

APPENDIX 2

SPECIFICATIONS FOR MARYLAND 202 - 202F SALES AND USE TAX BOOK

These specifications for Maryland Sales and Use Tax Form 202-202F books include monthly, quarterly, semi-annual (seasonal) and annual forms to be printed, processed, imaged, and mailed by the vendor awarded the contract.

Camera-ready copy will be furnished to the vendor upon contract award. This may consist of PDFs sent via e-mail and/or FTP. All artwork must be printed full size (i.e., copy may not be photographically reduced or distorted unless instructions call for minor reduction). Registration of duplicate forms to be within the tolerance of plus or minus 1/32 of an inch, total 1/32 of an inch. No printer's imprint.

The data file for use with the books will be furnished to the vendor by the Office of the Comptroller. This may of electronic file sent via FTP. The vendor must review the file and notify the Division within 15 days of receipt of any issues or concerns with the format or contents of the file.

MONTHLY FORM BOOKS

Includes booklet with forms, etc., up to 2 inserts, Davac wet activated gum labels, tape and staple binding on the left side of the booklet and wafer seal that conforms to USPS regulations.

MONTHLY FORM BOOK REQUIREMENTS:

Size	9" x 11" Overall outside dimensions
	8 1/2" x 11" Form dimension after detachment at perforations
Paper	Cover - 110 lb.- index/cover stock
	Pages - All other pages of book use 24 lb. bond
Ink:	Ink is to be soy based in colors stated.

Estimated Quantity: 1,500

Monthly filers are mailed:

Monthly form books must contain the following:

FRONT COVER: 2 sided per sample.
Front Cover (Front) - Text/ Not personalized
Front Cover (Inside) - Maintenance of Records - Personalized with Account Number, Filing Frequency and Year/Date
Printed in black ink
Use 110 lb. index/cover stock

All pages and forms are 24 lb. bond. Only pages 6-13 (forms and return labels) have micro-perforations 1/2" in from left edge.

Page 1: 2-sided per sample.
Letter from Comptroller / Sales and Use Tax Facts page 1
Printed in black ink

- Page 2:** 2-sided per sample.
Sales and Use Tax Facts Page 2 / Form 202 Instructions Page 1
Printed in black ink
- Page 3:** 2-sided per sample.
Form 202 Instructions Page 2 / Form 202 Instructions Page 3
Printed in black ink
- Page 4:** 2-sided per sample.
Form 202 Instructions Page 4 / Form 202 Instructions Page 5
Printed in black ink
- Page 5:** 2-sided per sample.
Form 202F Instructions Page 1 / Form 202F Instructions Page 2
Printed in black ink
- Pages 6 -10:** 2-sided per sample (12).
Form 202-202F / Blank Page
Form 202-202F is personalized includes month ending date and due date, taxpayer name and complete address, and scan line. Exact print location and specifications for all personalized information and scanline will be provided to the vendor. All preprinted information and scan line must be in laser print; printed in OCR "A" font and must be readable by Maryland Revenue Administration Division and their lockbox facility's remittance processing equipment with a guarantee that 99% of all forms will be readable.
Printed in black ink and dropout ink PMS / Pantone 190 at 100% as indicated in artwork.
- Page 11:** 2-sided per sample.
Comptroller of Maryland - SUT return address/Blank page.
Davac wet activated gum labels with micro-perforation.
Printed in black ink
- Page 12:** 2-sided per sample.
Change of Address for Businesses Form 109-B
Printed in black ink
- Page 13:** 2-sided per sample.
Final Report Form 202FR
Printed in black ink

BACK COVER: 2-sided per sample.
Sales and Use Tax Returns Information / Back Cover with RAD Permit
Indicia, Personalized taxpayer address and iMb barcode
Back and inside back cover is 110 lb. index/cover stock.
Printed in black ink

2INSERTS: Vendor will print up to 2 inserts. Paper color to be determined. Artwork to be supplied by the Comptroller.

QUARTERLY FORM BOOKS

Includes booklet with forms, etc., up to 2 inserts, Davac wet activated gum labels, tape and staple binding on the left side of the booklet and wafer seal that conforms to USPS regulations.

QUARTERLY FORM BOOK REQUIREMENTS:

Size	9" x 11" Overall outside dimensions
	8 1/2" x-11" Form dimension after detachment at perforations
Paper	Cover - 110 lb. index/cover stock
	Pages - All other pages of book use 24 lb. bond
Ink:	Ink is to be soy based in colors stated.

Estimated Quantity: 2,600

Quarterly Filers are mailed:

Quarterly Form Books must contain the following:

FRONT COVER: 2 sided per sample.
Front Cover (Front) - Text / Not personalized
Front Cover (Inside) - Maintenance of Records - Personalized with Account Number, Filing Frequency and Year/Date
Printed in black ink
Use 110 lb. index/cover stock

All pages and forms are 24 lb. bond. Only pages 6 - 13 (forms and return labels) have micro-perforations 1/2" in from left edge.

Page 1: 2-sided per sample.
Letter from Comptroller/ Sales and Use Tax Facts page 1
Printed in black ink

Page 2: 2-sided per sample.
Sales and Use Tax Facts Page 2 / Form 202 Instructions Page 1
Printed in black ink

- Page 3:** 2-sided per sample.
Form 202 Instructions Page 2 / Form 202 Instructions Page 3
Printed in black ink
- Page 4:** 2-sided per sample.
Form 202 Instructions Page 4 / Form 202 Instructions Page 5•
Printed in black ink
- Page 5:** 2-sided per sample.
Form 202F Instructions Page 1 / Form 202F Instructions Page 2
Printed in black ink
- Pages 6 -10:** 2-sided per sample (4).
Form 202-202F / Blank Page
Form 202-202F is personalized includes month ending date and due date, taxpayer name and complete address, and scan line. Exact print location and specifications for all personalized information and scanline will be provided to the vendor. All preprinted information and scan line must be in laser print; printed in OCR "A" font and must be readable by Maryland Revenue Administration Division and their lockbox facility's remittance processing equipment with a guarantee that 99% of all forms will be readable.
Printed in black ink and dropout ink PMS / Pantone 190 at 100% as indicated in artwork.
- Page 11:** 2-sided per sample.
Comptroller of Maryland - SUT return address/Blank page. Davac wet activated gum labels-with micro-perforation.
Printed in black ink
- Page 12:** 2-sided per sample.
Change of Address for Businesses *Form* 109-B
Printed in black ink
- Page 13:** 2-sided per sample.
Final Report Form 202FR
Printed in black ink
- BACK Cover:** 2-sided per sample.
Sales and Use Tax Returns Information/ Back Cover with RAD Permit Indicia, Personalized taxpayer address and iMb barcode
Back and inside back cover is 110 lb. index/cover stock.
Printed in black ink

2INSERTS: Vendor will print up to 2 inserts. Paper color to be determined. Artwork to be supplied by the Comptroller.

SEMI-ANNUAL FORM BOOKS

Includes booklet with forms, etc., up to 2 inserts, Davac wet activated gum labels, tape and staple binding on the left side of the booklet and wafer seal that conforms to USPS regulations.

SEMI-ANNUAL FORM BOOK REQUIREMENTS:

Size	9" x 11" Overall outside dimensions
	8 1/2" x 11" Form dimension after detachment at perforations
Paper	Cover - 110 lb. index/cover stock
	Pages -All other pages of book use 24 lb. bond
Ink:	Ink is to be soy based in colors stated.

Estimated Quantity: 6,200

Semi-Annual Filers are mailed:

Semi-Annual Form Books must contain the following:

FRONT COVER: 2 sided per sample.
Front Cover (Front) - Text/ Not personalized
Front Cover (Inside) - Maintenance of Records - Personalized with Account Number, Filing Frequency and Year/Date
Printed in black ink
Use 110 lb. index/cover stock

All pages and forms are 24 lb. bond. Only pages 6 - 13 (forms and return labels) have micro-perforations 1/2" in from left edge.

Page 1: 2-sided per sample.
Letter from Comptroller/ Sales and Use Tax Facts page 1
Printed in black ink

Page 2: 2-sided per sample.
Sales and Use Tax Facts Page 2 / Form 202 Instructions Page 1
Printed in black ink

Page 3: 2-sided per sample.
Form 202 Instructions Page 2 / Form 202 Instructions Page 3
Printed in black ink

Page 4: 2-sided per sample.

Form 202 Instructions Page 4 / Form 202 Instructions Page 5
Printed in black ink

Page 5: 2-sided per sample.
Form 202F Instructions Page 1 / Form 202F Instructions Page 2
Printed in black ink

Pages 6 -10: 2-sided per sample (4).
Form 202-202F / Blank Page
Form 202-202F is personalized includes month ending date and due date, taxpayer name and complete address, and scan line. Exact print location and specifications for all personalized information and scanline will be provided to the vendor. All preprinted information and scan line must be in laser print; printed in OCR "A" font and must be readable by Maryland Revenue Administration Division and their lockbox facility's remittance processing equipment with a guarantee that 99% of all forms will be readable.
Printed in black ink and dropout ink PMS / Pantone 190 at 100% as indicated in artwork.

Page 11: 2-sided per sample.
Comptroller of Maryland - SUT return address/Blank page.
Davac wet activated gum labels with micro-perforation.
Printed in black ink

Page 12: 2-sided per sample.
Change of Address for Businesses Form 109-B
Printed in black ink

Page 13: 2-sided per sample.
Final Report Form 202FR
Printed in black ink

BACK COVER: 2-sided per sample.
Sales and Use Tax Returns Information/ Back Cover with RAD Permit Indicia, Personalized taxpayer address and iMb barcode
Back and inside back cover is 110 lb. index/cover stock.
Printed in black ink

2 INSERTS: Vendor will print up to 2 inserts. Paper color to be determined. Artwork to be supplied by the Comptroller.

ANNUAL FORM BOOKS

Includes booklet with forms, etc., up to 2 inserts, Davac wet activated gum labels, tape and staple binding on the left side of the booklet and wafer seal that conforms to USPS regulations.

ANNUAL FORM BOOK REQUIREMENTS:

Size	9" x 11" Overall outside dimensions
	8 1/2" x 11" Form dimension after detachment at perforations
Paper	Cover-110 lb. index/cover stock
	Pages - All other pages of book use 24 lb. bond
Ink:	Ink is to be soy based in colors stated.

Estimated Quantity: 1,500

Annual Filers are mailed:

Annual Form Books must contain the following:

FRONT COVER: 2 sided per sample.
Front Cover (Front)-Text / Not personalized
Front Cover (Inside) - Maintenance of Records - Personalized with Account Number, Filing Frequency and Year/Date
Printed in black ink
Use 110 lb. index/cover stock

All pages and forms are 24 lb. bond. Only pages 6 - 13 (forms and return labels) have micro-perforations 1/2" in from left edge.

Page 1: 2-sided per sample.
Letter from Comptroller/ Sales and Use Tax Facts page 1
Printed in black ink

Page 2: 2-sided per sample.
Sales and Use Tax Facts Page 2 / Form 202 Instructions Page 1
Printed in black ink

Page 3: 2-sided per sample.
Form 202 Instructions Page 2 / Form 202 Instructions Page 3
Printed in black ink

Page 4: 2-sided per sample.
Form 202 Instructions Page 4 / Form 202 Instructions Page 5
Printed in black ink

Page 5: 2-sided per sample.
Form 202F Instructions Page 1 / Form 202F Instructions Page 2

Printed in black ink

Pages 6 - 10:

2-sided per sample (4).

Form 202-202F / Blank Page

Form 202-202F is personalized includes month ending date and due date, taxpayer name and complete address, and scan line. Exact print location and specifications for all personalized information and scanline will be provided to the vendor. All preprinted information and scan line must be in laser print; printed in OCR "A" font and must be readable by Maryland Revenue Administration Division and their lockbox facility's remittance processing equipment with a guarantee that 99% of all forms will be readable.

Printed in black ink and dropout ink PMS / Pantone 190 at rD0% as indicated in artwork.

Page 11:

2-sided per sample.

Comptroller of Maryland- SUT return address/Blank page.

Davac wet activated gum labels with micro-perforation.

Printed in black ink

Page 12:

2-sided per sample.

Change of Address for Businesses Form 109-B

Printed in black ink

Page 13:

2-sided per sample.

Final Report Form 202FR

Printed in black ink

BACK COVER:

2-sided per sample.

Sales and Use Tax Returns Information/ Back Cover with RAD Permit Indicia, Personalized taxpayer address and iMb barcode

Back and inside back cover is 110 lb. index/cover stock.

Printed in black ink

LAYOUT:

Per official state version of the Sales Tax Return form, the report period, due date, tax account number, numeric return period, business name and address must be printed in the proper area, and the return must be signed and dated by the taxpayer or agent.

- All ALPHA Data should be in CAPS.
- Include the Data Field Labels (e.g., DUE DATE, ACCOUNTNUM.)
- Use 10 point OCR "A" font

Form 202 Page 1 (SUT) - Field Name	Start Row	Start Column	End Row	End Column	Field Size	Format
"FOR PERIOD ENDING... "	7	10	7	38	29	
"DUE DATE... "	8	16	8	32	17	
"ACCOUNT NUM... "	10	10	10	38	29	See below
Scanline*	12	53	12	71	19	See below
Business Name	12	10	12	40	31	
Business Address	13	10	13	40	31	
Business Address	14	10	14	40	31	
Business Address	15	10	15	40	31	

Form 202 Page 2 (S"UT) - Field Name	Start Row	Start Column	End Row	End Column	Field Size	Format
"FOR PERIOD ENDING... "	7	10	7	38	29	
"DUE DATE... "	8	16	8	32	17	
"ACCOUNT NUM... "	10	10	10	38	29	See below
Scanline*	12	53	12	71	19	See below
Business Name	12	10	12	40	31	
Business Address	13	10	13	40	31	
Business Address	14	10	14	40	31	
Business Address	15	10	15	40	31	
Form 202 Page 3 (SUT) - Field Name	Start Row	Start Column	End Row	End Column	Field Size	Format
"FOR PERIOD ENDING... "	7	10	7	38	29	
"DUE DATE... "	8	16	8	32	17	
"ACCOUNTNUM ... "	10	10	10	38	29	See below
Scanline*	12	53	12	71	19	See below
Business Name	12	10	12	40	31	
Business Address	13	10	13	40	31	
Business Address	14	10	14	40	31	
Business Address	15	10	15	40	31	

Form 202 Page 4 (SUT) - Field Name	Start Row	Start Column	End Row	End Column	Field Size	Format
"FOR.PERIOD ENDING... "	7	10	7	38	29	
"DUE DATE... "	8	16	8	32	17	
"ACCOUNT NUM... "	10	10	10	38	29	See below
Scanline*	12	53	12	71	19	See below
Business Name	12	10	12	40	31	
Business Address	13	10	13	40	31	
Business Address	14	10	14	40	31	
Business Address	15	10	15	40	31	

Account Number:

1. Print using 10 point OCR "A" font.
2. Scanline prints on Row 10, beginning in Col. 10, ending in Col. 38
3. Scan line reads from left to right 29_positions:
 - 1-7 Must say "ACCOUNT"

- ▶ 8 Blank
- ▶ 9-11 Must say "NUM"
- ▶ 12-14 Blank
- ▶ 15-22 Must contain the tax account number *
(with the first digit of the account
number in position 15 and the last digit
in position 22)
- ▶ 23 -25 Blank
- ▶ 26-29 • Must contain the return period (MMYY)

Scan Line:

1. Print using 10 point OCR "A" font.
2. Scanline prints on Row 12, beginning in Col. 53, ending in Col. 71
3. Scan line reads from left to right 19 positions:

- ▶ 1-2 Return period Month (in MM format)
- ▶ 3 Blank
- ▶ 4-7 Return period Year (in YYYY format)
- ▶ 8 Blank
- ▶ 9-10 Must contain zeros
- ▶ 11 Blank
- ▶ 12-19 Tax account number* (with the first
digit of the account number in
position 12 and the last digit in
position 19)

* The tax account number is the Central Registration (CR) number. It is numeric, 8 digits and starts with 0 or 1. **Returns with missing or invalid CR numbers will be rejected.**

2 INSERTS: Vendor will print up to 2 inserts. Paper color to be determined. Artwork to be supplied by the Comptroller.

Quality Control Production Sampling: Vendor must manufacture the mailing piece assuring a perfect match between personalized internal information and mailing address.

Mailing Postal Requirements: Must meet USPS standards to be mailed out Pre-Sort Standard with maximum savings. A letter of certification from the Post Office used by the vendor's production facility that approves the postage rate for the required form construction must be submitted with this bid to qualify for the award.

Certification(s): Provide with the bid the name of the USPS CASS and NCOA Certification Software used by the manufacturing facility and a copy of the manufacturing facility's current CASS and NCOA certificate for this software.

Quality Assurance: Maintain a thorough Quality Assurance Program to guarantee that none of the delivered forms have illegible information.

Permit(s) and Fee(s): Comptroller of Maryland, Revenue Administration Division's permit will be used. Postage and permit fees will be paid directly to the post office by the Revenue Administration Division. **Do Not Include In Bid.** Vendor must provide the Revenue Administration Division at least 15 days advance notice of the amount of postage that will be required for delivery.

USPS 3602s and 3607s: All original postage (USPS 3602s and 3607s) statements and receipts must be mailed (Express Mail Service) and faxed (or emailed) to Revenue Administration Division's contact.

Delivery Date: Products must be addressed, prepared for mailing and delivered to Post Office at a date mutually agreed upon by the Office of the Comptroller and awarded vendor.

Test Requirements: Vendor will supply Revenue Administration Division with 50 booklets, imaged with all variable data within 15 days of proof approval. Vendor will supply additional tests as needed until accurate data test is accomplished. State will not grant approval for actual production until test documents are approved in writing by the Revenue Administration Division.

On-Site Press Review(s): Provision is to be made for an on-site press review of the production with the Revenue Administration Division so that the final product may be sampled prior to delivery.