U.S. GOVERNMENT PUBLISHING OFFICE

Columbus, Ohio

GENERAL TERMS, CONDITIONS, AND SPECIFICATIONS

For the Procurement of

Section 508 Compliant PDF Files

as requisitioned from the U.S. Government Publishing Office (GPO) for

IRS Alternative Media Center – Richmond, VA

Department of Treasury – Washington, DC

Single Award

TERM OF CONTRACT

The term of this contract is for the period beginning April 1, 2021 and ending March 31, 2022, plus up to 4 optional 12-month extension period(s) (April 1, 2022 through March 31, 2023, April 1, 2023 through March 31, 2024, April 1 2024 through March 31, 2025, and April 1, 2025 through March 31, 2026) that may be added in accordance with the "Option to Extend the Term of Contract" clause in Section 1 of this contract. Special attention is directed to the "Economic Price Adjustment" clause in Section 1 of this contract.

BID OPENING

Bids shall be opened at 11:00 a.m. prevailing Columbus, OH time on **March 23, 2021**.

BID SUBMISSION

Bidders MUST submit email bids to bidscolumbus@gpo.gov for this solicitation. No other method of bid submission will be accepted at this time.

The company name, program number, and bid opening date must be specified in the subject line of the emailed bid submission. Bids received after 11:00 a.m. prevailing Columbus, Ohio Time on the bid opening date specified above will not be considered for award.

NOTICE TO BIDDERS

Significant revisions have been made throughout this specification. Bidders are cautioned to familiarize themselves with all provisions of this contract before bidding.

Special attention is directed to the bid submission provisions under "Additional Emailed Bid Submission Provisions" on page 6.

Abstract of current contract prices available at https://www.gpo.gov/how-to-work-with-us/vendors/contract-pricing.

For information of a technical nature contact Linda Price at lprice@gpo.gov or (614) 488-4616, ext. 7 (No collect calls).

SECTION 1. – GENERAL TERMS AND CONDITIONS

GPO CONTRACT TERMS

Any contract which results from this Invitation for Bid will be subject to the applicable provisions, clauses, and supplemental specifications of GPO Contract Terms (GPO Pub. 310.2, effective December 1, 1987 (Rev. 1-18)) and GPO Contract Terms, Quality Assurance Through Attributes Program for Printing and Binding (GPO Pub. 310.1, effective May 1979 (Rev. 09-19)).

GPO Contract Terms (GPO Publication 310.2) is available at the following web address:
https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/contract-terms-01-18.pdf

GPO QATAP (GPO Publication 310.1) is available at the following web address:
https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/qatap-rev-09-19.pdf

Additional GPO Publications can be found at:
https://www.gpo.gov/how-to-work-with-us/vendors/forms-and-standards.

SUBCONTRACTING

The predominant production functions are assessment and remediation of PDF files to bring them into compliance with 29 USC Section 508. These functions cannot be subcontracted.

SECURITY PROVISIONS

The contractor will be in custody of items considered by the Government to be Sensitive but Unclassified (SBU).

Safeguards

Any Treasury Department information made available, which is marked "Official Use Only" on the print order or on any part of the furnished material, shall be used only for the purpose of carrying out the provisions of this contract, and shall not be divulged or made known in any manner to any person except as may be necessary in the performance of the contract. All copies must be accounted for and waste sheets, printing plates, and electronic files destroyed beyond recognition, reconstruction, or recovery.

All training material shall be classified as "Official Use Only" whether or not it is specified on the print order.

Criminal/Civil Sanctions

Each officer or employee or subcontractor of the contractor to whom "Official Use Only" information may be made available or disclosed shall be notified in writing by the contractor that "Official Use Only" information disclosed to such officer or employee or subcontractor can be used only for a purpose and to the extent authorized herein, and that further disclosure of any such "Official Use Only" information, by any means for a purpose or to an extent unauthorized herein, may subject the offender to criminal sanctions imposed by 18 U.S.C. 641.

That Section provides, in pertinent part, that whoever knowingly converts to his use or another, or without authority, sells, conveys or disposes of any record of the United States or whoever received the same with the intent to convert it to his use or gain, knowing it to have been converted, shall be guilty of a crime punishable by a fine of up to $10,000 or imprisoned up to ten years or both.

Labels/marking indicating special handling may be required and will be indicated on the individual print order.

Security Controls

To ensure the contractor's facility can provide the necessary controls to safeguard security material, a tour of the facility may be conducted by IRS security personnel. The review of the facility will include, but is not limited to the following:

(a) Physical security controls,
(b) Protection of data recorded on magnetic media,
(c) Protection of data recorded on hard copy media,
(d) Identification and authentication controls,
(e) System accountability controls,
(f) Systems access controls,
(g) Protection of residual data,
(h) Back up procedures,
(i) Fire detection and annunciation,
(j) Contingency plans, and
(k) Personnel security

Contractor will be required to make reasonable changes to their facility and/or procedures to properly safeguard security material. If requirements are not met, requirements will be procured from other sources.

QUALITY CONTROL DOCUMENTS

The following documents and publications shall apply. In the event of conflict between the documents and publications referenced herein and the content of this specification, the content of this specification shall be considered a superseding requirement.

- 29 USC Section 508 Standards available at: https://www.section508.gov/content/learn/laws-and-policies
- W3C's Web Content Accessibility Guidelines (WCAG) 2.0 (Levels A and AA) or most current version available at: http://www.w3.org/TR/WCAG20/.
- W3C's Checklist of Checkpoints for WCAG 2.0 (Levels A and AA) available at: http://www.w3.org/TR/2006/WD-WCAG20-20060427/appendixB.html.
- IRS Form 14305 (Rev. 3-2019), Catalog Number 58451D, "Section 508 Compliant Checklist for Portable Document Form (PDF) Files."
- Contractor will be required to test all Section 508 Compliant PDF files against all WCAG 2.0 checkpoints and for compatibility with the JAWS 18 and Adobe XI Pro. Contractor will be required to update to the most recent IRS versions of JAWS and Adobe Acrobat.

EXTENSION OF TERM OF CONTRACT

At the request of the Government, the term of any contract resulting from this solicitation may be extended for such period of time as may be mutually agreeable to the GPO and the contractor.

OPTION TO EXTEND THE TERM OF CONTRACT

The Government has the option to extend the term of this contract for a period of 12 months by written notice to the contractor not later than 30 days before the contract expires. If the Government exercises this option, the extended contract shall be considered to include this clause, except, the total duration of the contract may not exceed 5 years **(March 31, 2026)** as a result of, and including, any extension(s) added under this clause. Further extension may be negotiated under the "Extension of Term of Contract" clause. See also "Economic Price Adjustment" clause for authorized pricing adjustment(s).

ECONOMIC PRICE ADJUSTMENT

The pricing under this contract shall be adjusted in accordance with this clause, provided that in no event will any pricing adjustment be made that would exceed the maximum permissible under any law in effect at the time of the adjustment.

There will be no adjustment for orders placed during the first period specified below. Pricing will thereafter be eligible for adjustment during the second and any succeeding performance period(s). For each performance period after the first, a percentage figure will be calculated as described below and that figure will be the economic price adjustment for that entire next period.

Pricing adjustments under this clause are not applicable to reimbursable postage or transportation costs, or to paper, if paper prices are subject to adjustment by separate clause elsewhere in this contract.

For the purpose of this clause, performance under this contract will be divided into successive periods. The first period will extend from **April 1, 2021 through March 31, 2022**, and the second and any succeeding period(s) will extend for 12 months from the end of the last preceding period, except that the length of the final period may vary. The first day of the second and any succeeding period(s) will be the effective date of the economic price adjustment for that period.

Pricing adjustments in accordance with this clause will be based on changes in the seasonally adjusted "Consumer Price Index For All Urban Consumers – Commodities Less Food" (Index) published monthly in the CPI Detailed Report by the U.S. Department of Labor, Bureau of Labor Statistics.

The economic price adjustment will be the percentage difference between Index averages as specified in this paragraph. An index called the variable index will be calculated by averaging the monthly Indexes from the 12-month interval ending three (3) months prior to the beginning of the period being considered for adjustment. This average is then compared to the average of the monthly Indexes for the 12-month interval ending **December 31, 2020**, called the base index. The percentage change (plus or minus) of the variable index from the base index will be the economic price adjustment for the period being considered for adjustment.

The Government will notify the contractor by contract modification specifying the percentage increase or decrease to be applied to invoices for orders placed during the period indicated. The contractor shall apply the percentage increase or decrease against the total price of the invoice less reimbursable postage or transportation costs and separately adjusted paper prices. Payment discounts shall be applied after the invoice price is adjusted.

If the Government exercises an option, the extended contract shall be considered to include this economic price adjustment clause.

NOTE: This contract does not have a Paper Price Adjustment clause.

ASSIGNMENT OF JACKETS, PURCHASE AND PRINT ORDERS

A GPO jacket number will be assigned and a purchase order issued to the contractor to cover work performed. The purchase order may be supplemented by an individual "Print Order" for each job placed with the contractor. The print order, when issued, will indicate the quantity to be produced and any other information pertinent to the particular order.

PRE-AWARD SURVEY

In order to determine the responsibility of the prime contractor or any subcontractor, the Government reserves the right to conduct an on-site preaward survey at the contractor's/subcontractor's facility or to require other evidence of technical, production, managerial, financial, and similar abilities to perform, prior to the award of a contract. As part of the financial determination, the contractor in line for award may be required to provide one or more of the following financial documents:

1. Most recent profit and loss statement
2. Most recent balance sheet
3. Statement of cash flows
4. Current official bank statement
5. Current lines of credit (with amounts available)
6. Letter of commitment from paper supplier(s)
7. Letter of commitment from any subcontractor

The documents will be reviewed to validate that adequate financial resources are available to perform the contract requirements. Documents submitted will be kept confidential and used only for the determination of responsibility by the Government. Failure to provide the requested information in the time specified by the Government may result in the Contracting Officer not having adequate information to reach an affirmative determination of responsibility.

PRE-AWARD TEST

The contractor being considered for award shall be required to complete the following pre-award test, unless waived by the Contracting Officer. The Government may waive the requirement for a pre-award test where supplies identical or similar to those called for have been previously furnished by the contractor and have been accepted by the Government.

1. The prospective contractor will receive the pre-award test material via contractor-maintained FTP site or e-mail. It is anticipated that the test material will consist of a Native PDF, a scanned PDF, and an Adobe LiveCycle Designer form. These publications may be untagged or tagged and may be in English or in a language other than English that is listed in "Section 2, Specifications". Contractor shall make the files Section 508 Compliant as described in "Section 2, Specifications".

2. The pre-award test must be performed at the same facilities and on the same equipment that will be used to produce Section 508 Complaint files required for this contract.

3. This test must be delivered by contractor-maintained FTP site or by e-mail before the close of business 3 workdays after the furnished test material is made available. The Government will review the test files and notify the contractor of the approval or disapproval within 3 workdays after receipt of test files.

4. Disapproval of Pre-award Test: At the option of the Government and if so notified by the Contracting Officer, the contractor may be permitted additional time to correct defects or to submit additional test material. The time allowed to provide additional test material may differ depending upon the nature of the defects noted. This will be specified when notification is given.

5. Approval of Pre-award Test: Approval will be based upon fulfilling all of the requirements of the specifications within the time specified. A single deviation from the contract specifications or failure to complete delivery within the time specified may result in declaring the contractor non-responsible.

No charges will be allowed for costs incurred in the performance of the pre-award test.

ORDERING

Items to be furnished under the contract shall be ordered by the issuance of print orders by the Government. Orders may be issued under the contract from **April 1, 2021 through March 31, 2022** plus for such additional period(s) as the contract is extended. All print orders issued hereunder are subject to the terms and conditions of the contract. The contract shall control in the event of conflict with any print order. A print order shall be "issued" upon notification by the Government for purposes of the contract when it is electronically transmitted or otherwise physically furnished to the contractor in conformance with the schedule.

REQUIREMENTS

This is a requirements contract for the items and for the period specified herein. Shipment/delivery of items or performance of work shall be made only as authorized by orders issued in accordance with the clause entitled "Ordering". The quantities of items specified herein are estimates only, and are not purchased hereby. Except as may be otherwise provided in this contract, if the Government's requirements for the items set forth herein do not result in orders in the amounts or quantities described as "estimated", it shall not constitute the basis for an equitable price adjustment under this contract.

Except as otherwise provided in this contract, the Government shall order from the contractor(s) all the items set forth which are required to be purchased by the Government activity identified on page 1.

The Government shall not be required to purchase from the contractor(s), requirements in excess of the limit on total orders under this contract, if any.

Orders issued during the effective period of this contract and not completed within that time shall be completed by the contractor(s) within the time specified in the order, and the rights and obligations of the contractor(s) and the Government respecting those orders shall be governed by the terms of this contract to the same extent as if completed during the effective period of this contract.

If shipment/delivery of any quantity of an item covered by the contract is required by reason of urgency prior to the earliest date that shipment/delivery may be specified under this contract, and if the contractor(s) will not accept an order providing for the accelerated shipment/delivery, the Government may procure this requirement from another source.

The Government may issue orders which provide for shipment/delivery to or performance at multiple destinations.

Subject to any limitations elsewhere in this contract, the contractor shall furnish to the Government all items set forth herein which are called for by print orders issued in accordance with the "Ordering" clause of this contract.

ADDITIONAL EMAILED BID SUBMISSION PROVISIONS

The Government will not be responsible for any failure attributable to the transmission or receipt of the emailed bid including, but not limited to, the following –

1. Illegibility of bid.
2. Emails over 75 MB may not be received by GPO due to size limitations for receiving emails.
3. The bidder's email provider may have different size limitations for sending email; however, bidders are advised not to exceed GPO's stated limit.
4. When the email bid is received by GPO, it will remain unopened until the specified bid opening time. Government personnel will not validate receipt of the emailed bid prior to bid opening. GPO will use the prevailing Columbus, Ohio time and the exact time that the email is received by GPO's email server as the official time stamp for bid receipt at the specified location.

PAYMENT

Anticipate some of the Print Orders (GPO Form 2511) will contain multiple items. Each item must be itemized in accordance with the Schedule of Prices and a grand total must be entered on the contractor's invoice.

Before any voucher will be accepted by GPO for payment, an itemized and totaled statement for each print order must be submitted to the order agency for examination and certification as to the correctness of the vouchers as applicable to the work performed. This certification by the ordering agency will suffice in lieu of submitting a completed sample with the contractor's voucher. A copy of the Page and Page Element Reports must be submitted along with the certified invoice.

Submitting invoices for payment via the GPO fax gateway (if no samples are required) utilizing the GPO barcode coversheet program application is the most efficient method of invoicing. Instruction for using this method can be found at the following web address: http://winapps.access.gpo.gov/fms/vouchers/barcode/instructions.html.

Invoices may also be mailed to: U.S. Government Publishing Office, Office of Financial Management, Attn: Comptroller, Stop: FMCE, Washington, DC 20401.

For more information about the billing process refer to the General Information of the Office of Finance web page located at https://www.gpo.gov/how-to-work-with-us/vendors/how-to-get-paid.

At time of invoicing, the contractor shall submit a copy of the print order, contractor's certified invoice, the Page and Page Element Reports, and all e-mail delivery receipts via e-mail to infocolumbus@gpo.gov.

SECTION 2. – SPECIFICATIONS

SCOPE

These specifications cover the assessment and remediation of PDF files (Adobe LiveCycle Designer, native PDF files, and scanned PDF files) that are untagged or tagged which require such operations as electronic transmission of files, OCR scanning and repair, document assessment and support, accessibility tagging and structuring, final review, and transmission of finished electronic files and report deliverables.

TITLE

Section 508 Compliant PDF Files

NUMBER OF ORDERS

Anticipate 1,203 orders per year, up to 10 PDF files per order. Anticipate 2,111 files per year. Files will be provided in English, Spanish, Arabic, Bengali, Persian, Gujarati, Italian, Khmer, Punjabi, Polish, Portuguese, Tagalog, Urdu, French, German, Russian, Vietnamese, Chinese (Simplified), Chinese (Traditional), or Korean. Additional languages may be provided as mutually agreeable to the Government and the contractor. Anticipate the following:

Table 1: Estimated Annual Volume

Language	Assessment Review Only	Assessment Review and Instruction	Assessment Review and Remediation of Tagged Files	Assessment Review and Remediation of Untagged Files
English	299 files	32 files, approximately 1 hour per file	1,030 files	309 files
Other than English	245 files (Spanish Only)	32 files, approximately 1 hour per file (Spanish Only)	74 files	90 files

NUMBER OF PAGES

A file may contain either one or more of the following page types: Form Pages, Tables of Contents and/or Index Pages, and/or Text Matter Pages. Text matter pages will be either "Simple" (will not contain graphs, tables, or charts) or "Complex" (will contain graphs, tables and/or charts). When ordered, average 5 "Complex" pages per file.

Anticipate up to 15 Form Pages per file with up to 250 form fields per Form Page. Most files will have 5 or less Form Pages. Most Form Pages will have 50 or less form fields.

Anticipate up to 10 Tables of Contents and/or Index Pages per file. Most files will have 2 or less Tables of Contents and/or Index Pages.

Anticipate up to 1,000 Text Matter Pages per file. Most files will have 10 to 40 Text Matter Pages.

Pages that have scanned images will require contractor to perform OCR Scanning with possible OCR Repair. Anticipate 1% of the pages requiring remediation will require OCR Scanning with or without OCR Repair.

Assessment Review and Remediation of Tagged Files

Contractor will be reimbursed for page type in accordance with the "Schedule of Prices" in Section 4. The following is anticipated:

Table 2: Page Types of Tagged Files

Language	Form Pages	Tables of Content/Index Pages	"Simple" Text Matter Pages	"Complex" Text Matter Pages
English	196	813	28,856	7,214
Other than English	107	29	849	212

Assessment Review and Remediation of Untagged Files

Contractor will be reimbursed for page type in accordance with the "Schedule of Prices" in Section 4. The following is anticipated:

Table 3: Page Types of Untagged Files

Language	Form Pages	Tables of Content/Index Pages	"Simple" Text Matter Pages	"Complex" Text Matter Pages
English	39	115	5,810	1,452
Other than English	16	16	838	209

ASSESSMENT REVIEW ONLY

Contractor will be reimbursed for Assessment Review in accordance with the "Schedule of Prices" in Section 4. File composition is expected to be similar to Remediation with Assessment Review of Tagged and Untagged Files. Files will be in English or Spanish only.

ASSESSMENT REVIEW AND INSTRUCTION

Contractor will be reimbursed for Assessment Review and Instruction in accordance with the "Schedule of Prices" in Section 4. File composition is expected to be similar to Remediation with Assessment Review of Tagged and Untagged Files. Files will be in English or Spanish only. IRS uses CommonLook PDF Global Access remediation software. Support will be required for this software.

NUMBER OF PAGE ELEMENTS

Most page types will contain one or more of the following page elements:

- Links: Up to 350 links per file (Form Pages and Text Matter Pages only), usually 30 or less.
- Alt Text Images: Up to 275 alt text images per file, usually 20 or less.
- Lists: Up to 1,200 lists per file, usually 100 or less.
- Simple Tables: Up to 575 simple tables per file, usually 30 tables per file.
- Complex Tables: Up to 600 complex tables per file, usually 10 tables per file.

QUANTITY/DELIVERABLES

Contractor will be required to perform an initial Assessment Review (IRS Form 14305) of every file. Some files will require Assessment Support and/or will require file Remediation. Assessment Support will require e-mail summary of supportive action. Each remediated file will require a final Assessment Review and a Page and Page Element Report.

GOVERNMENT TO FURNISH

PDF files to be sent via e-mail or contractor-maintained FTP site for 10MB and larger files. File(s) classified as SBU to be encrypted prior to transmission with instructions for opening file(s) sent in separate transmission (see "Security Provisions" in Section 1). Contractor to confirm receipt of all e-mail and FTP transmissions.

FILE FORMAT

Files will be the most current version of Adobe LiveCycle Designer PDF's, Adobe Acrobat Native PDF's, or Adobe Acrobat Scanned PDF's. Contractor to keep up to date on all version upgrades.

Adobe LiveCycle Designer PDF's will be files converted to or created in Adobe LiveCycle Designer. If remediation of Adobe LiveCycle Designer Form is required, the Government will furnish the "Adobe LiveCycle Source File" for the contractor to perform remediation upon.

Adobe Acrobat Native PDF's will be files converted to PDF from an electronic source file or created in Adobe Acrobat. It is not possible to provide a comprehensive list of source files, but the majority will have been created in the Microsoft Office Suite or Adobe InDesign or other desktop publishing software. Some items will contain scanned images within the document file.

Adobe Acrobat Scanned PDF's will be paper-based source documents that were scanned to PDF. Some native PDF's will contain scanned images within the document file.

TAGGING STRUCTURE

PDF's will be furnished as tagged or untagged files. Tagged files have had some degree of file remediation performed through Adobe Acrobat by a file user and/or by the built-in functions of native or Adobe Acrobat software. Untagged files will not have any 508 compliant document or structure tags. Anticipate scanned PDF's will be untagged.

FURNISHED FORMS

- GPO Form 2511, Print Orders.
- IRS Form 14305 (blank), Exhibit 1
- Page and Page Element Report, Exhibit 2
- GPO Delivery/Shipping Status Report Form

CONTRACTOR TO FURNISH

All materials and operations, other than those listed under "Government to Furnish", necessary to produce the product(s) in accordance with these specifications.

OCR SCANNING AND OCR REPAIR

PDF files may require the contractor to perform OCR (Optical Character Recognition) scanning of the file before the "Assessment Review" is conducted. When OCR scanning indicates a required repair, the contractor, after approval by the Government, shall repair the file using OCR software. OCR software is to scan at a minimum of 300 dpi or greater and render verbatim text of the scanned file (wet signatures should remain as images with alternative text description "xxxxx signature").

It is anticipated that approximately 1% of the total pages requiring remediation will also require OCR scanning. Most of the pages that require OCR scanning will also require the contractor to repair the OCR scanned pages.

INITIAL ASSESSMENT REVIEW

Each file will require the contractor to perform an initial Assessment Review of the furnished file. Upon receipt of file and after OCR scanning and repair (if required), contractor to assess the file for 508 compliance with WCAG 2.0 Levels A and AA and complete IRS Form 14305. For each file that is found to "fail", the contractor to include in the "comments" section what failed and where the first instance of the "failure occurred.

ASSESSMENT REVIEW ONLY

Some files will require an Assessment Review Only. The individual print order will indicate if the file(s) require Assessment Review Only. Files will be in English or Spanish only. After the initial Assessment Review, the contractor is to submit the complete IRS Form 14305 as a digital deliverable to GPO and IRS.

ASSESSMENT REVIEW AND INSTRUCTION

Some files will require an Assessment Review and Instruction. The individual print order will indicate if the file(s) require Assessment Instruction and provide contact information of the IRS representative requesting support. Files will be in English or Spanish only.

The contractor will provide step-by-step instruction to the IRS representative on how to bring the file into 508 compliance using CommonLook PDF Global Access. Instruction to be provided via telephone or e-mail. Contractor will be required to provide the IRS representative with an e-mail summary of the telephone instruction.

Contractor will only be reimbursed for Assessment Instruction when it is indicated on the individual print order and only when the IRS Form 14305 and the e-mail instructions or e-mail instruction summary is included with the contractor's invoice.

ASSESSMENT REVIEW AND REMEDIATION

Most items will require the contractor to conduct an initial Assessment Review and perform remediation on the file until the file is fully compliant. See additional information regarding remediation under "Remediate File" hereafter.

An occasional file will require that the Assessment Review will include instructions on how to make the file compliant with 29 USC Section 508.

REMEDIATE FILE

If the assessment review indicates that there are deficiencies in the file, the contractor shall remediate the file (unless order is for Assessment Review Only or Assessment Review and Support). English, Spanish, Arabic, Bengali, Persian, Gujarati, Italian, Khmer, Punjabi, Polish, Portuguese, Tagalog, Urdu, French, German, Russian, Vietnamese, Chinese (Simplified), Chinese (Traditional), or Korean, and will require remediation properly formatted for the language in which the file was provided. Additional languages may be required as mutually agreeable to the Government and the contractor.

The contractor to create structure trees, including changing of the "flow" of different page elements for the screen reading software.

Contractor will also be required to establish necessary metadata, proper document structure, navigation, tab order and reading order, keyboard accessibility, and correct color contrast within the file.

Page Types

Files will consist of a combination of Form Pages, Tables of Content or Index Pages, and/or Text Matter Pages.

Form Pages

Form Pages are pages within a file that contain a fillable form and are complex and dynamic in nature. Form Pages may contain text matter and/or any combination of Page Elements as defined below. Form Pages do not contain Tables of Contents or Index Pages or Text Matter Pages. All Form Pages will require proper tagging, including tab order and tool tips, to ensure the assistive technology user will be able to successfully fill out the form. The number of form fields varies greatly from file to file and will consist of dropdown boxes, check boxes, radio buttons, and text boxes.

Tables of Content and Index Pages

Tables of Content and Index Pages are pages within a file that contain extensive links that navigate within the file. Tables of Content and/or Index Pages may contain text matter and/or any combination of Page Elements as defined below. These pages do not contain Form Pages or Text Matter Pages. All Tables of Content and Index pages will require proper tagging of text matter, navigation, and reading order. All navigation links must be active.

Text Matter Pages

Text Matter Pages are pages within a file that contain text matter and/or any combination of Page Elements as defined below. These pages do not contain Form Pages or Tables of Content and/or Index Pages. All Text Matter Pages will require proper tagging of headers, footers, headings, columns, text matter, navigation, tables, graphics, and reading order. Blank pages to be announced as "Blank Page."

Text Matter Pages will be defined as "Simple" or "Complex". Simple text matter pages will not contain graphs, tables, or charts. Anticipate 80% of the pages will be "Simple" pages. Complex text matter pages will contain graphs, tables, and/or charts. Anticipate 20% of the pages will be "Complex" pages.

Page Elements

Form Pages, Tables of Content or Index Pages, and Text Matter Pages will consist of any combination of the following Page Elements:

Links

Contractor to develop descriptive and concise narrative for all tool tips. All internal and external links will require proper tagging for navigation and reading order. All navigation links must be active.

Alternate Text (Alt Text)

Contractor to develop descriptive and concise narrative for all non-text images, including charts, graphs, photographs, illustrations, graphics, logos, seals, signatures, screen shots, clip art, and all other non-text elements. All alt text will require proper tagging, navigation (as applicable), and reading order. Any alternate text that exists in the original file must remain as alternate text in the remediated file.

Lists

Bulleted and Numbered Lists are to be tagged with proper reading order and in list format with numbers and bullets read on the same line as the text, unordered lists are to be tagged and formatted as ordered lists.

Tables

Contractor to develop an alt text label that describes the table. All tables will require proper tagging of alt text, tab order, navigation (as applicable), and reading order. Tables will have single or multiple levels of column/row headers. Tables are defined as either simple or complex as follows:

Simple Tables

Defined as tables with single level column/row headers with a minimum of 2 columns and a combination of up to 20 columns and rows. For example: 2 columns and 5 rows, 3 columns and 4 rows, 5 columns and 3 rows, or 3 columns and 6 rows.

Complex Tables

Defined as all tables with single or multiple level column/row headers with a minimum of 2 columns and a combination of 21 or more columns and rows. For example: 2 columns and 11 rows, 3 columns and 8 rows, 10 columns and 3 rows, or 4 columns and 6 rows.

FINAL ASSESSMENT REVIEW

After remediation, the contractor shall perform another assessment review and develop a second assessment report. If deficiencies are found, contractor shall remediate the file again and perform another assessment review and develop another assessment report and continue in like manner until no more deficiencies are found. The contractor must attach a passing "Adobe Acrobat Accessibility Report" or other Government approved report to the e-mail with the remediated PDF file. The final assessment report, Adobe Acrobat Accessibility Report, and any other Government approved report is to be included as a deliverable with the remediated file.

PAGE AND PAGE ELEMENT REPORT

After remediating the file, contractor shall complete a Page and Page Element Report for each PDF file. The Page and Page Element Report is to be submitted to IRS with invoice to be certified and to GPO with the IRS certified invoice. Format of report to be provided to contractor at the time of award.

Orders shall have the Adobe Accessibility Report attached to each file with the exception of Adobe Live Cycle Files.

When the Form 14305 is part of the print order deliverable, the naming convention of that file shall have "passed" or "failed" added to the end of the file name.

Orders shall have a final PDF deliverable with the name convention changed to add the print order number.

READING ORDER AND ALT TEXT REVIEW

Files requiring remediation will also require the contractor to complete a reading order and alt text review of each PDF file. Reading order should be logical and completed left to right and top to bottom. Alt text should be descriptive, yet concise. Any alternate text that exists in the original file must remain as alternate text in the remediated file. An occasional order may require collaboration with Government representative.

SCREEN READER REVIEW

Files requiring remediation will also require the contractor to complete a screen reader review using the most current IRS versions of JAWS and Adobe Acrobat. If the file is not readable with the screen reader software, the contractor shall remediate the file again as described under "Remediate File" until the file is readable by the screen reader software.

DISTRIBUTION

The contractor shall submit the Section 508 Compliant PDF file, initial and final assessment reports, assessment support e-mail summaries, and Page and Page Element Reports to the Government via e-mail or contractor-maintained FTP site. File(s) classified as SBU to be encrypted prior to transmission with instructions for opening file(s) sent in separate transmission (see "Security Provisions" in Section 1).

All e-mails and e-mail notifications are to be sent to the ordering agency (e-mail addresses to be provided at time of award) and to the Government Publishing Office at trackcolumbus@gpo.gov. The e-mail shall include in the Subject line the Program and Print Order Number and "508 Compliant PDF Reports".

NOTE: The ship/deliver date indicated on the print order is the date products ordered must be received by the ordering agency via FTP or e-mail.

SCHEDULE

Adherence to this schedule must be maintained. Contractor must not start production of any job prior to receipt of the individual print order (GPO Form 2511) together with furnished material. Print order and furnished material will be sent to the contractor via e-mail or uploaded to contractor-maintained FTP site. The following schedule begins the day after receipt of the print order and furnished material; the workday after receipt of the print order and furnished material will be the first workday of the schedule.

Accelerated Schedule

Assessment Review Only files will require 1 workday for complete production and delivery. All other files will require 1 to 4 workdays for complete production and delivery. A maximum aggregate of 75 pages received per day with the same delivery date will be allowed under the Accelerated Schedule regardless of number of files on a print order or number of print orders placed.

For files requiring Assessment Review and Remediation with 1 workday for complete production and delivery, the Initial Assessment Review is due within 4 hours after print order is received. When 2 to 4 workdays are required for complete production and delivery, the Initial Assessment Review is due 1 workday after print order is received.

Regular Schedule

Assessment Review Only files will require 2 workdays for complete production and delivery. All other files will require 5 days or more for complete production and delivery. A maximum aggregate of 100 pages received per day with the same delivery date will be allowed under the Regular Schedule regardless of the number of files on a print order or number of print orders placed. The contractor will be allowed 2 additional workdays in the schedule per 100 pages, or fraction thereof, after the first 100 pages.

For files requiring Assessment Review and Remediation, the Initial Assessment Review is due 2 workdays after print order is received.

RECEIPT FOR DELIVERY

Contractor must furnish their own receipts for delivery. These receipts must include the GPO jacket, program, and print order numbers; total quantity delivered, date delivery made; and signature or read receipt of the Government agent accepting delivery. The original copy of this receipt must accompany the contractor's invoice for payment.

SECTION 3. – DETERMINATION OF AWARD

The Government will determine the lowest bid by applying the prices offered in the "Schedule of Prices" to the following units of production which are the estimated requirements to produce one year's production under this contract. These units do not constitute, nor are they to be construed as, a guarantee of the volume of work which may be ordered for a like period of time.

The following item designations correspond to those listed in the "Schedule of Prices".

			(1)	(2)
I.				
		(a)	11,960	9,800
		(b)	32	32
II.			(1)	(2)
		(a)	375	93
		(b)	300	90
III.			(1)	(2)
	A.	(a)	196	107
		(b)	813	29
		(c)	28,856	849
		(d)	7,214	212
	B.	(a)	39	16
		(b)	115	16
		(c)	5,810	838
		(d)	1,452	209

IV. PREMIUM PAYMENTS:

Files for Assessment Review Only that require a production of 1 workday and files for all other items that require a production schedule of 1 to 4 workdays will be paid at the premium rate in accordance with the contractor's offered percentage in the "Schedule of Prices".

All other orders will be placed within the required schedule and paid for at the basic prices offered.

Percentages offered for premium priced work are additional to the basic prices offered for units of work. Premium payments, when authorized, will apply to all items.

Failure of the contractor to deliver work at the time specified will result in disallowance of premium payments that were anticipated and the contractor will not list such items on his voucher.

It is estimated that **7%** of the orders placed on this contract will be for the accelerated schedule. Premium Payments for an Accelerated Schedule will be evaluated for award. Evaluation will be affected by applying the percentage increase, offered for the accelerated schedule in the "Schedule of Prices" (Item IV. (a)), to **7%** of the prices offered for all items.

PAGE 16 IS BLANK.

SECTION 4. – SCHEDULE OF PRICES

Bids offered are f.o.b. destination to all locations via e-mail or contractor-maintained FTP site.

Prices shall be all-inclusive, covering all materials and operations, for complete production in accordance with these specifications.

Bidder must make an entry in each of the spaces provided. Bids submitted with blank spaces, or with any obliteration, revision, or alteration of the order and manner of submitting bids, may be declared nonresponsive.

An entry of NC (No Charge) shall be entered if bidder intends to furnish individual items at no charge to the Government.

Bids submitted with NB (No Bid), NA (Not Applicable), or blank spaces for an item may be declared nonresponsive.

The Contracting Officer reserves the right to reject any offer that contains prices for individual items of production (whether or not such items are included in the Determination of Award) that are inconsistent or unrealistic in regard to other prices in the same offer or to GPO prices for the same operation if such action would be in the best interest of the Government.

All vouchers submitted to the GPO shall be based on the most economical method of production.

I. ASSESSMENT REVIEW: Prices offered must be all-inclusive in accordance with these specifications and shall include the cost of all required materials and operations necessary for assessing files and generating an assessment review report. Contractor will be reimbursed for Line Items I. (a) (1) and (2) only when print order indicates "Assessment Review Only" or the initial assessment review indicates that no deficiencies were found in the file. Contractor will be reimbursed for Line Items I. (b) (1) and (2) only when print order indicates "Assessment Review and Instruction".

	LANGUAGE	
	English (1)	Spanish (2)
(a) Assessment Review Only ..... per page	$_____	$_____
(b) Assessment Review and Instruction ..... per hour	$_____	$_____

II. OCR SCANNING AND REPAIR: Prices offered must be all-inclusive in accordance with these specifications and shall include the cost of all required materials and operations necessary for OCR scanning and repair. Charges for OCR repairs will only be allowed when authorized on the face of the individual print order or by contract modification.

	LANGUAGE	
	English (1)	Other than English (2)
(a) OCR Scanning of PDF Files ..... per page	$_____	$_____
(b) OCR Repair of PDF Files ..... per page	$_____	$_____

_____
(Initials)

RETURN THIS PAGE TO GPO, COLUMBUS, OH RO

SCHEDULE OF PRICES

III. REMEDIATE FILE: Prices offered must be all-inclusive in accordance with these specifications and shall include the cost of all required materials and operations necessary for the complete production of "Remediate File" under "Section 2 – Specifications". Prices offered to include two assessment reviews of each file (one before remediation and one after remediation), one review each of reading order, alt text, and by screen reader and one Page and Page Element Report for each file.

	LANGUAGE	
	English (1)	Other than English (2)
A. Tagged PDF Files:		
(a) Form Field Pages ..... per page	$_____	$_____
(b) Tables of Contents and Index Pages ..... per page	$_____	$_____
(c) Simple Text Matter Pages ..... per page	$_____	$_____
(d) Complex Text Matter Pages..... per page	$_____	$_____
B. Untagged PDF Files:		
(a) Form Field Pages ..... per page	$_____	$_____
(b) Tables of Contents and Index Pages ..... per page	$_____	$_____
(c) Simple Text Matter Pages ..... per page	$_____	$_____
(d) Complex Text Matter Pages..... per page	$_____	$_____

IV. PREMIUM PAYMENTS: This is only authorized for orders placed on the "Accelerated Schedule" as defined in these specifications.

(a) Percentage increase for Accelerated Schedule ....._____%

_____
(Initials)

RETURN THIS PAGE TO GPO, COLUMBUS, OH RO

SCHEDULE OF PRICES

SHIPMENT(S): Shipments will be made from: City _____, State _____

The city(ies) indicated above will be used for evaluation of transportation charges when shipment f.o.b. contractor's city is specified. If no shipping point is indicated above, it will be deemed that the bidder has selected the city and state shown below in the address block, and the bid will be evaluated and the contract awarded on that basis. If shipment is not made from evaluation point, the contractor will be responsible for any additional shipping costs incurred.

DISCOUNTS: Discounts are offered for payment as follows: _____ Percent, _____ calendar days. See Article 12 "*Discounts*" of Solicitations Provisions in GPO Contract Terms (Publication 310.2).

AMENDMENT(S): Bidder hereby acknowledges amendment(s) number(ed) _____

BID ACCEPTANCE PERIOD: In compliance with the above, the undersigned agree, if this bid is accepted within _____ calendar days (60 calendar days unless a different period is inserted by the bidder) from the date for receipt of bids, to furnish the specified items at the price set opposite each item, delivered at the designated point(s), in exact accordance with specifications.

NOTE: Failure to provide a 60-day bid acceptance period may result in expiration of the bid prior to award.

BIDDER'S NAME AND SIGNATURE: Unless specific written exception is taken, the bidder, by signing and submitting a bid, agrees with and accepts responsibility for all certifications and representations as required by the solicitation and GPO Contract Terms - Publication 310.2. When responding by fax or mail, fill out and return one copy of all pages in "SECTION 4. – SCHEDULE OF PRICES," including initialing/signing where indicated.

Failure to sign the signature block below may result in the bid being declared non-responsive.

Bidder _____
(Contractor Name) (GPO Contractor's Code)

_____
(Street Address)

_____
(City – State – Zip Code)

By _____
(Printed Name, Signature, and Title of Person Authorized to Sign this Bid) (Date)

_____
(Person to be Contacted) (Telephone Number) (Email)

THIS SECTION FOR GPO USE ONLY

Contracting Officer: _____ Date _____ Certifier by: _____ Date _____
(Initials) (Initials)

RETURN THIS PAGE TO GPO, COLUMBUS REGIONAL OFFICE

EXHIBIT ONE: ASSESSMENT REPORT, IRS FORM 14305 (PAGE 1 OF 4)

Section 508 Compliant Checklist for Portable Document Format (PDF) Files

Use this checklist as part of your process to make your PDF files comply with Section 508 of the Rehabilitation Act of 1973 and the Web Content Accessibility Guidelines (WCAG) 2.0. By accessing the links throughout the checklist, you will learn how to meet each WCAG guideline including PDF specific techniques that further explain how to meet each requirement. If you would like to have your files reviewed by an assistive technology user, contact the Alternative Media Center (AMC) at altmc@irs.gov or visit the Request section on the AMC website.

Product number *(short title)*	Revision date	Catalog number

Long title

Reviewer	Date reviewed

Section I. Edit Fields ***(Radio Buttons, Check Boxes, and Combo Boxes/Drop-downs)*** ☐ This section does not apply

1. Are form fields tagged so that users of assistive technology will know the type of input that is required for the field ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 4.1.2: Name, Role, Value (Level A)

PDF12

2. Do form controls have correct labels and markup ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 4.1.2: Name, Role, Value (Level A)

PDF12

3. Do tool tips convey the same message as the original text ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 4.1.2: Name, Role, Value (Level A)

PDF10

4. Is it possible to determine that a field is required ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.3.3: Error Suggestion (Level AA)

PDF5

5. Are there any fields which require a specific format? If so, when data is entered in that field, does a dialog box pop up if the format is incorrect ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.3.3: Error Suggestion (Level AA)

PDF5

6. Do pop-up error messages notify the assistive technology user of the error along with the associated field(s) ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.3.3: Error Suggestion (Level AA)

PDF5

Form **14305** (Rev. 3-2019) Catalog Number 58451D publish.no.irs.gov Department of the Treasury - **Internal Revenue Service**

Figure 1.1: Page 1 of IRS Form 14305

EXHIBIT ONE: ASSESSMENT REPORT, IRS FORM 14305 (PAGE 2 OF 4)

Page 2

7. Can the "Submit" (or other action) button be activated using the keyboard ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.3.2: On Input (Level A)

PDF15

8. Are the interactive form fields in the same order as on the document ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.2: Meaningful Sequence (Level A)

PDF3

9. Are interactive form fields usable with the keyboard (no mouse needed) ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.1.1: Keyboard (Level A)

PDF23

10. Do keyboard users become trapped in the content that can only be exited using a mouse or pointing device ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.1.2: No Keyboard Trap (Level A)

G21

Section II. Graphics/Pictures ☐ This section does not apply

1. Do pictures, graphs, charts and other non-text content have alternate text that conveys the same message ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.1.1: Non-Text Content (Level A)

PDF1

2. Are decorative images (non-text content with no meaning) set as artifacts so they are ignored by assistive technology ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.1.1: Non-Text Content (Level A)

PDF4

3. Have scanned images been turned into figures with alternate text ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.4.5: Images of Text (Level AA)

PDF7

4. If color is used to convey a message, is a text equivalent provided ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.4.1: Use of Color (Level A)

G14

Form **14305** (Rev. 3-2019) Catalog Number 58451D publish.no.irs.gov Department of the Treasury - **Internal Revenue Service**

Figure 1.1: Page 2 of IRS Form 14305

EXHIBIT ONE: ASSESSMENT REPORT, IRS FORM 14305 (PAGE 3 OF 4)

Page 3

Section III. Headings

1. Are headers tagged to provide order and structure ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.4.1: Bypass Blocks (Level A)

PDF9

2. Is the PDF bookmarked for quick navigation? Applies to long text based documents 10 pages or longer ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.4.5: Multiple Ways (Level AA)

PDF2

Section IV. Tables ☐ This section does not apply

1. Are the table row headers, column headers, and data cells tagged correctly ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.1: Info and Relationships (Level A)

PDF6

2. Are row and column headers spoken ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.1: Info and Relationships (Level A)

PDF20

3. Is there a logical relationship between the table headers and data cells ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.1: Info and Relationships (Level A)

PDF20

Section V. Format

1. Does the document tag structure read in the same order as a sighted reader would view the content ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.2: Meaningful Sequence (Level A)

PDF3

2. Does the page navigation toolbar show the same page numbering as the document ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.2.3: Consistent Navigation (Level AA)

PDF17

Form **14305** (Rev. 3-2019) Catalog Number 58451D publish.no.irs.gov Department of the Treasury - **Internal Revenue Service**

Figure 1.3: Page 3 of IRS Form 14305

EXHIBIT ONE: ASSESSMENT REPORT, IRS FORM 14305 (PAGE 4 OF 4)

Page 4

3. Has the Title entry been specified in the document properties ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.4.2: Page Title (Level A)

PDF18

4. Has the default language been set for the entire file ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.1.1: Language of Page (Level A)

PDF16

5. If the file has multiple languages, have the languages been set correctly ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 3.1.2: Language of Parts (Level AA)

PDF19

6. Are related list items (bullets and numbering) grouped together in a single list, to include any sub lists ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 1.3.1: Info and Relationships (Level A)

PDF21

Section VI. Links ☐ This section does not apply

1. Are all links functional, identifiable by assistive technology, and accessible from the keyboard ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.4.4: Link Purpose (In Context) (Level A)

PDF11

2. All links are identified with meaningful text ☐ Pass ☐ Fail ☐ N/A

Comments

How to meet 2.4.4: Link Purpose (In Context) (Level A)

PDF13

Section VII. Conclusion

1. Does this file meet Section 508 compliance and other accessibility standards ☐ Pass ☐ Fail ☐ N/A

Comments

Form **14305** (Rev. 3-2019) Catalog Number 58451D publish.no.irs.gov Department of the Treasury - **Internal Revenue Service**

Figure 1.4: Page 4 of IRS Form 14305

EXHIBIT TWO: 1561-S PAGE AND PAGE ELEMENT REPORT (PAGE 1 OF 1)

Program 1561-S
Page and Page Element Report

Program	**1561-S**
Print Order	
Original File Name	
Print Order Issue Date	
Ship/Deliver Date on Print Order	
File Information:	
Original File Tagged or Untagged	
File Language	
Page Types:	
Number of Form Field Pages	
Number of TOC/Index Pages	
Number of Simple Text Mattter Pages	
Number of Complex Text Matter Pages	
Page Elements:	
Number of Links in File	
Number of Alt Text Images in File	
Number of Lists in File	
Number of Simple Tables in File	
Number of Complex Tables in File	

Figure 2: 1561-S Page and Page Element Report