

BID OPENING: Bids shall be opened virtually at 11:00 a.m., Eastern Time (ET), on April 6, 2026 at the U.S. Government Publishing Office. All parties interested in attending the bid opening shall email bids@gpo.gov one (1) hour prior to the bid opening date and time to request a Microsoft Teams live stream link. This must be a separate email from the bid submission. The link will be emailed prior to the bid opening.

BID SUBMISSION: Bidders must email bids to bids@gpo.gov for this solicitation. No other method of bid submission will be accepted at this time. The jacket number and bid opening date must be specified in the subject line of the emailed bid submission. ***Bids received after the bid opening date and time specified above will not be considered for award.***

U.S. GOVERNMENT PUBLISHING OFFICE
Government Publishing and Print Procurement

GENERAL TERMS, CONDITIONS, AND SPECIFICATIONS

For the Procurement of

Medicare and You 2027 (English Area-Specific Handbooks)

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

Department of Health and Human Services (HHS)
Centers for Medicare & Medicaid Services (CMS)

BIDDERS, PLEASE NOTE: *This product was previously procured under Jacket 432-300.* The specifications have been extensively revised from the previous procurement; therefore, all bidders are cautioned to familiarize themselves with all provisions of these specifications before bidding, with particular attention to the following:

DATA SECURITY, *Disposal of Electronic PII* (page 5 of 47)
POSTAWARD PROJECT PLANS (page 8 of 47)
QUALITY ASSURANCE PROGRAM (page 11 of 47)
PAYMENT (page 14 of 47)
QUANTITY (page 15 of 47)
GOVERNMENT TO FURNISH (page 15 of 47)
PROOFS (page 17 of 47)
MAIL PREPARATION, *Mail Processing* (page 27 of 47)
SCHEDULE (page 31 of 47)
EXHIBIT 1 (follows the attachments at the end of these specifications)

Abstracts of previous procurement prices are available at: <https://www.gpo.gov/how-to-work-with-us/vendors/one-time-bid-pricing>.

For any questions concerning these specifications, contact Mary Newton at mnewton@gpo.gov or (202) 512-2132.

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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 Publication 310.2, effective December 1, 1987 (Rev. 01-18)) and Quality Assurance Through Attributes Program for Printing and Binding (GPO Publication 310.1, effective May 1979, (Rev. 09-19)).

GPO Contract Terms (GPO Publication 310.2) – <https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/contractterms2018.pdf>.

GPO QATAP (GPO Publication 310.1) – <https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/qatap-rev-09-19.pdf>.

CONTRACTOR: Throughout this document, the term “contractor” refers to the printing company that is awarded the contract. The term “subcontractor” refers to any other company that is performing work on this contract as hired by the contractor.

WORKING AND COMMUNICATING WITH OTHER PLANTS AND SUBCONTRACTORS: The contractor may employ the services of outside subcontractors to print all of or a portion of the text pages only and to perform all of or part of the non-printing requirements of this job. In addition, the contractor may utilize multiple plants within their own company to complete the requirements of this job. In such situations, the contractor MUST ensure that the subcontractors and additional plants have a copy of these specifications and meet all requirements stated within this document, as applicable. (*NOTE: The printing of all covers is a predominant function and cannot be subcontracted; however, the contractor may utilize multiple plants within their own company to print the covers.*)

It is the contractor’s responsibility to communicate with, and manage the work performed by, subcontractors and other plants. The contractor is responsible for enforcing all contract requirements outsourced to a subcontractor.

If the contractor needs to add a subcontractor at any time after approval of the contractor’s project plans (see “POSTAWARD PROJECT PLANS” specified herein), the subcontractor must be approved by the Government prior to production starting in that facility. The contractor must submit the subcontractor’s information to the Government for approval 24 hours prior to the start of production at that facility.

If the contractor needs to add another contractor production facility at any time after approval of the contractor’s project plans, the contractor must notify the Government 24 hours prior to production starting in that facility.

QUALITY ASSURANCE LEVELS AND STANDARDS: The following levels and standards shall apply to these specifications:

Product Quality Levels for Text Pages:

- (a) Printing Attributes – Level III.
- (b) Finishing Attributes – Level II.

Product Quality Levels for Covers:

- (a) Printing Attributes – Level II.
- (b) Finishing Attributes – Level II.

Inspection Levels (from ANSI/ASQC Z1.4):

- (a) Non-destructive Tests – General Inspection Level I.
- (b) Destructive Tests – Special Inspection Level S-2.

Specified Standards: The specified standards for the attributes requiring them shall be:

| <u>Attribute</u> | <u>Standard</u> |
|--|---|
| P-7. Type Quality and Uniformity | O.K. Press Sheets (via On-Site Inspections) |
| P-8. Gradient and Halftone Match | O.K. Press Sheets (via On-Site Inspections) |
| P-9. Solid and Screen Tint Color Match | O.K. Press Sheets (via On-Site Inspections) |
| P-10. Process Color Match | O.K. Press Sheets (via On-Site Inspections) |

Special Instructions: In the event that on-site inspection of press sheets is waived by the Government, the following listed alternate standards (in order of precedence) shall become the Specified Standards:

- P-7. O.K. Text Signatures/O.K. Cover Press Sheets/Average Type Dimension in Publication.
- P-8. O.K. Cover Press Sheets/O.K. Proofs/Electronic Media.
- P-9. O.K. Ink Drawdowns/Pantone Matching System.
- P-10. O.K. Cover Press Sheets/O.K. Proofs.

NOTE: For more information regarding quality levels, see “PREAWARD SURVEY.”

DATA SECURITY: These products contain Personally Identifiable Information (PII). Security of personally identifiable information is a vital component of this contract. The contractor shall guarantee strict confidentiality, integrity, and limited availability of all PII provided by the Government during the performance of this contract. Disclosure of the information/data, in whole or in part, by the contractor can only be made in accordance with the provisions in the Data Use Agreement (DUA). (Instructions for the DUA will be provided after award.)

It is the contractor’s responsibility to properly safeguard PII from loss, theft, or inadvertent disclosure and to immediately notify the Government of any loss/theft/inadvertent disclosure of personally identifiable information.

Personally identifiable information for the Medicare and You Handbook consists of a person’s name and address.

The contractor shall not release or sell to any person any technical or other data received from the Government under this contract; nor shall the contractor use the data for any purpose other than that for which it was provided to the contractor under the terms of this contract. The contractor must guarantee that furnished PII will be used only in the performance of this contract.

Proper control and handling must be maintained at all times to prevent any information or materials required to produce the products ordered under these specifications from falling into unauthorized hands. All PII furnished by the Government, duplicates created by the contractor or their representatives, and/or any resultant printouts must be kept accountable and under security to prevent their release to unauthorized persons. Unsecured telecommunications, including the internet, to transmit PII is prohibited.

Data Custodians: If any PII is to be forwarded to additional contractor-owned locations or to subcontractor-owned locations, all security requirements also apply to those locations (all parties involved). The contractor is responsible for the actions of all locations. The contractor’s project manager shall appoint up to two (2) Data Custodians at each location and shall have them complete an Addendum to Data Use Agreement (instructions will be provided after award). The contractor’s project manager must have the selected Data Custodians fill out and submit completed forms electronically to CMS (per instructions furnished by the Government) before any PII may be sent to that location.

Preaward/Postaward Surveys: At the Government’s option, preaward or postaward surveys may be conducted to review all data handling and production areas involved along with their specific functions and the contractor’s/subcontractor’s personnel, production, security, and other requirements as outlined in this contract and in the contractor’s Security Plan (see “POSTAWARD PROJECT PLANS” specified herein).

Personnel Security: CMS will perform background investigations on two (2) contractor employees who will access CMS' electronic mailbox. (See Exhibit 2 for more information.)

Physical Security: The contractor shall have a secure work area(s) for the processing and production of all CMS PII in electronic and paper format. The work area(s) shall be accessible only to authorized employees, and all work shall be monitored closely by contractor management while CMS PII is being processed and/or produced.

Information Technology (IT) Security: The contractor shall have a system in place to comply with the CMS Security Clause (see Exhibit 2 for more information).

Security Liaison(s): The contractor must appoint one (1) or more Security Liaisons to handle issues regarding: personnel, physical, and computer security; confidential issues that may arise at any point during the background investigation process; and, to serve as a point of contact to the Government for security issues. The liaison's duties will include attending the postaward conference; submitting a security plan (see "POSTAWARD PROJECT PLANS, *Security Plan*" specified herein); discussing confidential security issues with CMS staff; submitting background applications; and, resolving any issues of inaccurate or incomplete data supplied by background investigation applicants. In the event CMS discovers sensitive information during the background investigation, CMS Security may need to contact the background investigation applicant directly.

Disposal of Waste Material: Unless otherwise specified, the contractor must hold all waste material (surplus signatures, copies, etc.) that does NOT contain PII in accordance with the schedule (see "SCHEDULE"). All waste material containing PII must be destroyed immediately.

All waste material must be destroyed in a manner where it is not possible to recreate the product or identity of a beneficiary (i.e., burning, pulping, shredding, macerating, or other suitable means). If the contractor selects shredding as a means of destruction, it must be a cross-cut shredder with a maximum size of 5/32 x 1-1/2" cross-cut particles. Strip shredding is not acceptable.

Destruction of waste must occur inside the contractor's secure production facility, close to the point of binding/imaging. Any waste material containing PII that is not shredded immediately must be covered at all times while awaiting destruction. A cover must be placed over any bins with waste material containing PII when being moved from one location to another within the contractor's facility. Sending intact waste containing PII to a municipal incinerator, a recycler, or any other off-site processor is not acceptable and will be considered a data breach.

Disposal of Electronic PII: Unless otherwise specified, the contractor must keep all furnished electronic files, including those with PII, in accordance with the schedule (see "SCHEDULE"). Prior to destroying the electronic files, the contractor must notify GPO for authorization to destroy. When authorized, all electronic files including any files (parallel printout) deriving from the originally furnished file containing furnished PII must be permanently destroyed in accordance with Federal Information Security Management Act (FISMA) of 2002.

Until authorized to destroy, contractor is responsible for keeping the electronic files containing PII secure as specified herein.

CMS will maintain an archive of furnished files. Prior to destruction, contractor may be required to return the final address files used for mailing (after NCOA/CASS) via password-protected email to Christine Crawford at christine.crawford@cms.hhs.gov. Password must be sent in a separate email from the address file.

Incident Reporting Requirements: If there is a breach or a suspected breach of PII, the incident must be reported to CMS within one (1) hour of discovery. Contractor to report breaches to the CMS IT Service Desk at (410) 786-2580 or (800) 562-1963.

Expiration of Data Use Agreement: Upon expiration of the DUA, the contractor will be required to confirm the destruction of all CMS data files and that no copies have been kept. Failure to certify file destruction may cause the CMS Privacy Office to refuse to issue future DUAs and data with the contractor's company or to individuals listed on the DUA. (Instructions for the destruction of CMS data files will be provided after award.)

Security Exhibit: Exhibit 2 (CMS Security Clause (May 2018)) contains security clauses, information, and forms. (Exhibit 2 follows the Attachments at the end of these specifications.)

After award, all contractor management and employees involved in this contract will be instructed on to how to apply for access to CMS' electronic mailbox system (see "GOVERNMENT TO FURNISH"). Instructions for filling out the security documentation and the Data Use Agreement will also be provided after award. Submissions will be done electronically.

LIQUIDATED DAMAGES: "Medicare and You" is a Congressionally mandated publication: Balanced Budget Act of 1997, section 4001, 1851 (d) (2) (A); and, Medicare, Prescription Drug, Improvement and Modernization Act of 2003. Liquidated damages will apply and will be computed at the rate of two and one half percent (2.5%) of the contract price for the total quantity per each lot in accordance with specifications for each workday the contractor is in default of the shipping schedule(s); provided that the minimum amount of liquidated damages shall not be less than \$5.00 for the entire order and not more than \$50,000.00 per day on the entire order, except the total damages assessed against a contractor shall in no case exceed 50% of the total value of the entire order.

BUY AMERICAN ACT: Bidders must be in compliance with the Buy American Act. Additionally, in conjunction with the preaward survey (see "PREAWARD SURVEY" specified herein), bidders must state the paper supplier(s) that will be used in production of these handbooks. Refer to GPO Contract Terms (GPO Publication 310.2, Rev. 01-18).

PREAWARD 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(ies) 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 shall be required to provide 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(s)

NOTE: The letter of commitment from each paper supplier(s) must state what percentage of paper from each paper supplier will be used in production of these handbooks. Additionally, the letters must state the location (city/state/country) of the mill supplying the paper. (See "BUY AMERICAN ACT" specified herein.)

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.

Additionally, each of the contractor's facilities that are proposed for the production of the Medicare and You Handbooks must have the requisite Quality Level, in accordance with the specified Quality Assurance Levels and Standards (see "QUALITY ASSURANCE LEVELS AND STANDARDS" specified herein). *(NOTE: This requirement applies to the prime contractor (for each of their plants producing on this contract) and all subcontractors.)*

Due to the time-sensitive nature of this contract, any samples submitted for quality evaluation must be received at GPO prior to the bid opening date (see "BID OPENING" specified on page 1).

If the submitted samples are determined to not meet the requisite quality level or are incomplete samples, the contractor shall be deemed to have failed to comply with the applicable requirements of these specifications. Any inability to meet the applicable requirements of these specifications is sufficient cause for a determination of non-responsibility. The contractor will not be allowed to submit additional samples.

Additionally, the preaward survey will include a survey of each of the contractor's facilities that are proposed to be used in the production of the Medicare and You Handbooks. A listing of all subcontractors involved will also be reviewed.

PREAWARD PAPER SAMPLES: The Government does not anticipate testing paper samples; however, the Government retains the right to request paper samples for testing if deemed necessary.

If required, at the Government's option, all bidders must have the required paper samples ready to submit at the time of bid opening date (specified on page 1). Contractor(s) being considered for award will be notified if paper testing is required and to submit their samples. Only contractors being considered for award will have their paper tested. The Government reserves the right waive the preaward paper samples.

The sample requirement is no less than 25 sheets each of the required text and cover stock, as specified under "STOCK/PAPER." Each sheet is to be 8-1/2 x 11" in size.

All samples submitted by a paper mill(s) or a contractor must be labeled as to the JCP Code, paper weight, and paper manufacturer/mill. Additionally, the package must clearly identify the jacket number and contractor on whose behalf the paper samples are being submitted. ***Any package not properly identified/labeled and/or has less than the specified 25 sheets will not be tested.***

NOTE: Random paper samples received by a paper supplier/mill that does not identify the contractor on whose behalf the samples are being submitted WILL NOT BE TESTED OR RETURNED.

Contractors must notify their paper supplier(s)/mill(s) that the mill must submit separate paper samples for each contractor. A paper mill cannot submit the same set of paper samples for multiple contractors.

Samples may be inspected and tested and must comply with the specifications as to kind and quality of materials.

NOTE: Due to the time-sensitive nature of this contract, preaward paper samples may be tested after award; however, award of the contract prior to acceptance of the paper samples does not relieve the contractor of using paper that is in accordance with the Government Paper Specifications Standards or in accordance with the paper requirements specified under "STOCK/PAPER," as applicable. If tested after award, should the paper samples be determined to be "not equal," the contractor may be allowed to submit additional samples.

If required, the preaward paper samples are to be submitted to: U.S. Government Publishing Office, Chief of Testing and Technical Services, Attn: Lowell Brown, Loading Dock, Mail Stop: QC, 44 H Street, NW, Washington, DC 20401. **NOTE: All samples are to be delivered via overnight carrier. Samples are NOT to be sent through the USPS.**

At time of delivery to GPO, contractor must notify Mary Newton at mnewton@gpo.gov, OCIMD@gpo.gov, AND gcpp@gpo.gov. Email notification must include the jacket number, name of the contractor, paper manufacturer/mill, shipper, and all tracking numbers.

If the paper samples are disapproved (or determined to be “not equal”) by the Government, the Government, at its option, may require the contractor to submit additional samples for inspection and test, in the time and under the terms and conditions specified in the notice of rejection.

In the event the additional samples are disapproved by the Government, the contractor shall be deemed to have failed to comply with the applicable requirements of these specifications for stock/paper, which may be reason for a determination of non-responsibility (if tested before award) or a determination of a possible quality defect (if tested after award).

Samples will not be returned to the contractor. No charges will be allowed for costs incurred for the preaward paper samples.

POSTAWARD PROJECT PLANS: Within five (5) workdays of notification of contract award, the contractor shall submit one (1) PDF copy of their Project Plans via email to the following email addresses:

- Mary Newton at mnewton@gpo.gov
- Christine Crawford at christine.crawford@cms.hhs.gov
- Keith Williams at keith.williams@cms.hhs.gov
- Brittany Hewitt at brittany.hewitt@cms.hhs.gov
- Tina Grimm at tina.grimm@cms.hhs.gov
- John Czumalowski at john.czumalowski@cms.hhs.gov

NOTE: Email must include jacket number and contractor name.

The proposed plans are subject to Government approval. The Government will review the project plans. If the project plans are lacking large portions of information or are considered too vague for the Government to evaluate, the plans may be rejected, and the contractor will be required to revise and resubmit the plans. If the Government has questions, these questions will be forwarded to the contractor to be addressed either before or at the postaward conference. After the postaward conference, the contractor may be required to resubmit revised project plans. If required, the revised project plans must be submitted within three (3) workdays of notification of revisions.

Once approved, no changes to these plans may be made without written approval from the Contracting Officer.

The Government reserves the right to waive some or all of these plans.

The contractor must present detailed Project Plans to include the following:

Security Plan: The contractor must have a formal, documented Security Plan that will ensure their compliance with all of the security provisions of this contract and as referenced in the attached Exhibit 2. Particular attention should be given to addressing compliance of the Federal Information Security Management Act of 2002 (FISMA) and the Privacy Act of 1974 as referenced in Exhibit 2, CMS Security Clause (May 2018) and as specified in this contract. Minimum security requirements for Federal Information Security Modernization (FISMA) compliance are defined by the Department of Commerce, National Institute of Standards and Technology (NIST) in Federal Information Processing Standards (FIPS) Publication 200 “Minimum Security Requirements for Federal Information and Information Systems.” This document can be found on the internet at: <http://csrc.nist.gov/publications/fips/fips200/FIPS-200-final-march.pdf>.

Release of PII by CMS does not constitute CMS’ approval or acceptance of the Security Plan. At any time during this contract, if CMS finds deficiencies in the contractor’s Security Plan, CMS may require correction of the deficiency.

Personnel Plan: This plan must contain the following information for the contractor's Project Manager and Alternate (Backup) Project Manager:

- Name
- Work address
- Telephone numbers (office and cellular)
- Fax number
- Email address

Additionally, the personnel plan must identify one (1) main point of contact (POC) and one (1) designated backup POC for all phases of the contract. The main POC and/or backup POC will be expected to attend all meetings, inspections, conference calls, virtual MS Teams meetings, etc. NOTE: The main POC will be the recipient of all email communications.

Physical Security Plan: This plan must provide details demonstrating how the contractor will provide security for the processing and production of all CMS PII in accordance with "DATA SECURITY, *Physical Security*," as specified herein.

Production Facilities Plan: The following information for all contractor and subcontractor production facilities that will be used for this project shall be provided:

- Company name
- Plant name
- Street address
- Name of contact person
- Number and type of presses, binding lines, and imaging lines that will be used to produce these handbooks
- Contact person's telephone numbers (office and cellular)
- Contact person's email address
- Plant manager's name (for each shift)
- Plant manager's telephone numbers (office and cellular)
- Plant manager's email address

If the contractor needs to add another contractor production facility at any time after approval of the contractor's project plans, the contractor must notify the Government 24 hours prior to production starting in that facility (see "WORKING AND COMMUNICATING WITH OTHER PLANTS AND SUBCONTRACTORS" specified herein).

If the contractor needs to add or change a piece of equipment other than what was specified in the project plans, that piece of equipment must be approved prior to starting production on it.

If the contractor needs to add a subcontractor at any time after approval of the contractor's project plans, the subcontractor must be approved by the Government prior to production starting in that facility. The contractor must submit the subcontractor's information to the Government for approval 24 hours prior to production starting in that facility (see "WORKING AND COMMUNICATING WITH OTHER PLANTS AND SUBCONTRACTORS" specified herein).

Production Plan: This plan must include:

- The projected commencement dates for cover printing, text printing, binding, and address imaging for each production facility that will be producing these handbooks.
- The daily quantity projections for cover printing, text printing, binding, and address imaging for each production facility that will be producing these handbooks.

On-Site Monitors Security/Safety Plan: This plan must include a description of the security/safety procedures that the contractor has in place or will provide for all Government on-site monitors for each production facility, including any outside areas, such as parking lots. At the Government’s option, some or all of the monitoring and inspections may be done virtually. However, the contractor must still provide their On-Site Monitors Security/Safety Plan with the required information.

Continuity of Operations (COOP) Plan: The failure to deliver the products required under this specification in a timely manner would have an impact on the Congressional Mandate for delivery of the handbooks. Therefore, if for any reason(s) (act(s) of God, labor disagreements, pandemic, national emergency, etc.) the contractor is unable to perform at said locations for a period longer than two (2) workdays, the contractor must have a backup plan for producing the products required under this specification.

Plans for their contingency production must be prepared and submitted as part of the COOP Plan. These plans must include a detailed description with the location of the facility(ies) to be used, equipment available at each facility, and a timetable for the start of production at each facility.

Plans must address how the contractor will handle large disruptions (pandemic, natural disaster, etc.) and small disruptions (piece of equipment breaks down, facility loses power, etc.).

Part of the plan must also include the transportation (if applicable) of Government materials from one facility to another.

COOP plans must address both the contractor’s main facilities and their backup facilities. All terms and conditions of this contract will apply to both the contractor’s main facilities and backup facilities. Due to the time sensitive nature of the handbooks produced on this contract, the contractor must maintain the original schedule set forth in this contract.

Quality Assurance Plan: This plan must include, for each location, the names of all quality assurance personnel and a detailed description of the number, type, and frequency of inspections that will be performed as well as the records that will be maintained documenting these activities (see “QUALITY ASSURANCE PROGRAM” specified herein). The plan must also include samples of detailed quality checklists that will be used at each identified type of inspection. Personnel responsible for performing these quality inspections will be required to sign the checklist for their specific task, certifying that they have read and understand the required checklist. A copy of the certified checklist must be posted at the site of the inspection for review and confirmation by the GPO monitor. A sample of the intended 5,000th book parallel printout format must be submitted with the contractor’s project plans for review and approval.

Transportation Management Plan: This plan must describe the details of obtaining transportation services for the drop-shipment of single copies to appropriate postal facilities and for delivery of bulk copies. This plan must show how the transportation service providers are selected by the contractor’s firm as the best value for the Government. Plan must include the following information regarding the contractor’s methods for:

- Soliciting and reviewing bids for transportation services to ensure that the Government is receiving “best value.”
- Evaluating reasonableness of cost/price.
- Evaluating on-time delivery record.
- Controlling transportation costs.

Sequential Numbering Plan: This plan must include sufficient detail to fulfill the contract requirements that there are no duplicate, damaged, or missing pieces. Each piece must have a unique number within each state’s quantity. An explanation of the contractor’s sequential numbering system is required to understand the required audit trail for each and every piece.

Disposal of Waste Material Plan: This plan must explain how all waste materials (with and without PII) will be destroyed in accordance with “DATA SECURITY, *Disposal of Waste Material*,” as specified herein.

QUALITY ASSURANCE PROGRAM: By submission of the bid, the contractor agrees to maintain a quality system in addition to GPO’s regular program. At a minimum, this program will include the following:

- Random press sheet pulls during the run by the press operator, mechanically dated and time stamped, then signed by the person performing the inspection. The press pulls will consist of a pull from all streams being produced every 20 minutes with the attached GPO “Certificate of Selection” form (Attachment C) also being mechanically dated and time stamped then being filled out by the shift pressroom foreman at the end of each shift.
- A designated company official who will be responsible for checking the first 10 addresses for each item printed in each location by comparing them with a parallel printout as well as every 5,000th piece. The results of these checks will be recorded and made available to the Government upon request.
- Each 5,000th book must be numbered continuously in intervals of 5,000. The numbering must not repeat within a state.
- For each 5,000th book, contractor is required to date and time stamp on Cover 4 when the book was pulled. A label with the date/time stamp when pulled is acceptable but must be applied to Cover 4 only. The date/time stamp (or label with date/time stamp) must not be on Cover 1.
- Any deviation from the parallel printout must indicate the steps taken for correction including going back to the last matching address and identifying the first and last pieces which had to be re-run as a result of the deviation. An accurate record of all complete publications and the anticipated release date for shipment to the U.S. Postal Service is essential.
- The contractor is required to keep the press sheet pulls and the pulled 5,000th books for six (6) months after completion of distribution. After six (6) months, the press sheet pulls and books are to be destroyed in accordance with “*Disposal of Waste Material*” specified under “DATA SECURITY.” Contractor must furnish a certificate of destruction certifying that the press sheet pulls and books have been destroyed properly.

NOTE: Although a Government representative may be on site during much of the binding and imaging phase, it still remains the contractor’s responsibility to follow their own quality assurance program. The Government representative is monitoring production and not performing quality assurance checks.

MONITORING AND INSPECTION BY THE GOVERNMENT: At the Government’s option, some or all of the monitoring and inspections may be performed on site at the contractor’s facility(ies) or virtually, as specified below. After award, contractor will be informed as to whether the monitoring and inspections will be on site or virtually.

At the Government’s option, any of the below inspections/monitoring requirements may be waived.

On-Site Monitoring and On-Site Inspection: Performance of all elements and functions of the Quality Assurance Plan and the right of the Government to make general or specialized tests and inspections does not relieve the contractor of any responsibility for meeting all requirements in this contract. A Government representative may be on site during the startup of the binding and imaging portion of this job and may stay on site for all or part of the binding and imaging process.

A desk, telephone, facsimile machine, and computer with Microsoft Office software (Microsoft Office 2000 or later), a CD-ROM drive, and Internet access in a non-smoking, temperature-controlled environment shall be available for the exclusive use of the Government representative(s) during this time and must be located within a reasonable distance and/or be reasonably accessible to the production lines. These requirements apply for all locations that are doing binding and/or imaging, including subcontractors.

The Government representatives shall have full, unrestricted, and unescorted access to production facilities where CMS work is being produced (including disposal/destruction of waste materials).

The Government on-site monitor will be monitoring the bindery and imaging production as a monitor/observer. The Government on-site monitor will not be responsible for any quality assurance checks. The contractor must continue to perform all scheduled quality assurance checks regardless of the presence of the Government on-site monitor.

All binding/imaging equipment must be inspected and approved by the on-site monitor prior to use.

Virtual Monitoring and Virtual Inspection: Some or all of the communication may be accomplished using various methods of communication such as email, telephone, GPO File Sharing Site, and MS Teams application.

Virtual monitoring and/or virtual inspecting to include, but not limited to, the following –

- Meetings, online training, and virtual inspections will be held via MS Teams.
- All plants working on this product must have access to and be able to use all methods of communication listed in these specifications.
- Contractor must have a setup that includes a downward-facing camera capable of capturing an entire 2-page spread in a single frame.
- Transfer of mail files/parallel printout from the contractor to the GPO inspectors must be done via PDF files with passcode protection or via GPO File Sharing Site.
- Some communications may require security requirements and restrictions, to include but not be limited to:
 - PII (including photos of PII) may not be shown in the MS Team conversations.
 - PII (including photos of PII) may not be recorded or transmitted by cell phones.
 - PII (including photos of PII) may not be emailed unless sent via password-protected, encrypted email (password must be provided in a separate email).
- Content, binding, and image inspections for each state and each piece of equipment will be held via MS Teams.
- Contractor must confirm that PII is not being recorded while it is being shared with the GPO inspectors.

Virtual monitoring and inspections (in lieu of on-site monitoring/inspections) do not relieve the contractor of producing and distributing the products in accordance with the contract specifications at the requisite quality level.

The Government retains the right to conduct on-site monitoring and/or inspections at any point during production and distribution, at the Government's discretion.

All binding/imaging equipment must be inspected and approved by the on-site monitor prior to use.

POSTAWARD CONFERENCE: Government representatives will conduct a conference with the contractor's representatives, including at least one (1) mailing representative, at the Government Publishing Office, Washington, DC, at a date and time determined by the Government (see "SCHEDULE" for dates). At the Government's option, the postaward conference may be conducted via teleconference. NOTE: Based on discussions at the postaward conference, the contractor may be required to submit revised project plans.

WARRANTY: Contract Clause 15, “Warranty,” of GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 01-18)) is amended for the solicitation to the effect that the warranty period is EXTENDED from 120 calendar days to 180 calendar days from the date the check is tendered as final payment. All other provisions remain the same.

PRIVACY ACT NOTIFICATION: This procurement action requires the contractor to do one or more of the following: design, develop, or operate a system of records on individuals to accomplish an agency function in accordance with the Privacy Act of 1974, Public Law 93-579, December 31, 1974 (5 U.S.C. 552a) and applicable agency regulations. Violation of the Act may involve the imposition of criminal penalties as stated in 5 U.S.C. 552a (i)(1) CRIMINAL PENALTIES. It is incumbent upon the contractor to inform its officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a, specifically, 5 U.S.C. 552a (i)(1) CRIMINAL PENALTIES and m(1) GOVERNMENT CONTRACTORS.

PRIVACY ACT

(a) The contractor agrees:

- (1) to comply with the Privacy Act of 1974 and the rules and regulations issued pursuant to the Act in the design, development, or operation of any system of records on individuals in order to accomplish an agency function when the contract specifically identifies (i) the system or systems of records and (ii) the work to be performed by the contractor in terms of any one or combination of the following: (A) design, (B) development, or (C) operation;
- (2) to include the solicitation notification contained in this contract in every solicitation and resulting subcontract and in every subcontract awarded without a solicitation when the statement of work in the proposed subcontract requires the design, development, or operation of a system of records on individuals to accomplish an agency function; and
- (3) to include this clause, including this paragraph (3), in all subcontracts awarded pursuant to this contract which require the design, development, or operation of such a system of records.

(b) In the event of violations of the Act, a civil action may be brought against the agency involved where the violation concerns the design, development, or operation of a system of records on individuals to accomplish an agency function, and criminal penalties may be imposed upon the officers or employees of the agency where the violation concerns the operation of a system of records on individuals to accomplish an agency function. For purposes of the Act when the contract is for the operation of a system of records on individuals to accomplish an agency function, the contractor and any employee of the contractor is considered to be an employee of the agency.

(c) The terms used in this clause have the following meanings:

- (1) “Operation of a system of records” means performance of any of the activities associated with maintaining the system of records including the collection, use, and dissemination of records.
- (2) “Record” means any item, collection or grouping of information about an individual that is maintained by an agency, including, but not limited to, his education, financial transactions, medical history, and criminal or employment history and that contains his name, or the identifying number, symbol, or other identifying particular assigned to the individual, such as a finger or voice print or a photograph.
- (3) “System of records” on individuals means a group of any records under the control of any agency from which information is retrieved by the name of the individual or by some identifying number, symbol, or other identifying particular assigned to the individual.

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 time (specified as the local time zone) 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: Contractor is required to submit their billing invoice and all supporting documentation in either hard copy format or as a PDF file via email (at contractor's option), as follows:

- Hard copy billing invoice and all supporting documentation must be mailed or delivered to: U.S. Government Publishing Office, Office of Financial Management, Attn: Comptroller, Stop: FMCE, Washington, DC 20401.

OR

- PDF file of billing invoice and all supporting documentation must be emailed to: invoice-inquiry@gpo.gov AND Michelle Gibbs at mgibbs@gpo.gov.

Contractor to include with the billing invoice and supporting documentation an Excel spreadsheet with a breakdown for each state showing the mailed/shipped quantities and the postage and shipping costs for those quantities.

The invoice will be considered received and the examination/verification will start upon receipt of the billing invoice AND all supporting documentation (either in hard copy format or as a PDF file).

NOTE: Contractor is not to fax the billing invoice or supporting documentation.

A copy of the billing invoice only must be emailed to Mary Newton at mnewton@gpo.gov and Christine Crawford at christine.crawford@cms.hhs.gov. 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>.

Contractor's billing invoice must be itemized in accordance with the line items in the "SCHEDULE OF PRICES" for each assigned state/version.

TITLE: Medicare and You 2027 (English Area-Specific Handbooks).

PRODUCT: Multiple awards may be made for this solicitation. Unless otherwise indicated, all the requirements of these specifications apply equally to all jackets/items.

NOTE: For the purpose of this contract, the terms “item,” “version,” and “state” refer to an “Area Specific Handbook,” and these terms are used interchangeably throughout these specifications.

QUANTITY: The total requirement of this product is approximately 47,500,000 handbooks, divided into 10 lots of approximately 4,750,000 Area-Specific Handbooks per lot (plus up to 10% or minus up to 25%).

This quantity includes the Quality Assurance Random copies and Federal Depository Library Program copies required. Bids may be submitted on a minimum of one lot, up to the maximum of 10 lots. Each lot will have approximately 3 to 10 items.

Quantities for each item will vary from approximately 100,000 to 3,500,000 copies. This quantity is approximate, and the Government reserves the right to increase the quantity by up to 10% or decrease the quantity by up to 25%.

Billing adjustment due to quantity change will be made in accordance with the contractor’s bid prices in the “SCHEDULE OF PRICES.” In the event quantity changes occur, the contractor will not be allowed any additional time in the schedule.

NUMBER OF PAGES: There are approximately 3 to 10 items for each lot. Each item is an estimated 132 to 192-page publication with separate, wraparound cover. Each item contains text and cover pages as follows:

Text: Text consists of a basic (fixed) section and a variable section, as follows:

- Basic (Fixed) section is estimated to be approximately 116 pages and is common to all books.
- Variable section is approximately 16 to 76 pages, is unique to each Area-Specific Handbook, and is located at the end of each Area-Specific Handbook.

NOTE: See “ALLOWABLE CHARGES” specified herein for information regarding billing for the basic (fixed) section and variable section.

Covers: Covers 1, 2, and 3 are common to all handbooks; Cover 4 is unique to each area-specific handbook.

NOTE: Refer to Exhibit 1 for historical data for variable pages counts from previous years. Exhibit 1 is for information purposes only. There is no guarantee that the variable page counts for the products produced on this contract will be the same for any item/state version as in previous years.

TRIM SIZE: 8-3/8 x 10-7/8”.

NOTE: See “PRESS SHEET, CONTENT, BINDING, AND VARIABLE IMAGING INSPECTION” for color control bar requirements.

GOVERNMENT TO FURNISH: Data Files will be furnished via Electronic File Transfer (EFT) in an electronic mailbox that will be setup by CMS to provide the contractor with access to data files. Immediately after award, the contractor must submit the names of two (2) users (one primary user and one backup user) to Christine Crawford at christine.crawford@cms.hhs.gov.

Applicants must apply for access to CMS’ electronic mailbox (instructions to be provided after award). A Social Security Number may be required for the persons completing the form (no exceptions).

Prior to submitting an online application, contractor to contact Christine Crawford to request the electronic mailbox number to use when applying online. When online applications are complete, contractor must notify Christine Crawford by email (christine.crawford@cms.hhs.gov). Notifications of access will be sent to each applicant when approved.

Software: Contractor will need an Internet browser or may use a GIS-compatible Secure File Transfer Protocol (SFTP) Client.

The Government will furnish the following deliverables to the contractor at time of the postaward conference, or shortly thereafter:

- Print-ready Adobe Acrobat (current or near current version) PDF files via email. Files will consist of static text pages, variable pages that comprise the last portion of the handbook, and cover pages. NOTE: Original source files generated on a MAC computer with MAC OS Sequoia, version 15.7.3, using Adobe InDesign CC2026 in native application format and Adobe Acrobat DC (along with the corresponding Pantone Connect for Adobe Creative Cloud plug-in for spot color licensing) will be furnished via email upon request. (See below for additional specifications).
- Bulk distribution list (an MS Excel file with the distribution addresses will be emailed to the contractor prior to the postaward conference).
- Record layout for mailing addresses.
- One (1) copy of USPS Form 3615, Mailing Permit Application and Customer Profile.
- Applicable Penalty Permit number mailing indicia.

NOTE: Some or all of the above may be furnished electronically via email.

Adobe Acrobat PDF Files and Adobe InDesign CC2026 Files: Print-ready Adobe Acrobat (current or near current version) PDF files consisting of static text pages, variable pages that comprise the last portion of the handbook, and cover pages will be furnished via email. Printer and screen fonts will be embedded. *If requested*, original source files will be generated on a MAC computer with MAC OS Sequoia, version 15.7.3, using Adobe InDesign CC2026 in native application format. Printer and screen fonts will be provided. NOTE: Contractors must use CMS supplied fonts only.

NOTE: All software upgrades (for specified applications and plug-ins) which may occur during the term of the contract must be supported by the contractor.

The electronic files will be for the basic (fixed) section, variable sections, and covers of the handbooks. The fixed section of the handbooks is identical for ALL handbooks. Covers 1, 2, and 3 are identical for ALL handbooks; Cover 4 is unique to each Area-Specific Handbook. The fixed section portion of the handbook, which will comprise the first section of each handbook, is approximately 116 pages. The variable sections, which will be unique to each Area-Specific Handbook, are approximately 16 to 76 pages (either 16, 20, 24, 28, 32, 36, 40, 44, 48, 52, 56, 60, 64, 68, 72, or 76 pages) and follow the fixed section. *NOTE: Each Area-Specific Handbook may contain a different page count for the variable section at the end of the handbook.*

Identification markings such as register marks, commercial identification marks of any kind, etc., except GPO imprint, form number, and revision date, carried in the electronic files, must not print on finished product.

CONTRACTOR TO FURNISH: All materials and operations, other than those listed under “GOVERNMENT TO FURNISH,” necessary to produce the products in accordance with these specifications.

ELECTRONIC PREPRESS: Prior to image processing, the contractor shall perform a basic check (preflight) of the furnished media and publishing files to assure correct output of the required reproduction image. Any errors, media damage, or data corruption that might interfere with proper file image processing must be reported to: Keith Williams at keith.williams@cms.hhs.gov.

The contractor shall create or alter any necessary trapping, set proper screen angles and screen frequency, and define file output selection for the imaging device being utilized. Furnished files must be imaged as necessary to meet the assigned quality level.

Line screen resolution must be a minimum of 150 lpi for covers and 133 lpi for text.

PROOFS: The following proof requirements must be submitted for each plant location used in the printing of the product. NOTE: The GPO imprint line must be visible on all proofs of Cover 3.

- One (1) press quality PDF soft proof of the fixed section of the handbook (approximate circle folio pages 1 to 116) and Covers 1 through 4 (for content only) using the same Raster Image Processor (RIP) that will be used to produce the final printed product. PDF proof will be evaluated for text flow, image position, and color breaks. Proof will not be used for color match.

NOTE: Covers 1, 2, and 3 and the fixed section of each handbook are common to all Area-Specific Handbooks; therefore, only one (1) PDF proof is required regardless of the number of contractor's plants. For Cover 4, PDF proofs for each state are required as follows: one (1) proof of Cover 4 for each state with the mailing indicia and one (1) proof of Cover 4 for each state without the mailing indicia.

- Two (2) sets of inkjet proofs that are G7 profiled and use pigment-based inks for Covers 1 through 4 only (with indicia on Cover 4) for only one (1) state. (It is at the contractor's option as to which state cover to provide; however, the "O.K. to Print" for the state cover provided will become the quality standard for all the state covers.)

A proofing RIP that provides an option for high quality color matching (such as Device Links Technology and/or ICC Profiles Technology) and meets or exceeds industry tolerance to ISO 12647-7 Standard for Graphic Technology (as of 3/19/09, and future amendments) must be utilized plus GRACoL 2006 Coated #1 specifications (CGATS TR006) must be achieved. Output must be a minimum of 720 x 720 dpi on a GRACoL or SWOP certified proofing media. Proofs must contain the following color control strip to be evaluated for accuracy: IDEAlliance ISO 12647-7 Control Strip 2009 or 2013(i1).

Proofs must contain color control bars (such as Brunner, GATF, GRETAG, or RIT) for each color of ink on the sheet. Control bars must be placed parallel to the press's ink rollers and must show areas consisting of minimum 1/8 x 1/8" solid color patches; tint patches of 25, 50 and 75%; dot gain scale; and gray balance patches for process color (if applicable). These areas must be repeated consecutively across the sheet.

The make and model number of the proofing system utilized shall be furnished with the proofs. These proofs must contain all elements, be in press configuration, and indicate margins. Proofs will be used for color match on press. Direct to plate must be used to produce the final product with a minimum of 2400 x 2400 dpi.

Pantone colors must be simulated on proofs and must be proofed separately on a digital color content, overlay, or inkjet proof.

Contractor to submit two (2) sets of ink drawdowns on actual production stock of the black ink and the Pantone color(s) used to produce the product. Half of drawdown must show varnish or coating, as applicable.

NOTE: Proofs will not be required for variable pages.

Send one (1) set of inkjet proofs and one (1) set of ink drawdowns directly to: CMS, Attn: Keith Williams, SL-14-149, 7500 Security Boulevard, Baltimore, MD 21244-1850. Contractor must indicate jacket number, requisition number, contractor name and plant, and “PROOFS” (specifically, proof type and/or ink drawdowns) on proof package(s).

Send one (1) set of inkjet proofs and one (1) set of ink drawdowns directly to: Government Publishing Office, Publishing Support Operations, Quality Control for Published Products, Attn: John Carey/Sarah Coffin, Stop: CSPPS, Room C613, 732 North Capitol Street, NW, Washington, DC 20401. (Telephone: (202) 512-0542) Contractor must indicate jacket number, requisition number, contractor name and plant, and “PROOFS” (specifically, proof type and/or ink drawdowns) on the proof package(s). *NOTE: This set will be held by the GPO and will not be returned to the contractor.*

Email PDF soft proofs to:

- christine.crawford@cms.hhs.gov
- brittany.hewitt@cms.hhs.gov
- keith.williams@cms.hhs.gov
- jcarey@gpo.gov
- qcpp@gpo.gov

Email subject line must identify the jacket number, requisition number, contractor name and plant, and “PROOFS.”

Contractor must notify GPO Shared Support Services Compliance Section via email to compliance@gpo.gov and notify Mary Newton (mnewton@gpo.gov) immediately upon submitting all proofs and immediately upon notification that the proofs are available for pickup at CMS.

NOTE: The delivery addresses for the proofs may change. Contractor will be notified after award.

If any contractor’s errors are serious enough in the opinion of the GPO to require revised proofs, the revised proofs are to be provided at no expense to the Government. No extra time can be allowed for this reproofing; such operations must be accomplished within the original production schedule allotted in the specifications.

The contractor must not print prior to receipt of an “O.K. to Print.”

STOCK/PAPER: The specifications of all paper furnished must be in accordance with those listed herein or listed for the corresponding JCP Code numbers in the “Government Paper Specification Standards No. 13” dated September 2019, as applicable.

Government Paper Specification Standards No. 13 – https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/vol_13.pdf.

All text paper used in each handbook must be of a uniform shade if possible. If not possible, with the Government’s approval, the contractor may use different shades of paper for each section; however, the paper for each section of the handbook must be of a uniform shade (i.e., the pages of the fixed section must be of a uniform shade, and the pages of the variable section must be of a uniform shade). All paper properties specified for JCP Code A60 apply to each section within a book (i.e., fixed text pages and variable text pages).

All cover paper must have the grain parallel to the spine.

Text: White Uncoated Text, basis weight: 40 lbs. per 500 sheets, 25 x 38”, equal to JCP Code A60.

Cover: White Matte Coated Cover, basis weight: 65 lbs. per 500 sheets, 20 x 26”, equal to JCP Code L50. Exception: Gloss - Average each side not to exceed 35%.

PRINTING: Publication prints head-to-head, with an occasional head-to-side.

Text: A minimum of 133-line screen for text is required.

All text pages (fixed pages and variable pages) print in black and one (1) Pantone color (Pantone 300 Blue) consisting of illustrations, gradient tones, and type and line matter throughout. Text pages contain some bleeds. Fixed section text is circle folioed 1 through 116 (estimated). The variable section is the balance of the book.

There are no blank text pages. Some text pages may print “This page intentionally left blank,” or “NOTES.”

Press sheet inspections for the text will NOT be required. In lieu of the press sheet inspections, the contractor must provide 10 signatures of the first printing of the text pages at color density. These signatures must be provided for each plant printing the text pages. The black ink and the Pantone color (Pantone 300 Blue) must be within plus or minus five (5) points of the density mark on the ink drawdowns. The signatures must contain all color bars and information as required by GPO for a press sheet inspection and must be without perforations. NOTE: The color bars must be readable with a handheld densitometer.

NOTE: The delivery addresses specified below may change. Contractor will be notified after award.

- Contractor to deliver five (5) text signatures to: CMS, Attn: Keith Williams, SL-14-149, 7500 Security Boulevard, Baltimore, MD 21244-1850. Contractor must indicate the jacket number, requisition number, contractor name and plant, and “TEXT SIGNATURES” on the package.
- Contractor to deliver five (5) text signatures to: Government Publishing Office, Publishing Support Operations, Quality Control for Published Products, Attn: John Carey/Sarah Coffin, Stop: CSPS, Room C613, 732 North Capitol Street, NW, Washington, DC 20401. (Telephone: (202) 512-0542) Contractor must indicate the jacket number, requisition number, contractor name and plant, and “TEXT SIGNATURES” on the package.

Contractor must notify Mary Newton (mnewton@gpo.gov) immediately upon submitting text signatures.

Text signatures to be delivered within three (3) workdays of startup of printing.

Cover: A minimum of 150-line screen for covers is required.

Covers 1 and 2 print in four-color process and one (1) Pantone color (Pantone 300 Blue). Printing may consist of halftones, illustrations, bleeds, and type and line matter.

Cover 3 prints in black and one (1) Pantone color (Pantone 300 Blue) with the GPO imprint line in black in lower right-hand corner. NOTE: GPO imprint line MUST print on Cover 3 as specified. GPO imprint line must be in accordance with Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 01-18)).

Cover 4 prints in black and one (1) Pantone color (Pantone 300 Blue) consisting of type and line matter and agency logo. Contractor may knock out address area to be inkjet, if necessary. NOTE: Mailing indicia on Cover 4 must not print on bulk shipment copies (see Attachment A). Contractors may use a knock-out varnish window (from mailed versions) for the bulk versions in the address area only. The remainder of the cover must show varnish as specified below. (See “ALLOWABLE CHARGES” specified herein regarding billing information for covers.)

The Pantone color (Pantone 300 Blue) must print as a solid color. It cannot be built out of the process colors.

After printing, apply a non-yellowing, dull satin coating (varnish or aqueous) to prevent smearing and scratching. Coating must be dull satin (not gloss).

All covers must be printed on a press capable of printing five (5) colors in a single pass through the press (minimum of five (5) printing units).

VARIABLE COMPUTERIZED IMAGING (ADDRESSING FOR SELF-MAILERS): Contractor to address Cover 4 using inkjet, laser, or suitable method using a sans serif font that meets USPS guidelines (<http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>).

Address should read parallel to the short dimension of Cover 4 with placement and location in compliance with applicable USPS addressing guidelines (See Attachment A). Please note that furnished addresses can be up to eight (8) lines of address information; it is possible for the address block to use 10 lines of data, including barcodes.

After addressing, the addresses must not run or bleed when in contact with water and must be clear and legible. All address elements, components, ink characteristics, and barcodes must meet USPS automated flat mail processing equipment compatibility standards and comply with all related USPS requirements as cited in the Mailing Standards of the U.S. Postal Service, Domestic Mail Manual (DMM), and Flat Mail processing guidelines in effect at time of mailing (<http://pe.usps.gov>).

MARGINS: Margins will be as indicated in the furnished electronic media for the handbook. Inadequate gripper margins. Text pages throughout may bleed at the head, foot, and outside edge. Contractor is responsible for extending bleeds on furnished materials as necessary to ensure bleeds on final product.

BINDING: Perfect-bind text and wraparound cover; trim three sides (bind on the left 10-7/8" dimension). Center hinge score front and back - not to extend beyond 1/4" from bind edge. Grain must run parallel to spine. Glue the front and back cover to the first and last text pages between the scores and the bind.

PRODUCTION REPORT DURING BINDING AND IMAGING PHASE: During the binding and imaging phase of this project, the contractor must email production reports that compare "actual production" to the "projected production" quantities provided in the project plans to Christine Crawford (christine.Crawford@cms.hhs.gov), Keith Williams (keith.williams@cms.hhs.gov), and Mary Newton (mnewton@gpo.gov).

The production report shall be a single-page, Microsoft Excel spreadsheet with four (4) columns:

- 1) plant location
- 2) projected number of books bound and imaged (should match the projected totals in the project plans)
- 3) actual number of books bound and imaged
- 4) difference

Additionally, if on site, the contractor must provide hard copy, daily production reports for each production facility to each on-site monitor assigned to that facility. These production reports must provide the quantity of handbooks bound, imaged, and shipped. In the event that the monitors are not on site, contractor to email the daily production reports to the assigned monitor (email address to be provided after award) and qcpp@gpo.gov.

The contractor is responsible for compiling this information from each location that is doing binding and imaging work. This report should be submitted every three (3) calendar days that bindery and imaging work is being performed to Keith Williams and Mary Newton. At the postaward conference, or shortly thereafter, a Microsoft Excel spreadsheet shall be provided to the contractor for this purpose.

PRESS SHEET, CONTENT, BINDING, AND VARIABLE IMAGING INSPECTIONS: At the Government's option, any of the below inspections may be waived. Additionally, at the Government's option, some or all of the below inspections may be held on site or virtually (see "MONITORING AND INSPECTION BY THE GOVERNMENT").

The inspections are as follows:

- Cover pages press sheet inspection
- Content inspection for the variable pages
- Binding inspection (may be held concurrently with the variable imaging inspection)
- Variable imaging inspection (may be held concurrently with the binding inspection)

Cover Press Sheet Inspections: Contractor is to print an open 8-point star symbol, or a similar pre-identified unique symbol, within the finished trim area on each cover, which will be honed off after color “O.K.” standards have been established during the press sheet inspection.

Final makeready press sheets and imaged products will be inspected and approved at the contractor’s plant for the purpose of establishing specified standards for use during the actual press run. Upon approval of the sheets and imaged product, contractor is charged with maintaining those standards throughout the press run (within QATAP tolerances when applicable) and with discarding all makeready sheets that preceded approval. See GPO Publication 315.3 (Guidelines for Contractors Holding Press Sheet Inspections) dated January 2015. NOTE: A press sheet inspection is for the purpose of setting specific standards that are to be maintained throughout the entire run. It does not constitute a prior approval of the entire run.

GPO Publication 315.3:

https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/contractors_holding_psi.pdf?sfvrsn=2

Press sheets must contain control bars for each color of ink on the sheet. Control bars must be placed parallel to the press’s ink rollers. The control bars (such as BRUNNER, GATF, GRETAG, or RIT) must show areas consisting of 1/8 x 1/8” minimum solid color patches; tint patches of 25, 50, and 75%; dot gain scale; and gray balance patches for process color (if applicable). These areas must be repeated across the entire press sheet.

Viewing Light: Press sheets will be viewed under controlled conditions with 5000 degrees Kelvin overhead luminaries. The viewing conditions must conform to ISO 3664-2009; a viewing booth under controlled conditions with 5000 degrees Kelvin overhead luminaries with neutral gray surroundings must be provided.

NOTE: If a contractor is printing covers in multiple locations, a single cover press sheet inspection will be held at the location that is printing first. The contractor is responsible for maintaining the same standards at all other printing locations.

The contractor must have the signed and approved proofs available at the cover press sheet inspections. The contractor must not print prior to receipt of an “O.K. for Color.” NOTE: If multiple plants are being used to print, contractor must have a copy of the signed-off press sheet at each plant.

Content Inspections: A Government inspector may conduct a content inspection for the variable pages when the contractor starts to print these pages. The purpose of this content inspection is to ensure that the pages printed match the PDF file sent to the contractor. Since no proofs are required for these pages, only the content and color separation will be examined at the start of this press run. The Government inspector will not establish new standards for color or ink density; contractor must match color standards established by the contractor-furnished text signatures.

The contractor must provide one (1) set of laser prints of the variable pages (output at 100%). These laser prints must be printed directly from the furnished file and pre-rip. The laser prints must be either in color or run as separations to show color breaks.

Binding and Variable Imaging Inspections: In the event that a contractor is binding or imaging in multiple locations, a binding and/or imaging inspection may be held in EACH location. This includes all plants the contractor uses for binding and/or imaging, as well as all subcontractor locations.

Binding operations may be inspected at the contractor's plant for binding quality conformance and to ensure that all GPO binding specifications are being met.

Variable imaging inspections will be held to ensure that:

- The variable computerized imaging specifications and pertinent GPO imaging specifications are being followed.
- All address elements, components, ink characteristics, and barcodes meet USPS automated flat mail processing equipment compatibility standards.
- The correct covers, text pages, and address files are being utilized for the specific book being printed.

If binding and imaging are being done in line, then the binding and imaging inspections will be held concurrently.

Contractor is not to bind prior to receipt of an "O.K. for Binding" and is not to image addresses and barcodes prior to an "O.K. for Imaging."

Scheduling Inspections: Cover press sheet inspections MUST be held during normal business hours (8:00 a.m. to 5:00 p.m., prevailing local time) on Government workdays, Monday through Friday. Cover press sheet inspections will NOT be held on weekends or Federal holidays.

If possible, contractors should attempt to conduct the content inspection, as well as the binding and imaging inspections, during normal business hours (8:00 a.m. to 5:00 p.m., local prevailing time) on Government workdays, Monday through Friday. However, since the binding and imaging schedules, as well as the printing schedule for the variable pages, are very tight, these inspections may be held on weekends, Federal holidays, and during evening hours.

The Project Manager or Alternate Project Manager must notify GPO and CMS of the date and time the press sheet (cover only) inspection, content inspection, binding inspection(s), and variable imaging inspection(s), will be performed.

In order for proper arrangements to be made for on-site inspections, notification must be given at least three (3) calendar days prior to EACH inspection. NOTE: For virtual inspections, 1-hour AND 24-hour notification may be required for each inspection. Contractor will be notified prior to the inspections if an on-site or virtual inspection will take place.

Notify both GPO and CMS, as follows:

- U.S. Government Publishing Office, Quality Control for Published Products (QCPP), Washington, DC 20401, telephone number (202) 512-0542 (telephone calls will only be accepted between the hours of 8:00 a.m. and 2:00 p.m., Monday through Friday, prevailing Eastern Time).
- Keith Williams, telephone number (410) 786-1962.

It is the contractor's responsibility to schedule all press sheet inspections with the Government, including inspections held at different plants. The Government will not accept press sheet inspection appointments communicated by subcontractors hired by the contractor; however, the Government will accept content/binding/imaging inspection appointments communicated by subcontractors hired by the contractor.

It is the contractor's responsibility to ensure that appropriate personnel that can make any potential corrections, adjustments, and repairs, including the creation of new plates, prepress adjustments, and mixing inks, are on site during all inspections.

NOTE: See contract clauses, paragraph 14(e)(1), Inspections and Tests of GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 01-18)). When supplies are not ready at the time specified by the contractor for inspection, the Contracting Officer may charge to the contractor the additional cost of the inspection.

PRESS SHEETS, SIGNATURES, AND SAMPLES: The on-site cover press sheet, content, binding, and/or variable imaging inspections may be waived, and the inspection(s) will be performed virtually (see "MONITORING AND INSPECTION BY THE GOVERNMENT").

- If required, in lieu of an on-site cover press sheet inspection, the contractor will be required to submit 10 untrimmed cover press sheets for each assigned state with all color bars and marks in place (for each assigned state – five (5) sheets to GPO and five (5) sheets to CMS, as specified below).
- If required, in lieu of an on-site content inspection, the contractor will be required to submit seven (7) folded, untrimmed sets of each text signature of the variable pages for each assigned state (for each assigned state – two (2) sets to GPO and five (5) sets to CMS, as specified below. One (1) set will be signed and returned to the contractor).
- If required, in lieu of an on-site binding and/or variable imaging inspection, the contractor will be required to submit seven (7) bound and imaged samples for each assigned state (for each assigned state – two (2) samples to GPO and five (5) samples to CMS, as specified below. One (1) sample will be signed and returned to the contractor). **NOTE: For the imaging of addresses on the samples, contractor will either be furnished dummy addresses or be instructed to use any dummy address (such as the addresses provided in Attachment A, page 2).**

NOTE: The delivery addresses specified below may change. Contractor will be notified after award.

All press sheets, signatures, and/or samples are to be delivered as follows:

- Contractor to deliver to: CMS, Attn: Keith Williams, SL-14-149, 7500 Security Boulevard, Baltimore, MD 21244-1850. Contractor must indicate jacket number, requisition number, contractor name and plant, and "PRESS SHEETS" or "SAMPLES" (as applicable) on the package.
- Contractor to deliver to: Government Publishing Office, Publishing Support Operations, Quality Control for Published Products, Attn: John Carey/Sarah Coffin, Stop: CSPS, Room C613, 732 North Capitol Street, NW, Washington, DC 20401. (Telephone: (202) 512-0542) Contractor must indicate jacket number, requisition number, contractor name and plant, and "PRESS SHEETS" or "SAMPLES" (as applicable) on the package.

Contractor must notify Mary Newton (mnewton@gpo.gov) immediately upon submitting press sheets, signatures, and/or samples.

Press sheets, signatures, and/or samples, as applicable, are to be delivered within three (3) workdays of startup of printing/binding/imaging, as applicable.

PACKING:

Bulk Shipments: Pack each item separately and identify the shipping containers with the Area-Specific item name, item number, inventory control number, publication number, and publication revision date which will be provided at the postaward conference, or shortly thereafter. **Each shipping container in all shipments must contain this information on the actual shipping container.**

Pack suitable per shipping container not to exceed 40 pounds when fully packed. Shipping containers must be packed in a manner that will ensure there is no damage to the product during shipping and handling.

Mailed Shipments: Single copies must be mailed as self-mailers.

Pallets (required for motor freight ship only): Pallets must be type III and must conform to Federal Specifications NN-P-71C, and any amendments thereto except for dimensions and single center stringer. Full entry MUST be on the 40" width. Receipt of incorrect pallets may result in a charge for each incorrect pallet which will be assessed against the contractor. This charge will cover additional costs incurred by CMS to re-palletize the shipment onto correct pallets. Loaded pallets must be machine wrapped with shrinkable or stretchable plastic strong enough to retain the integrity of the pallet during transportation and handling. Do NOT use metal strapping or pallet caps for securing material on pallets. Copies on pallets must be consolidated so that there is no more than one (1) partial pallet per destination.

Pallet preparation and pallet sortation are subject to specific USPS standards. Pallets and related labeling must be prepared in accordance with the Mailing Standards of the U.S. Postal Service and DMM in effect at time of mailing as published at <http://pe.usps.com>. (See Attachment B for CMS Pallet Specifications.)

For shipments to United Systems of Arkansas, Inc., pallets must be 40 x 48", either stringer or block pallet type. Pallet stack height is a maximum of 56", including pallet height.

LABELING AND MARKING:

Bulk Shipments: Contractor to download GPO Form 905 (R. 7-15) – Labeling and Marking Specifications which can be located on GPO.gov, fill in appropriate blanks, and attach to shipping containers. Label must be in a location on the container where CMS Warehouse can see on rack system. **NOTE: Contractor must use GPO Form 905 on all shipping containers.**

Mailed Shipments: Address individual copies for mailing (see "VARIABLE COMPUTERIZED IMAGING (ADDRESSING FOR SELF-MAILERS)").

Contractor to create and affix placards to the pallets according to the content and destination of the mail. At least two (2) clearly visible, white placards must be affixed to two (2) adjacent sides of each pallet. Contractor to label placards bearing Intelligent Mail Barcodes (IMb) in accordance with the current USPS Mailing Standards.

For the Quality Assurance Random Copies, contractor to apply furnished Business Reply Mail label (see "QUALITY ASSURANCE RANDOM COPIES" below for additional information). **NOTE: Each container must identify which state(s) and how many copies for that state(s) are packed in the container.**

QUALITY ASSURANCE RANDOM COPIES: The contractor is required to submit 50 quality assurance random copies *for each assigned state* to test for compliance against specifications. Each state's quantity must be divided into equal sublots and select a copy from a different general area of each subplot. The contractor will be required to certify that copies were selected as directed using GPO Form 917 – Certificate of Selection of Random Copies (located on GPO.gov). Copies will be paid for at the running rate offered in the contractor's bid and their cost will not be a consideration for award. A copy of the purchase order/specifications must be included.

NOTE: If a state quantity is divided between printing plants, the number of quality assurance random copies must be divided evenly among each those plants (for example, if two plants are printing the quantity for one state, 25 random copies would come from one plant, and 25 random copies would come from the other plant).

Business Reply Mail labels will be furnished (via email) for mailing the quality assurance random copies. The copies are to be mailed at the same time as the first scheduled shipment. A U.S. Postal Service approved Certificate of Mailing, identified by jacket and purchase order numbers must be furnished with billing as evidence of mailing. *NOTE: Contractor is to produce the number of labels needed (on YELLOW stock) and destroy any remaining labels upon completion of the contract. The Business Reply Mail label furnished is only to be in used in the production of this contract. The contractor must use the furnished Business Reply Label and the samples must be mailed through the USPS. Contractor may not use a third-party shipper to ship these samples.*

DISTRIBUTION:

Single copies: Mail f.o.b. contractor's city approximately 4,650,000 single copies (per lot) via the Government-furnished mailing permit, as specified below. Contractors will be notified of final quantities, as well as the specific books they will be printing, at the postaward conference, or shortly thereafter. ***NOTE: Drop-shipments to USPS' Destination Sectional Center Facility (DSCF) Entry, Sorting and Delivery Centers (S&DC) Entry, and Destination Delivery Unit (DDU) Entry are required.***

NOTE: One lot will have approximately 1,000 to 2,000 copies destined for Puerto Rico as part of the total quantity. These copies mail in accordance with the requirements specified under "Single Copies" above.

Bulk Shipments:

- Ship f.o.b. contractor's city approximately 10,000 to 15,000 books (per lot) to approximately 10 to 150 locations.
- Mail f.o.b. contractor's city the Quality Assurance Random Copies to the address specified on the furnished business reply label. (NOTE: Contractor must notify GPO via email to mnewton@gpo.gov and qcpp@gpo.gov the same day as delivery to the USPS.)
- Ship f.o.b. contractor's city approximately 200 to 1,500 copies of each item to: CMS, CMS Receiving Clerk, 7500 Security Boulevard, Baltimore, MD 21244. (Telephone: (410) 786-2948) The contractor will be notified of the final quantity at the postaward conference, or shortly thereafter. The Area-Specific item name, item number, inventory control number, publication number, and publication revision date must appear on each container.
- Ship f.o.b. contractor's city approximately 200 to 4,000 copies of each item to: United Systems of Arkansas, Inc., Attn: PODFO, 4949 West Bethany Road, Little North Rock, AR, 72117. (Telephone: (800) 264-0812) NOTE: The contractor will be notified of the final quantity at the postaward conference, or shortly thereafter.
- Ship f.o.b. contractor's city one (1) copy marked "Depository Copies Item No. 0512-A-39" to: U.S. Government Publishing Office, Federal Depository Library Program, Mail Stop: FDLP, 44 H Street, NW, Loading Dock, Washington, DC 20401. *NOTE: Contractor is only required to submit one (1) copy to the address specified. It is at the contractor's option as to which state version to provide. Contractor must notify GPO the same day the product ships via email to tmerrick@gpo.gov and kmarshall@gpo.gov. Subject line of the email must include the jacket number, tracking numbers, shipping method, and title of product.*

Bulk ship the number of handbooks required, as specified above, via reimbursable, small parcel carrier (see “SCHEDULE” for dates). These shipments must be by traceable means with a signed receipt. Some deliveries may require INSIDE DELIVERY. Contractor will be reimbursed for all shipping costs by submitting all shipping receipts with billing invoice for payment.

For the Quality Assurance Random Copies, the contractor is cautioned that the “Postage and Fees Paid” indicia on the furnished Business Reply Mail label may be used only for the purpose of mailing the quality assurance random copies produced under this contract.

CMS Delivery Appointment: Receiving hours are Monday through Friday, 7:30 a.m. to 3:30 p.m., on a “first come, first serve” basis (no appointment necessary). The contact number is (410) 786-2948.

United Systems of Arkansas, Inc. Delivery Appointment: Normal receiving hours are 6:00 a.m. to 5:00 p.m., Central Standard Time (CST), Monday through Friday. (No after hours or weekend deliveries are accepted unless pre-approved through shipping/receiving.) No appointments are necessary. Contractor to email Robert Bluejacket at bluejacket@unitedsystems.net with the delivery date of bulk items.

Cost for transporting the mailed copies to the USPS mailing facility is reimbursable upon receipt of the contractor’s delivery receipts with their billing invoice. Additionally, the contractor is responsible for the mailed copies until the copies have been accepted by an official USPS representative at a physical postal facility, regardless of whether an on-site USPS representative at the contractor’s facility has filled out and signed a PS Form 8125 for those copies.

NOTE: It is the contractor’s responsibility to ensure that all required paperwork and the furnished agency mailing indicia is filled out correctly and issued/on file with the appropriate mailing/shipping facilities. Contractor to contact John Czumalowski at (808) 348-2241 with any questions.

MAIL PREPARATION: All items mailed will have a printed CMS Standard Mail “Postage and Fees Paid” Permit (#G-845). The contractor is cautioned to use the permit imprint only for mailing material produced under this contract. The contractor is required to prepare all mail in accordance with appropriate USPS rules and regulations, including the Mailing Standards of the U.S. Postal Service, DMM (<http://pe.usps.com>), and other USPS procedural publications in effect at time of mailing.

All mailing shall be made at the Standard Class rate.

Contractor must provide to the CMS, Office of Security/Facilities and Logistics Operations (OSFLO) information required by the USPS for creation of an Informed Delivery Campaign.

The contractor is required to obtain the maximum USPS postage discounts possible in accordance with the USPS Standard Class mail automated and non-automated mail discount structure in effect at time of mailing, except when any address data enhancement will negatively affect deliverability and/or omit any required address fields.

Contractor shall follow indicia, address, and barcode placement found on Attachment A, which is consistent with current USPS Address Quality Standards, and in accordance with appropriate USPS rules and regulations including the Mailing Standards of the United States Postal Service and DMM in effect at time of mailing (<http://pe.usps.gov/DMM300/Index>).

The typestyle must be sans serif and consistent with the guidelines in USPS Publication 28, Postal Addressing Standards, (<http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf>) and must consist of all upper case characters, comparable to the typestyle and font size illustrated in Attachment A. No contractor alterations to this copy will be permitted without written authorization from CMS and GPO.

In compliance with USPS Mail Preparation and Sortation Regulations, all mail must be: appropriately marked; barcoded if necessary; supported with documentation generated by Presort Accuracy Validation and Evaluation (PAVE) certified software; or, printed in a standardized format to ensure USPS acceptance. Full Service Intelligent Mail Barcode barcoding and delivery address placement used for this mailing must comply with the CMS specifications cited and USPS requirements for automation-compatible mail in effect at the time of the mailing. The contractor will be responsible for payment of any additional postage resulting from a loss of a discount due to irresponsible and careless application of USPS mail preparation and sortation standards. Addresses for this mailing come from a Government maintained file.

Intelligent Mail Barcode (IMb): During the term of this contract, all mailed copies will be required to meet the Full-Service option using Intelligent Mail Barcodes to access automation postal rates for flats.

The contractor must understand and be able to implement all mail preparation requirements enacted by the Postal Service related to using Intelligent Mail. The requirements that include, but are not limited to, preparing the Intelligent Mail Barcodes meeting USPS quality acceptance standards; experience with assigning unique numbers for each mail piece; preparing electronic manifests; making electronic appointments; producing revised tray/pallet label formats; and, other similarly detailed IMb requirements as mandated by the Postal Service are essential.

Mail Processing: The contractor must process the address files by using Coding Accuracy Support System (CASS), National Change of Address (NCOA), and Delivery Sequence File 2nd Generation (DSF²) certified mail processing software to qualify for the most cost-efficient Standard/Bulk automation rates available. The contractor must furnish the appropriate, properly filled-out forms to the U.S. Post Office. The files must be matched against the postal database to update and correct the ZIP codes, provide ZIP codes, and provide the data required to print delivery point barcode for each address.

After the contractor has processed the address files, they are to drop the undeliverables (DSF²: Vacants and records containing no forwarding address) and notify both GPO and CMS. These undeliverable copies may not be required to be mailed (see “UNDELIVERABLES/RETURNED COPIES” specified herein for more information).

During the NCOA process, if there are any addresses that update to another state, contractor is to update the address on the book but is not to switch state books based on the updated address. If any duplicates are identified, contractor is to mail all copies.

NOTE: Contractor is NOT to run the foreign files through CASS, NCOA, or Delivery Point Validation (DPV) software. This applies to the packages (Initial, General, and Accretes) as well as any other record files that contain international (foreign) addresses.

Contractor is to forward the unmatched file to CMS for approval/disapproval of the NEW quantity.

For the final quantity counts for the basis of this contract’s distribution, the address files only need to be processed through CASS and NCOA one time and must not be processed prior to 8/5/2026, but no later than 8/12/2026. All related costs to perform this one-time operation must be included in submitted bid pricing. No additional reimbursement will be authorized. In addition to the Government’s one-time requirement, the contractor may process the address files through CASS and NCOA at any time for their own internal needs, at the contractor’s expense.

DSF² Requirement: It is incumbent upon the contractor to ensure the maximum postage discount possible is received for this mailing.

DSF² is a licensed, address hygiene product that contains information on all addresses (except general delivery addresses) served by the Postal Service. DSF² includes the ZIP Codes, ZIP+4® codes, carrier route code, walk-sequence information, and all other delivery attributes related to each specific address. DSF² is one of the approved methods under USPS Mailing Standards for preparing mail to meet the walk-sequence criteria required for carrier route periodicals, mail pieces, and Enhanced Carrier Route Standard Mail pieces mailed at high density, high density plus, and saturation rates. Walk sequence is the exact order in which a carrier delivers mail from one delivery point to the next. As provided in current DMM (<http://pe.usps.com>), walk sequence may be used at the mailer's option to satisfy the LOT sequencing criteria required for carrier route periodicals, mail pieces, and Enhanced Carrier Route Standard Mail pieces mailed at basic rates.

In order to ensure that CMS is receiving the maximum postage discounts available, the contractor is required to have the mail files they are working with processed through DSF² so that the handbooks are in walk-sequenced order when delivered to the DSCFs and S&DCs. As a result of this process, a significant portion of the handbooks will qualify for high density, high density plus, and saturation rates.

The contractor is required to work directly with one of the vendors that are licensed by the USPS to provide DSF² services or indirectly with one of these vendors (i.e., through another company that works with one of the approved DSF² vendors). A list of the vendors approved by the USPS to provide DSF² services can be found at the following website: <https://postalpro.usps.com/address-quality/dsf2> (for "DSF 2nd Generation").

DSF² Summary Reports/Files: The contractor is required to submit a summary DSF² report/file indicating:

- The number and percentages of addresses that qualify for a high density, high density plus, or saturation rate;
- The amount of money saved by qualifying for these rates; and,
- A file with all the undeliverables (vacant addresses, no forwarding addresses, and no ZIP codes).

The contractor must forward copies of the DSF² summary reports/file to: CMS, Attn: John Czumalowski (address to be provided after award); or email to: john.czumalowski@cms.hhs.gov. (See "SCHEDULE" for dates.)

Mail Storage/Staging: Mailing must be assembled and stored for eventual turnover to the USPS. Mailing for delivery to all destinations must be turned over to assure on-time delivery to partners and beneficiaries. If truck-trailers (vans) will be needed from the USPS, it is the contractor's responsibility to schedule an advance planning meeting with the USPS and request these services. However, physical loading is the contractor's responsibility, in conformance with the USPS loading plan. The Government may inspect the storage and staging operations at the contractor's facilities.

Unless otherwise specified, during storage/staging, the contractor must not stack the pallets more than two (2) pallets high.

USPS Mail Requirements: The contractor is required to abide by the USPS requirements for Full-Service IMb mailings, including the use of eDoc, ePostage, and electronic FAST appointments. The contractor is required to provide logistical information to CMS and the USPS prior to production. This information must include load plans indicating quantities by version by USPS Entry Point. During production, the contractor is required to utilize available USPS services and data (Full-Service IMb Start the Clock), combined with their own tracking and delivery information to provide a daily snapshot of quantities delivered to USPS facilities and an in-home estimate based on current published USPS standards.

Mailing Dates: Contractor must arrange delivery dates to the USPS facilities in the states which are receiving deliveries by the dates specified in the "SCHEDULE."

Mail Service Disruption Reports: The contractor is required to provide a report on disruption to the mail service due to weather or any unforeseen situations, such as accidents (vehicle, boat, etc.) or pandemic situations (H1N1, COVID-19, etc.) as follows:

- A report for areas with weather/health impacted delays or pandemic situations (H1N1, COVID-19, etc.), to include, but is not limited, to the following:
 - Mail that is en route.
 - Non-delivery of mail.
 - Pull back of non-postal transportation.
 - Refund request for non-delivery/acceptance.
 - Completion of refund request and that the refund has occurred.
 - Mail staged until end of event for both the contractor facility and USPS facility.
 - Mail destroyed for both the contractor facility and USPS facility.
 - Volume of mail impacted by state.
 - Instructions provided that are contrary to contract language (e.g., non-strapping of handbooks).
- Situations such as accidents (vehicle, boat, etc.) rendering mail damaged or destroyed, to include, but not limited, to the following:
 - Letter to CMS explaining the details of the incident.
 - Truck and load report.
 - Original postage statement copies.
 - Bill of lading from trucking company, if available.

Contractor to provide these reports only when the mailing/delivery of the handbooks will be impacted by weather-related events, situations such as accidents (vehicle, boat, etc.), or pandemic situations (H1N1, COVID-19, etc.).

Contractors must notify the Government of any changes in processing instructions received from the U.S. Postal Service, which contradicts contract specifications, as soon as the contractor is made aware of them (e.g., non-strapping of books, changes in documentation, usage of containers).

The contractor must forward copies of the Mail Service Disruption Reports to: CMS, Attn: John Czumalowski, (address to be provided after award); or email to: john.czumalowski@cms.hhs.gov.

Final Logistics Report: Contractor is required to provide a detailed analysis of all expenses related to postage, drop shipment freight, and bulk copy shipping for each item. This report must include the following data elements:

- Item/Load number
- Consignee key/consignee zip (Mailshop)
- Number of pieces
- Running total
- Weight
- USPS Fast appointment number
- USPS delivery confirmation
- Track/Trace report showing the appointment dates and USPS confirmation numbers

Enter Point Optimization Report (template to be provided and to be used by the contractor):

- Postal One verify date
- Postal One postage costs
- Postal One running total costs
- Net savings

A copy of this report must accompany all mailing statements and shipping receipts required below. The contractor must submit this report via email (see “SCHEDULE” for dates) to: John Czumalowski at john.czumalowski@cms.hhs.gov, and Mary Newton at mnewton@gpo.gov. **PLEASE NOTE: This is a critical deliverable, and this job is not considered to be complete until a correctly formatted report is submitted. Contractor will not be paid until this report is delivered.**

Mailing Statements: Contractor must provide the following to: CMS, Attn: John Czumalowski (method of delivery must require CMS acknowledgment of receipt) (see “SCHEDULE” for dates):

- Copies of all commercial freight bills for bulk shipments
- Contractor-prepared ZIP Code Count Listing (format must show 3-digit, 5-digit, and carrier route ZIP Code destinations.)
- Copies of 3602-R (Postage Statement – Standard Mail) for ALL postage receipts (form can be obtained from: www.uspspostalone.com).
 - One (1) copy of the aggregate count report in totality.
 - Every shipment must contain an individual receipt. Receipt(s) cannot be combined totality.
 - All states must be indicated on the actual 3602-R.
 - All receipts must be emailed to: john.czumalowski@cms.hhs.gov.
- Copies of 8125 (Plant-Verified Drop Shipment (PVDS) Verification and Clearance) - If contractor is using eInduction or Seamless Acceptance at the Business Mail Acceptance Entry Unit:
 - It enables quicker appointment processing in the Facility Access Shipment Tracking (FAST) online system; eliminates the need for clerks to manually reconcile containers against paper documentation (PS Forms 8125); and provides 24/7 appointment resolution.
 - The contractor will be required to provide the pre-induction validations and e8125 communication message sent from *PostalOne!*. This will replace the hardcopy 8125.

Contractor must notify the Contract Administrator, Mary Newton, at mnewton@gpo.gov when the mailing statements have been emailed to CMS (as specified above) and/or sent out for delivery.

PLEASE NOTE: These are critical deliverables, and this job is not considered to be complete until a correctly formatted report is submitted. Contractor will not be paid until this report is delivered.

The contractor must supply legible USPS certified copies of all USPS Form 3602-R, or similar forms, and GPO Form 712. Facsimile postage statements of USPS Form 3602-R, or similar forms, are acceptable, but must contain data and elements in locations as close as possible to where they appear on the USPS Form. The facsimiles and/or alternate items must include all other information pertaining to the mailing, including the class of mail, postage payment method (e.g., permit imprint) and form number. The facsimile must fully and exactly reproduce the “Certification and USPS Use Only” fields that appear on the USPS form. A postage statement produced by software certified by the USPS PAVE or Manifest Analysis and Certification (MAC) program is considered a USPS-approved form for these standards.

Reimbursement for the actual freight costs will be made from copies of the commercial carrier freight bills that must be submitted with the contractor’s invoice, and each freight bill must show the shipping cost and weight of the shipment. If the contractor utilizes a freight consolidator, payment will be made with the submission of the contractor’s invoices showing actual charges to the contractor. NOTE: Reimbursed freight costs will not be subject to any prompt payment discounts.

Certificate of Conformance: When using Permit Imprint Mail, the contractor must complete GPO Form 712 – Certificate of Conformance (Rev. 10-15), and the appropriate mailing statement(s) supplied by the USPS. A fillable GPO Form 712 Certificate of Conformance can be found at <https://www.gpo.gov/how-to-work-with-us/vendors/forms-and-standards>.

Return of Government Furnished Material: If applicable, all Government furnished materials must be returned to CMS. (See “SCHEDULE” for dates.)

As applicable, all expenses incidental to picking up and returning furnished materials, submitting proofs, press sheets/signatures, sample copies, invoices, postal receipts, drop-shipment plans, project plans, and other materials associated with this contract, must be borne by the contractor. PLEASE NOTE: Any shipments sent to CMS using FedEx must use FedEx packaging and containers/boxes.

SCHEDULE: This publication is mandated by the following Congressional legislation and must be met without exception: Balanced Budget Act of 1997, Section 4001, 1851 (d) (2) (A) and (B), and the Medicare, Prescription Drug, Improvement and Modernization Act of 2003. It is critical that the contractor meets all production and delivery dates.

Contractor to submit proofs and ink drawdowns as soon as the contractor deems necessary in order to comply with the shipping and mailing schedule.

Proofs and ink drawdowns will be withheld no later than 10 workdays from receipt by CMS/GPO until they are made available for pickup by the contractor for hard copy proofs or until changes/corrections/“O.K. to Print” are provided via email or phone call for PDF soft proofs. (NOTE: The first workday after receipt of proofs and ink drawdowns is day one of the hold time.)

If revised proofs and/or ink drawdowns are required due to contractor errors, the revised proofs and/or ink drawdowns will be withheld up to 10 workdays from receipt by CMS/GPO until they are made available for pickup by the contractor for hard copy proofs or until changes/corrections/“O.K. to Print” are provided via email or phone call for PDF soft proofs. (NOTE: The first workday after receipt of proofs and ink drawdowns is day one of the hold time.) This process may be repeated until CMS determines that the proofs and/or ink drawdowns are satisfactory.

| DATE | EVENT |
|--|--|
| 4/6/2026 | Bid Opening Date |
| Approximately 10 workdays after bid opening date | Anticipated award notification and issuance of purchase order. |
| Within five (5) workdays of notification of contract award | Deadline for submitting Postaward Project Plans to CMS and GPO. |
| 6/12/2026 | Contractor receives the page count for the fixed section. The fixed section is common to all books. |
| TBD | Postaward Conference. |
| Week of 7/6/2026 (or sooner, if possible) | Contractor receives address file counts per item (Area-Specific Handbooks). Counts are prior to final contractor NCOA/IMb processing. |
| Week of 7/6/2026 (or sooner, if possible) | Contractor receives bulk copy distribution address Excel files via email to the designated, main POC. |
| Week of 7/6/2026 (or sooner, if possible) | Contractor receives print-ready PDF files for the covers and fixed section for the Area-Specific Handbook. (Source InDesign files will be furnished upon request.) |
| TBD by contractor | Text signatures due to CMS/GPO. |
| TBD by contractor | Cover Press Inspection. |

| | |
|---|---|
| 8/5/2026 (no earlier) – through 8/12/2026 (no later than) | Contractor must process the address files through CASS/NCOA for final quantities and notify CMS of all undeliverable quantities per each state, when completed. |
| 8/26/2026 | Contractor receives one (1) completed file of a variable section for preflighting. |
| No later than 9/9/2026 | Contractor receives page counts for the variable sections (NOTE: If this information is available sooner, CMS will notify GPO and the contractor.) |
| No later than 9/9/2026 | Contractor receives PDF file pages for the variable sections. |
| TBD by contractor | Content inspection for variable pages. |
| TBD by contractor | Binding/Imaging Inspections. |
| 9/9/2026 | Earliest date that any distribution can be made regardless of when files for variable pages are furnished. |
| 9/9/2026 – 9/30/2026 | Mailing of all bulk copies and self-mailers. |
| 9/30/2026 | Last day for contractor to ship self-mailers from plant (Form 8125 verification). |
| 11/16/2026 | Earliest date contractor may destroy furnished electronic files (including those containing PII) and waste materials that do NOT contain PII, unless otherwise specified. |
| 12/7/2026 | Deadline for contractor to submit their DSF ² report. |
| 12/7/2026 | Deadline for contractor to return all Government furnished materials, as applicable. |
| 12/7/2026 | Deadline for contractor to submit Final Logistics Report. |
| 12/7/2026 | Deadline for contractor to submit all required mailing statements. |

The ship/deliver date indicated is the date products ordered for mailing/shipping f.o.b. contractor’s city must be delivered to the U.S. Postal Service or picked up by small package carrier.

NOTE: In order to meet the scheduled mailing date, all mailed copies must be accepted by a USPS representative (with a signed/dated PS Form 8125) AND must have left the contractor’s plant(s) no later than 9/30/2026.

Unscheduled material such as shipping documents, receipts or instructions, delivery lists, labels, etc., will be furnished with the order or shortly thereafter. In the event such information is not received in due time, the contractor will not be relieved of any responsibility in meeting the shipping schedule because of failure to request such information.

For compliance reporting purposes, the contractor must notify the U.S. Government Publishing Office of the date of shipment or delivery, as applicable. Upon completion, contractor must contact the Shared Support Services Compliance Section via email at compliance@gpo.gov; or via telephone at (202) 512-0520. Personnel receiving the email or call will be unable to respond to questions of a technical nature or to transfer any inquiries.

UNDELIVERABLES/RETURNED COPIES: For mailed copies that are determined to be unmailable (prior to entering into the mail stream) or for any bulk deliveries that are returned or are undeliverable, contractor must notify CMS immediately. CMS may direct the contractor to deliver to another address or destroy the copies.

NOTE: During times of natural disasters or national emergencies, the contractor may be required to hold/store copies, pick up mailed/delivered copies, re-mail copies, and/or re-deliver copies to another address.

Contractor may be required to hold/store copies for up to 15 calendar days at no cost to the Government or destroy copies (up to and including 5,000 copies) at no cost to the Government. Contractor will be entitled to financial compensation for copies held/stored longer than 15 calendar days or for a quantity over 5,000 copies to be destroyed. If required, the Contracting Officer will issue a modification.

NOTE: Copies for destruction must be destroyed in accordance with “Disposal of Waste Material” specified under “DATA SECURITY.”

GPO KEY PERSONNEL:

- Contracting Officer: Clint Mixon, cmixon@gpo.gov
- Contract Administrator: Mary Newton, (202) 512-2132, mnewton@gpo.gov

CMS KEY PERSONNEL:

- Medicare and You Project Manager: Christine Crawford, (410) 786-1887, christine.crawford@cms.hhs.gov
- Medicare and You Project Manager Backup: Brittany Hewitt, brittany.hewitt@cms.hhs.gov
- Printing and Technical Issues: Keith Williams, keith.williams@cms.hhs.gov
- Mail File Content and Formatting Issues: Tammy Johnson, (410) 786-6326, tammy.johnson@cms.hhs.gov
- Mailing and Shipping Issues: John Czumalowski, (808) 348-2241, john.czumalowski@cms.hhs.gov
- Mailing and Shipping Issues Backup: Tina Grimm, (410) 786-4045, tina.grimm@cms.hhs.gov

DETERMINATION OF AWARD FOR ONE LOT:

The total requirement of this product is approximately 47,500,000 handbooks divided into 10 lots of approximately 4,750,000 copies each. Offers must include the cost of all materials and operations for one (1) lot listed in accordance with these specifications. An offer for a quantity less than a full lot will not be considered. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

It is the Government's intent to award 1 to 10 separate contracts for individual lots of approximately 4,750,000 copies each, plus up to 10% or minus up to 25%. Award will be made based on the combination of lots that results in the lowest overall cost to the Government and to responsible offeror(s) whose offer(s) the Government has determined to be fair and reasonable by applying the prices listed in the "SCHEDULE OF PRICES" to the following units of production.

The item designations correspond to those listed in the "SCHEDULE OF PRICES."

All Items

| | (1) | (2) |
|-----|-----|-------|
| (a) | 5 | 4,750 |
| (b) | 1 | 4,750 |
| (c) | 5 | 4,750 |
| (d) | 5 | 4,750 |
| (e) | 5 | 4,750 |

The Contracting Officer reserves the right to reject any offer that contains prices for individual items of production 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.

SCHEDULE OF PRICES FOR ONE (1) LOT (Prices offered are based on printing 4,750,000 copies (one (1) lot)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for two (2) or more lots, an offer for one (1) lot must be submitted. If a contractor wishes to submit a bid for two (2) or more lots, they must submit copies of each of the SCHEDULE OF PRICES for each multiple lot, up to the maximum lots for which they are bidding (Example: If a contractor wishes to bid on a maximum of four (4) lots, a bid for one (1) lot, two (2) lots, three (3) lots, and four (4) lots must be submitted).

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____
 NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the contractor. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR TWO (2) LOTS (Prices offered are based on printing 9,500,000 copies (two (2) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for two (2) lots, an offer for one (1) lot must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 2 for the prices offered for two (2) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR THREE (3) LOTS (Prices offered are based on printing 14,250,000 copies (three (3) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for three (3) lots, an offer for one (1) lot and two (2) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 3 for the prices offered for three (3) lots with the exception of line item (b)(1) which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR FOUR (4) LOTS (Prices offered are based on printing 19,000,000 copies (four (4) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for four (4) lots, an offer for one (1) lot, two (2) lots, and three (3) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 4 for the prices offered for four (4) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR FIVE (5) LOTS (Prices offered are based on printing 23,750,000 copies (five (5) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for five (5) lots, an offer for one (1) lot, two (2) lots, three (3) lots, and four (4) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 5 for the prices offered for five (5) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

(Initials)

SCHEDULE OF PRICES FOR SIX (6) LOTS (Prices offered are based on printing 28,500,000 copies (six (6) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for six (6) lots, an offer for one (1) lot, two (2) lots, three (3) lots, four (4) lots, and five (5) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 6 for the prices offered for six (6) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR SEVEN (7) LOTS (Prices offered are based on printing 33,250,000 copies (seven (7) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for seven (7) lots, an offer for one (1) lot, two (2) lots, three (3) lots, four (4) lots, five (5) lots, and six(6) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 7 for the prices offered for seven lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR EIGHT (8) LOTS (Prices offered are based on printing 38,000,000 copies (eight (8) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for eight (8) lots, an offer for one (1) lot, two (2) lots, three (3) lots, four (4) lots, five (5) lots, six (6) lots, and seven (7) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 8 for the prices offered for eight (8) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____
 NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR NINE (9) LOTS (Prices offered are based on printing 42,750,000 copies (nine (9) lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for nine (9) lots, an offer for one (1) lot, two (2) lots, three (3) lots, four (4) lots, five (5) lots, six (6) lots, seven (7) lots, and eight (8) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 9 for the prices offered for nine (9) lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” (specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____
 NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

SCHEDULE OF PRICES FOR TEN LOTS (Prices offered are based on printing 4 7,500,000 copies (10 lots)):

Prices offered shall include the cost of all required materials and operations for each item listed necessary for the complete production and distribution of the product listed in accordance with these specifications. Prices for additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges, and will not be a factor for determination of award.

Before an offer will be considered for 10 lots, an offer for one (1) lot, two (2) lots, three (3) lots, four (4) lots, five (5) lots, six (6) lots, seven (7) lots, eight (8) lots, and nine (9) lots must be submitted. The DETERMINATION OF AWARD figures on page 34 will be multiplied by 10 for the prices offered for 10 lots with the exception of line item (b)(1), which will remain 1.

See “ALLOWABLE CHARGES” specified herein for billing of makeready charges.

The bidder must make an entry in each of the spaces provided.

| | <u>Makeready and/or Setup</u> (1) | <u>Running Per 1,000 copies</u> (2) |
|---|--|--|
| (a) Complete Cover.....per complete cover..... | \$ _____ | \$ _____ |
| (b) Basic 116-page section.....per basic section..... | \$ _____ | \$ _____ |
| (c) 16-page signatureper signature..... | \$ _____ | \$ _____ |
| (d) 8-page signatureper signature..... | \$ _____ | \$ _____ |
| (e) 4-page signatureper signature..... | \$ _____ | \$ _____ |

For informational purposes only, the bidder must state the administrative cost of preparing and implementing the drop-shipment plans, processing the addresses through CASS, NCOA, and DSF², and any other mail processing services required by the specifications stated above for all items combined and included in the above bid prices.

.....\$ _____

NOTE: This cost must be included in the above bid prices and is not reimbursable.

The number of text pages stated herein are estimates only and may increase or decrease for any one or all of the items at the time the final PDF files for the variable pages are made available to the printer. In the event text page count changes do occur, the contractor will not be allowed any additional production time, nor will a surcharge be permitted to any of the line item bid prices submitted (See “ALLOWABLE CHARGES” specified herein).

Transportation charges are not a factor in determining award. However, bidder must state in the bid the location (city and state) of the plant(s)/location(s) from which this product will be shipped with approximate quantities for each plant/location on page 46. If shipment is not made from this location, contractor may be responsible for any additional shipping costs incurred. The bidder must also provide the name and location (city and state) of any subcontractors that will be used. Allocation of lots after award will be based upon price and location. Additionally, the bidder must provide the name and location (city and state) where the text and covers will be printed (including plant-specific GPO Contractor’s Code).

 (Initials)

ALLOWABLE CHARGES: Charges will be allowed on the basis of that combination of the basic 116-page section and other signatures for the variable pages as may be required, plus the cover. **EXCEPTION:** Unless otherwise specified, no more than three (3) blank pages will be permitted at the end of the text.

Complete Cover Pricing: For each state version, contractor will be allowed only one (1) makeready charge for each state cover regardless of the number of plants used to produce each state's covers. Additionally, this one makeready charge must include all plate changes required for the bulk covers and the self-mailer covers. Contractor is not entitled to separate makeready charges for bulk covers and self-mailer covers for the same state.

Basic (Fixed) 116-Page Section Pricing: For the basic 116-page section, contractor will be allowed only one (1) makeready charge for the 116-page basic section regardless of the number of plants used to produce the product; the number of awarded lots; or the total number of assigned states.

If the basic section page count is other than 116 pages (plus or minus), the contractor will either increase or decrease their makeready and running bid prices for the basic 116-page section by their bid prices for the applicable 4, 8, or 12-page signature. (For example, if the basic section is actually 120 pages, the contractor will increase their basic section makeready and running prices by their 4-page signature makeready and running prices. If the basic section is actually 112 pages, the contractor will decrease their basic section makeready and running prices by their 4-page signature makeready and running prices.)

Variable Section Pricing: For each state version, contractor will be allowed only one (1) makeready charge for each required signature, as needed, regardless of the number of plants used to produce each state's variable pages.

In all cases, billing invoices presented to the GPO must reflect the most economical method (to the Federal Government) of production at the prices offered.

Fractional parts of 1,000 will be prorated at the per-1,000 rate.

Contractor's billing invoice must be itemized in accordance with the line items in the "SCHEDULE OF PRICES" for each state.

Contractor is to fill out and submit pages 45 through 47 with their bid, for each individual lot they are bidding on, making copies as necessary. Contractor is to indicate clearly the lot number for which each sheet applies.

LOT NUMBER: _____

TEXT AND COVER PRINTING LOCATIONS: If more space is needed, contractor may attach a separate sheet. NOTE: The location and contractor's code must be for the actual facility used in production.

Text Printing Location: _____ GPO Contractor's Code _____

Cover Printing Location: _____ GPO Contractor's Code _____

SUBCONTRACTORS: If more space is needed, contractor may attach a separate sheet.

Name: _____ Role: _____ City and State: _____

SHIPPING LOCATIONS: If more space is needed, contractor may attach a separate sheet.

Shipping From: _____ Approximate Quantity From This Location: _____

Shipping From: _____ Approximate Quantity From This Location: _____

Shipping From: _____ Approximate Quantity From This Location: _____

Shipping From: _____ Approximate Quantity From This Location: _____

Shipping From: _____ Approximate Quantity From This Location: _____

(Initials)

DISCOUNTS: Discounts are offered for payment as follows: _____ Percent, _____ calendar days. See Article 12 “Discounts” of Solicitation 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 points(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 email, fill out and return one copy of all pages in “SECTION 4. – SCHEDULE OF PRICES,” including initialing/signing where indicated. Valid electronic signatures will be accepted in accordance with the Uniform Electronic Transactions Act, §2. Electronic signatures must be verifiable of the person authorized by the company to sign bids.

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

Bidder _____
(Contractor Name) (GPO Contractor’s Code – Primary Facility)

(Street Address)

(City – State – Zip Code)

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

(Printed Name) (Telephone Number)

(Email) (Fax Number)

THIS SECTION FOR GPO USE ONLY

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

ATTACHMENT A
(At less than 100%)

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services
7500 Security Blvd.
Baltimore, MD 21244-1850

PRSR STD
POSTAGE & FEES
PAID CMS
PERMIT NO. G-845

Official Business
Penalty for Private Use, \$300

CMS Product No. 10050
September 2025

RESALE IS PROHIBITED



JOHN BENEFICIARY
7500 SECURITY BOULEVARD
BALTIMORE MD 21244-1850

National Medicare Handbook

Moving?

Visit [SSA.gov](https://www.ssa.gov) to change your address. If you get RRB benefits, visit [RRB.gov](https://www.rrb.gov) or call the RRB at 1-877-772-5772. TTY users can call 1-312-751-4701.

¿Necesita usted una copia de este manual en Español?

Llame al 1-800-MEDICARE (1-800-633-4227). Los usuarios de TTY pueden llamar al 1-877-486-2048.



Medicare

Please note that furnished addresses can be up to eight lines of address information, and it is possible for the address block to use 10 lines of data, including barcodes.

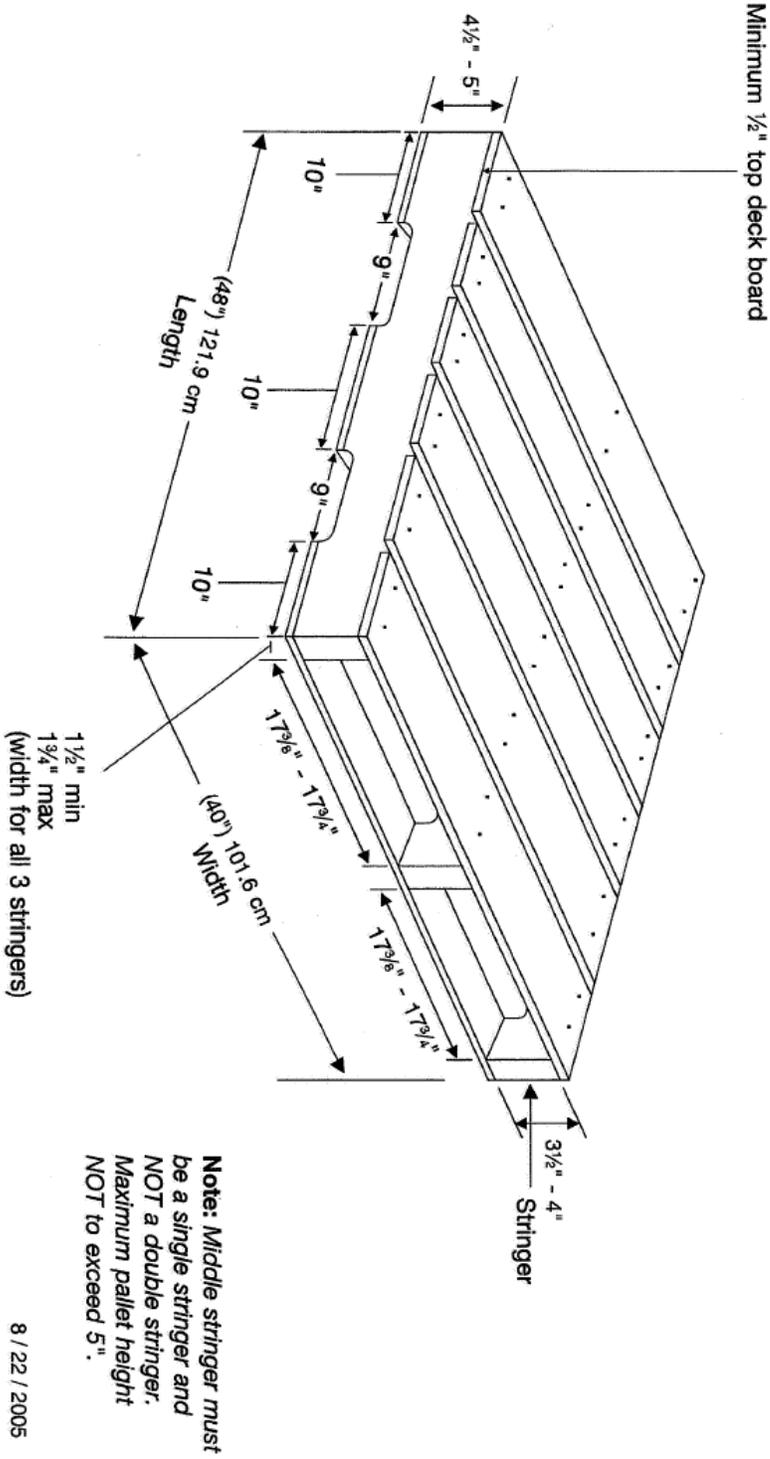
JANE BENEFICIARY
JOE BENEFICIARY
MAILSTOP SL-12-16
SOUTH BUILDING
7500 SECURITY BOULEVARD
BALTIMORE, MD 21244-1850

JANE BENEFICIARY
JOE BENEFICIARY
MAILSTOP SL-12-16
SOUTH BUILDING
DIVISION OF PUBLICATIONS
7500 SECURITY BOULEVARD
BALTIMORE, MD 21244-1850

JANE BENEFICIARY
JOE BENEFICIARY
BUILDING ENGINEERS
MAILSTOP SL-12-16
ADMINISTRATIVE SERVICES GROUP
SOUTH BUILDING
7500 SECURITY BOULEVARD
BALTIMORE, MD 21244-1850

SINGLE CENTER STRINGER PALLET FOR CMS BULK SHIPMENTS

CMS Pallet Specifications



U.S. GOVERNMENT PUBLISHING OFFICE

CERTIFICATE OF SELECTION

OF

RANDOM PRESS SHEET PULLS PER SHIFT

SHIFT START
TIME STAMP
HERE

SHIFT START
TIME STAMP
HERE

I hereby certify that these random press sheets produced for Medicare & You, Jacket _____, have been selected in accordance with the contract specifications by _____.

(Name of Plant and Shift)

I understand that these random press sheets will be inspected for quality and content according to the contract specifications.

The penalty for making false statements to the U.S. Government is prescribed in 18 U.S.C. 1001.

(Signature of Pressroom Shift Foreman) *(Date)*

(Printed Name of Pressroom Shift Foreman)

Instructions:

- The contractor must make a press sheet quality pull every 20 minutes, for all streams being produced, according to the contract specifications.
- *The sheets must be time stamped by machine (or hand) and signed by the employee inspecting the sheets.*
- Signed and stamped press pulls, along with this signed certificate, must be filed and released to the inspector upon request.
- All time stamps must be on the face of this form in the spaced allotted and be legible.

EXHIBIT 1

The following table provides historical data for the variable page counts for the last three (3) years. The data provided is for informational purposes only. There is no guarantee that the variable page counts for the products produced on this contract will be the same for any item/state version.

| PUBLICATION NO. | MEDICARE & YOU (ENGLISH AREA-SPECIFIC HANDBOOK) VERSIONS | 2024 | 2025 | 2026 |
|-----------------|---|------|------|------|
| 10050-01 | Northern California | 48 | 44 | 48 |
| 10050-02 | Southern California | 60 | 56 | 56 |
| 10050-03 | Alaska & Hawaii (includes Pacific Territories & Pacific Military) | 44 | 44 | 40 |
| 10050-06 | Arizona | 36 | 36 | 36 |
| 10050-07 | Nevada | 28 | 28 | 32 |
| 10050-08 | New Mexico | 24 | 24 | 28 |
| 10050-09 | Colorado | 36 | 36 | 36 |
| 10050-12 | Oklahoma | 28 | 28 | 28 |
| 10050-13 | Kansas | 28 | 28 | 28 |
| 10050-14 | Arkansas | 28 | 28 | 32 |
| 10050-16 | Missouri | 36 | 32 | 40 |
| 10050-17 | Mississippi | 24 | 28 | 28 |
| 10050-18 | Louisiana | 28 | 32 | 32 |
| 10050-19 | Texas | 64 | 68 | 76 |
| 10050-20 | Michigan | 52 | 52 | 48 |
| 10050-21 | Ohio | 48 | 48 | 48 |
| 10050-23 | Illinois | 40 | 44 | 40 |
| 10050-24 | Wisconsin | 36 | 36 | 36 |
| 10050-25 | South Carolina | 28 | 28 | 32 |
| 10050-26 | Georgia | 40 | 40 | 40 |
| 10050-27 | Northern Florida | 68 | 64 | 68 |
| 10050-28 | Southern Florida | 56 | 56 | 60 |
| 10050-31 | Pennsylvania | 60 | 64 | 68 |
| 10050-32 | West Virginia | 24 | 24 | 24 |
| 10050-33 | Virginia | 36 | 36 | 40 |
| 10050-34 | North Carolina | 40 | 44 | 44 |
| 10050-38 | New York City/Surrounding Counties | 40 | 36 | 36 |
| 10050-39 | New York (not NYC) | 48 | 44 | 40 |
| 10050-40 | New Jersey & Puerto Rico (includes Virgin Islands, Atlantic Euro) | 48 | 48 | 48 |
| 10050-41 | Minnesota | 32 | 32 | 28 |
| 10050-42 | Nebraska | 24 | 24 | 24 |
| 10050-43 | North Dakota & South Dakota | 40 | 36 | 28 |
| 10050-44 | Washington | 36 | 32 | 36 |
| 10050-45 | Utah | 24 | 24 | 24 |
| 10050-46 | Maine | 24 | 24 | 24 |
| 10050-47 | Connecticut | 24 | 24 | 24 |
| 10050-48 | Massachusetts | 32 | 32 | 36 |
| 10050-49 | Delaware | 20 | 20 | 20 |
| 10050-50 | Tennessee | 36 | 32 | 36 |
| 10050-51 | Kentucky | 32 | 36 | 36 |
| 10050-52 | Idaho | 28 | 24 | 24 |
| 10050-53 | Indiana | 36 | 40 | 36 |
| 10050-54 | Iowa | 28 | 28 | 24 |
| 10050-55 | Alabama | 28 | 28 | 28 |
| 10050-56 | Maryland & Washington, DC | 36 | 36 | 32 |
| 10050-57 | Oregon | 36 | 32 | 32 |
| 10050-58 | Montana & Wyoming | 32 | 32 | 28 |
| 10050-59 | New Hampshire | 20 | 20 | 16 |
| 10050-60 | Vermont | 20 | 16 | 16 |
| 10050-61 | Rhode Island | 20 | 20 | 20 |

CMS SECURITY CLAUSE (MAY 2018)

<The contracting officer shall insert the following provision/clause, CMS Security Clause, in all new solicitations and resultant contracts issued after April 15, 2016, where contractors require physical access to CMS facilities and/or access to CMS Federally Controlled Information Systems as defined by OMB Memo M-05-24.

**NOTE: CMS has many versions and variations of a CMS Security Clause in existing contracts. At the request of OTS, OEI and OSSO, DQAT will be instructing that various contracts be updated with consideration given to the Federal Information Systems accessible by the contractor.*

IMPORTANT: Please also remember to include FAR Clauses

- FAR 52.204-9 – Personal Identity Verification of Contractor Personnel
- FAR 52.222-54 – Employment Eligibility Verification

Note: The reference to section H does not need to be included if UCF is not being utilized. Further, delete all blue text instructions and ensure any yellow highlighted information is complete in the final version of the provision/clause. A word version of the clause is available at the following (link)

Update: On May 2nd 2018, the links within the clause were updated.>

H.x CMS SECURITY CLAUSE (MAY 2018)

a. Applicability

In accordance with OMB Memorandum M-05-24, Implementation of Homeland Security Presidential Directive 12 (HSPD-12): Policy for a Common Identification Standard for Federal Employees and Contractors, dated August 27, 2004, and Federal Information Processing Standard (FIPS) PUB Number 201-2, Personal Identity Verification (PIV) of Federal Employees and Contractors, CMS must achieve appropriate security assurance for multiple applications by efficiently verifying the claimed identity of individuals seeking physical access to Federally controlled government facilities and/or logical access to federally controlled information systems. Contractors that require routine physical access to a CMS facility and/or routine access to a CMS federally controlled information system will be required to obtain a CMS issued PIV, PIV-I or Locally Based Physical Access card. FIPS PUB 201-2 specifies the architecture and technical requirements for a common identification standard for Federal employees and Contractors.

When a PIV or PIV-I card is provided, it shall be used in conjunction with a compliant card reader and middleware for logical system access. The Contractor shall (1) Include FIPS 201-2 compliant, HSPD-12 card readers with the purchase of servers, desktops, and laptops; and (2) comply with FAR 52.204-9, Personal Identity Verification of Contractor Personnel.

b. Definitions

“Agency Access” means access to CMS facilities, sensitive information, information systems or other CMS resources.

EXHIBIT 2
CMS Security Clause (May 2018)

“Applicant” is a Contractor employee for whom the Contractor submits an application for a CMS identification card.

“Contractor Employee” means prime Contractor and subcontractor employees who require agency access to perform work under a CMS contract.

“Official station”— As defined by Federal Travel Regulations, An area defined by the agency that includes the location where the employee regularly performs his or her duties or an invitational traveler’s home or regular place of business. The area may be a mileage radius around a particular point, a geographic boundary, or any other definite domain, provided no part of the area is more than 50 miles from where the employee regularly performs his or her duties or from an invitational traveler’s home or regular place of business. If the employee’s work involves recurring travel or varies on a recurring basis, the location where the work activities of the employee’s position of record are based is considered the regular place of work.

“Federal Identification Card” (or “ID card”) means a federal government issued or accepted identification card such as a Personal Identity Verification (PIV) card, Personal Identity Verification-Interoperable (PIV-I) card, or a Local-Based Physical Access Card issued by CMS, or a Local-Based Physical Access Card issued by another Federal agency and approved by CMS. “Issuing Office” means the CMS entity that issues identification cards to Contractor employees.

“Locally Based Physical Access Card” means an access Card that is graphically personalized for visual identification, that does not contain an embedded computer chip, and is only used for physical access.

“Local Security Servicing Organization” means the CMS entity that provides security services to the CMS organization sponsoring the contract, Division of Physical Security and Strategic Information (DPSSI).

“Logical Access” means the ability for the Contractor to interact with CMS information systems, databases, digital infrastructure, or data via access control procedures such as identification, authentication, and authorization.

“Personal Identity Verification (PIV) card,” as defined in FIPS PUB 201-2, is a physical artifact (e.g., identity card, “smart” card) issued to an individual that contains a PIV Card Application which stores identity credentials (e.g., photograph, cryptographic keys, digitized fingerprint representation) so that the claimed identity of the cardholder can be verified against the stored credentials by another person (human readable and verifiable) or an automated process (computer readable and verifiable).

“Personal Identity Verification-Interoperable (PIV-I) card” similar to a PIV card, is a physical artifact (e.g., identity card, “smart” card) issued to an individual that contains a PIV Card Application which stores identity credentials (e.g., photograph, cryptographic keys, digitized fingerprint representation) so that the claimed identity of the cardholder can be verified against the stored credentials by another person (human readable and verifiable) or an automated process (computer readable and verifiable). PIV-I cards are issued by a non-federal government entity to non-federal government staff. PIV-I cards are issued in a manner that allows federal relying parties to trust the cards. The PIV-I cards uses the same standards of vetting and issuance developed by the U.S. government for its employees

c. Screening of Contractor Employees

i. Contractor Screening of Applicants

1. **Contractor Responsibility:** The Contractor shall pre-screen individuals designated for employment under any CMS contract by verifying minimum suitability requirements to ensure that only qualified candidates are considered for contract employment. At the discretion of the government, the government reserves the right to request and/or review Contractor employee vetting processes. The federal minimum suitability requirements can be found below in section (c)(2)—Suitability Requirements, and are also contained in 5 CFR 731.202. The Contractor shall exercise due diligence in pre-screening all employees prior to submission to CMS for agency access.
2. **Alien Status:** The Contractor shall monitor an alien's (foreign nationals) continued authorization for employment in the United States. If requested by the Agency, the Contractor shall provide documentation to the Contracting Officer (CO) or the Contracting Officer's Representative (COR) that validates that the Employment Eligibility Verification (e-Verify) requirement has been met for each Contractor or sub-Contractor employee working on the contract in accordance with Federal Acquisition Regulation (FAR) 52.222-54 - Employment Eligibility Verification.
3. **Residency Requirement:** All CMS Contractor applicants shall have lived in the United States at least three (3) out of the last five (5) years prior to submitting an application for a Federal ID Card. CMS will process background investigations for foreign nationals in accordance with Office of Personnel Management (OPM) guidance. Contractor employees who worked for the U. S. Government as an employee overseas in a Federal or military capacity; and/or been a dependent of a U.S. Federal or military employee serving overseas, must be able to provide state-side reference coverage. State-side coverage information is required to make a suitability or security determination. Examples of state-side coverage information include: the state-side address of the company headquarters where the applicant's personnel file is located, the state-side address of the Professor in charge of the applicant's "Study Abroad" program, the religious organization, charity, educational, or other non-profit organization records for the applicant's overseas missions, and/or the state-side addresses of anyone who worked or studied with the applicant while overseas.
4. **Selective Service Registration:** All males born after December 31, 1959, must meet the Federal Selective Service System requirements as established on www.sss.gov.

ii. Identification Card Application Process

ID Card Sponsor: The CMS Contracting Officer's Representative (COR) will be the CMS ID card Sponsor and point of contact for the Contractor's application for a CMS ID card. The COR will review and approve/deny the HHS ID Badge Request before the form is submitted to the CMS, Office of Support Services and Operations, (OSSO), Division of Personnel Security Services (DPS), for processing. If approved, an applicant may be issued either a Personal Identity Verification (PIV) or PIV- I card that meets the standards of HSPD-12 or a Local-Based Physical Access Card.

EXHIBIT 2
CMS Security Clause (May 2018)

Contractor Application Required Submissions: All applicants shall submit an HHS ID Badge Request form for issuance of a Federal ID Card. Unless otherwise directed by the ID Card Sponsor or DPS, applicants are required to electronically submit the request form via CMS' Enterprise User Administration (EUA) Electronic Front-end Interface (EFI) system, which is located at <https://eua.cms.gov/efi>. To assist users with the application process, a user's guide is located at: <https://www.cms.gov/about-cms/contracting/contracting-policy-resources>.

The EUA users guide link should be used to obtain the most current instructional guidance.

PIV Training: Contractors who need PIV or PIV-I card shall complete HHS PIV Applicant Training, which is found at <https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html>. A copy of the completion certificate shall be included with the EFI application.

CMS Applicant Evaluations: CMS will evaluate an applicant's required access level. Once the review is complete and accepted for further processing, the applicant will be contacted by DPS to submit the below information, as applicable.

1. **e-QIP:** Contractor employees will be required to submit information into e-QIP, a web-based automated system that is designed to facilitate the processing of standard investigative forms used when conducting background investigations for Federal security, suitability, fitness and credentialing purposes.
2. **Fingerprints:** Instructions for obtaining fingerprints will be provided by CMS, OSSO, DPS.
3. **OF 306:** Contractor employees may be required to complete the Optional Form (OF) 306, Declaration for Federal Employment which can be found at https://www.opm.gov/forms/pdf_fill/of0306.PDF.
4. **Access to Restricted Area(s):** The CMS COR will initiate all Federal ID card holders' physical access requests via Physical Access Control System (PACS) Central at <https://pam.cms.gov/identify.php>.

Suitability Requirements: CMS may decline to grant agency access to a Contractor employee including, but not limited to, any of the criteria cited below:

1. Misconduct or negligence in employment;
2. Criminal or dishonest conduct;
3. Material, intentional false statement, or deception or fraud in examination or appointment;
4. Refusal to furnish testimony as required by § 5.4 of 5 CFR 731.202;
5. Alcohol abuse, without evidence of substantial rehabilitation, of a nature and duration that suggests that the applicant or appointee would be prevented from performing the duties of the position in question, or would constitute a direct threat to the property or safety of the applicant or appointee or others;
6. Illegal use of narcotics, drugs, or other controlled substances without evidence of substantial rehabilitation;
7. Knowing and willful engagement in acts or activities designed to overthrow the U.S. Government by force; and
8. Any statutory or regulatory bar which prevents the lawful employment of the person involved in the position in question.

Badge Issuance: Upon approval of the badging application process and prior to starting work on the contract, applicants whose official station is located within 50 miles from CMS' central office

EXHIBIT 2
CMS Security Clause (May 2018)

or one of its regional offices will be contacted to appear in person, at least two times (estimated at one hour for each visit), and shall provide two (2) original forms of identity source documents in order to generate the badge/ID. The identity source documents shall come from the list of acceptable documents included in FIPS 201-2, located at <http://nvlpubs.nist.gov/nistpubs/FIPS/NIST.FIPS.201-2.pdf>. At least one (1) document shall be a valid State or Federal government-issued picture ID. PIV-I mobile enrollment stations will be made available for applicants that have an official station more than 50 miles from CMS or any of its regional offices, and the employee will not need to travel to a CMS Office. The Contractor will be contacted by CMS for further instructions on the badging process in this scenario.

d. CMS Position Designation Assessment

CMS will assign a risk and sensitivity level designation analysis to the overall contract and/or to Contractor employee positions by category, group or individual. The risk and sensitivity level designations will be the basis for determining the level and type of personnel security investigations required for Contractor employees. At a minimum, the FBI National Criminal History Check (fingerprint check) must be favorably adjudicated. Additionally, the OPM e-QIP and other required forms must be accepted by DPS before a CMS identification card will be issued.

e. Post Badging Training Requirements:

Contractor employees that receive an HHS ID Badge are expected to complete the following online trainings each year, according to the timeframes indicated below, and annually thereafter. The below list is not all inclusive and the COR may indicate training that must be taken in addition to the below:

- i. **Security and Insider Threat Awareness and Training (30 days after receiving badge):** This course outlines the role of Contractors with regard to protecting information and ensuring the secure operation of CMS federally controlled information systems. Estimated time to complete is one hour.
- ii. **Computer Based Training (CBT) (within 3 days of approved EUA account):** This training offers several modules to familiarize contractor employees with features of CMS' webinar service. Estimated time to complete is one hour.

f. Background Investigation and Adjudication

Upon contract award and receipt of an HHS ID Badge Request, CMS will initiate the Agency Access procedures, to include a background investigation.

CMS may accept favorable background investigation adjudications from other Federal agencies when there has been no break in service. A favorable adjudication does not preclude CMS from initiating a new investigation when deemed necessary. Each CMS sponsored Contractor shall use the OPM e-QIP system to complete any required investigative forms.

The Contractor remains fully responsible for ensuring contract performance pending completion of background investigations of Contractor personnel. Employees that do not require access to CMS federally controlled information systems, facilities, or sensitive information in order to perform their duties may begin work on a contract immediately and need not submit an HHS ID Badge Request.

- i. Failure to cooperate with OPM or Agency representatives during the background investigation process is considered grounds for removal from the contract.

EXHIBIT 2
CMS Security Clause (May 2018)

- ii. DPS may provide written notification to the Contractor employee, with a copy to the COR, of all suitability/non-suitability decisions. A CMS adjudicative decision (based on criminal history results or completed investigation results) is final, and is not subject to appeal.
- iii. Contractor personnel for whom DPS determines to be ineligible for ID issuance will be required to cease working on the contract immediately.
- iv. The Contractor shall immediately submit an adverse information report, in writing to the CO with a copy to the COR, of any adverse information regarding any of its employees that may impact their ability to perform under this contract. Reports should be based on reliable and substantiated information, not on rumor or innuendo. The report shall include, at a minimum, the Contractor employee's name and associated contract number along with the adverse information. The COR will forward the adverse information report to the DPS for review and/or action.
- v. At the Agency's discretion, Contractor personnel may be provided an opportunity to explain or refute unfavorable information before an adjudicative decision is rendered on whether or not to withdraw the Federal ID from the individual in question. Under the provision of the Privacy Act of 1974, Contractor personnel may request a copy of their own investigation by submitting a written request to the OPM Federal Investigative Services (FIS) Freedom of Information (FOI) office. The following OPM-FOI link is being provided to afford one the instructions for obtaining a copy of one's file: <https://www.opm.gov/investigations/freedom-of-information-and-privacy-act-requests/>.

g. Background Investigation Cost

The government will bear the cost of background investigations that are performed at the direction of CMS' personnel security representatives by the Federal government's approved and designated background investigation service provider, the OPM.

At the Agency's discretion, if an investigated Contractor employee leaves the employment of the Contractor, or otherwise is no longer associated with the contract within one (1) year from the date the background investigation was completed, the Contractor may be required to reimburse CMS for the full cost of the investigation. Depending upon the type of background investigation conducted and the cost incurred by CMS, the Contractor cost will be determined based upon the current OPM fiscal year billing rates, which can be found at <https://nbib.opm.gov/hr-security-personnel/investigations-billing-rates-resources/>. The amount to be paid by the Contractor shall be due and payable when the CO submits a written letter notifying the Contractor as to the cost of the investigation. The Contractor shall pay the amount due within thirty (30) days of the date of the CO's letter by check, made payable to the "United States Treasury." The Contractor shall provide a copy of the CO's letter as an attachment to the check and submit both to the Office of Financial Management at the following address:

Centers for Medicare & Medicaid Services
PO Box 7520
Baltimore, Maryland 21207

h. Identification Card Custody and Control

The Contractor is responsible for the custody and control of all forms of Federal identification issued by CMS to Contractor employees. The Contractor shall immediately notify the COR when

EXHIBIT 2
CMS Security Clause (May 2018)

a Contractor employee no longer requires agency access due to transfer, completion of a project, retirement, removal from work on the contract, or termination of employment. Return all CMS Federal ID cards to:

The Centers for Medicare and Medicaid Services
Attn: DPS, Mailstop: SL-17-06
7500 Security Boulevard
Baltimore, Maryland 21244

The Contractor shall also ensure that Contractor employees comply with CMS requirements concerning the renewal, loss, theft, or damage of an ID card.

Failure to comply with the requirements for custody and control of CMS issued ID cards may result in a delay in withholding final payment or contract termination, based on the potential for serious harm caused by inappropriate access to CMS facilities, sensitive information, information systems or other CMS resources.

- i. **Renewal:** A Contractor employee's CMS issued ID card is valid for a maximum of five (5) years and 9 months or until the contract expiration date (including option periods), whichever occurs first. The renewal process should begin six weeks before the ID card expiration date by contacting the COR. If an ID card is not renewed before it expires, the Contractor employee will be required to sign-in daily for facility access and may have limited access to information systems and other resources. Contractor ID card certificate(s) require yearly updates from the issuance date. The yearly updates should be coordinated between the contractor and the COR.
- ii. **Lost/Stolen:** Immediately upon detection that an ID card is lost or stolen, the Contractor or Contractor employee shall report a lost or stolen ID card to the COR and the local security servicing organization at SECURITY@cms.hhs.gov. The Contractor shall also submit an Incident Report within 48 hours, to the COR, DPS at Badging@cms.hhs.gov, and the local security servicing organization. The Incident Report shall describe the circumstances of the loss or theft. If the loss or theft is reported by the Contractor to the local police, a copy of the police report shall be provided to the COR. The Contractor employee shall sign in daily for facility access and may have limited access to information systems and other resources until the replacement card is issued.
- iii. **Replacement:** An ID card will be replaced if it is damaged, contains incorrect data, or is lost or stolen for more than three (3) days, provided there is a continuing need for agency access to perform work under the contract.

In the event that the PIV card or certificate(s) are not renewed in a timely fashion, or the ID card requires replacement due to being lost, stolen, or damaged, the contractor employee will go through the "Badge Issuance" process again as described in above in section (c)(2). In any of these events, contact your COR to coordinate the appropriate next steps.

i. Surrender ID Cards/Access Cards, Government Equipment

CMS reserves the right to suspend or withdraw ID card access at any time for any reason. Access will be restored upon the resolution of the issue(s).

EXHIBIT 2
CMS Security Clause (May 2018)

Upon notification that routine access to CMS facilities, sensitive information, federally controlled information systems or other CMS resources is no longer required, the Contractor shall surrender the CMS issued ID card, access card, keys, computer equipment, and other government property to the CMS COR or directly to CMS at the address referenced above in section (f). DPS Contractor personnel who do not return their government issued property within 48 hours of the last day of authorized access to CMS, may be permanently barred from CMS systems and facilities and may be subject to fines and penalties, as authorized by applicable Federal or State laws.