



**REQUEST FOR INFORMATION (RFI)**

**No. 1000343956**

**Health Assessment and Accommodation Services**

**for**

**The Canada Revenue Agency**

**Closing Date and Time: October 22, 2018, 2:00 PM (EDT)**



## 1. DISCLAIMER:

Responding to this Request for Information (RFI) is not a prerequisite to receiving or being eligible to bid on any Request for Proposal (RFP). Any RFP will be advertised on the Government Electronic Tendering Service (GETS) commonly referred to as Buy and Sell (<https://buyandsell.gc.ca/>).

This RFI is not to be construed as a solicitation for tenders or proposals. No contract or other form of commitment will be entered into based on responses to this RFI. This RFI is not considered as authorization by the Canada Revenue Agency (CRA) to undertake any work that would result in costs to CRA.

Nothing in this RFI shall be construed as a commitment from CRA to issue an RFP for this solution. CRA may use non-proprietary information provided in its review and/or in the preparation of any formal RFP. All responses will be held by CRA on a confidential basis (subject to applicable federal legislation) and remain the property of CRA once they have been received. CRA may reproduce or photocopy or transcribe the response and any non-proprietary supporting documentation for the purpose of its review and/or inclusion in any resulting RFP document. Contractors responding to this RFI may be invited to a meeting to further clarify their responses to questions provided herein.

CRA shall not be bound by anything stated herein. CRA reserves the right to change, at any time, any or all parts of the requirements, as it deems necessary. CRA also reserves the right to revise its procurement approach, as it considers appropriate, either based upon information submitted in response to this RFI or for any other reason it deems appropriate.

Responses to this RFI will not be used to pre-qualify or otherwise restrict participation in any future procurement process (e.g. an RFP). Responses will not be formally evaluated.

CRA will not reimburse any expenditure incurred in preparing responses and participating in the presentation sessions related to this RFI.

Respondents must note that this list of questions is not exhaustive, and respondents are invited to provide any additional information that might prove useful and/or beneficial to the CRA.

## 2. RESPONSES:

The vendor must provide a contact name, email address and telephone number when submitting their response.

Respondents are requested to submit responses by email to Steve Gilroy at [steve.gilroy@cra-arc.gc.ca](mailto:steve.gilroy@cra-arc.gc.ca) by, October 22, 2018; 2:00 PM Eastern Daylight Time (EDT).

While electronic submissions are preferred, respondents may also submit a hard copy of their response to the following address.

Canada Revenue Agency  
Bid Receiving Unit  
Ottawa Technology Centre  
Receiving Dock  
875 Heron Road, Room D-95  
Ottawa, ON K1A 1A2  
Telephone No: (613) 941-1618



The Bid Receiving Unit of CRA is open Monday to Friday inclusive, between the hours of 07:30 and 15:30, excluding those days that the federal government observes as a holiday.

### **3. ENQUIRIES:**

All enquiries regarding this RFI must be submitted via email to [Steve.Gilroy@cra-arc.gc.ca](mailto:Steve.Gilroy@cra-arc.gc.ca)

### **4. PRESENTATION SESSIONS:**

Respondents to this RFI may be invited to attend one-on-one presentation sessions with CRA representatives. These sessions would allow respondents to present their RFI responses.

### **5. INTRODUCTION:**

The Canada Revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories, and administers various social and economic benefit and incentive programs delivered through the tax system.

The CRA employs over 43,000 employees across Canada. The CRA has a legislated responsibility to provide accommodation and applicable benefits to employees where required. Through its Early Intervention and Return to Work (EIRTW) Program, the CRA supports employees dealing with an injury, illness, disability or medical condition, and assists them in maintaining or regaining their ability to remain at, or return to work, to perform and be productive in the workplace.

In order to effectively manage its cases of injury/illness, the CRA requires the services and expertise of medical professionals. When it is not possible to obtain the required medical information from the employee's own physician or health practitioner, the CRA purchases external services for fitness to work evaluations (FTWE) (or functional abilities evaluation), consultative services and other services.

The CRA's legislated responsibility to provide accommodation also extends to the employer's obligation to take measures to eliminate disadvantages to employees and prospective employees who apply on staffing processes. As a result, the CRA sometimes requires psychoeducational assessments that will determine an employee's functional abilities and whether accommodations are required to complete assessments in the context of staffing processes.

As the medical industry evolves, the CRA is looking for a better understanding of the available medical/disability management services, such as processes, timelines and deliverables to efficiently respond to the needs of its employees and to management's expectations.

### **6. OBJECTIVE:**

The objective of this RFI is to gather information on industry capabilities related to the provision of the services and to gather information on potential price structures<sup>1</sup>, for federal government organizations.

Please note the following CRA definition:

Physician or health practitioner is registered, licensed or certified to practice in the jurisdiction where the services are rendered, and who can provide primary health care, diagnose an injury or illness and determine and/or provide necessary procedures or treatments to patients.

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<sup>1</sup> Options for price structure may include, but are not limited to: hourly rate; price per unit; all-inclusive rate; percentage (%); administrative fees; management fee; price scale.



The CRA is looking for information on vendors that can offer **all or part** of the services described below:

**A. Fitness to work evaluation (FTWE)**

The CRA uses a FTWE to assess an employee's ability or fitness to perform the duties of their own, or another position. The evaluation is carried out with employee consent and with input from the physician or health practitioner, if applicable. The FTWE may include one or more of the following:

- an upfront analysis of existing medical information to determine the type of health assessment required, when applicable;
- a file review in situations where information has changed following a completed FTWE or medical evaluation;
- a determination of the employee's fitness to remain in, or safely return to the workplace;
- a determination of a possible date of return to work;
- an identification of the limitations and restrictions; and
- a follow-up with the service provider on questions concerning the limitations and restrictions.

**B. Psychoeducational assessments**

Psychoeducational assessments help to determine functional abilities and limitations of an employee or prospective employee and whether accommodations are required to complete an assessment in the context of a staffing process.

A psychoeducational assessment will be conducted by a qualified psychologist. The results of a psychoeducational assessment will be provided to the employer in the form of a comprehensive report, redacted of personal information and medical diagnosis. The report is used by the CRA requester to determine the required accommodations for the employee or prospective employee in the assessment(s) during a staffing process.

**C. Consultative services**

Consultative services / Consultation on complex cases: Following a medical assessment by the service provider or by the employee's own physician or health practitioner, where there are identified limitations and restrictions, consultative services or advice may be required to obtain recommendations for reasonable accommodation. In complex cases, a medical file review may be required to determine next steps and/or to distinguish medical workplace barriers from personal life and family issues. Where medical workplace barriers are present, the appropriate advice would be provided (i.e. fitness to work evaluation or referral to a specialist). Where non-medical workplace barriers are identified, the next steps would be addressed internally.

The provision of consultative services may require input from a physician or health practitioner to provide accommodation recommendations. In some situations, an onsite (workplace) assessment may be required to recommend accommodation solutions.

**D. Workers' Compensation Board review and appeal process**

Provision of provincial-specific medical advice that will help the CRA determine whether to appeal a provincial board claim decision; review relevant documents from an employee's claim file; provide advice to facilitate the adjudication of a claim; provide advice to obtain the services of a medical specialist or expert witness, to complete a file review, medical evaluation, and to testify at a provincial tribunal.

**E. Service related to the completion of forms and for the transfer of medical information**



Forms must be completed by physician and sent to a third party for the processing of a disability insurance claim or to support an application for a retirement on medical grounds. This service may require the service provider to act as physician in the following circumstances: when an employee does not have a physician; the physician has retired; the employee has been going to different clinics.

In an environment where the CRA has noticed more complex workplace issues, the management of cases of injury, illness, disability, or medical condition has become increasingly challenging.

The protection of personal information is of utmost importance to the CRA which abides by strict information technology and security requirements. Sharing information electronically with the CRA must be done through secure portals. The service provider may have to submit to Designated Organizational Screening (DOS). Personnel that may have access to employee protected information will require a reliability clearance status by the Government of Canada.

**7. GENERAL QUESTIONS:**

<u>A.(i) Fitness to Work Evaluation (FTWE) - General</u>	
<u>1.</u>	Describe the process for a routine FTWE.
<u>2.</u>	What information is the Employer expected to provide for the FTWE?
<u>3.</u>	How much time is dedicated to preparation for the appointment by the assessor and their staff? How long is a FTWE appointment?
<u>4.</u>	What deliverable is provided to the Employer and in what format is it presented? Does the physician indicate whether the employee should be following a treatment plan that could be affecting his performance in the workplace? Is the Employer informed of this impact on performance?
<u>5.</u>	What process is followed to ensure that a quality FTWE deliverable is submitted to the employer? What process is followed when the employer is not satisfied with the deliverable?
<u>6.</u>	Is there a trend for distinct FTWE forms, such as one for suspected mental illnesses and another for all other suspected medical conditions? If so, how are distinct forms helpful?
<u>7.</u>	After the assessment is completed, what information is shared with the employee's physician or health practitioner? If the employee does not have a physician or health practitioner, can information be sent to a walk-in clinic, with employee consent?
<u>8.</u>	Describe the industry standard for the length of time taken to provide a complete FTWE to result to the employer. Does this differ per region/province? Explain.
<u>9.</u>	Describe the industry standard for number of follow-ups or clarification questions to be asked by the employer and a timeline for the assessor to respond.
<u>10.</u>	When is it reasonable to close a FTWE file?
<u>11.</u>	What is the standard notice period for late cancellation or missed appointment for a routine FTWE assessment?
<u>12.</u>	How are other organizations buying FTWE for their employees? Are they also buying treatment services? If so, what types?
<u>A.(i). Price Structure - Fitness to Work Evaluation (FTWE)</u> Please describe what is included in the proposed price structure for a FTWE. Describe the price structure for late cancellation or missed appointment. What is the price structure for follow-up or clarification questions? <b>Please do not provide any prices.</b>	



<u>A.(ii) Fitness to work evaluation (FTWE) - Referral to specialist</u>	
<u>1.</u>	Describe the process for transitioning a file from a FTWE assessor to a specialist, including the method for transmitting. How much work and time does this activity involve?
<u>2.</u>	Describe the industry standard for the length of time taken to provide a complete FTWE result when there is a referral to a specialist?
<u>3.</u>	How does your organization deal with significantly long wait times in some provinces where an assessment by a specialist is required?
<u>4.</u>	When an employee's physician or health practitioner has identified that the employee must be assessed by a specialist but has not made the referral, can the service be purchased directly from a specialist, based on the advice of a physician or health practitioner, thereby bypassing a FTWE? Explain?
<u>5.</u>	What is the standard notice period for late cancellation or missed appointment with a specialist?
<u>A. (ii) Price Structure – assessment with specialists.</u> Please describe what is included in the proposed price structure. Also, describe the price structure for a late cancellation or missed appointment. <b>Please do not provide any prices.</b>	

<u>B. Psychoeducational assessment</u>	
<u>1.</u>	Describe the process involved in conducting a psychoeducational assessment?
<u>2.</u>	Provide details about what is included in a typical psychoeducational report. i) What information is typically provided to the employer? ii) What information is provided to the employee?
<u>3.</u>	What is the industry standard notice period for cancelling or rescheduling an appointment with a psychoeducational assessor?
<u>B.1. Price Structure – psychoeducational assessment.</u> Please describe what is included in the proposed price structure. Also, describe the price structure for a late cancellation or a missed appointment. <b>Please do not provide any prices.</b>	

<u>C. Consultative Services</u>	
<u>1.</u>	What is the process for a medical file review? When is one done? What information is gathered? What is the advantage to the employer?
<u>2.</u>	What type of information is required to provide accommodation recommendations? Is it feasible to provide accommodation recommendations by reviewing only the known limitations/restrictions? In what situations would an onsite (workplace) assessment be required?
<u>3.</u>	What services are provided by occupational therapists? Why is an occupational therapist required when there are limitations and restrictions? What is the deliverable to the employer?
<u>4.</u>	In a report, how is a medical barrier distinguished from a non-medical barrier?
<u>5.</u>	How can you assist the CRA on determining accommodation when the limitations and restrictions are too vague or cannot be applied in the workplace?
<u>6.</u>	In a situation where the CRA-provided training for adaptive technology software (for example, Dragon NaturallySpeaking) is not sufficient due to the identified limitations/restrictions are you able to identify and arrange alternate modes of training? If yes, explain how.
<u>C.1. Price Structure – consultative services.</u> Please describe what is included in the proposed price structure for this service. <b>Please do not provide any prices.</b>	



<u>D. Review of Workers' Compensation Board (WCB) claims and appeal process</u>	
<u>1.</u>	Describe the type of service that can be offered for workers' compensation board cases?
<u>2.</u>	What types of services are other federal organizations buying for their workers' compensation board cases?
<u>3.</u>	Explain the difference in services offered for the Québec « Commission des normes, de l'équité, de la santé et de la sécurité du travail » (CNESST) from services provided to other provinces.
<u>D.1. Price Structure – Review of WCB claims and appeals.</u>	
Please describe what is included in the proposed price structure for this service. <b>Please do not provide any prices.</b>	

<u>E. Service related to the completion of disability insurance (DI) claims forms, of medical retirement forms and for the Transfer of medical information</u>	
<u>1.</u>	Can a service be purchased to support an employee who does not have a physician and who wishes to apply for disability insurance benefits? Explain.
<u>2.</u>	Can a service be purchased to support an employee who does not have a physician and who wishes to apply for medical retirement? Explain.
<u>3.</u>	Describe the process for transferring medical information to the employee's insurer for disability benefits or to Health Canada for medical retirement.
<u>E.1. Price Structure – Completion of DI insurance claim forms, medical retirement forms and transfer of medical information.</u>	
Please describe what is included in the proposed price structure for this service. <b>Please do not provide any prices.</b>	

**General Administration Questions:**

1. Describe your capability to recruit and train assessors (physicians, specialists and psychoeducational assessors) across the country. Do you establish a roster of assessors? How is your recruitment process affected by the regional/provincial medical industry challenges?
2. Describe your capability to ensure that your assessor's credentials are up to date.
3. Describe your capability to provide services across the country, including in remote areas. Describe your capability to provide bilingual services across the country.
4. Describe your capability to send automatic email reminders of appointment dates to employee and department.