



RFP 23-5851

Permanent Vote by Mail Invitation Printing & Mailing Services

McHenry County seeks proposals for printing and mailing services, subject to continuing need and availability of funds. All requirements are according to specifications enclosed.

Contact Information. Direct all inquiries & communication via email to:
Djuana M Leonard, C.P.M., Procurement Specialist, E-mail: dmleonard@mchenrycountyil.gov

Any communication regarding this Bid or Request between the date of issue and date of award is required to go through the Procurement Specialist listed (or the Purchasing Administrative Specialist). Unauthorized contact with other McHenry County staff or officers is strictly forbidden. **ELECTRONIC COMMUNICATIONS REQUIRED.**

MANDATORY COVER PAGE
COVER SHEET - TYPE or PRINT CLEARLY

Company: Integrated Voting Systems Date: 1-2-2023

Contact Person: Jeremy Heroux

Address: 930 Lafayette rd City: Medina State: OH Zip Code: 44256

Email Address: Jeremy@integravote.com

Telephone number: 216-288-7715 FEIN or SSN: 36-4820866

SCHEDULE OF EVENTS

December 20, 2022	RFP available on County website
December 27, 2022	Questions due to dmleonard@mchenrycountyil.gov no later than 12:00 p.m.(CST). Submit via email.
December 28, 2022	Addendum posted on County website no later than 4:00 p.m. (CST)
January 3, 2023	Proposals due no later than 9:00 a.m. (CST). Submit PDFs via email.

OVERVIEW OF McHENRY COUNTY

The County of McHenry is a unit of local government in the State of Illinois with a population of 310,000, as estimated by the US Census Bureau, within 611 square miles. It is ranked as one of the fastest growing of Illinois' 102 counties. The governing body is the County Board, which is comprised of twenty-four elected members.

The County has thirteen (13) constructed facilities in various locations totaling approximately 688,000 square feet.

The County employs approximately 1,300 full and part-time employees in twenty-eight departments, which are administrated by a mix of elected officials and appointed department heads. McHenry County manages nursing home care, public health services, public safety, an adult correctional facility, transportation planning, road improvement and maintenance, administrative services, and a judicial system.

REQUEST FOR PROPOSALS (General Terms and Conditions)

DEFINITION

Request for Proposals (RFP) is a method of procurement permitting discussions with responsible contractor and revisions to proposals prior to award of a contract. Proposals will be opened and evaluated in private. Award will be based on the criteria set forth herein.

EVALUATION of PROPOSAL

The proposals submitted by contractors shall be evaluated solely in accordance with the criteria set forth in the RFP. The Evaluation Committee may conduct discussions with any offeror who submits an acceptable or potentially acceptable proposal. Contractors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals. During such discussions, the Evaluation Committee shall not disclose any information derived from one proposal to any other contractor.

CRITERIA for SELECTION and SUBMISSION REQUIREMENTS

The following criteria and point system shall be used by the selection team to determine the firm or individual(s) most qualified and best suited to perform the work:

- 1. **Qualifications and Project Approach (30 points)**
Contractor's capability in all respects to perform fully the contract requirements, including approach to project and cost-saving ideas.
- 2. **Cost (20 points)**
- 3. **Experience (40 points)**
This includes the contractor's experience for the specific scope of services as set forth herein with projects of similar nature, size, complexity, and requirements as the County.
- 4. **Reference Responses (10 points)**

Total 100 points

NEGOTIATIONS

The County of McHenry reserves the right to negotiate specifications, terms, and conditions, which may be necessary or appropriate to the accomplishment of the purpose of this RFP. The County may require the RFP and the offeror's proposal be incorporated in full or in part as Contract Documents. This implies that this RFP and all responses, supplemental information, and other submissions provided by the contractor during discussions or negotiations may be held by the County of McHenry as contractually binding on the successful Contractor.

DESCRIPTION OF WORK AND SPECIFICATIONS

McHenry County seeks proposals for printing and mailing services, subject to continuing need and availability of funds. NOTE DELIVERY TIMELINE: JANUARY 4, 2023-FEBRUARY 10, 2023.

Project description

The project consists of a mailing to be sent to a list (provided by the Clerk) of between **150,000 and 230,000** registered voters from McHenry County, although the mail may be delivered to other locations. The piece to be mailed is attached. It includes a form and an informational page and must be printed in substantially the same form as shown in the specimen. Mailed piece and envelope would include variable data (to be provided by the County).

Also included, must be some mechanism for the recipient to return the application form. This could be a pre-addressed envelope or self-mailer. The final format must employ some sort of security printing to prevent mail handlers from being able to view the content specifics.

The vendor is responsible for

1. Making the piece ready to mail including printing, cutting folding, inserting, etc.
2. Printing; **black ink only (no color required)**
3. Printing the delivery address on the outside of the envelope along with any other information required for best rate via first-class delivery
4. Delivery address must **NOT** be altered by the vendor
5. Printing voter name, address, voter ID and bar-coded voter ID on the application form
6. Bringing the pieces to the post office.
7. Sorting the list for the most economical postal rate
8. Providing the Clerk with a reasonable estimate of postage at least 15 days prior to delivery. Upon receipt of the estimate, the Clerk would fund an account with the USPS for the estimated amount.
9. Delivery of the piece via USPS to the voters within the specified timeframe (1/4/2023 – 2/10/2023)
10. Proposals must include the base components, such as: paper, envelopes, and all services to be provided by the vendor
- 11. Proposals must be all-inclusive, except for postage, no additional costs will be incurred by the County**

Submissions should include, at a minimum, the following:

- Examples of other projects that are similar in nature, size, complexity, and requirements as the County.
- Examples of experience working with post office
- Describe the approach to this project; including method for voters to return the completed document to the County
- Describe any cost-savings ideas
- Complete cost for materials, services, etc.



McHenry County Clerk And Recorder's Office

Joseph J. Tirio – Clerk and Recorder

THIS IS NOT A BALLOT



YOUR POLLING PLACE FOR ELECTION DAY, NOVEMBER 8 IS:

«PollPlaceAbbr»
«SamBalAddress1»
«SamBalAddress2»

IMPORTANT DATES:

Early Voting at the Clerk's Office:
Starts Feb 23, M-F, 8:30 AM – 4:30 PM

Early voting throughout the County:
Starts March 20:
See MCHENRYCOUNTYCLERKIL.GOV
for dates, times, and locations.

«FirstName» «LastName»

«ResidenceAddress»

«ResidenceCity», «ResidenceState» «ResidenceZipCode»

Dear Voter,

On June 17, 2021, the Governor signed into law Public Act 102-0015, allowing voters to complete a one-time application to enroll in a **Permanent Vote by Mail program** and receive a ballot by mail for all future elections. The change in law also compels all Election Authorities to send the enclosed application to you at this time.

If you choose to request permanent vote-by-mail status, you will remain in that status until you either request to be removed, we are notified of a change of address outside our county, or we confirm that you have registered to vote in another county. You may apply to permanently be placed on vote by mail status using the attached application.

Q: What should I do with this form?

A: If you want to receive a vote by mail ballot for every election, then complete the enclosed form and return it to us. If you wish to receive a ballot for primary elections, you must also specify a party preference.

Q: What should I do if I don't want to be on the permanent vote by mail list?

A: If you don't want to receive a vote by mail ballot for every election, then you may destroy this mailing.

Q: Why did I get this form?

A: The law requires that the County Clerk's Office send it to you at this time.

Q: What should I do if I have questions?

A: Call our office at (815) 334-4242

Thank you for your interest in our elections. Please do not hesitate to call if you have any questions.

(informational attachment)

APPLICATION FOR PERMANENT VOTE BY MAIL STATUS

Applicant's Name	«FirstName» «MiddleName» «LastName»
Street Address	«ResidenceAddress»
City, State, Zip	«ResidenceCity», «ResidenceState» «ResidenceZipCode»
County	McHenry
Date of Birth*	
Phone Number*	
Email*	
Precinct	«PrecinctName»

For Election Authority's Use Only	
Ballot Style:	
Voter ID:	«VoterID»

For Election Judge's Use Only	
Initials:	
Voter's Consecutive Number:	

*Optional information; even though this is not required, providing it may aid in the processing of your ballot

I am currently a registered voter and wish to apply for **permanent vote by mail status**.

I state that I reside at the address specified above, in the stated precinct and county, that I have lived at such address for 30 days or more preceding this election, that I am lawfully entitled to vote in such precinct at the next regularly scheduled election, and that:

- I wish to vote by mail in all subsequent elections that do not require a party designation.
- or -
- I wish to vote by mail in all subsequent elections and wish to receive the party ballot indicated below in all elections that require a party designation.
- Democratic
 Republican
 Other* _____

I hereby make application for an official ballot or ballots to be voted by me at such election, and I agree that I shall return such ballot or ballots to the official issuing the same prior to the closing of the polls on the date of the election or, if returned by mail, postmarked no later than election day, for counting no later than during the period for counting provisional ballots, the last day of which is the 14th day following election day.

Under penalties as provided by law pursuant to 10 ILCS 5/29-10, the undersigned certifies that the statements set forth in this application are true and correct.

Signature of Applicant

Today's Date

Address to which ballot
should be mailed:
(if different from above)

IMPORTANT:

You must return the **completed and signed application** to the election authority with jurisdiction over your registration. This application may be submitted via email (votebymail@mchenrycountyil.gov), through the mail, or by personal delivery. If submitting in by mail, please direct it to:

**McHenry County Clerk's Office
Attn: Vote by Mail Dept.
2200 NORTH SEMINARY AVENUE
WOODSTOCK, IL 60098.**

*Voter will only receive a primary ballot if the party listed is an established party in a race in which the voter is entitled to vote.

MANDATORY PAGE
PROPOSAL PRICING FORM

We, Integrated Voting Systems, propose to provide the requested services according to the requirements of this Request for Proposal. We also certify that this written proposal is valid for 120 days from the day of this proposal and the attached information is received and filed by the County of McHenry.

COSTS BELOW SHOULD BE BASED UPON THE QUANTITY OF: 230,000

Printing Costs: \$ 34,500.00

Sorting List & Mailing Services: \$ 4,600.00

Delivery to Post office: \$ 0.00 (included)

Additional services; cutting, folding, etc. \$ 3,450.00

LUMP SUM OF ALL COSTS (excluding postage) TO COMPLETE THIS PROJECT: \$ 42,550.00

Delivery Timeline GUARANTEE: JANUARY 4, 2023-FEBRUARY 10, 2023: YES NO

Please List any exceptions to the RFP Specifications:

Need artwork ASAP - 1-5-2023

MANDATORY PAGE
REFERENCES

Please list three (3) references, other than McHenry County, you have done similar work, service or supplied similar products to within the last twelve (12) months. **Email address required. It is the vendor's responsibility to ensure references respond to the County, as required.**

Entity: Trumbull County Board of Elections

Address: 2947 Youngstown rd, SE City, State, Zip Code: Warren, OH 44484

Telephone Number: 330-369-4050 Contact Person: Director Stephanie Penrose

Email Address: Spenrose@trumbull.BoE.ohio.gov

Entity: Mahoning County Board of Elections

Address: 345 Oak Hill Ave. City, State, Zip Code: Youngstown, OH 44502

Telephone Number: 330-783-2474 Contact Person: Chris Rakocy - IT Director

Email Address: Crakocy@mahoningcountyoh.gov

Entity: Clermont County Board of Elections

Address: 76 South Riverside dr. City, State, Zip Code: Batavia, OH 45103

Telephone Number: 513-732-7472 Contact Person: Chris Dennison Deputy Director

Email Address: CDennison@vote.clermontcountyohio.gov

MANDATORY PAGE
CERTIFICATONS PAGE

- I acknowledge to have read, understand, and agree to the **Bid or Request Documents** Provided for this Bid or Request as posted on McHenry County's Website Yes
- I acknowledge to have read, understand, and agree to the policies contained within the **McHenry County Purchase Ordinance**, amended June 1, 2021 Yes
- I acknowledge I have read, understand, and agree to the **Standard Terms and Conditions** provided for this Bid or Request as posted on McHenry County's website. Yes
- I acknowledge to have read, understand, and agree to all **Addenda** provided for this Bid or Request as posted on McHenry County's website. Yes
- Vendor certifies it has reviewed, completed & *submitted the* **MANDATORY County of McHenry Status of Ownership Information** Yes
- I acknowledge there to be SEVEN (7) **Mandatory Pages, including the W-9** to be completed and/or submitted for my Bid or Submission to be considered. Yes
- Submitter certifies it has not been barred from contracting with a unit of State or Local Government because of a violation of Section 33E-3 or 33E-4 of the **Criminal Code of 1961, as amended.** Yes

- Vendor certifies it is aware that all contracts for the Construction of Public Works are subject to the **Illinois Prevailing Wage Act** (820 ILCS 130/1-12) and this Bid or Request
 Is Subject to, Is NOT Subject to the Illinois Prevailing Wage Act. Yes

- Vendor acknowledges this Bid or Request Is Subject to, Is NOT Subject to the **Employment of Illinois Workers in Public Works Act** (30 ILCS 570/3) and will comply with the requirements set forth in this Act. Yes

- I acknowledge this Bid or Request Requires, Does NOT Require a **Bid Bond** Yes

- Under penalties of perjury, I certify that my correct **Federal Taxpayer Identification Number** is: 36-4820866

- I am doing business as a (please indicate one):
 Sole Proprietorship
 Corporation: State of Incorporation: DE
 Partnership
 Other _____

▪ State full names, titles and addresses of all responsible principles and/or partners below and/or Authorized Negotiators:

Name and Title: Jeremy Heroux - Regional Manager

City, State and Zip Code: 930 Lafayette rd, Medina, OH 44256

Telephone Number: 216-288-7715 Email: Jeremy@integravote.com

Name and Title: _____

City, State and Zip Code: _____

Telephone Number: _____ Email: _____

**MANDATORY PAGE
SIGNATURE PAGE**

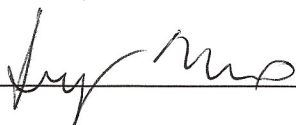
- I have carefully examined the Bid or Request, Scope of Work, Specifications, and any other documents accompanying or made a part of this Bid or Request. I hereby propose to furnish the goods or services specified. I agree my proposal will remain firm for a period of up to 120 days from due date to allow the County time to evaluate the qualifications submitted. I verify all information contained in this proposal is truthful to the best of my knowledge and belief. I further certify I am duly authorized to submit on behalf of the firm as its act and deed, and the firm is ready, willing, and able to perform if awarded the contract. I further certify, under oath, this proposal is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a proposal for the same product or service. No officer, employee or agent of the County of McHenry or any other proposer is interested in said proposal and the Undersigned executed this Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

Individual/Company/Corporation: Integrated Voting Systems

Business Address: 930 Lafayette rd

City, State and Zip Code: Medina, OH 44256

Printed Name and Title: Jeremy Heroux - Regional Manager

Signature:  **Date:** 1-2-2023

Telephone Number: 216-288-7715 Email: Jeremy@integravote.com

Witness Printed Name and Title: Samantha Pawson Customer Service Manager

Witness Signature:  **Date:** 2 Jan 2023

End of Document

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

INTEGRATED VOTING SYSTEMS INC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

- Individual/sole proprietor or single-member LLC
 C Corporation
 S Corporation
 Partnership
 Trust/estate
 Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____
Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.
 Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

496 S URUAPAN WAY

6 City, state, and ZIP code

DINUBA, CA 93618

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type. See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

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

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
				-			-			
or										
Employer identification number										
3	6	-	4	8	2	0	8	6	6	

Part II Certification

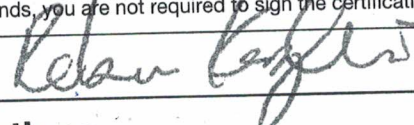
Under penalties of perjury, I certify that:

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

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

Sign Here

Signature of U.S. person ▶



Date ▶

04/26/2021

General Instructions

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

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



Integrated Voting Systems

Medina Ohio Facility
930 Lafayette Rd.
Suite S
Medina, OH 44256

**STANDARD
OPERATION
PROCEDURES
(SOP)**

Integrated Voting Systems

STANDARD OPERATING PROCEDURE (SOP)

Pre-Production Process – Job Schedule

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: May 18, 2022 **Revision #:** 3

1. Purpose

1.1. To provide clear organized information regarding the status of every job in the production process. Job Schedule will include a calendar of all job details from acceptance of quote/bid to the completion of the jobs requirements.

2. Responsibility / Scope

2.1. Employees included in the Job Schedule process include: Plant/General Manager, Sales Representative, Production Supervisors/Leads, Customer Service Representatives, IT/Data personnel, and IVS Administrative personnel as required.

3. Definitions

T	Description
J	Detailed document tracking job status through

4. References

5. Procedure

Materials required: Job Schedule Template, Job Calendar, Job Work order/instructions.

5.1. Upon customer acceptance of the quote/bid all jobs will be entered onto the job schedule.

5.2. A detailed job calendar including all dates and deadlines will be shared with the production group.

5.3. Job Schedule will be updated as needed. All changes will be communicated with the IVS Production Team.

5.4. All jobs on Job Schedule will be reviewed Daily at 9am Production Meeting.

5.5. All Jobs will remain on the Job Schedule until completion of all job

Integrated Voting Systems

STANDARD OPERATING PROCEDURE (SOP)

requirements per work order.

6. Criteria for Satisfactory Results

- IVS Sales/Customer Service:
 - Confirms original work order requirements and adds details to the job schedule.
 - Evaluates stock requirements for each job and identifies special needs to the production team.
 - Communicates with customer's regarding deadlines and data requirements per job order.
 - Provides customer with proofs and copies of all required production pieces per job order.

- IVS Plant Manager / Production Lead:
 - Monitors daily production schedules and processes to assure jobs are progressing on schedule.
 - Manages inventories of raw materials required for each job. IVS Inventory Schedule A.
 - Maintains plant production equipment (printers, folders, inkjets, and inserters) to assure performance and completion of job requirements.
 - Maintains inventory of plant consumable supplies required for each machine. IVS Inventory Schedule B

7. Forms and Records

7.1. IVS Job Schedule

7.2. IVS Inventory Logs – Schedule A – Customer Materials, Schedule B – Shop Supplies/Consumables

Pre-Production Process – Inventory Management

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #:** 1

1. Purpose

1.1. To provide clear organized information regarding the inventory requirements for every job in the production process.

2. Responsibility / Scope

2.1. Employees included in the Inventory process include: Plant/General Manager, Sales Representatives, Production Supervisors/Leads, Customer Service Representatives, and IVS Warehouse as required.

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STANDARD OPERATING PROCEDURE (SOP)

3. Definitions

T	Description
S	Detailed inventory of all stock materials in
S	Detailed inventory of all consumable materials
	Raw materials required to produce jobs – Customer

4. References

5. Procedure

Materials required: Inventory Schedule A, Inventory Schedule B, Inventory Count Sheets, Warehouse Material Placards, and Warehouse Location Tags.

5.1. All stock materials in the facility will be counted and tracked on Schedule A.

5.1.1 – Customer specific materials will receive and additional “Unique” Color-Coded placard identifying the Customer Name, Job Name, and other information as required by Job Order.

5.2. All plant consumable items will be counted and tracked on Schedule B. Materials will be coded and dated as required for expiration dates as dictated by manufacturer.

5.3. Plant Inventory Schedules:

5.3.1 – Schedule A – Stock Materials will be counted monthly in the Physical Inventory. Daily usage will be tracked and noted to Plant Manager and Production Leads as required by stock level.

5.3.2 – Schedule A – Job Specific Stock Materials will be counted as needed to assure proper inventories available for completion of job order requirements.

5.3.3 – Schedule B – Plant Consumables Inventory will be counted weekly and managed daily. Specific attention to high-turn and long lead time items is needed.

5.4. Material Receiving and Check-in Process:

5.4.1 – All in-bound materials/items will be counted and matched to the job order per the Bill of Lading Documents.

5.4.2 – All received items will be open and inspected as needed per the job order requirements. Any damaged or order discrepancies will be brought to the attention of the Production Lead or Plant Manager as needed.

5.4.3 – Samples of all customer / job specific materials will be pulled and

Integrated Voting Systems

STANDARD OPERATING PROCEDURE (SOP)

given to the IVS Sales and CSR team as required.

5.5. Plant Inventory Process:

5.5.1 - All materials will be moved to the proper inventory locations in the warehouse.

5.5.2 - All “new” materials will be placarded and the quantity updated on Inventory Schedules as required in 5.3.

5.5.3 – All Job/Customer Specific Materials will receive an additional Color-Coded placard to identify it from raw materials inventory.

6. Criteria for Satisfactory Results

➤ IVS Sales/Customer Service:

- Confirms original work order materials requirements.
- Orders material/stock requirements for each job.
- Provides pre-order samples to Plant Manager and Production Lead for in-bound inspection process.
- Validates Samples from Plant upon arrival at IVS facility.

➤ IVS Plant Manager / Production Lead:

- Confirms plant inventories as required
- Fully inspects all in-bound materials at the receiving dock.
- Provides samples and communicates with sales customer services as needed.

7. Forms and Records

7.1. IVS Job Schedule

7.2. IVS Inventory Logs – Schedule A – Customer Materials, Schedule B – Shop Supplies/Consumables

Integrated Voting Systems

STANDARD OPERATING PROCEDURE (SOP)

INKJET OPERATIONS

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #: 5 – Date 8.17.17**

1. Purpose

1.1. To provide instruction on basic job actions, quality checks, set-up verification steps in preparing the inkjet systems.

2. Responsibility / Scope

2.1. Production supervisor, inkjet lead, and inkjet support positions. Procedures to be used when preparing an inkjet system for a new job. Procedure can be used at all inkjet processing positions.

3. Definitions

T	Description
F	Position placing mail pieces at infeed to inkjet
D	Data Processing

4. References

- 4.1. MPTQM List Mailer (MS1 – MS9)
- 4.2. MPTQM List Mailer (MF1 – MF2)

5. Procedure

Materials required: Correct work order packet for job / correct blank stock / USPS trays, sleeves, and mail sacks as required by job requirements.

Personnel needed: (2) production personnel consisting of a inkjet lead (feeder position) and inkjet support (mail piece QC, USPS handling unit production) based on job requirements. 3rd support employee may be needed as job requirements dictate.

5.1. Clean inkjet processing area of materials and debris from previous job production.
)Unused items are returned to inventory or customer per work order instructions.

5.2. Bring correct work order packet to inkjet station desk. Supervisor or warehouse personnel to bring proper stock materials to the inkjet location.

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STANDARD OPERATING PROCEDURE (SOP)

- 5.3. Perform pre-start set-up on inkjet machine with sample pieces for proper alignment /adjustment per job requirements.
- 5.4. Adjust feeder chute section
- 5.5. Adjust height of feed roller section – only one piece through
- 5.6. Adjust / align out feed guide roller
- 5.7. Set inkjet head height – closer to piece / better the print quality.
- 5.8. Run a “test” piece through the inkjet. Adjust each section as needed for smooth flow through each section. Run at normal operation speed – 18,000 PPH (pieces per hour) depending on piece / type of job.
- 5.9. Prepare feed table / guides
- 5.10. Synchronize feeder table / base feed table for smooth outflow.
- 5.11. To begin job production, select correct sequence for individual run – each run may have preferred “first-out” based on job / customer preference / zip code location.
- 5.12. Pull out DP list from work order packet – open job file - select job name - if job name not on machine menu - select NEW.
- 5.13. Type in data from DP list – to include new file name / job number... into Inkjet PC.
- 5.14. Verify file name / count for job from screen with work order DP data sheet – both must match or at least be one (1) more count on the screen than the DP file (accounts for the initial sample piece).
- 5.15. At Inkjet PC, set-up the print size (normal is Courier #9 unless otherwise noted on Notes section of work order). Check for correct number of lines in address – to include barcode line.
- 5.16. At Inkjet PC screen, adjust image to best fit the mail piece being processed – authorized / experienced operator only.
- 5.17. Center barcode / address manually to mail piece by moving print head north / south.
- 5.18. Run new sample through, checking printed address / barcode with – USPS Postal template #D-1010706 Rev G / Notice 67 – USPS, September 2000.
- 5.19. Verify first three (3) names from DP list loaded into Inkjet PC as found in

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the DP file. If NOT correct / STOP – contact supervisor. If correct, continue.

5.20. Complete Production Quality Check sheet – ALL sections and sign / date it. Take run sample / Production Quality Check sheet to production supervisor. Have Production supervisor sign / date it. This is to ensure that every aspect of the job is correct.

5.21. Match the reply envelope stock to samples in work order

5.22. If an election's inkjet job, a faxed copy of the first run sample MUST be taken to the CSR for customer faxed or email verification. Copies of faxed or emailed approved samples are found in the Sales office / Production office.

5.23. Confirm that data layout matches signed proof from the customer.

5.24. Verify that data file name for ink-jetting matches the work order and that record count is correct.

5.25. Align mailing address to show outgoing envelope and meet USPS clearance regulations.

5.26. Monitor print quality of all data throughout the ink-jetting process.

5.27. Scan, read and record customer 3 of 9 barcodes (voter ID) using barcode scanning equipment while printing. This confirms bar code is readable for county.

5.28. Read and verify Intelligent Mail barcodes throughout the ink- jetting process. Using USPS Template 4A as needed.

5.29. Verify that the matching code structure for insert matching on envelope and ballot are the same.

5.30. Move & restock all unused material to warehouse on completion.

5.31. Sorter operator to make on-line adjustments to meet operational speeds standard of 18,000 PPH. Sorter inspects discharged addressed mailers for blanks / doubles / ink print quality / barcode throughout run.

6. Criteria for Satisfactory Results

Quality on-line checks / operational duties:

➤ Inkjet Lead position: confirms raw mail piece is correct for job, removes any separator sheets from mail pieces, bends mail pieces for best feed. Loads correct mail pieces into feed chute / monitors feed flow at levels to eliminate feed jams. Confirms all job material are correct

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for the job in process. Maintains work area – housekeeping / brings correct raw material to work station. Break down empty boxes as time allows during the run.

- Inkjet Support position: verifies address print is correct, not smeared, machine output not running blanks or doubles. Inspects barcode for lines / gaps – adjust ink head to obtain best quality / fully legible address & barcode. Separates discharged mail pieces based on zip code designation – address bar has double asterisk to show change in zip code (* *). Operates in-line heater to dry / set inkjet print if mailer requires quick drying to prevent ink smears.
- Additional Inkjet support if required: removes addressed mailers from discharge feed conveyor / places mailers in proper mail tray – affix correct pre-printed mail tag on tray / tray covers placed on finished trays / transfers tray to cases or pallets for further processing. Maintains work area for housekeeping, prepares area for next run. Palletizing / stretch-wrapping of individual mail pallets as required for shipment.
- Spoilage Procedures
 - Save the misprinted, damaged, or illegible pieces for count recap at end of run. Obtain count and tag for reprint-reprocessing as needed.
 - Record missing / damaged mailers on production work order

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➤ Verification for data files –

- Verify Customer name / Job name match on Production and DP work order
- Verify file name from DP work order EXACTLY matches file name loaded on Inkjet station used
- Verify Total Record Count for EACH file loaded at Inkjet station EXACTLY matches the records
- Verify that the first three (3) records of each file loaded on the Inkjet match the record verification sheet(s) included with the DP work order

7. Forms and Records

7.1. Quality Record Table

7.2. Production Quality Control Sheet – to be included with Production work order

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STANDARD OPERATING PROCEDURE (SOP)

Quality Control – Inkjet process

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #:** 4 – Date 8.17.17

1. Purpose

1.1. To check and verify that jobs run on the inkjet systems are performed correctly per quality standards and established written work order. To do the job right the first time, every time

2. Responsibility / Scope

2.1. Responsibilities – Production inkjet crews & leads / Production manager / QC auditor

2.2. Scope – Production inkjet job sites / frequency – on every job run

3. Definitions

T	Description
C	Coding Accuracy Support System

4. References

4.1. MPTQM – MS-8, QI3, QI5

5. Procedure

Materials required: Inkjet Quality Procedures Checklist

5.1. QC inspector / auditor and operator perform the following checks:

- Front page of CASS report / Inkjet screen file name matches EXACTLY as Production work order
- Complete job packet with approved / signed sample piece
- Total piece count is one more than inkjet screen display versus CASS report

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- First ten (10) records printed / matched with screen – found on last page of CASS report
- Plastic USPS template D-1010706 Rev G used to measure parameters - OCR read area and barcode requirements.

5.2 Pieces must be checked for the following:

- Barcode clearance from left / right / top / bottom
- Barcode size – must contain 62 BARS for a Zip + 4 Delivery Point and Check digit – must fit in the barcode template
- Correct mailing piece for job / job region (if applies)
- Address block and barcode must fit COMPLETELY within the OCR Read Area
- Barcode fits in the BAR SIZE blocks of the barcode reader
- Barcode and address at least 1/8 inch clear of any other printing
- Print quality – no smears, lines, print in focus

Quality control test parameters:

- Quality checks are conducted at the job pre-start; be randomly checked for above quality no less than once per hour and at completion of production run. Operators conduct on-line inspection throughout run.
- Audit results are documented on the Daily Quality Assurance check list
- Audits results are stored in QA office files.

6. Forms and Records

6.1. Daily Quality Assurance Checklist (Rev. 33104)

6.2. Production Control / QA Job Track – Inkjetting process

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STANDARD OPERATING PROCEDURE (SOP)

INSERTER QUALITY OPERATIONS

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Production Manager*

Date in effect: March 2, 2017 **Revision #: 6 - Date -8.17.17**

1. Purpose

1.1. To provide clear, consistent, and repeatable instructions for the general operation of the inserting machines for quality results, and safe-efficient inserter machine operations

2. Responsibility / Scope

2.1. Inserter operator; Production manager/supervisor / QA staff

3. Definitions

T	Description
F	Folding / collating machine used to fold materials
	Multi-station (4-12 station) for envelope inserting

4. References

- 4.1. Raw material control SOP – PPRO0003
- 4.2. MPTQM List Mailer (MS1-MS9)
- 4.3. MPTQM List Mailer (MF1-MF2)

5. Procedure

5.1. Production manager – confirm correct work order packet for job with approved sample pieces properly stamped; signed off as entered on Production schedule and OK'd.

5.2. Warehouse person / QA or authorized production person to gather all required materials – correct envelopes, inserts, statement, return envelopes required for job. Confirm with signed sample piece or with sample verification binders (located at each inserter).

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- 5.3. Production manager, QA staff and machine operators are to verify correct materials per work order. Mail materials for job are to be staged with laser printed materials. Partial boxes to be inspected to confirm correct contents.
- 5.4. Only ONE (1) job is to be at the inserter workstation at a time – all other mail materials to be removed and stored properly.
- 5.5. Check “Double-Detector” on inserters – adjust for both missing inserts / double inserts by moving the adjustment screws in/out until detector light is triggered. Only FULLY trained personnel are to perform this adjustment.
- 5.6. Load statements / inserts (per work order) into inserter feed section – fan prior to loading.
- 5.7. Load inserts / return envelopes per work order into backside of inserter feed section. Set inserter pocket switches as used.
- 5.8. Load correct envelopes into front side of inserter feed section
- 5.9. Verify sufficient amount of water in sealer system – carefully fill as needed
- 5.10. Check that there is sufficient postage on the meter for the job.
- 5.11. Verify sufficient postmark ink in Hasler / Ascom postage meter – carefully fill as needed – do not overflow.
- 5.12. Supervisor / QA to verify correct postage per work order and postmark on envelope. Confirm correct endorsement (pre-printed / applied).
- 5.13. Quality checks are to be done throughout the operation by machine operator AND production supervisor / QA. Specific documentation to
Be developed:
- Discharged envelope – check for statement window – fully in envelope window; barcode 5/8” or greater from bottom of mail piece
 - Mail in envelope – no empty envelopes; address block within envelope window
 - Meter – sufficient postage – per job requirements

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STANDARD OPERATING PROCEDURE (SOP)

- Postage rate, classification is correct per work order instructions
- Inserts are correctly placed in envelope;
- Envelope is fully sealed

5.14. Place sealed envelopes in clean letter tray (free of moisture / dirt / debris)

5.15. Fill mail tray / set filled tray on mail cart / work order packet placed with job. Upon completion of all mail inserting jobs, move finished mail to the OCR for processing (if applicable).

5.16. Verify count for laser / data processing job – meter counts. If incorrect, contact Production / DP manager with count discrepancies. If count matches DP count, complete count verification section at bottom of laser sheet. Turn in with meter sheet to the Production office.

6. Criteria for Satisfactory Results

- Correct envelopes per work order
- Envelopes fully sealed
- Correct inserted materials per work order
- Address placed in envelope window correctly
- Correct postmark information on envelope
- Count matches that of DP laser / report

7. Forms and Records

- 7.1. Daily QA Audit Sheet (PSQS0001-1)
- 7.2. Postage meter sheet
- 7.3. Laser completion sheet

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STANDARD OPERATING PROCEDURE (SOP)

Quality Control – Inserting process

Document issued by: *Director of Quality/ Quality Systems Document*

approved by: *Director of Quality/ Quality Systems*

Date in effect: March 2, 2017 **Revision #: 7 – Dated 8.17.17**

1. Purpose

1.1. To check and verify that jobs run on the inserters are performed correctly per quality standards and established written work order.

2. Responsibility / Scope

2.1. Responsibilities – Production inserters / Production manager/ QA auditor

2.2. Scope – Production inserting job sites / frequency – on every job run

3. Definitions

T	Description
D	Data Processing

4. **References** - MPTQM Standards QI 1, QI5, QI3, QI5,

5. Procedure

Materials required: Daily Quality Assurance checks sheet, pen, clipboard or worktable

5.1. All inserting jobs must have supervisory sign-off prior to starting job (Yellow Inserter QC checklist)

5.2. No job is signed off by anyone without a job jacket / signed work order having signed sample / authorized pieces. All inserting jobs are to be inspected for:

- Correct raw materials (envelopes / statements-inserts, return envelopes)
- Correct postage rate and date (month-date-year)
- Correct address placement in window envelopes
- Barcode readability (if applies)

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STANDARD OPERATING PROCEDURE (SOP)

- Pass the Tap test – address falls within window clearance standards
- Correct job counts – match DP / Production work order
- If count DOES NOT MATCH DP / Production work order, contact Production Manager immediately
- Correct imprint / endorsement / visual clarity (if required)
- See #5.4 for detailed quality checks

5.3 Sorting procedures – all sorters must follow the following when sorting:

- If on-line sorting, follow sort breaks on Mail Sortation reports.

5.4 Quality Control checks – randomly sample about 100 - 300 completed envelopes from tray – check front / middle / back of tray. Check for:

5.5 Match envelope stocks to sample in work order.

5.6 Check for and match additional inserts to sample in work order.

5.7 Set-up inserter to match the order of inserts in the envelope to the sample in the work order.

5.8 Set-up camera systems to match reply envelope and ballot using the Insert Matching Code on each.

5.9 In case of camera mismatch, check contents of 3 voter packets on either side of the mismatch.

5.10 Reprint any ballots or envelopes damaged during the inserting process.

5.11 Move and restock all unused material to warehouse on completion of inserting.

- Good address in window – visible / bottom of address block within 1/8 inch from bottom of address window
- Meter clarity / legible / correct postmark
- Correct postmark date for job
- Envelopes correct / properly sealed
- Barcode clearance acceptable

Inspect for correct contents (proper inserts / correct envelope)

Best to pull samples directly from meter discharge and open when glue has not set / re-seal after inspection.

Correct inserts / proper order / inserts blocking address

5.13 Trays: tray tag holders cannot have stickers on them – remove any old tray tags before using.

5.13.1 If machine sorting required, remove any old tray tags and place correct tray tag per Mail Sortation report

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STANDARD OPERATING PROCEDURE (SOP)

6. Criteria for Satisfactory Results

- If all above is correct, tray is accepted.
- If one (1) envelope fails, re-check additional ten (10) envelopes and inspected for above quality checks tray.
- If zero (0) defects found, tray is accepted.
- If one (1) fails, entire tray is set aside for 100% inspection.
- Remove and correct any defective mail found

7. Forms and Records

- 7.1. Daily Quality Assurance checklist (PSQA0001)

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STANDARD OPERATING PROCEDURE (SOP)

QUALITY PARAMETERS FOR BALLOT PRINTING

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #:** 3 Dated 8.17.17

1. Purpose

1.1. To provide basic direction on quality measures / print attributes for election ballot printing. Refer to Integrated Voting Systems (IVS) Ballot Inspection and Specifications Manual, located in the Vortex office area.

2. Responsibility / Scope

2.1. Responsibilities – Digital press operators / IVS managers

2.2. Scope – “The Vortex” ballot print / processing area of IVS – authorized personnel only; frequency of quality inspection – throughout the ballot printing process / at a minimum of three times per ballot print job.

3. Definitions

T	Description
I	Integrated Voting Systems
T	To Be Determined

4. References

4.1. OPEN – may not be part of MPTQM (TBD)

5. Procedure

This SOP is an overview of quality parameters that are unique with our ballot printing processes and will provide a listing of quality parameters / measures used in our ballot printing process.

- Correct ballot files printed / files not duplicated

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- Matching ballot files / codes on both front / back of ballot; printed ballot codes match that of the Print report
- Tabulation scanner verification – minimum of three (3) un-voted ballots per ballot print job are to be tested / scanned through any available scanner. Documentation of test completed – initials that ballot print job is completed found on the Ballot Roadmap (blue form).
- Ballot print roadmap forms are initialed ONLY when the print job is completed and quality scanner tests are complete.
- Ballots are printed in the correct number sequence –
 - All ballots are printed in REVERSE ORDER sequence (highest number on top, lowest number at bottom of stack)
- Non-perforated ballot paper will be standard number sequence
- Vertical 1” paper will have rough side (UP) for printing of ballot backs, smooth side (UP) for ballot fronts. Vertical perf are to be loaded towards feed side of tray.
- Ballots are to be free of ink smears, spots, color streaks, fuser oil stains; ballots must meet color standards and image / artwork – have state or county watermark seals per ballot work order instructions.
- Ballots NOT meeting visual quality standards are to be destroyed via shredding before completing the work shift.
- Finished ballots are to be placed in prepared ballot storage boxes with corresponding box labels.
- Finished ballots are to be free of edge damage

6. Criteria for Satisfactory Results

- Available scanner PASS
- Print quality standards are met

7. Forms and Records

- 7.1. Ballot Print reports
- 7.2. Available scanner ta

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STANDARD OPERATING PROCEDURE (SOP)

BALLOT REPRINT - SINGLE / MULTIPLE PAGES

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #:** 1 – Dated 8.17.17

1. Purpose

1.1. To correctly / efficiently reprint ballots when necessary

2. Responsibility / Scope

2.1. Responsibilities – Digital press operators / IVS managers

2.2. Scope – Ballot printing area – Vortex, IVS; frequency – as needed

3. Definitions

T	Description

4. **References** - None

5. Procedure

Materials required: File page(s) to be reprinted / Reprint log

Single page reprints –

5.1. Go to file needing corrected page(s)

5.2. Click File...Pages

5.3. CTRL click on page(s)

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5.4. CTRL A on files

5.5. CTRL click on page

5.6. Press DELETE key...Are you sure? Press YES

5.7. File – Save As... use same file name with _extension (A,B,C...)

Alternate Method –

5.8 Identify ballot number(s) / precinct needing to be reprinted.

5.9 Open Adobe Acrobat 10.0 (from PC START tab).

5.10 Select ballot file needed for reprint using the file folder icon at top toolbar.

Use the UP arrow to locate specific file desired.

5.11 To locate page(s) desired for reprint, multiply the ballot number by 2;
subtract 1 to reach the reprint ballot needed.

5.11.1 Example: Ballot #45 needs to be reprinted ... multiply 45 x 2, subtract 1 =

89. The 89th page will be the front side of the ballot and the backside will be page 90.

5.12 Go to Printer icon at toolbar – Properties – Advanced

5.13 At window, select Paper Size / Select PostScript Custom Page / Set correct width &
height for ballot – 8.7” width by 12”, 15” or 19” – depending on ballot.

5.14 Set paper feed direction – Short-edge first. Click OK and OK to close all windows to
return to Print Window.

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5.15 File will rip to the CREO process folder. Once ripped, the file will transfer from the Process Queue to the Print Queue window.

5.16 Click Print Process - click on file to open. Set Print Parameters – number of copies printed, select Print Range – set even for ballot backs, odd for ballot fronts.

5.17 At Paper Stock tab, verify paper tray, paper set name and paper size.

5.18 Press SUBMIT to print.

6. Criteria for Satisfactory Results

➤ Correct ballot reprinted

7. Forms and Records

7.1. Reprint Log form.

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STANDARD OPERATING PROCEDURE (SOP)

DIGITAL PRINTING – QA PROCEDURES

Document issued by: *Director of Quality/ Quality Systems*

Document approved by: *Department Manager*

Date in effect: March 2, 2017 **Revision #:** 4 Dated 8.17.17

1. Purpose

1.1. To provide general instructions on the verification of files and quality checks performed on digital printing jobs; to have proper documentation confirming that verification and quality checks are performed as required.

2. Responsibility / Scope

2.1. Responsibilities – digital print operator, department manager and/or IVS managers; QA-QS Manager

2.2. Scope – frequency of use: each digital print job; areas of use: Vortex print area of IVS and Kodak Solution Area

3. Definitions

T	Description
M	Mail Preparation Total Quality Management
M	Month – date - year

4. References

4.1. **MPTQM – Mail Piece Manufacturing (Printing) – MP3, MP5 – MP6**

5. Procedure

Materials required:

Correct paper stock / color ink toner / lubrication materials (expendables) / data files / power / climate controls / process computers / printers / office furniture / Press Proof labels / IVS Print work order / Xerox support.

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STANDARD OPERATING PROCEDURE (SOP)

5.1. File naming: *Proof files*

5.1.1. Proof File names will contain: *filename* + "PROOF" + Date in mmddyy.ext - example – JulyNewsletterPROOF071105.pdf

5.2. File naming: *Print Files*

5.2.1. Print File names will contain: *filename* + "FINAL" + Date in mmddyy.ext
- Example – JulyNewsletterFINAL071105.pdf

5.2.2. Subsequent proof or final files shall have a numeral in front of "PROOF" or "FINAL" to indicate its order. For instance, the second proof for the job above would be named JulyNewsletter2PROOF071105.pdf

5.2.3. Only the current file to be printed should be on the file transfer media (Thumb Drive) to ensure that the correct file is printed. Please remove any files submitted previously for printing.

5.2.4. Proofs for customers – Proofs for customer can be run any way they desire. Recommend that they be run on actual stock but realize that larger sizes cannot be faxed.

5.2.5. Press Proofs – A press proof will be run on actual stock called for in the work order. This press proof may be signed by the customer or by a IVS staff person familiar with how the job is to be. NOTE: Jobs WILL NOT BE RUN WITHOUT A SIGNED PRESS PROOF.

5.2.6. If possible, the original proof signed by the customer should be attached to the press proof.

5.3. Changes – Any changes to the job after a Press Proof has been signed will require a new Press Proof with signatures.

5.4. Run-Time QC checks:

5.4.1. First printed piece out will be visually checked and compared against the press proof. Any variations from the press proof – image, color, content or other deviation from the press proof, STOP – notify management and / or make corrections if qualified.

5.4.2. During the press run, spot checks on the print output are done looking at color, image quality, streaks and other visual issues. Minimum quality checks to performed at first – middle of run and at end of run, more frequently on longer press runs.

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5.4.3. Documentation of these checks will be initialed off by the press operator on a “Press Proof” label that is attached to the Press Proof.

5.4.4. Instructions for Press Proof label completion:

5.4.4.1. PRESS PROOF OK__Customer / IVS rep must sign
(Check copy for quality and correctness on the following copies:

_____ 1st COPY _____ Mid Copy _____ Last Copy_____

- *Press operator will initial here after performing quality checks on these copies.*

Quantity Run: _____ Date(s): _____

- *Press operator will write quantity they printed here / date*

Press Operator Signature: _____

- *Press operator will sign off here when job is completed indicating they have done required checks.*

QC Follow-up: _____ Date: _____

- *QC department signs here when they do a random check to ensure that QC measures are being done.*

Print Steps:

5.5. Verify that all materials (paper stock, work orders, other documents, etc) associated with other jobs are cleared from printer area.

5.6. Verify paper stock(s) are correct per work order before commencing printing.

5.7. Start print and perform following Quality Assurance throughout print run:

5.7.1. Fan printed pages on one side, focusing on 50% of the vertical page – look for color intensity / alignment / print quality / foreign ink marks. Repeat visual quality check on opposite side of pages printed.

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5.7.2. Look for out-of-place or changes as printed sheets are fanned

5.7.3. Record checks for first copy, mid-run and last copy for QC checks

5.7.4. If quality issues noted, stop printer – inspect for more detailed check.

5.7.5. Notify Manager of “Down” machine and call for technician service on printer.

5.7.6. QA Note: In case poor print quality is detected – release to production is only approved by General Manager / Director - Quality Assurance.

5.8. Upon completion of print job:

5.8.1. Press operator records quantity; compares against required print amount / date. If count does NOT match required amount, run proper amount.

5.8.2. Print operator signs when job is completed indicating that they have performed required quality checks.

6. Criteria for Satisfactory Results

➤ Correct job with correct materials printed in the required quantity in the highest-possible quality level.

➤ Documentation is complete for the job (work order / signed sample piece / Press Proof Label.

7. Forms and Records

7.1. IVS Work Order

7.2. Press Proof Label

7.3. Press Proof / any changes in the job documented and approved

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STANDARD OPERATING PROCEDURE (SOP)

PREVENTATIVE MAINTENANCE - PRODUCTION

Document issued by: *Director of Quality / Quality Systems*

Document approved by: *General Manager*

Date in effect: March 2, 2017 **Revision #:** 4 – Dated 8.17.17

1. Purpose

1.1. To define the general goals and focus of our Preventive Maintenance program for production (mail and print) operations at IVS, how it will benefit our operations and help achieve business goals. This overview SOP will also include daily and routine / scheduled preventive maintenance of powered warehouse vehicles (forklifts and powered pallet jacks). Preventive Maintenance is an essential element in MPTQM.

2. Responsibility / Scope

2.1. Responsibilities – IVS Management team / IVS Production personnel / Warehouse and dock personnel

2.2. Scope – This PM program will be designed specifically for production operations, production printing and warehouse operations. Frequency of use will be based on specific equipment usage and manufacturer recommendations. Specific work instructions are found with each PM logbook. Fleet Preventive Maintenance will be addressed in a separate document.

3. Definitions

T	Description
P	Preventive Maintenance - Production
M	Mail Preparation Total Quality Management

4. References

4.1. MPTQM Standards – MP1 / MS2 / MF1 / SP1 / SN1 / PO7

5. Procedure

Materials required: Equipment Logbooks / general maintenance materials / oils
– lubricants / safety equipment

5.1. As this is a general overview for production PM, specific work instructions will not be included in this document. The scope of this production PM will include all primary and some secondary production equipment that supports mail handling and delivery to USPS.

5.2. Preventive maintenance of primary equipment will consist of weekly, monthly, semi-annual and annual preventive maintenance steps. By working with our mail equipment partners (Mailers' Edge, Timpac and Bowe, Bell & Howell, Imperial), we have developed basic in-house procedures that address machine lubrication, cleaning, visual inspection and other preventive maintenance measures.

5.3. By training personnel on basic PM activities, building interest along personnel in maintaining clean / safe-operating equipment and including key personnel in maintenance decision-making, we can foster greater interest in their equipment condition.

5.4. Routine audits of PM activities are taken, documented and reported to management, identifying opportunities, rewarding good compliance and further building interest.

5.5. Equipment safety is a primary concern at IVS – operators are required to and fully encouraged to report unsafe working conditions, develop correction plans and be involved in safety audits.

6. Criteria for Satisfactory Results

- Routine audits / compliance reports
- Reduction of major machine break-down
- Safety issues reported / acted upon in a timely manner
- Reward measures
- High levels of quality-output mail material

7. Forms and Records

7.1. Equipment PM logs – Production-warehouse / Print Shop and Laser Shop