



RETURN BIDS TO : - RETOURNER LES SOUMISSION À:

Canada Revenue Agency
Agence du revenu du Canada
See herein / Voir dans ce document

Proposal to: Canada Revenue Agency
We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein and/or attached hereto, the goods and/or services listed herein and on any attached sheets at the price(s) set out therefor.

Proposition à : l'Agence du revenu du Canada
Nous offrons par la présente de vendre à Sa Majesté la Reine du Chef du Canada, en conformité avec les conditions énoncées dans la présente incluses par référence dans la présente et/ou incluses par référence aux annexes jointes à la présente et ci-jointes, les biens et/ou services énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

Bidder's Legal Name and Address - (ensure the Bidder's complete legal name is properly set out)
Raison sociale et adresse du Soumissionnaire - (s'assurer que le nom légal au complet du soumissionnaire est correctement indiqué)

Blank lines for bidder information

Bidder is required to identify below the name and title of the individual authorized to sign on behalf of the Bidder - Soumissionnaire doit identifier ci-bas le nom et le titre de la personne autorisée à signer au nom du soumissionnaire

Form fields for Name/Nom, Title/Titre, Signature, Date, Telephone No., Fax No., and E-mail address

AMENDMENT TO REQUEST FOR PROPOSAL / MODIFICATION DE DEMANDE DE PROPOSITION

Main form table with sections: Title - Sujet, Solicitation No. - No de l'invitation, Amendment No. - N° modif., Solicitation closes - L'invitation prend fin, Contracting Authority - Autorité contractante, Telephone No. - No de téléphone, Fax No. - No de télécopieur, Destination - Destination



SOLICITATION AMENDMENT # 001

This solicitation amendment is raised to:

1. Address the following questions submitted during the solicitation period as per RFP; and
 2. Amend the RFP.
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1. QUESTIONS AND ANSWERS

Q1. In Appendix 1. Mandatory Criteria, Evaluation procedures. CRA references domestic commercial data and international commercial data. What is CRA's definition of domestic and international?

A1. Domestic = Canada
International = two or more countries, other than Canada.

Q2. In Appendix 1. Mandatory Criteria , Evaluation procedures Group C, for Searchable database, will CRA accept a response that includes Canadian records only, North America records only?, International records only?

A2. No, for Group C, CRA would not accept a response that includes Canadian records only.

No, for Group C, CRA would not accept a response that includes International records only.

A response with North American records only would be acceptable as long as the data/records contain data on Canada and US and Mexico.

Q3. For section 1.0 Mandatory Requirements under A1. Domestic Commercial Data, CRA states 'bulk data must contain at least 50 million comprehensive records on active entities and 25 million comprehensive records on inactive entities. Question: If by domestic CRA means Canadian, there are est 1.1M businesses in Canada as per Industry Canada. Based on this, will the response not meet the mandatory requirement and therefore render the bid non responsive?

A3. Please refer to modification #3 below.

Q4. Under section 1.0 - Mandatory requirements - Domestic Commercial Data, criteria A1 states: "The bulk data must contain at least 50 million comprehensive records on active entities and 25 million comprehensive records on inactive entities." Can you please clarify and verify that these numbers are indeed for Canadian businesses only. (see p. 23 of the RFP). These numbers are also reflected in the Point Rated Criteria A2 (p. 41 of the RFP).

A4. See response A3.

Q5. We're working with team on the mandatory requirements and in the case we don't meet mandatory requirements will our bid be considered non-compliant and be void? As we work through this...is there an opportunity for an extension and what would that entail? We would be seeking be an additional 2 weeks.

A5. If the mandatory requirements are not met, the bid will be considered non-compliant and void. Please see modification #1 below regarding the RFP extension.



2. AMENDMENTS TO THE RFP

1. On the front page of the Request For Proposal document:

DELETE:

2017-11-06

INSERT:

2017-11-17

2. At Section 1.3 Glossary of Terms;

INSERT:

TERM	DEFINITION
Domestic	Canada
International	Two or more countries, other than Canada



3. At Appendix 1: Mandatory Criteria, DELETE Section 1.0 Mandatory Requirements IN ITS ENTIRETY and REPLACE WITH:

1.0 MANDATORY REQUIREMENTS

1.1 APPLICABLE TO GROUP A – DOMESTIC COMMERCIAL DATA:

Criteria	Mandatory Requirement	Bidder Response (Yes/No)
A1	Bulk Data Requirements	
	<ul style="list-style-type: none"> • The bulk data must contain at least 1.0 million comprehensive records on active domestic entities and 0.5 million comprehensive records on inactive domestic entities. 	
	<ul style="list-style-type: none"> • The bulk data must be provided via Secure File Transfer Protocol (SFTP); 	
	<ul style="list-style-type: none"> • The bulk data must be able to be hosted on a 'postgresql' database server in delimited text; 	
	<ul style="list-style-type: none"> • The bulk data must include data from January 2016 and onward; 	
	<ul style="list-style-type: none"> • All data must have been validated by the Contractor; and • The first delivery of the bulk data must be provided to the Technical Authority within 30 calendar days of the contract award. 	
A2	Data Dictionary and Other Supporting Documentation	
	<ul style="list-style-type: none"> • A data dictionary must be provided in English and French and must contain the following: <ul style="list-style-type: none"> ○ The name, definition, type of character, length, and location within the file for each data element in the data; ○ Descriptions for any codes used in the data elements; ○ Sample data (minimum 10 records); 	
	<ul style="list-style-type: none"> • All supporting documentation must be in English; and • The data dictionary and other supporting documentation must be provided to the Technical Authority within 30 calendar days of the contract award. 	
A3	Bulk Data Updates	
	<ul style="list-style-type: none"> • Bulk data updates must be provided to the Technical Authority on or before the first business day of every month; 	
	<ul style="list-style-type: none"> • Bulk data updates must be provided via Secure File Transfer Protocol (SFTP); 	
	<ul style="list-style-type: none"> • Bulk data updates must be able to be hosted on a 'postgresql' database server in delimited text; 	
	<ul style="list-style-type: none"> • All data updates must be validated by the Contractor; and • Bulk data updates must clearly indicate/demonstrate what has been changed since the last update. 	



1.2 APPLICABLE TO GROUP B – INTERNATIONAL COMMERCIAL DATA:

Criteria	Mandatory Requirement	Bidder Response (Yes/No)
B1	Bulk Data Requirements	
	<ul style="list-style-type: none"> • The bulk data must contain at least 50 million comprehensive records on active international entities and 25 million comprehensive records on inactive international entities. 	
	<ul style="list-style-type: none"> • The bulk data must be provided via Secure File Transfer Protocol (SFTP); 	
	<ul style="list-style-type: none"> • The bulk data must be able to be hosted on a 'postgresql' database server in delimited text; 	
	<ul style="list-style-type: none"> • The bulk data must include data from January 2016 and onward; 	
	<ul style="list-style-type: none"> • All data must have been validated by the Contractor; and 	
	<ul style="list-style-type: none"> • The first delivery of the bulk data must be provided to the Technical Authority within 30 calendar days of the contract award. 	
B2	Data Dictionary and Other Supporting Documentation	
	<ul style="list-style-type: none"> • A data dictionary must be provided in English and French and must contain the following: <ul style="list-style-type: none"> ○ The name, definition, type of character, length, and location within the file for each data element in the data; ○ Descriptions for any codes used in the data elements; ○ Sample data (minimum 10 records); 	
	<ul style="list-style-type: none"> • All supporting documentation must be in English; and 	
	<ul style="list-style-type: none"> • The data dictionary and other supporting documentation must be provided to the Technical Authority within 30 calendar days of the contract award. 	
B3	Bulk Data Updates	
	<ul style="list-style-type: none"> • Bulk data updates must be provided to the Technical Authority on or before the first business day of every month; 	
	<ul style="list-style-type: none"> • Bulk data updates must be provided via Secure File Transfer Protocol (SFTP); 	
	<ul style="list-style-type: none"> • Bulk data updates must be able to be hosted on a 'postgresql' database server in delimited text; 	
	<ul style="list-style-type: none"> • All data updates must be validated by the Contractor; and 	
<ul style="list-style-type: none"> • Bulk data updates must clearly indicate/demonstrate what has been changed since the last update. 		



1.3 APPLICABLE TO GROUP C: SEARCHABLE DATABASE:

Criteria	Mandatory Requirement	Bidder Response (Yes/No)
C1	Database Requirements	
	<ul style="list-style-type: none"> The database must contain at least 1.0 million comprehensive records on active domestic entities and 0.5 million comprehensive records on inactive domestic entities. 	
	<ul style="list-style-type: none"> The database must contain at least 50 million comprehensive records on active international entities and 25 million comprehensive records on inactive international entities; 	
	<ul style="list-style-type: none"> The database must include data from January 2012 and onward; 	
	<ul style="list-style-type: none"> All data must have been validated by the Contractor; 	
	<ul style="list-style-type: none"> The database must be updated on a daily basis; and 	
	<ul style="list-style-type: none"> Identify the source of the data if available (If the source of the data is not originating from the vendor itself, then usually it is derived from another publisher, supplier, company, etc.). 	
C2	Users' Access	
	<ul style="list-style-type: none"> The database must provide simultaneous unlimited online access for CRA users; 	
	<ul style="list-style-type: none"> The database must be accessible to users on a 24 hour /7 days a week basis; 	
	<ul style="list-style-type: none"> The database interface must be provided in English and French; 	
	<ul style="list-style-type: none"> The Contractor must provide and maintain secure access to the database (e.g. user IDs and Passwords); 	
	<ul style="list-style-type: none"> The Contractor must provide access or licences for a minimum 100 users; 	
	<ul style="list-style-type: none"> The Contractor must update the list of authorized users within 5 business days of being requested; 	
	<ul style="list-style-type: none"> The Contractor must provide training accounts as required; and The Contractor must provide authorized CRA users with access to the database within 30 calendar days of contract award. 	
C3	Functionality	
	<p>The database must allow for:</p> <ul style="list-style-type: none"> Downloading and saving of documents to the user's computer. Once downloaded, these documents must not require a connection to the database in order to be accessed. Storing, viewing, searching, emailing, and printing of documents downloaded from the database, using at least 3 of the following industry standard formats: Word, PDF, Excel, CSV, or HTML files; The creation and generation of reports that collate information available on individuals or companies contained in the data element fields. The user must be able to build, manipulate and customize their own reports. 	



2. DELETE Appendix 2: Point Rated Criteria, IN ITS ENTIRETY and REPLACE WITH:

Technical bids will be assessed separately against the evaluation criteria identified below. Point-rated criteria not addressed in the bid will result in a score of zero being assigned against that particular criterion.

All point rated criteria that are included in the winning bidders proposal, will be added to Annex A, Statement of Work (SOW), and will form part of the resulting contract(s).

1.0 Group A - Bulk Domestic Commercial Data

	Criteria	Max. Available Points	Rating Scale	Bidder Response
A1	<p>In addition to the data elements identified in the mandatory requirements, the bidder should indicate whether its proposal includes the following data elements in its domestic commercial data by responding “yes” or “no” to each bullet below in the bidder response section.</p> <p>The bidder will receive two (2) points for each data element they offer to provide.</p>			
	Entity Identification			
	<ul style="list-style-type: none"> A data element that will indicate geographical information including one of the following: longitude and latitude, geospatial coordinates and GPS codes; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide details of the top three suppliers (determined by total dollar value of all payments made) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide the details of the top three competitors (determined by sales volume) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the number of employees for the entire organization including all subsidiaries and branches. This element will indicate if the number is exact or an estimate and will indicate if the principals are included in the number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will identify any criminal charges for which a conviction(s) was found and for which a pardon has not been received. This element will also indicate if no criminal record exists; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether mail is deliverable; 	2 points	Yes = 2 points No = 0 points	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
	<ul style="list-style-type: none"> A data element that will indicate whether the physical address exists. 	2 points	Yes = 2 points No = 0 points	
Financial Information				
	<ul style="list-style-type: none"> Data elements that will contain the following 4 financial ratios for the entity: <ul style="list-style-type: none"> earnings per share ratio; debt to equity ratio; current ratio; quick ratio; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide a listing of all payables that are in Collections; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the dollar values associated with any judgements; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the total number of suits settled out of court; 	2 points	Yes = 2 points No = 0 points	
A2	The bidder should state in the bidder response section, the number of active and inactive corporations, unincorporated businesses, charities, governments and other entities that it will provide in its domestic commercial data.	16 points	<p>The bidder's proposal indicates its data contains:</p> <p>2 points – greater than (>) 1.00 million, equal or less than (\leq) 1.30 million active domestic entities</p> <p>2 points – greater than (>) 0.50 million, equal or less than (\leq) 0.80 million inactive domestic entities</p> <p>4 points – greater than (>) 1.30 million, equal or less than (\leq) 1.60 million active</p>	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
			domestic business entities 4 points – greater than (>) 0.80 million equal or less than (\leq) 1.10 million inactive domestic entities 8 points – greater than (>) 1.60 million active domestic entities 8 points - greater than (>) 1.10 million inactive domestic entities	
A3	<p>Other Supporting Documentation:</p> <p>The bidder should state “yes” or “no” in the bidder response section if they will provide all supporting documentation in French.</p> <p>The bidder will receive 2 points if they will provide all supporting documentation in French.</p>	2 points	Yes = 2 points No = 0 points	
Total Available Points		40 Pts		
Minimum Points Required		28 Pts		



2.0 Group B – Bulk International Commercial Data

	Criteria	Max. Available Points	Rating Scale	Bidder Response
B1	<p>In addition to the data elements identified in the mandatory requirements, the bidder should indicate whether its proposal includes the following data elements in its international commercial data by responding “yes” or “no” to each bullet below in the bidder response section.</p> <p>The bidder will receive 2 points for each data element they offer to provide.</p>			
	Entity Identification			
	<ul style="list-style-type: none"> A data element that will indicate Geographical information including one of the following: longitude and latitude, geospatial coordinates and GPS codes; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide details of the top three suppliers (determined by total dollar value of all payments made) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide the details of the top three competitors (determined by sales volume) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the number of employees for the entire organization including all subsidiaries and branches. This element will indicate if the number is exact or an estimate and will indicate if the principals are included in the number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will identify any criminal charges for which a conviction(s) was found and for which a pardon has not been received. This element will also indicate if no criminal record exists; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether mail is deliverable; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether the physical address exists; 	2 points	Yes = 2 points No = 0 points	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
	Financial Information			
	<ul style="list-style-type: none"> • A data element that will contain the following 4 financial ratios for the entity; <ul style="list-style-type: none"> ○ earnings per share ratio; ○ debt to equity ratio; ○ current ratio; ○ quick ratio; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> • A data element that will provide a listing of all payables that are in Collections; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> • A data element that will indicate the dollar values associated with any judgements; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> • A data element that will indicate the total number of suits settled out of court. 	2 points	Yes = 2 points No = 0 points	
B2	The bidder should state in the bidder response section, the number of active and inactive corporations, unincorporated businesses, charities, governments and other entities that it will provide in its international commercial data.	16 points	<p>The bidder's proposal indicates its data contains:</p> <p>2 points – greater than (>) 50 million equal or less than (\leq) 100 million active international entities</p> <p>2 points – greater than (>) 25 million equal or less than (\leq) 50 million inactive international entities</p> <p>4 points – greater than (>) 100 million equal or less than (\leq) 150 million active international entities</p> <p>4 points – greater than (>) 50 million</p>	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
			equal or less than (\leq) 75 million inactive international entities 8 points – greater than ($>$) 150 million active international entities 8 points – greater than ($>$) 75 million inactive international entities	
B3	Other Supporting Documentation The bidder should state “yes” or “no” in the bidder response section if they will provide all supporting documentation in French. The bidder will receive 2 points if they will provide all supporting documentation in French.	2 points	Yes = 2 points No = 0 points	
Total Available Points		40 Pts		
Minimum Points Required		28 Pts		



3.0 Group C – Searchable Database

	Criteria	Max. Available Points	Rating Scale	Bidder Response
C1	<p>In addition to the data elements identified in the mandatory requirements, the bidder should indicate whether its proposal includes the following data elements in its searchable database by responding “yes” or “no” to each bullet below in the bidder response section.</p> <p>The bidder will receive 2 points for each data element they offer to provide.</p>			
	Entity Identification			
	<ul style="list-style-type: none"> A data element that will indicate the names of shareholders that are individuals or trusts; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will list the salaries of all currently listed officers and directors; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the number of years the position has been held by all current officers and directors; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the date the business was started/registered; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the date the business became incorporated; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the jurisdiction at time of incorporation; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the current jurisdiction; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the date the business became inactive; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate any other business affiliations of the directors of the entity; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the Citizenship of all current directors; 	2 points	Yes = 2 points No = 0 points	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
	Financial Information			
	<ul style="list-style-type: none"> A data element that will contain the financial statements (balance sheet and income statement) for the two previous years of the top three competitors (as determined by sales volume) of the entity; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether the database contains the Notes to the financial statements for the two previous years of the top three competitors (as determined by sales volume) of the entity; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will list all assets owned including properties (facilities & buildings); 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide details of the top three suppliers (determined by total dollar value of all payments made) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will provide the details of the top three competitors (determined by sales volume) including the name, address and an identifier number; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will contain the following 4 financial ratios for the entity <ul style="list-style-type: none"> earnings per share ratio; debt to equity ratio; current ratio; quick ratio; 	2 points	Yes = 2 points No = 0 points	
	Legal Claims and Actions			
	<ul style="list-style-type: none"> A data element that will indicate the dollar values associated with any judgements; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will show a listing of all payables in Collections; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the total number of suits settled out of court; 	2 points	Yes = 2 points No = 0 points	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
	<ul style="list-style-type: none"> A data element that will indicate the existing patents, intellectual property, or copyrights; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the business news releases, newsletters, media coverage; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate trend reporting of credit risk; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether the entity owns or rents the facilities at the business address; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate whether the business operates from the owner's residence; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the monthly credit scores based on the promptness of payments to creditors for the current and past 2 fiscal years; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the monthly risk scores of business default within 12 months for the current and past 2 fiscal years; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the monthly risk scores of delinquent payments over the next 12 months for the current and past 2 fiscal years; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the current and expected financial condition of the entity; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> A data element that will indicate the details of payment history including total payments, frequency, defaults, lateness, etc.). 	2 points	Yes = 2 points No = 0 points	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
C2	The bidder should state in the bidder response section, the number of active and inactive corporations, unincorporated businesses, charities, governments and other entities contained in their searchable database.	16 points	<p>The bidder's proposal indicates its data contains:</p> <p>2 points – greater than (>) 50 million, equal or less than (\leq) 100 million active international entities</p> <p>And</p> <p>greater than (>) 1.00 million, equal or less than (\leq) 1.30 million active domestic entities</p> <p>2 points – greater than (>) 25 million, equal or less than (\leq) 50 million inactive international entities</p> <p>And</p> <p>greater than (>) 0.50 million, equal or less than (\leq) 0.80 million inactive domestic entities</p> <p>4 points – greater than (>) 100 million, equal or less than (\leq) 150 million active international entities</p> <p>and</p> <p>greater than (>) 1.30 million, equal or less than (\leq) 1.60 million active domestic entities</p>	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
			<p>4 points – greater than (>) 50 million, equal or less than (\leq) 75 million inactive international entities</p> <p>and</p> <p>greater than (>) 0.80 million, equal or less than (\leq) 1.10 million inactive domestic entities</p> <p>8 points – greater than (>) 150 million active international entities</p> <p>and</p> <p>greater than (>) 1.60 million active domestic entities</p> <p>8 points – greater than (>) 75 million inactive international entities</p> <p>and</p> <p>greater than (>) 1.10 million inactive domestic entities</p>	



	Criteria	Max. Available Points	Rating Scale	Bidder Response
C3	<p>Functionality:</p> <p>In addition to the database functionality identified in the mandatory requirements, the bidder should indicate whether its proposal includes the following functionality in a searchable database by responding “yes” or “no” to each bullet below in the bidder response section.</p> <p>The bidder will receive 2 points for each database functionality.</p>			
	<ul style="list-style-type: none"> • The bidder is to state their ability to provide a dashboard where all fields are fully customizable by the user; 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> • The database provides a summary which includes all of the following: <ul style="list-style-type: none"> ○ the names of the entity; ○ parent (if applicable); ○ addresses and phone numbers; ○ the type of business (corporation, partnership or trust); ○ total sales; and ○ the number of employees. 	2 points	Yes = 2 points No = 0 points	
	<ul style="list-style-type: none"> • All link resolvers are kept up to date in the database. 	2 points	Yes = 2 points No = 0 points	
Total Available Points		80 Pts		
Minimum Points Required		56 Pts		



4. At Annex A: Statement of Work, Section 3.0 DESCRIPTION:

INSERT:

Domestic = Canada

International = Two or more countries, other than Canada

5. At Annex A: Statement of Work, DELETE Section 4.0 MANDATORY REQUIREMENTS, IN ITS ENTIRETY and REPLACE WITH:

4.0 MANDATORY REQUIREMENTS

4.1 GROUP A: DOMESTIC DATA

4.1.1 Bulk Data Requirements

- The bulk data must contain at least 1.0 million comprehensive records on active domestic entities and 0.5 million comprehensive records on inactive domestic entities.

4.2 GROUP B: INTERNATIONAL DATA

4.2.1 Bulk Data Requirements

- The bulk data must contain at least 50 million comprehensive records on active international entities and 25 million comprehensive records on inactive international entities.

4.3 GROUPS A & B: DOMESTIC AND INTERNATIONAL DATA:

The following mandatory requirements are related to Group A and B:

4.3.1 Bulk Data Requirements

- The bulk data must be provided via Secure File Transfer Protocol (SFTP);
- The bulk data must be able to be hosted on a 'postgresql' database server in delimited text;
- The bulk data must include data from January 2016 and onward;
- All data must have been validated by the Contractor; and
- The first delivery of the bulk data must be provided to the Technical Authority within 30 calendar days of the contract award.

4.3.2 Data Dictionary and Other Supporting Documentation

- A data dictionary must be provided in English and French and must contain the following:
 - The name, definition, type of character, length, and location within the file for each data element in the data;
 - Descriptions for any codes used in the data elements;
 - Sample data (minimum 10 records);
- All supporting documentation must be in English; and
- The data dictionary and other supporting documentation must be provided to the Technical Authority within 30 calendar days of the contract award.



4.3.3 Bulk Data Updates

- Bulk data updates must be provided to the Technical Authority on or before the first business day of every month;
- Bulk data updates must be provided via Secure File Transfer Protocol (SFTP);
- Bulk data updates must be able to be hosted on a 'postgresql' database server in delimited text;
- All data updates must be validated by the Contractor; and
- Bulk data updates must clearly indicate/demonstrate what has been changed since the last update.

4.4 **GROUP C: SEARCHABLE DATABASE:**

The following mandatory requirements are related to Group C:

4.4.1 Database Requirements

- The database must contain at least 1.0 million comprehensive records on active domestic entities and 0.5 million comprehensive records on inactive domestic entities.
- The database must contain at least 50 million comprehensive records on active international entities and 25 million comprehensive records on inactive international entities.
- The database must include data from January 2012 and onward;
- All data must have been validated by the Contractor;
- The database must be updated on a daily basis; and
- Identify the source of the data if available (If the source of the data is not originating from the vendor itself, then usually it is derived from another publisher, supplier, company, etc.).

4.4.2 Users' Access

- The database must provide simultaneous unlimited online access for CRA users;
- The database must be accessible to users on a 24 hour /7 days a week basis;
- The database interface must be provided in English and French;
- The Contractor must provide and maintain secure access to the database (e.g. user IDs and Passwords);
- The Contractor must provide access or licences for a minimum 100 users;
- The Contractor must update the list of authorized users within 5 business days of being requested;
- The Contractor must provide training accounts as required; and
- The Contractor must provide authorized CRA users with access to the database within 30 calendar days of contract award.

4.4.3 Functionality

- The database must allow for:
 - Downloading and saving of documents to the user's computer. Once downloaded, these documents must not require a connection to the database in order to be accessed.
 - Storing, viewing, searching, emailing, and printing of documents downloaded from the database, using at least 3 of the following industry standard formats: Word, PDF, Excel, CSV, or HTML files;
 - The creation and generation of reports that collate information available on individuals or companies contained in the data element fields. The user must be able to build, manipulate and customize their own reports.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED