

Department of Taxation &
Finance
3850000

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2025 to March 31, 2026

Contracting State Agency Name: Department of Taxation & Finance
 Contract Number: Amendment 3 - C400663
 Agency Business Unit: TAX01
 Agency Department ID: 3850000
 Contract Term: 03/25/2025 to 03/25/2037
 Contractor Name: Marshall & Swift/Boeckh
 Contractor Address: 40 Pacifica Suite 900, Irvine, CA, 92618
 Description of Services Being Provided: Custom API and Mapping Tool

Scope of Contract (Choose one that best fits):

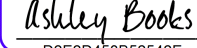
- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☐ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☒ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Senior Professional	21.00	1,966.00	\$401,881.95
Professional	14.00	1,536.00	\$313,983.05
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	35.00	3,502.00	\$715,865.00
Grand Total	35.00	3,502	\$715,865.00

Name of person who prepared this report: Ashley Books

Title: Senior Product Manager, Marshall and Swift

Phone #: (262) 957-6992

Preparer's Signature: 

D2E2D458B52542E...

Date Prepared: 05/15/2025

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: Department of Taxation and Finance

Contract Number: C400716

Agency Business Unit: TAX01

Agency Department ID: 3850381

Contract Term: 09/06/2022 to 09/5/2025

Contractor Name: AKF Consulting LLC

Contractor Address: 757 Third Avenue (12th Floor - AIM), New York, NY 10017

Description of Services Being Provided: General consulting and program design services for the New York Secure Choice Savings Program.

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☐ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☒ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Engagement Partner	2.00	30.75	\$13,530.00
Project Manager	1.00	13.17	\$4,608.33
Senior Analyst	2.00	32.25	\$12,416.25
Analyst	1.00	1.00	\$185.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	6.00	77.17	\$30,739.58
Grand Total	6.00	77.17	\$30,739.58

Name of person who prepared this report: Andrea Feirstein

Title: CEO and Managing Director

Phone #: 646-218-9864

Preparer's Signature: Andrea Feirstein

Date Prepared: 05/14/2025

New York State Consultant Services Contractor's Annual Employment Report

Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: NYS Department of Taxation and Finance
 Contract Number: PH68613
 Agency Business Unit: TAX01
 Agency Department ID: 3850000
 Contract Term: 07/01/2019 to 06/30/2029
 Contractor Name: Knowledge Builders Inc.
 Contractor Address: 1977 Western Avenue, Suite 1, Albany, NY - 12203
 Description of Services Being Provided: IT Specialist, Business Analyst & Software Developer

Scope of Contract (Choose one that best fits):

- ☒ Analysis ☒ Evaluation ☐ Research ☐ Training
☒ Data Processing ☒ Computer Programming ☐ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
15-1232.00 / IT Specialist	1.00	499.75	\$40,509.74
OCHBIT13197	1.00	1,895.50	\$128,856.09
OCHBIT13327	1.00	436.00	\$35,137.24
OCHBIT13701	1.00	392.00	\$27,447.84
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	4.00	3,223.25	\$231,950.91
Grand Total	4.00	3,223	\$231,950.91

Name of person who prepared this report: Sanjay Kapalli

Title: Executive Vice President

Phone #: (518) 250-4189

Preparer's Signature: 

Date Prepared: 05/02/2025

FORM B

New York State Consultant Services Contractor's Annual Employment Report

Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: **Department of Taxation & Finance**

Contract Number: PH68617

Agency Business Unit: TAX01

Contract Term: 7/1/2019 to 6/30/2029

Agency Department ID: 38500000

Contractor Name: MVP Consulting Plus, Inc.

Contractor Address: 401 New Karner Rd., 3rd Fl., Albany, NY 12205

Description of Services Being Provided: IT Consulting Services

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
15-1121.00	1.00	417.50	\$26348.43
15-1199.02 OCHBIT13388	1.00	1536.00	\$86200.32
15-1243.00 OCHBIT13590	1.00	576.00	\$53095.68
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	3.00	2529.5	\$165644.43
Grand Total	3.00	2529.5	\$165644.43

Name of person who prepared this report: Nancy Gordon

Title: Contract Manager

Phone #: 518-218-1700

Preparer's Signature: _____



Date Prepared: 5/6/2025

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: TAX AND FINANCE
 Contract Number: PH68620 Agency Business Unit: TAX01
 Contract Term: 7/1/2019 to 6/30/2029 Agency Department ID: 3850000
 Contractor Name: Panha Solutions Inc
 Contractor Address: 1659 Central Ave, Ste 103, Albany, NY 12205
 Description of Services Being Provided: Hourly Based Information Technology

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Software Architect (OCHBIT13458, OCHBIT12384, OCHBIT12618, OCHBIT13093, OCHBIT13307, OCHBIT11783)	6.00	10,713.00	\$1,015,927.00
IT Specialist (OCHBIT12973)	1.00	992.00	\$72,693.76
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	7.00	11,705.00	\$1,088,620.76
Grand Total	7.00	11,705	\$1,088,620.76

Name of person who prepared this report: Milinda P Puvvada

Title: CEO

Phone #: 518-878-7457

Preparer's Signature: P. Milinda Panha

Date Prepared: 5/15/2025

FORM B

New York State Consultant Services Contractor's Annual Employment Report

Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: Department of Taxation and Finance
 Contract Number: PH68621 Agency Business Unit: TAX01
 Contract Term: 07/01/2019 to 06/30/2024 Agency Department ID: 3850000
 Contractor Name: PSI International Inc.
 Contractor Address: 11200 Waples Mill Rd, Suite 200 Fairfax, ,VA 22030
 Description of Services Being Provided: IT Services

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Database Architects	1	1,292.00	\$ 113,024.16
Total this Page	1	1,292.00	\$113,024.16
Grand Total	1	1,292.00	\$113,024.16

Name of person who prepared this report: Jasmin Bertulfo

Title: Accountant

Phone #: 703.621.5849

Preparer's Signature: 

Date Prepared: 05/15/2025

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: Department of Taxation and Finance
 Contract Number: PH68626
 Agency Business Unit: TAX01
 Agency Department ID: 3850000
 Contract Term: 07/01/2019 to 06/30/2029
 Contractor Name: Spruce Technology Inc.
 Contractor Address: 1149 Bloomfield Ave, Ste G, Clifton, NJ 07012
 Description of Services Being Provided: Hourly Based Information Technology Services

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Software Architect Expert - OCHBIT13323	1.00	1,536.00	\$142,141.44
Software Architect Expert - OCHBIT13496	1.00	1,155.00	\$106,883.70
Business Analyst Expert - OCHBIT13497	1.00	602.00	\$44,493.82
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	3.00	3,293.00	\$293,518.96
Grand Total	3.00	3,293	\$293,518.96

Name of person who prepared this report: Andrea Cano

Title: Staffing & Administrative Coordinator

Phone #: 9177010966

Preparer's Signature: Andrea Cano

Date Prepared: 05/12/2025

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: Department of Taxation and Finance
 Contract Number: PH68629
 Agency Business Unit: TAX01
 Agency Department ID: 3850000
 Contract Term: 7 / 1 / 19 to 6 / 30 / 29
 Contractor Name: **Tech Valley Talent, LLC**
 Contractor Address: **1360 Kania Road, Amsterdam, NY 12010 and
 20 Prospect St., Ballston Spa, NY 12020**
 Description of Services Being Provided: **IT Staff Augmentation; IT Professional Services**

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☒ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
15-2051.01 Business Intelligence Analysts	1.0	411	26,669.79
15-1299.09 Information Technology Project Managers	1.0	1541.5	137,363.07
15-1299.09 Information Technology Project Managers (OCHBIT13714)	1.0	481	44,528.92
Total this Page	3.0	2433.5	208,561.78
Grand Total	3.0	2433.5	208,561.78

Name of person who prepared this report: **Rene Guzek**Title: **VP of Operations**Phone #: **518-882-0001 x112**Preparer's Signature: *Rene Guzek*Date Prepared: **5/14/2025**

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(Use additional pages, if necessary)

FORM B

New York State Consultant Services Contractor's Annual Employment Report

Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: NYS Department Taxation and Finance (NYS DTF)
 Contract Number: PH68631 Agency Business Unit: TAX01
 Contract Term: 5/20/2024 to 11/19/2026 Agency Department ID: 3850000
 Contractor Name: Trigyn Technologies Inc
 Contractor Address: 100 Metroplex Drive, Edison, NJ 08817
 Description of Services Being Provided: HBITS-05-13327 Software Developer Expert

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Software Developer Expert \$81.55 OCHBIT13327	1.00	1,882.00	\$153,477.10
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	1.00	1,882.00	\$153,477.10
Grand Total	1.00	1,882	\$153,477.10

Name of person who prepared this report: Tom Gordon

Title: Sr. Vice President

Thomas A

Gordon:A01094E000001
6DB7337560000038E3
 Digitally signed by Thomas A
 Gordon: A01094E0000016DB7337560000038E3
 DN: cn=US, ou=U.S. Government, ou=ECA,
 c=US, email=thomas.gordon@nys.gov,
 cn=Thomas A
 Gordon: A01094E0000016DB7337560000038E3
 Date: 2025.05.08 12:38:06 -0400

Phone #: 732-777-4608

Preparer's Signature: _____

Date Prepared: 5/7/2025

(Use additional pages, if necessary)

FORM B

New York State Consultant Services
Contractor's Annual Employment Report
 Report Period: April 1, 2024 to March 31, 2025

Contracting State Agency Name: New York State Tax & Finance (NYS DTF)
 Contract Number: PH69606 / OC#: OCHBIT12951
 Agency Business Unit: OFT01
 Agency Department ID: 1380000
 Contract Term: 07/01/2024 to 06/30/2029
 Contractor Name: Computer Technology Services Inc.
 Contractor Address: 358 Broadway - Granite Palace Bldg, Suite 203, Saratoga Springs, NY 12866
 Description of Services Being Provided:

Scope of Contract (Choose one that best fits):

- ☐ Analysis ☐ Evaluation ☐ Research ☐ Training
☐ Data Processing ☐ Computer Programming ☒ Other IT consulting
☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services
☐ Health Services ☐ Mental Health Services
☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Project Manager	1.00	1,882.00	\$156,168.36
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
	0.00	0.00	\$0.00
Total this Page	1.00	1,882.00	\$156,168.36
Grand Total	1.00	1,882.00	\$156,168.36

Name of person who prepared this report: Thomas Bianco

Title: Recruiting & Operations

Phone #: 518-466-5234

Preparer's Signature: _____



Date Prepared: 5/14/2025

FORM B

**New York State Consultant Services
Contractor's Annual Employment Report
Report Period: April 1, 2024 to March 31, 2025**

Contracting State Agency Name: NYS Dept Taxation & Finance**Contract Number:** PN691AC**Agency Business Unit:** 0**Agency Department ID:** 0**Contract Term:** 3/1/2024 To 3/31/2027**Contractor Name:** New York State Technology Enterprise Corporation (NYSTEC)**Contractor Address:** 99 Otis Street, 2nd Floor, Rome, NY 13441**Description of Services Being Provided:** DTF CARTS Technical Architecture**Scope of Contract (Choose one that best fits):**☐ Analysis ☐ Evaluation ☐ Research ☐ Training☐ Data Processing ☐ Computer Programming ☒ Other IT Consulting☐ Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services☐ Health Services ☐ Mental Health Services☐ Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting

Employment Category	Number of Employees	Number of hours to be worked	Amount Payable Under the Contract
11-3021.00 Computer and Information Systems Manager	3.00	3,891.00	\$ 743,110.12
Total this page	3.00	3,891.00	\$ 743,110.12
Grand Total	3.00	3,891.00	\$ 743,110.12

Name of person who prepared this report: Michael J. Tallman**Title:** Contracts Manager**Phone #:** 315-334-7843 mtallman@nystec.com**Preparer's Signature:****Date Prepared:** 04-28-2025

(Use additional pages, if necessary)

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