

REQUEST FOR TASK ORDER PROPOSALS <i>(THIS IS NOT AN ORDER)</i>			TYPE OF MARKET <input type="checkbox"/> OPEN <input type="checkbox"/> SET-ASIDE <input checked="" type="checkbox"/> DCSS <input type="checkbox"/> GSA		PAGE OF PAGES 1   2	
1. REQUEST NO. <b>DCGD-2009-T-0017 M0001</b>	2. DATE ISSUED October 21, 2008	3. REQUEST/PURCHASE REQUEST NO. RQ465814	4. NIGP COMMODITY CODE		CAPTION <b>OSSE IT Equipment Maintenance</b>	
5A. ISSUED BY Office of Contracting and Procurement (OCP) 441 4th Street NW Bid Room Suite 703 South Washington, DC 20001			6. DELIVER BY (Date) <b>Date of Award - September 30, 2009</b>			
5B. FOR INFORMATION CALL: (Name and telephone no.) (No collect calls) <b>Anthonisha Felton, 202-481-3799</b>			7. DELIVERY <input type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER (See Schedule)			
8. TO: NAME AND ADDRESS, INCLUDING ZIP CODE  Prospective DC Supply Schedule (DCSS) vendors.			9. DESTINATION (Delivery Address)  OSSE LOCATIONS AS LISTED IN THE ATTACHED SCOPE OF WORK			
10. PLEASE FURNISH QUOTATIONS TO ISSUING OFFICE (See 5A and 5B above) ON OR BEFORE CLOSE OF BUSINESS (Date and Time) <b>November 18, 2008 - 2:00 PM</b>		11. BUSINESS CLASSIFICATION (Check appropriate boxes) <input type="checkbox"/> SMALL <input type="checkbox"/> LOCAL <input type="checkbox"/> RESIDENT OWNED <input type="checkbox"/> LONG TIME RESIDENT <input type="checkbox"/> ENTERPRISE ZONE				
<b>IMPORTANT:</b> This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contracts for supplies or invoices. Supplies are of domestic origin unless otherwise indicated by quoter. Any representations and/or certifications attached to this Request for Quotations must be completed by the quoter.						
<b>12. SCHEDULE (Include applicable Federal, State and local taxes)</b>						
ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	
	<p>Bidder(s) shall provide Firm Fixed pricing for IT Equipment Maintenance services (Printers, Copiers, Faxes, and Scanners ) for the Office of the State Superintendent of Education (OSSE) in accordance with the specification as stated herein.</p> <p><u>REQUIREMENTS:</u></p> <p><b>The contractor shall provide coverage of all parts and labor charges to maintain the listed equipment. (See the attached Scope of Work.)</b></p> <p><b>The contractor shall respond to all service calls with-in 8 hours or the next business day of the call is placed after 1:00pm Monday through Friday.</b></p> <p><b>Bidder shall state unit cost:</b> _____</p> <p><b>Bidder shall state total cost:</b> _____</p> <p>Bidder shall state TAX ID No.: _____</p> <p>District of Columbia Supply Schedule _____</p> <p>GSA Schedule _____</p> <p>(DCSS Market Solicitation with Preference Points given to Small Local Business Development Enterprise.)</p> <p><u>Delivery (5 Locations):</u>  <b>51 N Street, NE Washington, DC</b></p> <p><b>1150 5<sup>th</sup> Street, SE Washington, DC</b></p> <p><b>441 4<sup>th</sup> Street, NW Washington, DC</b></p> <p><b>717 14<sup>th</sup> Street, NW Washington, DC</b></p>					

	<p><b>1201 17<sup>th</sup> Street, NW Washington, DC</b></p> <p><u>Period of Performance/Delivery Date:</u> Date of Award – September 30, 2009</p> <p><u>Award Basis:</u> The contract will be awarded to the <b>lowest price responsible offeror</b> whose proposal fulfills all minimum requirements of the Scope of Work. The District reserves the right to reject any or all proposals determined to be inadequate or unacceptable. The District may award a contract on the basis of initial offers received without discussions. Therefore, each initial offer should contain the offeror's best terms from a <b>firm-fixed-price basis and technical standpoint.</b></p> <p><u>Quotation Submission Date:</u> The closing date for receipt of quotation is <b>November 18, 2008 by 2:00 p.m. EST.</b></p> <p>Any questions regarding this solicitation should be submitted to Anthonisha Felton at <a href="mailto:Anthonisha.felton@dc.gov">Anthonisha.felton@dc.gov</a> no later than Monday, November 17, 2008 at 11:00 a.m.</p> <p><b>Bidder shall update the attached Master Supplier Information Collection Form.</b></p> <p><b>Bidder shall update the attached W-9 form.</b></p> <p><b>Please fax in to 202-727-2019 when complete.</b></p> <p><u>Hand delivery or Electronic Delivery of Proposals:</u></p> <p>Hand Deliver to: Office Contracting and Procurement Bid Room/Bid Counter 441 4th Street, N.W., Suite 703 South Washington, D.C. 20001</p> <p>Or E-Mail to: <a href="mailto:Anthonisha.felton@dc.gov">Anthonisha.felton@dc.gov</a> in PDF format only.</p> <p><u>Attachments:</u> <b>Scope of Work, Master Supplier Information Form, W-9</b></p> <p>Notice: The district government requires all vendors to have an approved contract or purchase order in place prior to providing goods or services. Entering into contracts verbally or without appropriate authorization is prohibited. Any vendor who delivers services or goods to the District without a proper contract is doing so entirely at their own risk. The District does not pay for goods or services that were provided without the benefit of a properly executed contract.</p>			
13. DISCOUNT FOR PROMPT PAYMENT	10 CALENDAR DAYS %	20 CALENDAR DAYS %	30 CALENDAR DAYS %	CALENDAR DAYS %
14. NAME AND ADDRESS OF QUOTER ( <i>Street, city, county, State and ZIP Code</i> )	14. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION	16. DATE OF QUOTATION		
		17. NAME AND TITLE OF SIGNER ( <i>Type or print</i> )	18. TELEPHONE NO. ( <i>Include area code</i> )	

## **Scope of Work - M0001**

For Fiscal Year 2009 the **Office of the State Superintendent of Education** is looking for a contractor to provide routine maintenance and break-fix services for the agencies copiers, FAX machines, printers and scanners. See equipment list.

The selected vendor will cover all parts and labor charges to maintain the listed equipment in good working order. The vendor must respond to all service calls with-in 8 hours or the next business day of the call is placed after 1:00pm Monday through Friday.

The Office of the State Superintendent of Education has **5 locations within the District of Columbia**. Below is the lost of locations that will be covered within this contract.

### ***Location 1 - 51 N St. NE Washington DC***

- Lower Level
- 3<sup>rd</sup> Floor
- 7<sup>th</sup> Floor

### ***Location 2- 1150 5<sup>th</sup> St. SE Washington DC***

- 1<sup>st</sup> Floor
- 2<sup>nd</sup> Floor
- 3<sup>rd</sup> Floor

### ***Location 3- 441 4<sup>th</sup> St. NW Washington DC***

- 3<sup>rd</sup> Floor
- 7<sup>th</sup> Floor

### ***Location 4- 717 14<sup>th</sup> St. NW Washington DC***

- 4<sup>th</sup> Floor
- 7<sup>th</sup> Floor
- 8<sup>th</sup> Floor
- 12<sup>th</sup> Floor

### ***Location 5- 1201 17<sup>th</sup> St. NW Washington DC***

- 1<sup>st</sup> Floor
- 2<sup>nd</sup> Floor
- 3<sup>rd</sup> Floor
- Attic

## Equipment List

Line Item	Model	Serial Number	Location	Building	Floor
1	Canon 5020	JCT14238	Front Desk	441N	350N
2	Canon Color IR3220G	JPM00706		717 14th	2nd Floor
3	CANON IR 8500	MPB02240	COPY ROOM	441N	350N
4	Canon ImageRunner105	MPT03621		717 14th	8th Floor
5	CANON IR 2000	MQU07096	SBOE 7TH FLR	441N	350N
6	CANON IR 2000	MQU06945	3N54A	441N	350N
7	CANON IR 5000	NRF04959	OUTSIDE 3N67	441N	350N
8	Canon IR7095	SHX00222		717 14th	12th Floor
9	Canon IR7095	SHX00223		717 14th	7th Floor
10	XEROX WORKCENTER 7665	VDR000526	COPY ROOM	441N	350N
11	XEROX WORKCENTER 7665	VDR001471	Carol Scurlock	Van Ness	Records Room
12	CANON 3175	UYR08586	COPY ROOM	441N	350N
13	Brother Intellifax 2820	L6J316117		717 14th	7th Floor
14	Panafax UF-890	LBG2AV00571	COPY ROOM 2	51N	7th FLR
15	Canon Laser Class 810 (fax)	MZJ04106	Student Hearing Office, Room 1	Van Ness	1st FLR
16	Brother Intellifax 4750e	U60283M5J399668	SBOE 7TH FLR	441N	350N
17	Brother Intellifax 4100	U60Z98G5J311077	RM 103A	Van Ness	2nd FLR
18	Brother Intellifax 2820	U61325M7N321838		717 14th	12th Floor
19	Brother Intellifax 2920	U61326H6J431888		717 14th	12th Floor
20	Brother Intellifax 2920	U61326H6J432012		717 14th	12th Floor
21	Brother Intellifax 4100e	U61639E7J655068	RM 102	Van Ness	2nd FLR
22	Brother Intellifax 4100	U61639H6J529305		717 14th	12th Floor
23	CANON LASER 9000L	UYS13013	Room 758 COPY ROOM 1	51N	7th FLR
24	Canon 9000L Fax	UYS33577	Rental Service 703-971-5700, Supplies 800-367-4836	51N	LL
25	CANON LASER 9000L	UYS63507	OUTSIDE 3N38	441N	350N
26	HP 1400mfp	B0002240	Room i	51N	7th FLR
27	HP Color Laser Jet 1600	CB37300913	Room i	51N	7th FLR
28	CANON DR - 3080C	CC303252	Room 758 COPY ROOM 1	51N	7th FLR
29	HP PSC 1410 ALL-IN-ONE	CN56SB4144	RM 108	Van Ness	2nd FLR
30	HP LJ 1022n	CNBC63M0HP	Room O	51N	7th FLR
31	HP LJ 3055	CNBJ001809	3N23	441N	350N
32	HP LJ 3055	CNBJ001809	IN FRONT of 3025	51N	3rd FLR
33	HP LJ P2015d	CNBJC47701	3N23	441N	350N
34	HP CLJ 3500	CNBRC20850	RM 108	Van Ness	2nd FLR
35	HP Color LJ 3500	CNBRK36090	ROOM O	51N	7th FLR
36	HP LJ 4345 MFP	CNDC81F036	COPY ROOM 2	51N	7th FLR
37	HP LJ 4345 MFP	CNDC81F03G	RM 210	Van Ness	3rd FLR
38	CLJ 2250LN	CNGHG02814	3017-G	51N	3rd FLR
39	HP CLJ 2550LN	CNGHH03533		51N	3rd FLR
40	HP LJ 2420	CNGKK89323	RM 107-A	Van Ness	2nd FLR
41	HP Laserjet 4250dtn	CNGXB01780		717 14th	2nd Floor
42	HP Laserjet 4250dtn	CNGXB01788		717 14th	12th Floor
43	HP Laserjet 4250dtn	CNGXF00239		717 14th	8th Floor
44	HP LJ 4250n	CNGXF94394	RM 107	Van Ness	2nd FLR
45	HP LJ 4345 MFP	CNGYF00150	RM 106	Van Ness	2nd FLR
46	HP LJ 3800	CNWBB66356		51N	3rd FLR
47	HP COLOR LJ 4700DN	JP4LB04480	SBOE 7TH FLR	441N	350N
48	HP Color LJ 4700	JP4LB18963	COPY ROOM 2	51N	7th FLR

49	HP Color LJ 4700dt	JP4LB21576	Room 202	Van Ness	3rd FLR
50	HP Color LJ 4700	JP4LB23735	Room 758 COPY ROOM 1	51N	7th FLR
51	HP Color LJ 4700dn	JP4LD01462	Room LL	51N	7th FLR
52	HP Color Laser Jet 4600	JPBKB10779	3017-K	51N	3rd FLR
53	HP Color LaserJet 5550dn	JPFC57S059		717 14th	8th Floor
54	HP Color Laserjet 5550dn	JPFC57S05W		717 14th	7th Floor
55	HP Color LaserJet 5550dn	JPFC58X00M		717 14th	12th Floor
56	HP Color LaserJet 5550dn	JPFC58X00R		717 14th	7th Floor
57	HP Color Laserjet 5550dn	JPFC58X00W		717 14th	12th Floor
58	HP Color LaserJet 5550dn	JPFC59404Z		717 14th	2nd Floor
59	HP Color Laserjet 5550dn	JPFC594058	q3715a	717 14th	7th Floor
60	HP LJ 4500N	JPHCD05173	3N55	441N	350N
61	HP CLJ 4650	JPKAD33694	RM 106	Van Ness	2nd FLR
62	HP COLOR LJ 4700DN	JPLLC14198	3N63A	441N	350N
63	HP COLOR LJ 4700DN	JPLLC19745	COPY ROOM	441N	350N
64	HP COLOR LJ 4700DN	JPRLC19561	OUTSIDE 3N79	441N	350N
65	HP LJ 9050 MFP	JPTL6D400P	RM 106	Van Ness	2nd FLR
66	HP LJ 9050mfp	JPTL71X0CD	Hearing Officer's Room	Van Ness	1st FLR
67	HP Color Laser Jet 2840	MY7231042	Room i	51N	7th FLR
68	HP LJ 4100	SG5C306F37	3032-E	51N	3rd FLR
69	HP Laserjet 4250dtn	SNCNGXB04772		717 14th	7th Floor
70	HP PRO SERIES 2000C	T347304	3N5	441N	350N
71	Brother HL-6050D	U60955E4J148816		51N	3rd FLR
72	Canon Color IC MF 8180C	UAB04249	RM 102	Van Ness	2nd FLR
73	Canon ImageClass MF8180C	UAB04714	Student Hearing Office, Room 1	Van Ness	1st FLR
74	Canon Color IC MF 8180C	UAB04917	RM 103	Van Ness	2nd FLR
75	HP LJ 4050N	USBC156778	DEBORAH GIST	441N	350N
76	HP LJ 4250	USBXS22759	SHO DIRECTORS PERSONAL PRINTER	Van Ness	1st FLR
77	HP LJ 6MP	USDN006852	Dr. Partee, Glenda - Director	51N	7th FLR
78	HP LJ 4200	USDNN23157	3N50	441N	350N
79	HP LJ 4200	USDNS22645	3N41	441N	350N
80	HP LJ 4200	USDNS22655	ROOM M	51N	7th FLR
81	HP LJ 4000N	USEX005655	FRONT DESK (Lizette.Brown@dc.gov)	51N	7th FLR
82	HP LJ 4100TN	USGNH17055	3N42	441N	350N
83	HP LJ 4200	USGNN62757	Room across from SHO	Van Ness	1st FLR
84	HP Laserjet 8100	USKG006877		717 14th	12th Floor
85	Canon 4100tn	USLK22307	Near George Ferguson	441N	350N
86	HP LJ 4100TN	USLNK22277	COPY ROOM	441N	350N
87	HP LJ 4100TN	USLNK22295	OUTSIDE 3N79	441N	350N
88	HP Laser Jet 4100	USLNK22307	3032-E (Michelle Robinson)	51N	3rd FLR
89	HP LJ 4100TN	USLNK22308	HALLWAY BETWEEN 3N48 AND 3N49	441N	350N
90	HP LJ 4100TN	USLNK22311	3N63A	441N	350N
91	HP LJ 4050	USQU000980	3N21	441N	350N
92	XEROX Phaser 7400DT	WMY701964	3017B&3017-C	51N	3rd FLR
93	CANON LASER 2050	YKM06852	3N21	441N	350N
94	HP COLOR LJ 4700DN		In front of Kristin Yochum's Cubicle	441	350N
95	HP CLJ 4600DN			51N	3rd FLR
96	HP LJ 2015d		Dr. Partee, Glenda - Director	51N	7th FLR
97	HP LJ 3800		Room AA, Cynthia Bell - Director	51N	7th FLR
98	HP CLJ 8550		not being used	Van Ness	3rd FLR
99	HP Color LJ 8550dn		Room 206	Van Ness	3rd FLR
100	Brother 9700 MFC			51N	3rd FLR
101	Xerox Documate 152 (Scanner)	730CN1077S5C1300762		717 14th	12th Floor

102	Xerox Documate 152 (Scanner)	736CN107985C1300684		717 14th	12th Floor
103	Xerox Documate 152 (Scanner)	739CN1079S5C1300370		717 14th	12th Floor
104	Xerox Documate 152 (Scanner)	739CN1079S5C1300411		717 14th	12th Floor
105	HP Scanjet 5530	CN39B57002		717 14th	8th Floor
106	HP Scanjet 3970	CN46SB1DZT		717 14th	12th Floor
107	HP Scanjet 8290	CN56ET0482		717 14th	8th Floor
108	HP Scanjet 8290	CN56GT0011		717 14th	2nd Floor
109	HP Scanjet 8290	CN577T0419		717 14th	12th Floor
110	Digital Sender	SGBJ7C40QW	SHO, Brittany Lacy's Office	Van Ness	1st FLR
111	HP DIGITAL SENDER 9200c	SGRR018957	SBOE 7TH FLR	441N	350N

## Request for Taxpayer Identification Number and Certification

**Give form to the requester. Do not send to the IRS.**

<b>Print or type See Specific Instructions on page 2.</b>	Name (as shown on your income tax return)	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ..... <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	City, state, and ZIP code	
	List account number(s) here (optional)	

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number
or
Employer identification number

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

- The U.S. grantor or other owner of a grantor trust and not the trust, and
- The U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person, do not use Form W-9. Instead, use the appropriate Form W-8 (see Publication 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a “saving clause.” Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity not subject to backup withholding, give the requester the appropriate completed Form W-8.

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS 28% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

**Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),
3. The IRS tells the requester that you furnished an incorrect TIN,

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or

5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See the instructions below and the separate Instructions for the Requester of Form W-9.

Also see *Special rules for partnerships* on page 1.

## Penalties

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

## Specific Instructions

### Name

If you are an individual, you must generally enter the name shown on your income tax return. However, if you have changed your last name, for instance, due to marriage without informing the Social Security Administration of the name change, enter your first name, the last name shown on your social security card, and your new last name.

If the account is in joint names, list first, and then circle, the name of the person or entity whose number you entered in Part I of the form.

**Sole proprietor.** Enter your individual name as shown on your income tax return on the “Name” line. You may enter your business, trade, or “doing business as (DBA)” name on the “Business name” line.

**Limited liability company (LLC).** Check the “Limited liability company” box only and enter the appropriate code for the tax classification (“D” for disregarded entity, “C” for corporation, “P” for partnership) in the space provided.

For a single-member LLC (including a foreign LLC with a domestic owner) that is disregarded as an entity separate from its owner under Regulations section 301.7701-3, enter the owner’s name on the “Name” line. Enter the LLC’s name on the “Business name” line.

For an LLC classified as a partnership or a corporation, enter the LLC’s name on the “Name” line and any business, trade, or DBA name on the “Business name” line.

**Other entities.** Enter your business name as shown on required federal tax documents on the “Name” line. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on the “Business name” line.

**Note.** You are requested to check the appropriate box for your status (individual/sole proprietor, corporation, etc.).

### Exempt Payee

If you are exempt from backup withholding, enter your name as described above and check the appropriate box for your status, then check the “Exempt payee” box in the line following the business name, sign and date the form.

Generally, individuals (including sole proprietors) are not exempt from backup withholding. Corporations are exempt from backup withholding for certain payments, such as interest and dividends.

**Note.** If you are exempt from backup withholding, you should still complete this form to avoid possible erroneous backup withholding.

The following payees are exempt from backup withholding:

1. An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2),
2. The United States or any of its agencies or instrumentalities,
3. A state, the District of Columbia, a possession of the United States, or any of their political subdivisions or instrumentalities,
4. A foreign government or any of its political subdivisions, agencies, or instrumentalities, or
5. An international organization or any of its agencies or instrumentalities.

Other payees that may be exempt from backup withholding include:

6. A corporation,
7. A foreign central bank of issue,
8. A dealer in securities or commodities required to register in the United States, the District of Columbia, or a possession of the United States,
9. A futures commission merchant registered with the Commodity Futures Trading Commission,
10. A real estate investment trust,
11. An entity registered at all times during the tax year under the Investment Company Act of 1940,
12. A common trust fund operated by a bank under section 584(a),
13. A financial institution,
14. A middleman known in the investment community as a nominee or custodian, or
15. A trust exempt from tax under section 664 or described in section 4947.

The chart below shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 15.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 9
Broker transactions	Exempt payees 1 through 13. Also, a person registered under the Investment Advisers Act of 1940 who regularly acts as a broker
Barter exchange transactions and patronage dividends	Exempt payees 1 through 5
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 7

<sup>1</sup> See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation (including gross proceeds paid to an attorney under section 6045(f), even if the attorney is a corporation) and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, and payments for services paid by a federal executive agency.

## Part I. Taxpayer Identification Number (TIN)

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited liability company (LLC)* on page 2), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note.** See the chart on page 4 for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local Social Security Administration office or get this form online at [www.ssa.gov](http://www.ssa.gov). You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/businesses](http://www.irs.gov/businesses) and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting [www.irs.gov](http://www.irs.gov) or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note.** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

**Caution:** A disregarded domestic entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if items 1, 4, and 5 below indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). Exempt payees, see *Exempt Payee* on page 2.

**Signature requirements.** Complete the certification as indicated in 1 through 5 below.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.** You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

## Secure Your Tax Records from Identity Theft

Identity theft occurs when someone uses your personal information such as your name, social security number (SSN), or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

Call the IRS at 1-800-829-1040 if you think your identity has been used inappropriately for tax purposes.

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

### Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS personal property to the Treasury Inspector General for Tax Administration at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: [spam@uce.gov](mailto:spam@uce.gov) or contact them at [www.consumer.gov/idtheft](http://www.consumer.gov/idtheft) or 1-877-IDTHEFT(438-4338).

Visit the IRS website at [www.irs.gov](http://www.irs.gov) to learn more about identity theft and how to reduce your risk.

## What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
4. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee <sup>1</sup>
b. So-called trust account that is not a legal or valid trust under state law	The actual owner <sup>1</sup>
5. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
For this type of account:	Give name and EIN of:
6. Disregarded entity not owned by an individual	The owner
7. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
8. Corporate or LLC electing corporate status on Form 8832	The corporation
9. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
10. Partnership or multi-member LLC	The partnership
11. A broker or registered nominee	The broker or nominee
12. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name and you may also enter your business or "DBA" name on the second name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships* on page 1.

**Note.** If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

## Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons who must file information returns with the IRS to report interest, dividends, and certain other income paid to you, mortgage interest you paid, the acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA, or Archer MSA or HSA. The IRS uses the numbers for identification purposes and to help verify the accuracy of your tax return. The IRS may also provide this information to the Department of Justice for civil and criminal litigation, and to cities, states, the District of Columbia, and U.S. possessions to carry out their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You must provide your TIN whether or not you are required to file a tax return. Payers must generally withhold 28% of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to a payer. Certain penalties may also apply.

*District of Columbia  
Office of Contracting and Procurement  
Master Supplier Information Collection Template*

Vendor Name (Legal Name): \_\_\_\_\_

Vendor Number (I + Tax ID): 1 \_\_\_\_\_

Phone Number (including area codes and extensions): \_\_\_\_\_

General E-mail Address: \_\_\_\_\_

Website Address: \_\_\_\_\_

W9 Tax ID Number: \_\_\_\_\_

CBE?: Yes  No  CBE Number: \_\_\_\_\_ (Choose matching items for **Supplier** and **Ownership** Types).

Contact Name: \_\_\_\_\_

Contact E-Mail Address: \_\_\_\_\_

Supplier/Vendor Type: \_\_\_\_\_

Ownership Type: \_\_\_\_\_

**Supplier/Vendor Type**

1=DC Employee	4=Local Government	7=Other
2=Federal Agency	5=Vendor-Business	8=CBE
3=State Agency	6=Vendor=Individual	

**Ownership Type**

A=State Corporation	I=Individual Recipient	R=Foreign
C=Professional Corp.	L=CBE	S=Sole Ownership
E=State Employee	M=Medical Corporation	T=Partnership
F=Financial Institution	O=Out of State Corporation	U=Non-Profit
G=Government Entity	P=Professional Association	

Please fax in to 202-727-9183 when complete.

**Mail Code = 000 = Supplier Headquarters Address (Cannot be a PO Box)**

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Mail Code = 200 = Payment Remittance Address if Different from 000**

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Mail Code = 300 = Purchase Order Address if Different from 000 (Cannot be a PO Box)**

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**ALL ITEMS IN THIS AREA MUST BE COMPLETED TO RECEIVE ELECTRONIC PURCHASE ORDERS**

**DUN & Bradstreet No. (DUNS):** \_\_\_\_\_

*(To apply for a your DUNS number call 1-800-234-3867 Required for all Email and Fax Purchase Order forwarding requests.)*

**ANID Number:**

**(Please register at <https://service.ariba.com/Supplier.aw>; You will not be able to receive your purchase orders by email or fax without this number.)**

**Do you want the purchase order forwarded by e-mail or fax?** Email  Fax

*(Please choose only one)*

**Ordering E-Mail Address (Send Purchase Orders):** \_\_\_\_\_

**Ordering Fax Number (Send Purchase Orders):** \_\_\_\_\_

***Please note: The fax number is still required for Email orders***

Does the Vendor Accept Purchase Cards:      Yes       No