIRGINIA CONSOLIDATED PUBLIC RETIREMENT BOARD, IS SOLICITING BIDS TO PROVIDE THE AGENCY WITH PRINTING AND MAILING OF 1099 FORMS PER THE ATTACHED SPECIFICATIONS.						
TECHNICAL QUESTIONS CONCERNING THIS SOLICITATION MUST BE SUBMITTED IN WRITING TO KRISTA FERRELL IN THE WEST VIRGINIA STATE PURCHASING DIVISION AT 304-558-4115 OR VIA EMAIL AT KRISTA.S.FERRELL@WV.GOV. DEADLINE FOR ALL TECHNICAL QUESTIONS IS JULY 30, 2009 BY THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ANSWERED BY ADDENDUM AFTER THE DEADLINE HAS LAPSED.						
QUESTIONS CONCERNING THE PROCESS BY WHICH A VENDOR MAY SUBMIT A BID TO THE STATE OF WEST VIRGINIA ARE NOT CONSIDERED TO BE TECHNICAL QUESTIONS AND MAY BE AT ANY TIME PRIOR TO THE BID OPENING AND IN ANY FORMAT.						
EXHIBIT 10						
REQUISITION NO.:						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
		304-733-3687		8/18/2009		
TITLE		FEIN		ADDRESS CHANGES TO BE NOTED ABOVE		
Sr. Account Executive		59-0759379				

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

2009 AUG 19 AM 11:11
WV PURCHASING
DIVISION

GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in case of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130

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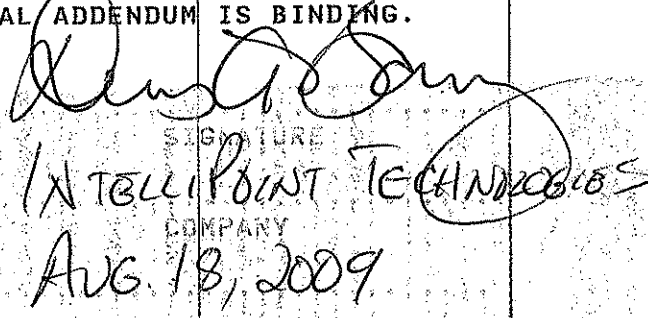
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25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS		
07/21/2009						
BID OPENING DATE: 08/11/2009		BID OPENING TIME 01:30PM				
LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM ACKNOWLEDGEMENT I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC. ADDENDUM NO. S: NO. 1 NO. 2 NO. 3 NO. 4 NO. 5 I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS. VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.  INTELLIPPOINT TECHNOLOGIES AUG 18, 2009						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
TITLE		FAX		ADDRESS CHANGES TO BE NOTED ABOVE		

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ADDENDUM NO.'S:						
NO. 1 ✓						
NO. 2 ✓						
NO. 3						
NO. 4						
NO. 5						
I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS.						
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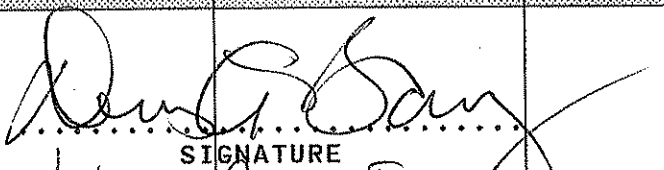
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<div style="text-align: center;"> SIGNATURE INTELLIPONT TECHNOLOGIES COMPANY AUG. 18, 2009 DATE</div> <p>REV. 11/96</p> <p>EXHIBIT 3</p> <p>LIFE OF CONTRACT: THIS CONTRACT BECOMES EFFECTIVE ON AWARD AND EXTENDS FOR A PERIOD OF ONE (1) YEAR OR UNTIL SUCH "REASONABLE TIME" THEREAFTER AS IS NECESSARY TO OBTAIN A NEW CONTRACT OR RENEW THE ORIGINAL CONTRACT. THE "REASONABLE TIME" PERIOD SHALL NOT EXCEED TWELVE (12) MONTHS. DURING THIS "REASONABLE TIME" THE VENDOR MAY TERMINATE THIS CONTRACT FOR ANY REASON UPON GIVING THE DIRECTOR OF PURCHASING 30 DAYS WRITTEN NOTICE.</p> <p>UNLESS SPECIFIC PROVISIONS ARE STIPULATED ELSEWHERE IN THIS CONTRACT DOCUMENT, THE TERMS, CONDITIONS AND PRICING SET HEREIN ARE FIRM FOR THE LIFE OF THE CONTRACT.</p> <p>RENEWAL: THIS CONTRACT MAY BE RENEWED UPON THE MUTUAL WRITTEN CONSENT OF THE SPENDING UNIT AND VENDOR. A REQUEST FOR RENEWAL MUST BE SUBMITTED TO THE DIRECTOR OF PURCHASING THIRTY (30) DAYS PRIOR TO THE EXPIRATION DATE. SUCH RENEWAL SHALL BE IN ACCORDANCE WITH THE TERMS AND CONDITIONS OF THE</p> <p>SEE REVERSE SIDE FOR TERMS AND CONDITIONS</p> <p>SIGNATURE _____ TELEPHONE _____ DATE _____</p> <p>TITLE _____ FEIN _____ ADDRESS CHANGES TO BE NOTED ABOVE</p>						

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<p>ORIGINAL CONTRACT AND SHALL BE LIMITED TO TWO (2) ONE (1) YEAR PERIODS.</p> <p>CANCELLATION: THE DIRECTOR OF PURCHASING RESERVES THE RIGHT TO CANCEL THIS CONTRACT IMMEDIATELY UPON WRITTEN NOTICE TO THE VENDOR IF THE COMMODITIES AND/OR SERVICE SUPPLIED ARE OF AN INFERIOR QUALITY OR DO NOT CONFORM TO THE SPECIFICATIONS OF THE BID AND CONTRACT HEREIN.</p> <p>OPEN MARKET CLAUSE: THE DIRECTOR OF PURCHASING MAY AUTHORIZE A SPENDING UNIT TO PURCHASE ON THE OPEN MARKET, WITHOUT THE FILING OF A REQUISITION OR COST ESTIMATE, ITEMS SPECIFIED ON THIS CONTRACT FOR IMMEDIATE DELIVERY IN EMERGENCIES DUE TO UNFORESEEN CAUSES (INCLUDING BUT NOT LIMITED TO DELAYS IN TRANSPORTATION OR AN UNANTICIPATED INCREASE IN THE VOLUME OF WORK.)</p> <p>QUANTITIES: QUANTITIES LISTED IN THE REQUISITION ARE APPROXIMATIONS ONLY, BASED ON ESTIMATES SUPPLIED BY THE STATE SPENDING UNIT. IT IS UNDERSTOOD AND AGREED THAT THE CONTRACT SHALL COVER THE QUANTITIES ACTUALLY ORDERED FOR DELIVERY DURING THE TERM OF THE CONTRACT, WHETHER MORE OR LESS THAN THE QUANTITIES SHOWN.</p> <p>ORDERING PROCEDURE: SPENDING UNIT(S) SHALL ISSUE A WRITTEN STATE CONTRACT ORDER (FORM NUMBER WV-39) TO THE VENDOR FOR COMMODITIES COVERED BY THIS CONTRACT. THE ORIGINAL COPY OF THE WV-39 SHALL BE MAILED TO THE VENDOR AS AUTHORIZATION FOR SHIPMENT, A SECOND COPY MAILED TO THE PURCHASING DIVISION, AND A THIRD COPY RETAINED BY THE SPENDING UNIT.</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT</p>						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE		DATE		
TITLE		FEIN		ADDRESS CHANGES TO BE NOTED ABOVE		

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WITHOUT FURTHER ORDER.						
THE TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT SHALL SUPERSEDE ANY AND ALL SUBSEQUENT TERMS AND CONDITIONS WHICH MAY APPEAR ON ANY ATTACHED PRINTED DOCUMENTS SUCH AS PRICE LISTS, ORDER FORMS, SALES AGREEMENTS OR MAINTENANCE AGREEMENTS, INCLUDING ANY ELECTRONIC MEDIUM SUCH AS CD-ROM.						
REV. 05/26/2009						
EXHIBIT 4						
LOCAL GOVERNMENT BODIES: UNLESS THE VENDOR INDICATES IN THE BID HIS REFUSAL TO EXTEND THE PRICES, TERMS, AND CONDITIONS OF THE BID TO COUNTY, SCHOOL, MUNICIPAL AND OTHER LOCAL GOVERNMENT BODIES, THE BID SHALL EXTEND TO POLITICAL SUBDIVISIONS OF THE STATE OF WEST VIRGINIA. IF THE VENDOR DOES NOT WISH TO EXTEND THE PRICES, TERMS, AND CONDITIONS OF THE BID TO ALL POLITICAL SUBDIVISIONS OF THE STATE, THE VENDOR MUST CLEARLY INDICATE SUCH REFUSAL IN HIS BID. SUCH REFUSAL SHALL NOT PREJUDICE THE AWARD OF THIS CONTRACT IN ANY MANNER.						
REV. 3/88						
PURCHASING CARD ACCEPTANCE: THE STATE OF WEST VIRGINIA CURRENTLY UTILIZES A VISA PURCHASING CARD PROGRAM WHICH IS ISSUED THROUGH A BANK. THE SUCCESSFUL VENDOR MUST ACCEPT THE STATE OF WEST VIRGINIA VISA PURCHASING CARD FOR PAYMENT OF ALL ORDERS PLACED BY ANY STATE AGENCY AS A CONDITION OF AWARD.						
NOTICE						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE				TELEPHONE		
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A SIGNED BID MUST BE SUBMITTED TO: DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130 THE BID SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE BID MAY NOT BE CONSIDERED: SEALED BID BUYER: KRISTA FERRELL-FILE 21 RFQ. NO.: CPR10006 BID OPENING DATE: 08/11/2009 BID OPENING TIME: 1:30 PM PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR BID: 253-540-4750 CONTACT PERSON (PLEASE PRINT CLEARLY): DENNIS A. BARRY						
SEE REVERSE SIDE FOR TERMS AND CONDITIONS						
SIGNATURE		TELEPHONE			DATE	
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Specifications for RFQ on 1099R Preparation

July 2009

The scope of this project is as follows:

It will be the responsibility of the West Virginia Consolidated Public Retirement Board (WVCPRB) to provide the personal and financial information to the vendor. The data will be sent to the vendor in the format attached (attachment#1). The vendor will then provide the necessary forms (1099R's) compliant with the regulations of the Internal Revenue Service, print, collate, and mail the documents, using the most cost effective method. The vendor will then provide electronic copies of the 1099R information as mailed. This data must be submitted to the WVCPRB secure FTP website. See details below.

All copies of 1099R's must be original print, duplicated copies are unacceptable. All three of the 1099R must be on one single 8.5"x11" sheet with perforations between each copy. The first one is to be sent to the IRS, the second one is to be sent to the State, and the third is for the recipient to retain for their records. Instructions will be printed on the reverse side.

1099R paper weight must be 24 pound. They are folded and inserted into the envelope.

No pull-apart or pressure-sealed forms. All copies must be on paper inserted in an envelope.

Envelopes must have IMPORTANT TAX RETURN DOCUMENT ENCLOSED on them, must also have TEMP RETURN SERVICE on them, and must be 2-window, white, 9 7/16" x 3 7/8" size with confidential tint.

Vendor must remit bid in line item form to include:

- 1.) Cost to print 1099s with instructions on reverse
- 2.) Cost to print or copy insert (duplex)
- 3.) Cost to insert forms for mailing
- 4.) Postage cost per mail piece and total for 55,000 pieces
- 5.) 1099 Express licenses (8)
- 6.) Grand total

Forms must be Internal Revenue Service (IRS) compliant.

If there are incomplete addresses, the complete address must be added by the vendor, using USPS approved methods (i.e. 9 digit zip codes).

Addresses must be bar-coded according to the USPS guidelines.

Vendor must provide the upgraded 1099 Express software to read and print the data (i.e. WVCPRB must be able to pull up a record, edit, and print the 1099R). Vendor must provide data of all 1099R's mailed. This data must be submitted via FTP to our secure FTP website. WVCPRB will provide a userid, password, and URL.

Q:\ITMgrs\1099\Specs...

The successful bidder must have a Compliance Office that maintains expertise with IRS requirements for 1099R's. Vendor must provide proof of this expertise.

The vendor must mail the approximately 55,000 forms per year using the most cost effective method. If the number of mail pieces go over 55,000 additional postage will be needed.

Vendor must have the capability to add inserts in with the 1099R's. Inserts are to be 8.5"x11". Paper weight for inserts must be 20 lbs. Inserts will be duplex and printed in black ink. Keep in mind that one of the inserts (every other year, next time 2011) is a full-color calendar provided by the WV State Auditor's Office and the WVCPRB has no control over the paper weight. WVCPRB will mail this calendar to your location. WVCPRB instruction inserts will be sent to the vendor in PDF format, vendor will print a sample, and fax back a copy of the insert for WVCPRB approval to ensure legibility and completeness. Upon WVCPRB approval, the vendor will copy and add the inserts. Unit price for inserts will be used for each separate insert added by WVCPRB as multiple inserts may be necessary. If there are multiple inserts and all recipients do not receive all inserts the WVCPRB will divide the file and inform vendor.

Vendor must agree to safeguard all information and sign a WVCPRB Confidentiality and Non-Disclosure Statement.

The successful bid must agree to the following timeline:

November 1 – Vendor will test WVCPRB data.

November 30 – On or before this date the vendor will send results of testing to WVCPRB.

December 1 – The vendor will ask for final count from WVCPRB so they can order paper and envelopes.

December 31 – On or before this date the vendor will schedule a time to help install the 1099 Express (or similar) software required to reproduce individual 1099R's. The vendor will supply a file created from the WVCPRB test file that will allow 1099 Express Software to bring up any account and print that account. This file will be purely for test purposes. For the live run the vendor will also supply a file for use with this software. In addition to that file the vendor will supply a final production file that will contain the whole reproduction of the print job. This file must be submitted to the WVCPRB secure FTP website.

January 1 – Vendor will request a postage check from WVCPRB. The postage check will be made payable to US POSTMASTER. Any excess will be credited on the final bill or any additional postage required will be requested on the final bill.

January 10 – Vendor will receive postage check on or before this date. Also inserts must be provided by WVCPRB on or before this date. Vendor will print a sample insert and fax to (304) 558-6337 for approval.

January 18 – Vendor will sweep FTP site for WVCPRB data. The input file will be in the preferred layout (attachment#1), no particular order, but will need to be sorted by zip for mailing discounts.

January 26 – Vendor will deliver all forms to the Post Office to be mailed. Do not break up into batches – must be mailed all at once on the same day.

January 27 – Vendor will submit the data via our secure FTP site to the WVCPRB.

Consolidated Public Retirement Board Confidentiality and Non-disclosure Statement

Protecting confidentiality and understanding the sensitive nature of information recorded at the Consolidated Public Retirement Board (CPRB) becomes the responsibility of every person. We must strictly adhere to a policy of non-disclosure of any information relating to our clients, and every state employee or contract worker working inside of or with our office must sign and abide by this confidentiality statement.

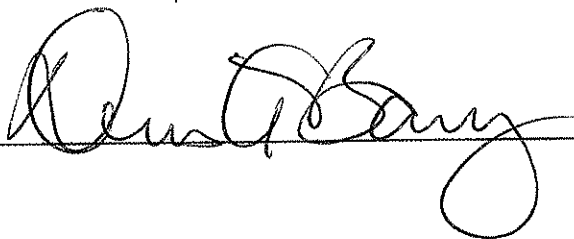
At no time, shall any state employee or contract worker who is working inside or with the CPRB discuss or distribute personal information regarding any client of this agency. This personal information includes, but is not limited to, client or employee salaries, medical history, pension specific information, social security numbers, or any other identifying numbers, addresses, banking information, telephone numbers, or any other data or information excluded from protection by the WV Freedom of Information Act.

"I, DENNIS A. BARRY understand the sensitive nature and the confidentiality of the client/employee information stored at the West Virginia Consolidated Public Retirement Board. I therefore acknowledge and agree that personal client/employee information and any other related data is to be treated as confidential information which is not a matter of public record. I therefore agree not to permit distribution or engage in discussion of this information to any person. I understand that, if at any time I am approached by an outside individual, agency or media representative, I shall direct their queries to the Executive Director of the Consolidated Public Retirement Board."

Print Name:

DENNIS A. BARRY

Signature:



Date:

8/18/2009

Revised 7/05/07

Individual Vendors

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

Pricing Sheet

RFQ# CPR10006

<u>Description</u>	<u>Unit Price</u>	<u>Quantity</u>	<u>Extended Price</u>
Print 1099 w/ Instructions on reverse side	\$ 0.43	55,000	\$ 23,650.00
Print or copy insert (duplex) ¹	Included	55,000	Included
Insert forms for mailing ²	Included	55,000	Included
Postage ³	\$ 0.44	55,000	\$ 24,200.00
1099 Express Licenses ⁴	Included	8	<u>Included</u>
Total			\$ 47,850.00

- ¹ The 'Print or copy insert (duplex)' pricing is included in the 'Print 1099 w/Instructions on reverse side' line item above.
- ² The 'Insert forms for mailing' pricing is included in the 'Print 1099 w/Instructions on reverse side' line item above.
- ³ Postage will be provided by the least expensive means available based on the information provided and will include the postage discount available for 3 and 5 digit zip sorting with intelligent bar coding. The pricing shown above is USPS first class postage without discount, and assuming weight is not over 2 ounces.
- ⁴ The 1099 Express software will be replaced with Greenshades DownloadMyForm.com. This allows the licensees (CPRB) to review, edit and reprint 1099s via a web browser. Greenshades integrates with Microsoft Dynamics GP (Great Plains) which would allow CPRB to maintain their 1099's in Dynamics GP and automatically transfer to DownloadMyForm.com. This would allow CPRB clients to review and print their own forms by logging onto DownloadMyForm.com. The pricing above includes 8 licenses of DownloadMyForm.com. The pricing includes training and support of the software.

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

State of West Virginia

VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with **West Virginia Code**, §5A-3-37. (Does not apply to construction contracts). **West Virginia Code**, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. Application is made for 2.5% resident vendor preference for the reason checked:

- ☒ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,
☒ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or** 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,
☐ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,

2. Application is made for 2.5% resident vendor preference for the reason checked:

- ☐ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,

3. Application is made for 2.5% resident vendor preference for the reason checked:

- ☐ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,

4. Application is made for 5% resident vendor preference for the reason checked:

- ☐ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,

5. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:

- ☐ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,

6. Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:

- ☐ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder:

INTELLIPoint TECHNOLOGIES

Signed:

[Signature]

Date:

AUG. 18, 2009

Title:

Sr. Acct Executive

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

IntelliPoint Technologies, LLC
 5841 Davis Creek Road
 Suite 202
 Barboursville, WV 25504

RFQ No. CPR/0006STATE OF WEST VIRGINIA
Purchasing Division**PURCHASING AFFIDAVIT****VENDOR OWING A DEBT TO THE STATE:**

West Virginia Code §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code*. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code* and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the *West Virginia Code* may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

Vendor's Name: INTELLIPOINT TECHNOLOGIES, LLCAuthorized Signature: [Signature] Date: 8/18/2009

Purchasing Affidavit (Revised 01/01/09)

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

MEMORANDUM

TO: State of West Virginia 1099-R Recipient

DATE: January 2009

RE: Explanation of 2008 Form 1099-R

To assist you in understanding your 2008 Form 1099-R, the following information is provided:

Box 1 - Gross distribution - This is the total gross annuity, loan offset or lump-sum distribution you received in 2008. If you retired in 2008 from the Teachers' Retirement or the Deputy Sheriff Retirement System and took a loan offset, you will receive two (2) 1099-R forms.

Box 2a - Taxable amount - This is the total amount of your annuity or lump-sum distribution in 2008 that may be subject to income tax. If you are required to complete a 2008 income tax return, please report the amount in this box.

Box 4 - Federal income tax withheld - This is the total amount of federal income tax deducted from your annuity or lump-sum distribution in 2008. Include this amount on your federal income tax return as tax withheld, and if Box 4 shows an amount other than zero, attach Copy B to your return.

Box 5 - Employee contributions or insurance premiums - The figure reported in this box, if any, is the total amount of your annuity or lump-sum distribution in 2008 that is **not taxable**. This figure is for IRS purposes only and is not a deduction from your annuity. **This is not a deduction for insurance premiums.**

Box 7 - Distribution code - If you are age 59 ½ or less, and your distribution code is a "2" in Box 7, you may need to file Form 5329. ***Questions regarding your tax preparation should be directed to the IRS or your tax preparer.***

Box 9b - Total employee contributions - This box applies to retirees only. There is only an amount reported in this box the first year of your retirement. This amount represents the total non-taxable contributions, if any, prior to July 1, 1986 and is for IRS purposes only. This is not a deduction from your retirement annuity.

Box 10 - State tax withheld - This is the total amount of West Virginia state income tax deducted from your annuity or lump-sum distribution in 2008. Deductions for state income tax are for the State of West Virginia only.

For an explanation of information reported in all other boxes, see the instructions on the back of your 1099-R form.

*****NOTICE TO RETIREES ONLY*****

TO AVOID DELAY IN RECEIVING YOUR ANNUAL 1099R, PLEASE NOTIFY OUR OFFICE OF ANY ADDRESS CHANGES

Federal Tax Law requires that we notify all retirees/beneficiaries annually of their option to have federal tax withheld from their pension check.

- A. You have the right to elect not to have withholding apply.
- B. You have the right to revoke a prior election not to have withholding apply.
- C. You have the right to adjust the allowance claimed on your current withholding certificate.

***** IMPORTANT: YOU DO NOT NEED TO REQUEST A WITHHOLDING CERTIFICATE UNLESS YOU WISH TO CHANGE YOUR WITHHOLDING STATUS.** Forms may be obtained by writing to our office or by visiting our web-site at www.wvretirement.com and clicking on the "Retirees" link.

PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

PAYER'S Federal identification No.
55-6011167

RECIPIENT'S identification No.
000-00-0000

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

Account number (see instructions)
236328338920080001P1

16 Year of Roth cont.

Form **1099-R**

This information is being furnished
to the Internal Revenue Service.

1 Gross distribution
\$ 1985.88
2a Taxable amount
\$ 1985.88
2b Taxable amount
not determined

3 Capital gain (incl. in 2a)

5 Employee contributions
or insurance premiums

7 Distribution
code **7** IRA/
SEP/
SIMPLE

9a Your percentage of total
distribution

10 State tax withheld

13 Local tax withheld

OMB No. 1545-0119

2008

Total
distribution

4 Federal tax withheld

6 Net unrealized appreciation
in employer's securities

8 Other

9b Total employee contributions

11 State/Payer's state no.

14 Name of locality

Distributions From
Pensions, Annuities,
Retirement or Profit-
Sharing Plans, IRAs
Insurance
Contracts, etc.

Form **1099-R Copy B**

Report this income
on your Federal
tax return. If this
form shows Fed-
eral income tax
withheld in box 4
attach this copy
to your return

12 State distribution

15 Local distribution

PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

PAYER'S Federal identification No.
55-6011167

RECIPIENT'S identification No.
000-00-0000

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

Account number (see instructions)
236328338920080001P1

16 Year of Roth cont.

Form **1099-R**

This information is being furnished
to the Internal Revenue Service.

1 Gross distribution
\$ 1985.88
2a Taxable amount
\$ 1985.88
2b Taxable amount
not determined

3 Capital gain (incl. in 2a)

5 Employee contributions
or insurance premiums

7 Distribution
code **7** IRA/
SEP/
SIMPLE

9a Your percentage of total
distribution

10 State tax withheld

13 Local tax withheld

OMB No. 1545-0119

2008

Total
distribution

4 Federal tax withheld

6 Net unrealized appreciation
in employer's securities

8 Other

9b Total employee contributions

11 State/Payer's state no.

14 Name of locality

Distributions From
Pensions, Annuities,
Retirement or Profit-
Sharing Plans, IRAs
Insurance
Contracts, etc.

Form **1099-R Copy C**

For Recipient's
Records

12 State distribution

15 Local distribution

PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

PAYER'S Federal identification No.
55-6011167

RECIPIENT'S identification No.
000-00-0000

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

Account number (see instructions)
236328338920080001P1

16 Year of Roth cont.

Form **1099-R**

This information is being furnished
to the Internal Revenue Service.

1 Gross distribution
\$ 1985.88
2a Taxable amount
\$ 1985.88
2b Taxable amount
not determined

3 Capital gain (incl. in 2a)

5 Employee contributions
or insurance premiums

7 Distribution
code **7** IRA/
SEP/
SIMPLE

9a Your percentage of total
distribution

10 State tax withheld

13 Local tax withheld

OMB No. 1545-0119

2008

Total
distribution

4 Federal tax withheld

6 Net unrealized appreciation
in employer's securities

8 Other

9b Total employee contributions

11 State/Payer's state no.

14 Name of locality

Distributions From
Pensions, Annuities,
Retirement or Profit-
Sharing Plans, IRAs
Insurance
Contracts, etc.

Form **1099-R Copy 2**

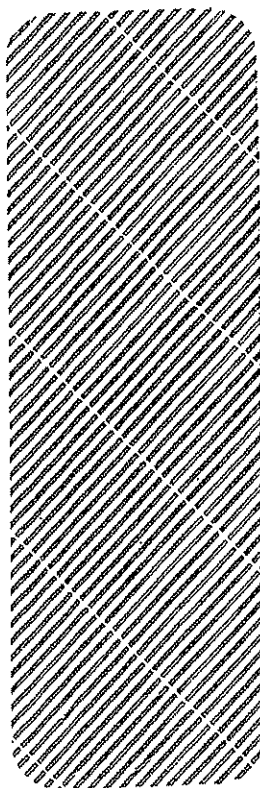
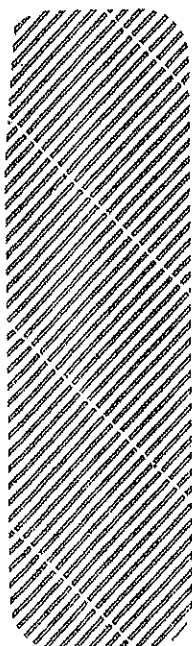
File this copy
with your state,
city, or local
income tax
return, when
required

12 State distribution

15 Local distribution

PRESORTED
FIRST CLASS MAIL
U.S. POSTAGE PAID
PITTSBURGH, PA
PERMIT NO. 4540

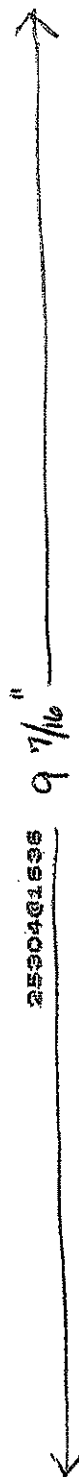
**Important Tax Return
Document Enclosed**



2530401536 9 7/16"

517

4"



*

Attachment#1 - File Layout

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01 MOORES-PREFERRED-RECORD.
05 MPR-RECIPIENT-ZIP-5      PIC X(05).
05 FILLER                  PIC X(04).
05 MPR-RECIPIENT-NAME      PIC X(40).
05 MPR-RECIPIENT-AREA.
    10 MPR-RECIPIENT-ADDRESS1
        PIC X(40).
    10 MPR-RECIPIENT-ADDRESS2
        PIC X(40).
    10 MPR-RECIPIENT-ADDRESS3
        PIC X(40).
    10 MPR-RECIPIENT-ADDRESS4
        PIC X(40).
    10 MPR-RECIPIENT-ADDRESS5
        PIC X(40).
    10 MPR-RECIPIENT-ADDRESS6
        PIC X(40).
05 MPR-RECIPIENT-AREA-OCC      REDEFINES
    MPR-RECIPIENT-AREA.
    10 MPR-RECIPIENT-ADDRESS      OCCURS 6 TIMES
        PIC X(40).
05 MPR-PAYER-EIN            PIC X(09).
05 MPR-LOCATION-ID           PIC X(04).
05 MPR-BRANCH-NBR          PIC X(04).
05 MPR-RECIPIENT-TIN       PIC X(09).
05 MPR-DO-NOT-MERGE-IND    PIC X.
05 MPR-FOREIGN-IND         PIC X.
05 MPR-SECONDARY-MERGE-CRITERIA
        PIC X(20).
05 MPR-TIN-TYPE            PIC X.
05 MPR-ACCOUNT-NBR.
    10 MPR-SSN              PIC X(09).
    10 MPR-ACCT-NBR         PIC X(06).
    10 MPR-ANNUITY-OR-REFUND
        PIC X(03).
    10 MPR-BEN-OR-CK-NBR    PIC X(02).
05 MPR-TYPE-OF-RETURN-CODE  PIC X.
05 MPR-PRODUCT-TYPE        PIC X(15).
05 MPR-AMOUNT-1            PIC 9(10)V99.
05 MPR-AMOUNT-2            PIC 9(10)V99.
05 MPR-AMOUNT-3            PIC 9(10)V99.
05 MPR-AMOUNT-4            PIC 9(10)V99.
05 MPR-AMOUNT-5            PIC 9(10)V99.
05 MPR-AMOUNT-6            PIC 9(10)V99.
05 MPR-AMOUNT-7            PIC 9(10)V99.
05 MPR-AMOUNT-8            PIC 9(10)V99.
05 MPR-AMOUNT-9            PIC 9(10)V99.
05 MPR-AMOUNT-A            PIC 9(10)V99.
05 MPR-AMOUNT-B            PIC 9(10)V99.
05 MPR-AMOUNT-C            PIC 9(10)V99.
05 MPR-AMOUNT-D            PIC 9(10)V99.
05 MPR-AMOUNT-E            PIC 9(10)V99.

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05	MPR-STATE-TAX-WH	PIC 9(10)V99.
05	MPR-LOCAL-TAX-WH	PIC 9(10)V99.
05	MPR-STATE-DIST-AMT	PIC 9(10)V99.
05	MPR-LOCAL-DIST-AMT	PIC 9(10)V99.
05	FILLER	PIC X(24).
05	MPR-PAYER-OFFICE-CODE	PIC X(04).
05	MPR-ZIP4-DELIVERY-POINT-DIGITS	PIC X(06).
05	MPR-RETURN-NAME	PIC X(40).
05	MPR-RETURN-ADDRESS-1	PIC X(40).
05	MPR-RETURN-ADDRESS-2	PIC X(40).
05	MPR-RETURN-ADDRESS-3	PIC X(40).
05	MPR-2ND-PAYEE-NAME-IND	PIC X.
05	MPR-PRINT-PROOF-IND	PIC X.
05	MPR-RULE-OF-78-MESSAGE	PIC X.
05	MPR-HALF-TIME-STUDENT-IND	PIC X.
05	MPR-GRAD-STUDENT-IND	PIC X.
05	MPR-LIABILITY-IND	PIC X.
05	MPR-GROSS-PROCEEDS-IND	PIC X.
05	MPR-BANKRUPTCY-IND	PIC X.
05	MPR-FOREIGN-ENITY-IND	PIC X.
05	MPR-REIMBURSED-AMT-IND	PIC X.
05	MPR-TERM-ILL-IND	PIC X.
05	MPR-DIST-CODE-MSA	PIC X.
05	MPR-DIRECT-SALES-IND-MISC	PIC X.
05	MPR-1098-E	PIC X.
05	MPR-IRA-SEP-SIMPLE-IND	PIC X.
05	MPR-TOTAL-DIST-IND	PIC X.
05	MPR-TAXABLE-AMT-NOT-DET-IND	PIC X.
05	MPR-DOC-SPEC-CODE	PIC X(02).
05	MPR-WRITTEN-ASSURANCE-IND	PIC X.
05	MPR-REC-PROP-OTHER-THAN-CASH	PIC X.
05	MPR-DECEASED-IND	PIC X.
05	MPR-IRA-SEP-SIMPLE-5498	PIC X.
05	MPR-MED-CHO-IND-1099-MSA	PIC X.
05	MPR-MED-CHO-IND-5498-MSA	PIC X.
05	MPR-ACADEMIC-PERIOD-IND	PIC X.
05	MPR-QUALIFIED-CONTRACT-LTC	PIC X.
05	MPR-1099G-AMT2-TAX-YEAR	PIC X(04).
05	MPR-TRADE-BUS-INCOME-IND	PIC X.
05	MPR-REQ-MIN-DIST-IND	PIC X.
05	MPR-CORRECTION-IND	PIC X.
05	MPR-2ND-TIN-NOTICE-IND	PIC X.
05	MPR-LAST-FILING-IND	PIC X.
05	MPR-TRUSTEE-TO-TRUSTEE-IND	PIC X.

05 MPR-QUILIFIED-TUITION-IND PIC X.

05 MPR-DESIGNATED-BEN PIC X.

05 MPR-STATE-CODE PIC X(02).

05 MPR-DATE PIC X(08).

05 MPR-DESC-A-B-C-OID-S PIC X(40).

05 MPR-STATE-PAYER-STATE-NBR
PIC X(15).

05 MPR-COUNTRY-DIV-INT PIC X(15).

05 MPR-CUSIP-NBR PIC X(15).

05 MPR-INSURED-FOREIGN-DNM PIC X.

05 MPR-INSURED-TID PIC X(09).

05 MPR-INSURED-NAME PIC X(40).

05 MPR-INSURED-STREET PIC X(40).

05 MPR-INSURED-CITY-STATE-ZIP
PIC X(40).

05 MPR-PCT-DIST PIC X(03).

05 MPR-PCT-TOTAL-ANNUITY PIC X(03).

05 MPR-LOCALITY-NAME PIC X(15).

05 MPR-CUST-SHORT-NAME PIC X(15).

05 MPR-PAID-CONTROL-NBR PIC X(04).

05 MPR-CUST-SERV-PHONE-NBR PIC X(12).

05 MPR-DIST-CODE-1099Q PIC X.

05 MPR-USER-DEFINED-MISC-1 PIC X(100).

05 MPR-USER-DEFINED-MISC-2 PIC X(100).

05 MPR-USER-DEFINED-MISC-3 PIC X(100).

05 MPR-LINE-MESSAGE-1 PIC X(72).

05 MPR-LINE-MESSAGE-2 PIC X(72).

05 MPR-LINE-MESSAGE-3 PIC X(72).

05 MPR-MOORE-RESERVED PIC X(20).

01 MOORES-CONTROL-RECORD.

05 MCR-LITERAL PIC X(14).

05 MCR-TYPE-OF-RETURN PIC X.

05 MCR-NBR-OF-PAYEES PIC 9(10).

05 MCR-CONTROL-TOTAL-1 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-2 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-3 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-4 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-5 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-6 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-7 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-8 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-9 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-10 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-11 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-12 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-13 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-14 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-15 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-16 PIC 9(16)V99.

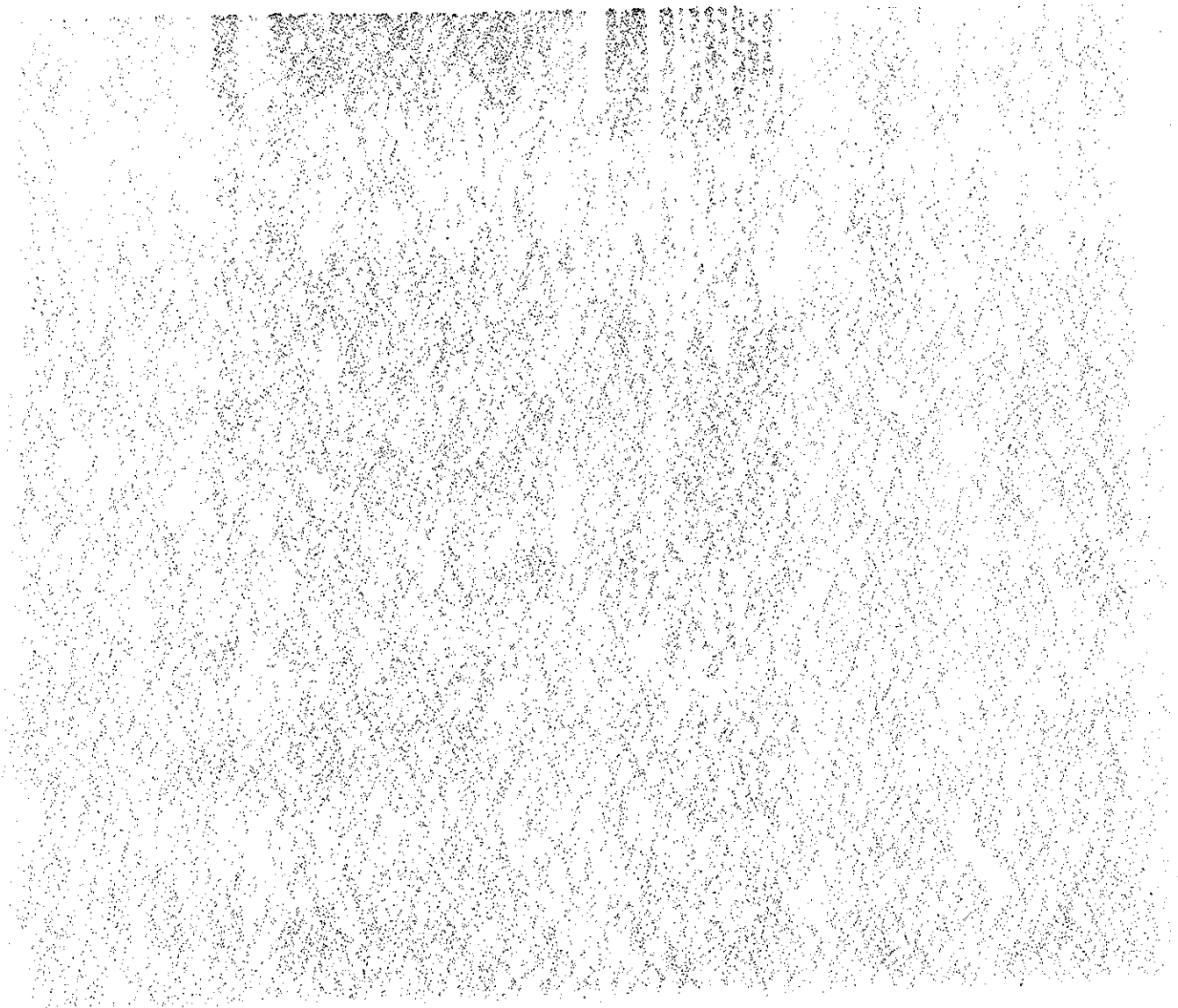
05 MCR-CONTROL-TOTAL-17 PIC 9(16)V99.

05 MCR-CONTROL-TOTAL-18 PIC 9(16)V99.

05 FILLER PIC X(1301).

*

END FILE LAYOUT



Anne Werum Lambright, Executive Director
Consolidated Public Retirement Board
4101 MacCorkle Avenue SE
Charleston, WV 25304
www.wvretirement.com



Glen B. Gainer III, State Auditor
West Virginia State Auditor's Office
Electronic Payments Division
Building 1, Suite W-125
www.wvsao.gov

2010 DIRECT DEPOSIT CALENDAR FOR RETIREES

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2		1	2	3	4	5	6		1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1		1	2	3	4	5	
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7			1	2	3	4	
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2			1	2	3	4	5	6			1	2	3	4	
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				

 Date Deposit funds will be available in your account
(Also indicates the date paper checks will be mailed)

If the Amount of your Direct Deposit is Wrong:

Contact: Retirement Benefits
Consolidated Public Retirement Board
1.800.654.4406

For Problems With Your Bank Account:

Contact: Electronic Payments Division
West Virginia State Auditor's Office
1.800.500.4079



State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

WV PURCHASING ACT SECT Fax 304-558-4115

Aug 10 2009 03:29pm P001/002

Request for Quotation

RFO NUMBER

PAGE

CPR10006

1

ADDRESS CORRESPONDENCE TO ATTENTION OF

KRISTA FERRELL
304-558-2596

RFO COPY

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

CONSOLIDATED PUBLIC RETIREMENT
BOARD
BUILDING 5, ROOM 1000
1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/10/2009				

BID OPENING DATE:

08/18/2009

BID OPENING TIME

01:30PM

LINE	QUANTITY	UOF	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 1						
THIS ADDENDUM IS ISSUED TO:						
1.) PROVIDE ANSWERS TO ALL TECHNICAL QUESTIONS SUBMITTED PRIOR TO THE DEADLINE FOR TECHNICAL QUESTIONS AND						
2.) TO EXTEND THE BID OPENING DATE						
BID OPENING DATE IS EXTENDED TO: 08/18/2009						
BID OPENING TIME REMAINS: 1:30 PM						
***** END ADDENDUM NO. 1 *****						
0001	1	LS		966-50		
PRINTING: BOOKS, CATALOGS, MAGAZINES, PAMPHLETS, ETC						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE

TELEPHONE

DATE

TITLE

FBN

ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

Q: What is the 1099 Express software?

A: The 1099 Express software allows online viewing of the exact 1099 mailed to the member.
<http://www.1099express.com/>

Q: How does CPRB utilize the 1099 Express software as it related to this RFP?

A: WV CPRB uses the software to bring up a record, edit the category of distribution code or Other Items, then prints the new 1099 for mailing. Vendor must provide the upgraded 1099 Express software to read and print the data (i.e. WV CPRB must be able to pull up a record, edit, and print the 1099).

Q: I assume as it state "1099 Express software (or similar)" that we could present a solution that Provides similar functionality as 1099 Express and it would be acceptable, correct?

A: Yes, that is correct

Q: Printing paperback books is what we specialize in. Do you have information for exact trim sizes, page counts and quantities?

A: Not applicable, these are not books we are printing.



State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
CPR10006

PAGE
1

ADDRESS CORRESPONDENCE TO ATTENTION OF
KRISTA FERRELL 804-558-2596

RFQ COPY

IntelliPoint Technologies, LLC
5841 Davis Creek Road
Suite 202
Barboursville, WV 25504

CONSOLIDATED PUBLIC RETIREMENT
BOARD
BUILDING 5, ROOM 1000
1900 KANAWHA BOULEVARD, EAST
CHARLESTON, WV
25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
08/14/2009				

BID OPENING DATE:

08/19/2009

BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
ADDENDUM NO. 2						
THIS ADDENDUM IS ISSUED TO EXTEND THE BID OPENING DATE.						
BID OPENING DATE IS EXTENDED TO: 08/19/2009						
BID OPENING TIME REMAINS; 1:30 PM						
***** END ADDENDUM NO. 2 *****						
0001	1	LS		966-50		
PRINTING: BOOKS, CATALOGS, MAGAZINES, PAMPHLETS, ETC						
***** THIS IS THE END OF RFQ CPR10006 ***** TOTAL:						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the **West Virginia Code** and the **Legislative Rules** of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the **West Virginia Code**.
8. Vendor preference will be granted upon written request in accordance with the **West Virginia Code**.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the **Legislative Rules** of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in case of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130

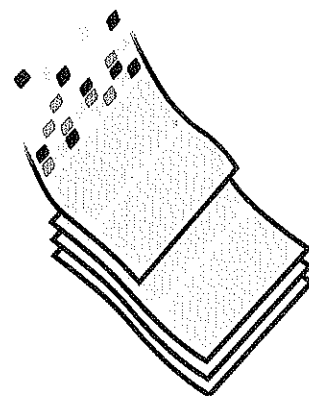
GREENSHADES YEAR END FORMS

Let Us Handle Your Tax Forms

Year-End is hard enough without the headache of distributing tax forms and reporting them to the government. Last year Greenshades helped thousands of companies to create and distribute over one million W-2s, 1099s, and other tax forms.

Here's How It Works

1. Greenshades will use our **direct integration** into Dynamics to upload your tax forms to a secure website.
2. Using the website, Administrators may see a variety of reports and **easily make changes** to individual forms.
3. If you choose, your employees may then sign into the website and **download their own form** – every form they download is one less that needs to be mailed!
4. As January 31st approaches, you can **outsource the mailing** to us with the click of a button. Greenshades will print, stamp, and mail your forms to their recipients.
5. If you wish to print and mail in-house, you can print the forms on blank paper – **no need to buy expensive pre-printed forms!**
6. Corrections and reprints are trouble-free. If you have an out-dated address, your recipient can use the website to **fix their own information** before printing their form.
7. When it comes time, Greenshades will **create an E-File** that will report your forms to the federal government.



DownloadMyForm.com

Here's How It Saves You Money

- No printing/mailing costs for employees that download their own form (and it's better for the environment)
- No purchasing overpriced pre-printed forms
- Greenshades passes along bulk mailing discounts
- Easier process for managing forms saves you hours of time

W-2 & 1099 Forms

Letting Greenshades Software handle your W-2s and 1099s is smart for the earth and your corporate budget. Because our green process distributes your forms very efficiently and with fewer materials, we can pass significant savings back to you. And, to ensure that you save time as well as money, we offer outsourcing and employee self-service options almost every step along the way.

Greenshades starts by posting your forms to a secure website that allows your employees/vendors to access their forms much like banking information and then download them to their computer. Last year our average client used this website to

eliminate all paper, printing, and postage expenses for 17% of their employees. This online distribution doesn't just make financial sense; it will also reduce your company's environmental footprint. If you wish, we will then inexpensively print and mail any forms that were not distributed online using our eco-friendly supplies and energy-efficient machinery. Alternatively, our website allows you to print the completed forms on blank paper, which eliminates any need to purchase expensive pre-printed forms. We also eliminate much of the hassle of year-end forms by helping with federal and state E-Filing, reprint ordering, corrections, and much more.



GREENSHADES
Smart Businesses Go Green.



GREENSHADES
— Smart Businesses Go Green. —

DOWNLOADMYFORM.COM

Contact the Greenshades Sales Team at

Phone # 888-255-3815 ext 2

Why Use Downloadmyform.com for My...

Earning Statements?

- ❑ Employees can view their complete pay history
- ❑ For direct deposit employees, online distribution saves the entire cost of printing and mailing the actual statements
- ❑ Greenshades will print and mail Direct Deposit Slips and MICR Paychecks at your discretion

Year End Forms?

- ❑ Administrators may see a variety of reports and easily make changes to individual forms
- ❑ Recipients have the ability to access their own form
- ❑ You can outsource the mailing to Greenshades with the click of a button or print in-house to blank forms
- ❑ Corrections and reprints are trouble-free

How Does Greenshades Synch Pay Information in GP or SL with Downloadmyform.com?

- ☐ We have a Connector Tool that will synch up your data in GP or SL with Downloadmyform.com
 - Choose between synchroning manually or automatically
- ☐ Upload employee pay information based on a variety of factors:
 - Employee Department
 - Employee Type
 - Employee Class
 - Employee Location
 - Whether employees receive live paychecks or paystubs

Paperless Payroll Wizard

Manual Data Sync
Use this screen to perform a manual data synchronization

Use this screen to synchronize data from Dynamics GP to DownloadMyForm.com.

☒ Sync Paychecks ☐ Sync W2s for tax year: 2009

Total Sync Progress

Progress of sync an individual company

< Back Next >

Paperless Payroll Wizard

Automatic Sync
Setup an automatic synchronization of your paychecks

If you wish, the Paperless Payroll Connector can automatically upload your paychecks to DownloadMyForm.com whenever you post them within Dynamics GP. For this feature to work, the connector must be active in your system tray when you run payroll.

☒ Please upload my paychecks to DownloadMyForm.com automatically

9:53 AM
Friday
4/10/2009

< Back Finish

Recipients have the ability to log in to a secure website to view, save, and print their Earning Statements and Year End Forms online

DownloadMyForm.com

Employee sign in for DownloadMyForm.com

Social Security Number:

Last Name:

☐ Remember me on this computer (what's this?)

As the administrator, you decide the logic for usernames and passwords

[illegible]

For recipients to receive their Year End Forms online they will be required to provide consent

Manage Your Forms as an Administrator

☐ In the administration center, manage your recipient earning statements and year end forms:

- View recipient access reports
- Print forms individually and in bulk

- Out-source the printing and mailing of Earning Statements and Year End Forms

☐ We support the following forms on Downloadmyform.com:

The screenshot shows the 'DownloadMyForm.com' website interface. At the top is a navigation bar with tabs: 'DownloadMyForm.com', 'List', 'Mail', 'Reports', and 'Settings'. Below this is a header area with the text 'Greenshades Payslips Change Workspace' and a user profile 'Lauren Klees (Sign Out)'. The main content area is divided into a sidebar and a main panel. The sidebar contains a 'Home' button and four menu items: 'List Payslips' (with a document icon), 'Mail' (with an envelope icon), 'Reports' (with a bar chart icon), and 'Settings' (with a gear icon). The main panel displays 'Information About Pay Date 12/1/2018' with a '(View Details)' link. It lists several statistics: 'Last Pay Date Employee Count: 27', 'Last Pay Date Pay Stub Count: 27', and 'Last Pay Date Gross Wages: \$28,030.68'. Below these are three lines of status information: 'These paystubs are currently viewable by your employees. (View Details)', '3 notifications have been sent for this pay run. (View Details)', and 'You have created 5 mail batches. (View Details)'. At the bottom of the main panel, it states 'You have created 3 download batches. (View Details)'. To the right of the main panel, there is a vertical list of supported forms: '-Direct Deposit Slips', '-Live Paychecks', '-W-2', '-1099-MISC', '-1099-DIV', '-1099-INT', '-1099-PATR', '-1099-OID', '-1099-R', '-1099-S', '-W-2G', '-1042-S', '-1098-C', '-T-4', and '-T-4A'.

DownloadMyForm.com List Mail Reports Settings

Greenshades Payslips Change Workspace Lauren Klees (Sign Out)

Home

List Payslips

Mail

Reports

Settings

Information About Pay Date 12/1/2018 [\(View Details\)](#)

Last Pay Date Employee Count: 27

Last Pay Date Pay Stub Count: 27

Last Pay Date Gross Wages: \$28,030.68

These paystubs are currently viewable by your employees. [\(View Details\)](#)

3 notifications have been sent for this pay run. [\(View Details\)](#)

You have created 5 mail batches. [\(View Details\)](#)

You have created 3 download batches. [\(View Details\)](#)

[View Welcome Wizard](#)

- Direct Deposit Slips
- Live Paychecks
- W-2
- 1099-MISC
- 1099-DIV
- 1099-INT
- 1099-PATR
- 1099-OID
- 1099-R
- 1099-S
- W-2G
- 1042-S
- 1098-C
- T-4
- T-4A

DownloadMyForm.com	List	Mail	E-File	Reports	Settings
GreenStrokes 2008 W-2 Tax Forms Change Worksheet					
Lauren Mearns (Sign Out) Need help?					

! This employee's form was included in a state or federal E-File that DownloadMyForms.com created as requested by Alex Bell on 1/15/2009 12:01:35 PM. If you make any changes, you must file a correction with the filing agency and provide the employee with a correction form.

[illegible]

Send Logos/Other Employee Information
Send Company-Wide State W-2/94s/02s
Send Information Needed for State E-Filed

[illegible]

Agencies can be used to help:

On the right, administrators have the ability to save, print, and re-print individual Earning Statements and Year End Forms as many times as they need

On the left, the administrator has the ability to make last minute edits to ANY of the information on the Year End Form by clicking "Edit."

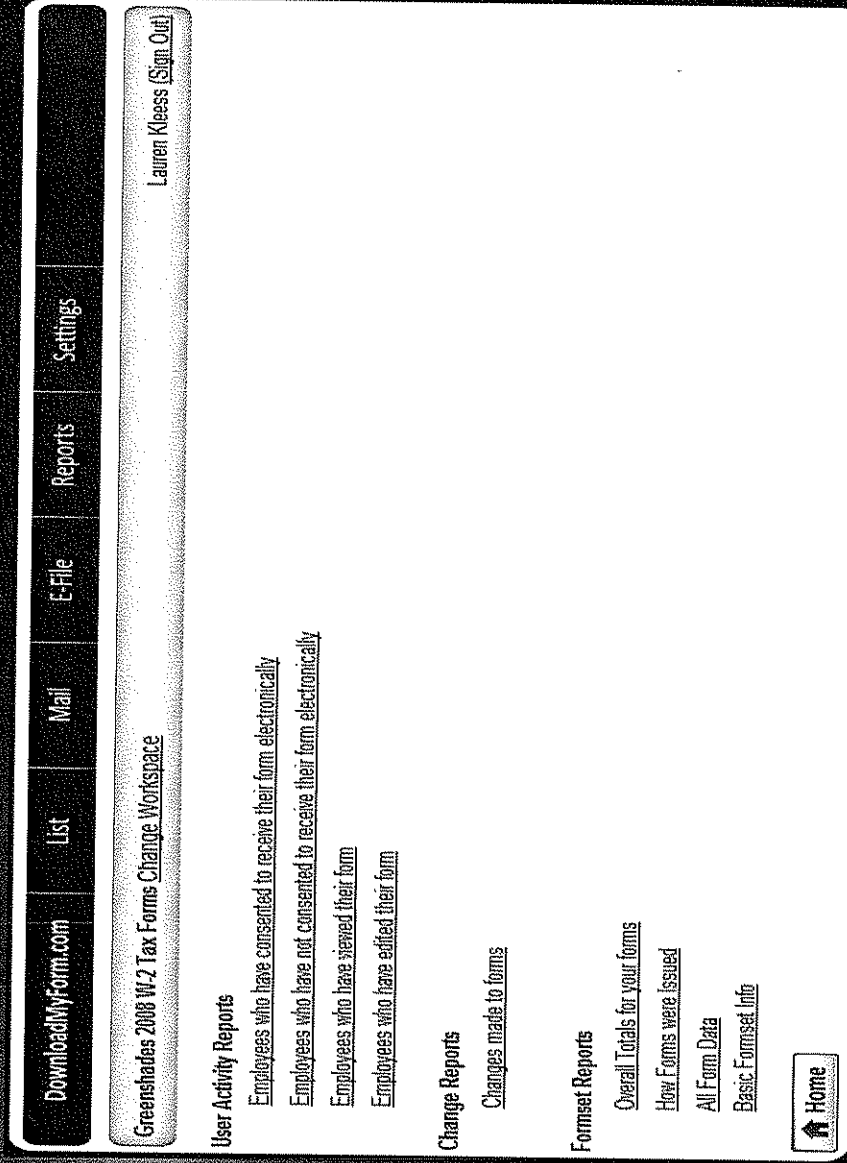
[illegible]

Downloadmyform.com will generate reports for the administrator to clearly see which employees have electronically:

- accessed their forms
- viewed their form
- edited their forms

For employees who have accessed their Year End Forms electronically, you are no longer required to give them a paper copy

Reports



Print and Mail Forms

□ Print and mail your forms in bulk:

- Allow Greenshades to print and mail MICR Paychecks, Paystubs, and Year End Forms for you
- Print Year End Forms in-house to blank perforated forms

□ You have the ability to select to print Paystubs and Year End Forms for only those recipients who have not retrieved these documents online

DownloadMyForm.com

List

Mail

E-File

Reports

Settings

Lauren Klees (Sign Out) Need Help?

Greenshades 2008 W-2 Tax Forms Change Workspace

Mail or Download: Choose Forms

View Totals

Choose Delivery

Advanced Options

Home Batch

What would you like to do with these forms?

☐ Have us print and mail these forms to their recipients
☐ Download a PDF of these forms to your computer

Choose type of form to use:

Revised BC22 Pressure Sealed

Which forms would you like to work with?

☐ All forms in this formatset
☒ All forms that must be issued on paper (electronic consent was not given)
☐ Let me choose specific forms

⚠ You have 11 high-severity warnings that you may wish to fix before continuing with this process. Please click [here](#) to view your current warnings.

Back

Continue

DownloadMyForm.com

List

Mail

E-File

Reports

Settings

Lauren Klees (Sign Out) Need Help?

Greenshades 2008 W-2 Tax Forms Change Workspace

Mail or Download: Choose Forms

View Totals

Choose Delivery

Advanced Options


Home Batch

What would you like to do with these forms?

☒ Have us print and mail these forms to their recipients
☐ Download a PDF of these forms to your computer

Choose type of form to use:

Revised BC22 Pressure Sealed



Back

Continue

Forms Printing and e-File through DownloadMyForm.com

Log in and choose your formset Workspace (1099s pictured).

DownloadMyForm.com Administrative Home - Windows Internet Explorer provided by GreenShades Software

https://www.downloadmyform.com/Admin.aspx

Green Shades Software, Inc. [US] Live Search

Windows Live - Bing

DownloadMyForm Administrative Home

DownloadMyForm.com List Mail E-File Reports Settings

Greenshades 2008 1099-MISC Tax Forms Change Workspace Walt Noland (Sign Out)

Home

- My 1099-MISCs
- Mail or Download
- Submit E-file
- Reports
- Settings

Current Alerts

You issued all of these forms to your vendors as of July 29th.
Forms must be e-filed to the IRS by March 31st. They may be corrected and re-issued until that time.
6 warnings have been found in your forms.
You currently have one or more unpaid invoices for services ordered on this website. Click here to view them.
1 vendor has submitted change requests for your review.

Company Totals View Here

8 Vendors Loaded
\$28,627.50 in Nonemployee Compensation

Form Batches

You have requested to download 25 batches of forms. View
You have requested to mail 2 batches of forms. View

D3W1.3192 ©2003-2010 Green Shades Software Inc. By accessing and using this page you agree to the Terms of Service Read our Privacy Statement

https://www.downloadmyform.com/ViewForms.aspx

Internet | Protected Mode: Off 100%

Powerpoint Greenshades ePay... Sent Items - Micro... Selfreview09.doc (C... Document1 - Micro... 2:48 PM Tuesday 8/18/2009

For printing, click on **List** to select a specific employee or create a print run filtered for a specific grouping.

DownloadMyForm.com List Mail E-File Reports Settings

Greenshades 2008 1099-MISC Tax Forms Change Workspace Walt Noland (Sign Out) Need Help?

View Vendors

Find a single vendor by using the search below. Click 'Print' to view a PDF of a form or 'View' to open a form to make changes.

Search for: Find

Look in: All Forms Advanced Search

	TIN	VendorName	VendorName2	AccountNumber	City	State	Zip
View Print	39-1234569	Mattie's Fish Store	Mattie Kang	VEN102	Jackson Hole	WY	83025
View Print	45-489100	John Doe Co.		123456	New York	NY	13245
View Print	23-55645	Jane Doe Co.		789456	Chicago	IL	45678
View Print	09-8765432	Film Studio, Inc.		654987	Los Angeles	CA	90210
View Print	Mario			TWFyaWB=	Koopa	FL	33012
View Print	32-589654	Timber Supply Co.		321654	Portland	OR	65498
View Print	23-456789	Maple Syrup Masters		852741	Burlington	UK	45612
View Print	95-3852721	Cattle Camp, Inc.		987654	Dallas	TX	65498

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https://www.downloadmyform.com/ViewForms.aspx

Internet | Protected Mode: Off 100%

Powerpoint Greenshades ePay... Sent Items - Micro... Selfreview09.doc (C... SmartZone Commu... 2:47 PM Tuesday 8/18/2009

GREENSHADES CENTER FOR 1099

Easily Manage the Most Difficult 1099s

Greenshades uses a direct integration into Dynamics GP or SL to process 1099-MISC, DIV, INT and PATR electronic returns. After creating the return, the Greenshades Center will upload the electronic report directly to the IRS. Add the Greenshades Forms module to easily print vendor copies of 1099s or outsource printing process while maintaining the ability to reprint, edit and correct forms as needed.

The Greenshades Center's wizard will guide users through a variety of options meant to organize the vendors and payments within Dynamics. Users can map payments to different boxes based on vendor classes, override the default 1099 type, perform vendor-level edits on the fly and much more.

E-File Wizard
Great Plains 1099 Defaults
For each 1099 type, select the box on the 1099 for which you would like that 1099 amount to apply.

Great Plains only allows for one 1099 amount per vendor. For each of the 1099 types in Great Plains, select the box on the 1099 for which you would like that 1099 amount to apply.

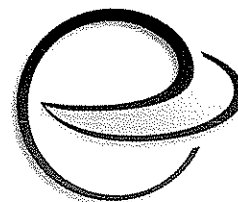
Default Miscellaneous Box: Nonemployee compensation (Box 7)
Default Dividend Box: Total ordinary dividends (Box 1a)
Default Interest Box: Interest income (Box 1)

Because Great Plains does not allow you to specify a 1099 type other than MISC, INT or DIV, would you like to override a Great Plains 1099 type as something else?

New 1099 Type: PATR
Great Plains 1099 Type: Dividend
Default Box: Patronage dividends (Box 1)

Yes No

Out < Back Next >



Why Greenshades?

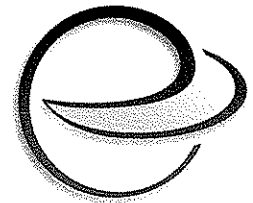
- Easily create the electronic file required for submission to the IRS
- Print recipient copies with Greenshades Forms
- Easily manage multiple payment boxes and box minimums
- Populate data from within Dynamics GP or SL
- No need to perform year-end closing in AP
- Add and combine external payment information
- Easily edit 1099 fields before submission
- Automatic combination and "roll-up" of multiple records for single vendors
- Specialty 1099 types available

If there are multiple records for vendors, Greenshades gives the option to "roll-up" multiple vendor records by TIN to produce a single 1099 per vendor. Greenshades will combine totals for same boxes or create a 1099 that reflects multiple payment boxes for a single vendor as appropriate.

Easy 1099 Compliance

Greenshades provides options to customize both of the name fields on the 1099 form itself. By populating data from the Vendor Name, Check Name or a number of user defined fields, Greenshades allows users to quickly identify a vendor's legal business name as well as a DBA or other important information.

Greenshades understands that all 1099 information is not always captured in a single accounting package, and has provided the ability to import information from Microsoft Excel which can then be combined with vendor records within Dynamics.



Advanced editing functionality, which enables users to edit any desired field in the 1099 record, ensures that even the most difficult reporting challenges are able to be filed in accordance with the IRS requirements.

Vendor Class	Tbl Type	1099 Type	Box
USA-USA	Default	MSC	Nonemployee compensation (Box 7)

Ask about additional modules available for some of the most common forms not handled within Dynamics. Filing and form solutions are available for 1098c, 1098t, 1099-OID, W2-G and many more.