



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

Name /Nom

Title/Titre

Signature

Date (yyyy-mm-dd)/(aaaa-mm-jj)

Telephone No. - No de téléphone

Fax No. - No de télécopieur

E-mail address - Adresse de courriel

AMENDMENT TO REQUEST FOR PROPOSAL / MODIFICATION DE DEMANDE DE PROPOSITION

Table with 2 columns: Solicitation No. - No de l'invitation, Date(yyyy-mm-dd)(aaaa-mm-jj), Amendment No. - N° modif., Solicitation closes - L'invitation prend fin, Time zone - Fuseau horaire, Contracting Authority - Autorité contractante, Telephone No. - No de téléphone, Destination - Destination, THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT.



## SOLICITATION AMENDMENT # 004

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

**Q11. Related to R2.1: The Statement of Work (SOW) section 12.0 describes that services for a work-related health assessment can be done by various assessors or health practitioners and specialists, which includes a physician. Furthermore, the definition of Fitness to Work Evaluation defines that an assessment can be carried out by a physician or health practitioner. We respectfully request that the municipal address submitted could be for a health practitioner and thus change the wording in this requirement from “physician” to “assessor or health practitioner” which would match the description in section 12.0 of the SOW.**

A11. In table R2.1 for the office location, the wording has been changed from “physician” to “assessor or health practitioner. Refer below to Section 2, Amendments to RFP, item no. 7.

**Q12. Related to Annex A Statement of Work, section 7.2: we wish to clarify that if the Contractor determines at the outset of the Service Request that a Special Exam needs to be arranged, that this step can occur first and the Fitness to Work Evaluation (FTWE) be completed after the Special Exam, so that the FTWE assessor has the required information to properly complete the OFAF.**

A12. No, a special exam cannot be arranged prior to the single primary assessment. Under Annex A Statement of Work, Section 7.5 – “FTWE requiring multiple assessments”, when subsequent medical assessment(s) or test(s) by specialist(s) are required, these follow the single primary assessment.

Under Section 7.5, the second bullet states that the primary assessor reviews the specialist’s report in order to complete the required documents, i.e. OFAF.

You may also refer to Appendix C – “Service Standards, Fitness to Work Evaluations and referrals to specialist(s)”, under the column “Release of the completed OFAF” that again states that the primary assessor is to review the specialist’s report in order to complete the required documents.

**Q13. Related to Annex B Basis of Payment, section C.2 Cancellations and Absences: we wish to clarify the fee for the cancellation or absence in the case of a FTWE, given this is a fixed price. For example, if the health practitioner charges \$500 for the cancellation fee, is the fee charged back to CRA this \$500 plus the mark-up percentage as noted in section B?**

A13. The physician’s or health practitioner’s applicable cancellation and absence fee, supported by copies of invoice receipts, is charged back to the CRA. The all-inclusive mark-up percentage is not applied to the physician’s or health practitioner’s applicable cancellation and absence fee. Refer below to Section 2, Amendments to RFP, item no. 8.

All administrative time spent scheduling, cancelling and rescheduling appointments is included in the FTWE firm all-inclusive unit price and the firm all-inclusive mark-up percentage. Please refer to sections:

- Annex B: Basis of Payment, section A, “Fitness to Work Evaluations (FTWEs)”;
- Annex B: Basis of Payment, section B, “Administrative Fees for medical tests and special exams”.

**Q14. Under Part 7 Model Contract, section 7.8 Security Requirements: We wish to clarify if the security requirement is for Designated Organization Screening (DOS) or for Document Safeguarding Capability (DSC). If bidding as a Joint Venture (JV), one resource has both DOS and DSC, and the other resource has DOS, we wish to clarify that the JV meets the security requirement as long as processing and storage of Protected B material occurs at the resource’s location with DSC.**

A14. The JV who holds a valid DOS and DSC will meet the security requirements as long as all the processing and storage of Protected B material will only occur at the supplier’s location who holds a valid DOS and DSC. This include the



physical and the electronic processing and storage. The other supplier who holds only a DOS can only use his resources who hold a valid Reliability status level and his location cannot be used for processing and storage of Protected B material.

**Q15. Page 59 of 131, section 2.0, states that “The Canada Revenue Agency (CRA) requires the services of an external Contractor to perform fitness to work evaluations (FTWEs).. .. to determine if an employee is medically fit, with or without limitations and/or restrictions, to safely and effectively carry out, or continue to carry out, the duties of their position.”**

**We understand here that you are looking for a provider to provide the following three types of examinations. Is that correct?**

- **Pre-employment medical examinations (= in-person examination for potential new employees)**
- **Periodic medical examinations (= in-person examination for current employees)**
- **Return-to-work medical examinations (= in-person examination for current employees with specific health problems)**

A15. No, that is incorrect. The Agency does not conduct pre-employment or periodic medical examinations. As is stated in the SOW, section 4.0, "Scope," the Agency requires that an FTWE be done in order to assess whether the employee is fit to work, related the employee's medical condition, which impacts the employee's ability to function in the workplace or their ability to return to work.

The Agency is looking for a service provider to conduct medical assessments at the Contractor's office or at the identified assessor or health practitioner's worksite in person, as indicated in the SOW, section 15.0, "Location of work."

**Q 16. Page 59 of 131, section 2.0, also states that “The designated assessor, or assessors, if deemed necessary, will provide recommendations to the employer outlining any occupational limitations and/or restrictions..”**

**We understand here that you are looking for a provider to issue a medical opinion following a file review of disability or extended absence (= paper review of current employees with health problems and who have already met with their physician or health practitioner). Is that correct?**

A16. No, the Agency does not require a file review following disability or an extended absence. As indicated in A15, employee tests are conducted in person at the Contractor's office or at the identified assessor or health practitioner's worksite. Even if an employee returns to work after a period of absence, the Agency could require an FTWE in person before the employee returns to work.

**Q17. Page 59 of 131, section 3.0, states “Special exams.” What exactly are these?**

A17 As indicated in Annex B, "Basis of Payment", section C, Cost Reimbursable Expenses: Medical tests and special exams – paragraph 1, "The Contractor will be reimbursed for medical tests prescribed by a physician (e.g. blood work, urinalysis, and x-ray) and/or fees for special exams (e.g. referral to a psychiatrist or specialized, physician assessment(s).. ..”

**Q 18. On page 43 of 131, section A, we are asked to propose a unit price per FTWE. We bill by unit for pre-employment, periodic and return-to-work medical examinations; however, we bill at the hourly rate for our files following disability or extended absence. Can you please confirm/specify your expectations for this table?**

A18. We require service providers to present a single, firm all inclusive unit price for assessing whether an employee is fit to work as described in Annex A – Statement of work, section 6 "Overview of Tasks." We do not ask for any hourly rates. See A15 for clarifications on the type of assessment sought.

**Q 19. Page 44 of 131, section B, states that “The Bidder must propose a one-time firm all-inclusive mark-up percentage for profit and administrative overhead for each medical test and special exam which may be reasonably and properly incurred to support the completion of the FTWE, regardless of the region of the test and special exam..” Can you please clarify what is expected here?**

**We are not sure about the meaning of “mark-up percentage for medical tests and special exams” requested in Table 2. We understand that “medical tests and special exams” are the provision of additional health services**



**requested by us (therefore provided by other health specialists). In this case, is the “mark-up percentage” the time spent to refer to that specialist and subsequently analyze the results received from that specialist?**

A19. It is the bidder's responsibility to determine the one-time firm all-inclusive mark-up percentage for each medical test and special exam. As indicated in Appendix 3, Financial Bid, section B, Mark-up Percentage for medical tests and special exams, in the first paragraph, this one-time firm all-inclusive mark-up percentage includes fees associated with "... ALL time spent on any activity required to process the medical tests and special exams", as described, in Annex A at section 6.0 Overview of Tasks.



## 2. AMENDMENTS TO THE RFP

### 7. At Table R2.1 “Geographic Capacity for providing a health assessment service”

**DELETE:**

**Office Location of Identified Physician**

(municipal address, city, province, postal code)

**INSERT:**

**Office Location of assessor or health practitioner**

(municipal address, city, province, postal code)

### 8. At Annex B, Section C 2. Cancellation and Absences

**INSERT after the last paragraph.**

The mark-up percentage is not applied to the Cancellation and Absence fees that are charged by the physician or medical practitioner.

**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED**