



## RETURN BIDS TO:

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soumissions - TPSGC

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Place du Portage, Phase III

Core 0B2 / Noyau 0B2

Gatineau

Quebec

K1A 0S5

Bid Fax: (819) 997-9776

## REQUEST FOR PROPOSAL

## DEMANDE DE PROPOSITION

**Proposal To: Public Works and Government  
Services Canada**

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 or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments - Commentaires**

**Vendor/Firm Name and Address**

**Raison sociale et adresse du**

**fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Middleware division / Division Intergiciels

Terrasses de la Chaudière

4th Floor, 10 Wellington Street

4th etage, 10, rue Wellington

Gatineau

Quebec

K1A 0S5

<b>Title - Sujet</b> Database Management System Software Logiciel de système de gestion de base de données	
<b>Solicitation No. - N° de l'invitation</b> 45045-190134/B	<b>Date</b> 2021-12-09
<b>Client Reference No. - N° de référence du client</b> 000011591	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$EEM-047-40183	
<b>File No. - N° de dossier</b> 047eem.45045-190134	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> Eastern Standard Time EST <b>on - le 2022-01-19</b> Heure Normale du l'Est HNE	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Robles, Carlos	<b>Buyer Id - Id de l'acheteur</b> 047eem
<b>Telephone No. - N° de téléphone</b> (873) 354-3556 ( )	<b>FAX No. - N° de FAX</b> ( ) -
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> STATISTICS CANADA Canadian Health Measures Survey 150 TUNNEYS PASTURE DRWY MAIN BLDG/ (SC0005) OTTAWA Ontario K1A0T6 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

<b>Delivery Required - Livraison exigée</b> See Herein – Voir ci-inclus	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/</b> <b>de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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45045-190134/001

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## PART 1 - GENERAL INFORMATION

### 1.1 Introduction

The bid solicitation is divided into seven parts plus attachments and annexes, as follows:

Part 1 General Information: provides a general description of the requirement;

Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;

Part 3 Bid Preparation Instructions: provides Bidders with instructions on how to prepare their bid;

Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;

Part 5 Certifications and Additional Information: includes the certifications and additional information to be provided;

Part 6 Security, Financial and Other Requirements: includes specific requirements that must be addressed by Bidders; and

Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Requirement, the Basis of Payment, the Electronic Payment Instruments, and any other annexes.

### 1.2 Summary

#### 1.2.1 Brief Description – Laboratory Information Management System (LIMS)

Statistics Canada (hereinafter referred to as "StatCan") has a requirement for a Laboratory Information Management System (LIMS) Solution (hereinafter referred to as "the Solution"). The Solution must be a complete and bug free "Commercial Off the Shelf Solution" (COTS) that must meet the requirements in this document. StatCan is looking for Perpetual User Floating Licenses to be installed on its own Cloud network. The Solution must enable and support the Canadian Health Measures Survey (CHMS) to manage biological sample (biospecimen) collection across the 6 time zones of Canada.

The Canadian Health Measures Survey (CHMS), is a national survey conducted by Statistics Canada in partnership with Health Canada and the Public Health Agency of Canada (PHAC). The purpose of the survey is to collect nationally representative information regarding the general health and lifestyles of Canadians.

The CHMS is collecting information on the health of Canadians by means of questionnaires, physical measures and biospecimen collection. Analyses of biospecimens, for blood, urine, and saliva are done for a variety of biomarkers such as nutrition, chronic and infectious diseases, environmental exposure, etc.

Data is collected through personal interviews at two of Statistics Canada's Mobile Examination Centers (MEC). During the MEC visit, the respondents are interviewed and basic information on demographics and health is collected. Later on, during the interview, blood, urine, and saliva samples are collected based on the respondent's given consent and their answers to a series of screening questions in order to ensure their safety.

Approximately 2500 respondents participate in the CHMS every year. During that time, the survey collects data and biospecimens from 8 different sites (for a duration of 6 weeks each). Only one Mobile Examination Center (MEC) is used at a time and the same teams travel from one site to another. The CHMS then collaborates with external laboratories across Canada to analyse and store the samples collected.

For respondent visits to its mobile examination center, the CHMS is currently using an application that was developed in-house. At this time, the CHMS is performing a redesign of all its applications and seeking ways to improve its processes, which includes the management of biospecimen collection.

The MEC is run by 2 teams of around 8 employees that alternate shifts (MEC collection runs from early morning to late evening).

The following short video gives a tour of the inside of the MEC: <https://youtu.be/z7w0avNMUtk>

The layout of the MEC can be found in Annex A of the Statement of Requirement (**Error! Reference source not found.**).

### **1.2.2 Trade Agreements**

The requirement is subject to the provisions of the World Trade Organization Agreement on Government Procurement (WTO-AGP), the Canada-Chile Free Trade Agreement (CCFTA), the Canada-Peru Free Trade Agreement (CPFTA), the Canada-Colombia Free Trade Agreement (CColFTA), the Canada-Panama Free Trade Agreement (CPanFTA), the Canada-European Union Comprehensive Economic and Trade Agreement (CETA), the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the Canadian Free Trade Agreement (CFTA), the Canada-Ukraine Free Trade Agreement (CUFTA), the Canada-Korea Free Trade Agreement (CKFTA), Canada-United States-Mexico Agreement (CUSMA) and the Canada-United Kingdom Trade Continuity Agreement (Canada-UK TCA).

### **1.2.3 Comprehensive Land Claim Agreements (CLCA)**

The resulting contract will not include deliveries of goods within locations that are subject to Comprehensive Land Claims Agreements (CLCAs).

### **1.2.4 epost Connect.**

Bids must be submitted only to the Public Works and Government Services Canada (PWGSC) Bid Receiving Unit via e-post Connect by the date and time indicated on page 1 of the bid solicitation. For additional information, Bidders must refer to Part 2 - Bidder Instructions and Part 3 - Bid Preparation Instructions, of the bid solicitation document. For further information on e-post Connect bidders must

contact the Bid Receiving Unit by e-mail at:

[tpsgc.dgareceptiondessoumissionsabbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessoumissionsabbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca).

### 1.3 Debriefings

Bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days from receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

## PART 2 - BIDDER INSTRUCTIONS

### 2.1 Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The [2003](#) (2020-05-28) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of [2003](#), Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: 60 days

Insert: 120 days

#### 2.1.1 SACC Manual Clauses

### 2.2 Submission of Bids

- a) Bids must be submitted **ONLY** to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit **via epost Connect**, time and place indicated on page 1 of the bid solicitation.

**Note:** For bidders needing to register with epost Connect the email address is:

[tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca](mailto:tpsgc.dgareceptiondessoumissions-abbidreceiving.pwgsc@tpsgc-pwgsc.gc.ca)

**Note:** Bids will not be accepted if emailed directly to this email address. This email address is to be used to open an epost Connect conversation, as detailed in Standard Instructions [2003](#), or to send bids through an epost Connect message if the Bidder is using its own licensing agreement for epost Connect.

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To submit a bid using epost Connect service, the Bidder must either:

- i. send directly its bid only to the specified PWGSC Bid Receiving Unit, using its own licensing agreement for epost Connect provided by Canada Post Corporation; or
  - ii. send as early as possible, and in any case, **at least six business days prior to the solicitation closing date and time**, (in order to ensure a response), an email that includes the bid solicitation number to the specified PWGSC Bid Receiving Unit requesting to open an epost Connect conversation. Requests to open an epost Connect conversation received after that time may not be answered.
- b) If the Bidder sends an email requesting epost Connect service to the specified Bid Receiving Unit in the bid solicitation, an officer of the Bid Receiving Unit will then initiate an epost Connect conversation. The epost Connect conversation will create an email notification from Canada Post Corporation prompting the Bidder to access and action the message within the conversation. The Bidder will then be able to transmit its bid afterward at any time prior to the solicitation closing date and time.
  - c) If the Bidder is using its own licensing agreement to send its bid, the Bidder must keep the epost Connect conversation open until at least 30 business days after the solicitation closing date and time.
  - d) The bid solicitation number should be identified in the epost Connect message field of all electronic transfers.
  - e) It should be noted that the use of epost Connect service requires a Canadian mailing address. Should a bidder not have a Canadian mailing address, they may use the Bid Receiving Unit address specified in the solicitation in order to register for the epost Connect service.
  - f) The Bid Receiving Unit will send an acknowledgement of the receipt of bid document(s) via the epost Connect conversation, regardless of whether the conversation was initiated by the supplier using its own license or the Bid Receiving Unit. This acknowledgement will confirm only the receipt of bid document(s) and will not confirm if the attachments may be opened nor if the content is readable.
  - g) Bidders must ensure that they are using the correct email address for the Bid Receiving Unit when initiating a conversation in epost Connect or communicating with the Bid Receiving Unit and should not rely on the accuracy of copying and pasting the email address into the epost Connect system.
  - h) A bid transmitted by epost Connect service constitutes the formal bid of the Bidder and must be submitted in accordance with section 05 of the [2003](#) (2020-05-28), Standard Instructions – Goods or Services - Competitive Requirements.
  - i) Due to the nature of the bid solicitation, bids transmitted by facsimile or electronic mail to PWGSC will not be accepted.

### 2.3 Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than **7** calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by Bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the question(s) or may request that the Bidder do so, so that the proprietary nature of the question(s) is eliminated and the enquiry can be answered to all Bidders. Enquiries not submitted in a form that can be distributed to all Bidders may not be answered by Canada.

## 2.4 Applicable Laws

Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Bidders.

## 2.5 Bid Challenge and Recourse Mechanisms

- (a) Several mechanisms are available to potential suppliers to challenge aspects of the procurement process up to and including contract award.
- (b) Canada encourages suppliers to first bring their concerns to the attention of the Contracting Authority. Canada's [Buy and Sell](#) website, under the heading "[Bid Challenge and Recourse Mechanisms](#)" contains information on potential complaint bodies such as:
  - Office of the Procurement Ombudsman (OPO)
  - Canadian International Trade Tribunal (CITT)
- (c) Suppliers should note that there are **strict deadlines** for filing complaints, and the time periods vary depending on the complaint body in question. Suppliers should therefore act quickly when they want to challenge any aspect of the procurement process.



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## PART 3 - BID PREPARATION INSTRUCTIONS

### 3.1 Bid Preparation Instructions

The Bidder must submit its bid electronically. Canada requests that the Bidder submits its bid in accordance with section 08 of the 2003 standard instructions. The epost Connect system has a limit of 1GB per single message posted and a limit of 20GB per conversation.

The bid must be gathered per section and separated as follows:

Section I: Technical Bid

Section II: Financial Bid

Section III: Certifications and additional information

Prices must appear in the Financial Bid only. No prices must be indicated in any other section of the bid.

**Format for Bid:** Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use a numbering system corresponding to that of the bid solicitation;
- (b) include a title page at the front of each volume of the bid that includes the title, date, bid solicitation number, bidder's name and address and contact information of its representative.

#### Section I: Technical Bid

In their technical bid, Bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. **Simply repeating the statement contained in the bid solicitation is not sufficient.** In order to facilitate the evaluation of the bid, Canada requests that Bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, Bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

**List of Proposed Software:** The Bidder must include a list identifying the name and the version number of the proposed software.

Part 4, Evaluation Procedures, contains additional instructions that bidders should consider when preparing their technical bid.

#### Section II: Financial Bid

- 3.1.1** Bidders must submit their financial bid in accordance with the Basis of Payment in Annex B. Bidders are requested to insert "\$0.00" for any item for which it does not intend to charge or for items that are already included in other prices set out in the tables. If the Bidder leaves any price

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blank, Canada will treat the price as "\$0.00" for evaluation purposes and may request that the Bidder confirm that the price is, in fact, \$0.00. No bidder will be permitted to add or change a price as part of this confirmation. Any bidder who does not confirm that the price for a blank item is \$0.00 will be declared non-responsive.

### **3.1.2 Electronic Payment of Invoices – Bid**

If you are willing to accept payment of invoices by Electronic Payment Instruments, complete Annex C – Electronic Payment Instruments, to identify which ones are accepted.

If Annex C – Electronic Payment Instruments is not completed, it will be considered as if Electronic Payment Instruments are not being accepted for payment of invoices.

Acceptance of Electronic Payment Instruments will not be considered as an evaluation criterion.

### **3.1.3 Exchange Rate Fluctuation**

The requirement does not offer exchange rate fluctuation risk mitigation. Requests for exchange rate fluctuation risk mitigation will not be considered. All bids including such provision will render the bid non-responsive.

### **3.1.4 SACC Manual Clauses**

[Standard Acquisition Clauses and Conditions \(SACC\) Manual - Buyandsell.gc.ca](#)

## **Section III: Certifications**

Bidders must submit the certifications and additional information required under Part 5.

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## **PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION**

### **4.1 Evaluation Procedures**

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### **4.1.1 Technical Evaluation**

##### **4.1.1.1 Mandatory Technical Criteria**

Refer to Annex A – Appendix I - Mandatory Requirements.

##### **4.1.1.2 Point Rated Technical Criteria**

Refer to Annex A – Appendix I – Point Rated Criteria.

#### **4.1.2 Financial Evaluation**

##### **4.1.2.1 Mandatory Financial Criteria**

The price of the bid will be evaluated in Canadian dollars, Applicable Taxes excluded, FOB destination, Canadian customs duties and excise taxes included.

Bids will be assessed in accordance with Annex B, Basis of Payment

### **4.2 Basis of Selection**

1. To be declared responsive, a bid must:
  - a) comply with all the requirements of the bid solicitation; and
  - b) meet all mandatory criteria.

The rating is performed on a scale of 250 points.

2. Bids not meeting above (a) or (b) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30 % for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70 %

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equals 135 and the lowest evaluated price is \$45,000 (45).

**Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)**

		Bidder 1	Bidder 2	Bidder 3
Overall Technical Score		115/135	89/135	92/135
Bid Evaluated Price		\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 36.56$	$92/135 \times 60 = 40.89$
	Pricing Score	$45/50 \times 40 = 32.73$	$45/50 \times 40 = 36.00$	$45/45 \times 40 = 40.00$
Combined Rating		83.84	75.56	80.89
Overall Rating		1st	3rd	2nd

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## PART 5 – CERTIFICATIONS AND ADDITIONAL INFORMATION

Bidders must provide the required certifications and additional information to be awarded a contract.

The certifications provided by Bidders to Canada are subject to verification by Canada at all times. Unless specified otherwise, Canada will declare a bid non-responsive, or will declare a contractor in default if any certification made by the Bidder is found to be untrue, whether made knowingly or unknowingly, during the bid evaluation period or during the contract period.

The Contracting Authority will have the right to ask for additional information to verify the Bidder's certifications. Failure to comply and to cooperate with any request or requirement imposed by the Contracting Authority will render the bid non-responsive or constitute a default under the Contract.

### 5.1 Certifications Required with the Bid

Bidders must submit the following duly completed certifications as part of their bid.

#### 5.1.1 Integrity Provisions - Declaration of Convicted Offences

In accordance with the Integrity Provisions of the Standard Instructions, all bidders must provide with their bid, **if applicable**, the Integrity declaration form available on the [Forms for the Integrity Regime](http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html) website (<http://www.tpsgc-pwgsc.gc.ca/ci-if/declaration-eng.html>), to be given further consideration in the procurement process.

### 5.2 Certifications Precedent to Contract Award and Additional Information

The certifications and additional information listed below should be submitted with the bid but may be submitted afterwards. If any of these required certifications or additional information is not completed and submitted as requested, the Contracting Authority will inform the Bidder of a time frame within which to provide the information. Failure to provide the certifications or the additional information listed below within the time frame specified will render the bid non-responsive.

#### 5.2.1 Integrity Provisions – Required Documentation

In accordance with the section titled Information to be provided when bidding, contracting or entering into a real property agreement of the [Ineligibility and Suspension Policy](http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Bidder must provide the required documentation, as applicable, to be given further consideration in the procurement process.

#### 5.2.2 Federal Contractors Program for Employment Equity - Bid Certification

By submitting a bid, the Bidder certifies that the Bidder, and any of the Bidder's members if the Bidder is a Joint Venture, is not named on the Federal Contractors Program (FCP) for employment equity "FCP Limited Eligibility to Bid" list available at the bottom of the page of the [Employment and Social Development Canada \(ESDC\) - Labour's](https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#) website (<https://www.canada.ca/en/employment-social-development/programs/employment-equity/federal-contractor-program.html#>).

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Canada will have the right to declare a bid non-responsive if the Bidder, or any member of the Bidder if the Bidder is a Joint Venture, appears on the "FCP Limited Eligibility to Bid list at the time of contract award.

### **5.2.3. Education and Experience**

The Bidder certifies that all the information provided in the résumés and supporting material submitted with its bid, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that every individual proposed by the Bidder for the requirement is capable of performing the Work described in the resulting contract.

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## **PART 6 - SECURITY, FINANCIAL AND OTHER REQUIREMENTS**

### **6.1 Security Requirements**

This requirement does not contain a Security Requirement; the requirement is unclassified and no classified information is involved.

### **6.2 Financial Capability**

*SACC Manual* clause [A9033T](#) (2012-07-16) Financial Capability

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## PART 7 - RESULTING CONTRACT CLAUSES

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### 7.1 Statement of Requirement

The Contractor must provide Laboratory Information Management System (LIMS) in accordance with the Requirement at Annex A.

#### 7.1.1 Option to Purchase

The Contractor grants to Canada the irrevocable option to acquire the goods, services or both described at Annex B - Basis of Payment of the Contract under the same conditions and at the prices and/or rates stated in the Contract. The option may only be exercised by the Contracting Authority and will be evidenced, for administrative purposes only, through a contract amendment.

The Contracting Authority may exercise the option at any time before the expiry of the Contract by sending a written notice to the Contractor.

#### 7.1.2 Task Authorization

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract. The work described in the Basis of Payment is not subject to Task Authorization.

##### 7.1.2.1 Task Authorization Process

1. The Project Authority will provide the Contractor with a description of the task using the PWGSC Task Authorization Form 572 included in Annex D.  
[https://buyandsell.gc.ca/cds/public/2021/05/12/ebc1a43514c96dc05567ae9e7772a05d/annex\\_ftaks\\_authorization\\_form-autorisation\\_de\\_tache\\_572.pdf](https://buyandsell.gc.ca/cds/public/2021/05/12/ebc1a43514c96dc05567ae9e7772a05d/annex_ftaks_authorization_form-autorisation_de_tache_572.pdf)
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority), within 10 calendar days of its receipt, the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.



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### 7.1.2.2 Task Authorization Limit

- a) The Technical Authority must authorize individual task authorizations up to a limit as set out and approved in the applicable task authorizations.
- b) Any task authorization to be issued in excess of that limit must be authorized by the Technical Authority and Contracting Authority before issuance.

## 7.2 Standard Clauses and Conditions

All clauses and conditions identified in the Contract by number, date and title are set out in the [Standard Acquisition Clauses and Conditions Manual](https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual) (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

### 7.2.1 General Conditions

[2030](#) (2020-05-28), General Conditions - Higher Complexity - Goods, apply to and form part of the Contract.

### 7.2.2 Supplemental General Conditions

[4002](#) (2010-08-16) Software Development or Modification Services;

[4003](#) (2010-08-16) Licensed Software; and

[4004](#) (2013-04-25) Maintenance Support Services of Licensed Software apply to and form part of the Contract.

## 7.3 Security Requirements

There is no security requirement applicable to the Contract.

## 7.4 Term of Contract

### 7.4.1 Period of the Contract

The "Period of the Contract" is the entire period of time during which the Contractor is obliged to perform the Work, which includes:

- 1) The Initial Contract Period, which begins on the date the Contract is awarded and ends at the successful completion of Initial Deliverables as set out in the table 1. 2 and 3 of Annex B\_Basis of Payment; and
- 2) the period during which the Contract is extended, if Canada chooses to exercise any options set out in the Contract.

### 7.4.2 Delivery Date

All the deliverables must be received on or before the dates outlined in the Table of Deliverables at 7.2 of Annex A – Statement of Requirement.

### 7.4.3 Option to Extend the Contract

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to 5 additional 1 year period(s) under the same conditions. The Contractor agrees that, during the extended

period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

## 7.5 Authorities

### 7.5.1 Contracting Authority

The Contracting Authority for the Contract is:

Name: **Carlos Robles**  
Title: Supply Specialist  
Department: Public Works and Government Services Canada  
Directorate: Business and Technology Solutions Sector (BTSS)  
Address: 10 Wellington, Gatineau, QC. K1A 0S5  
Telephone: 873-354-3556  
E-Mail: [carlos.robles@tpsgc-pwgsc.gc.ca](mailto:carlos.robles@tpsgc-pwgsc.gc.ca)

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

### 7.5.2 Technical Authority

The Technical Authority for the Contract is: (To be inserted at Contract Award)

Name:  
Title:  
Department:  
Directorate  
Address  
Telephone  
E-Mail address

The Technical Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Technical Authority; however, the Technical Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

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Id de l'acheteur - Buyer ID  
047eem  
N° CCC / CCC No./ N° VME - FMS

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### **7.5.3 Contractor's Representative**

The Contractor's representative for the Contract is: (To be inserted at Contract Award)

Name:  
Title:  
Address  
Telephone  
E-Mail address

## **7.6 Payment**

### **7.6.1 Basis of Payment**

#### **7.6.1.2 Firm Price**

Contractor will be paid a firm price specified in the contract Annex B\_ Basis of Payment –. Customs duties must be included, and taxes are extra.

#### **7.6.1.3 Limitation of Expenditure - Cumulative Total of all Task Authorizations**

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum as specify in applicable TA. Customs duties are included and Applicable Taxes are extra.
2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.
3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:
  - a. when it is 75 percent committed, or
  - b. four (4) months before the contract expiry date, or
  - c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,  
whichever comes first.

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## 7.6.2 Limitation of Price

Canada will not pay the Contractor for any design changes, modifications or interpretations of the Work unless they have been approved, in writing, by the Contracting Authority before their incorporation into the Work.

## 7.6.3 Method of Payment

### 7.6.3.1 Milestone Payments - Not subject to holdback

Canada will make milestone payments in accordance with the Schedule of Milestones detailed in the Contract and the payment provisions of the Contract if:

- a) an accurate and complete claim for payment using [PWGSC-TPSGC 1111 \[https://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html\]](https://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html), Claim for Progress Payment, and any other document required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b) all the certificates appearing on form [PWGSC-TPSGC 1111 \[https://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html\]](https://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html) have been signed by the respective authorized representatives;
- c) all work associated with the milestone and as applicable any deliverable required has been completed and accepted by Canada.

### 7.6.3.2 Task Authorization in Completion Basis.

For the Work described in Post Implementation Professional Services as Required at 8.3 of Annex A – Statement of Requirement, which is performed through the task authorization process. Canada will pay the Contractor on completion basis for work completed and accepted by the Technical Authority in accordance with the payment provisions of the Contract if:

- a) an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b) all such documents have been verified by Canada;
- c) the Work performed has been accepted by Canada.

## 7.6.4 Taxes - Foreign-based Contractor

Unless specified otherwise in the Contract, the price includes no amount for any federal excise tax, state or local sales or use tax, or any other tax of a similar nature, or any Canadian tax whatsoever. The price, however, includes all other taxes. If the Work is normally subject to federal excise tax, Canada will, upon request, provide the Contractor a certificate of exemption from such federal excise tax in the form prescribed by the federal regulations.

Canada will provide the Contractor evidence of export that may be requested by the tax authorities. If, as a result of Canada's failure to do so, the Contractor has to pay federal excise tax, Canada will reimburse the Contractor if the Contractor takes such steps as Canada may require to recover any payment made by the Contractor. The Contractor must refund to Canada any amount so recovered.

### 7.6.5 Electronic Payment of Invoices – Contract

The Contractor accepts to be paid using any of the following Electronic Payment Instrument(s):

- a. Visa Acquisition Card;
- b. MasterCard Acquisition Card;
- c. Direct Deposit (Domestic and International);
- d. Electronic Data Interchange (EDI);
- e. Wire Transfer (International Only);
- f. Large Value Transfer System (LVTS) (Over \$25M)

### 7.6.6 Discretionary Audit

1. The following are subject to government audit before or after payment is made:

The Contractor's certification that the price or rate is not in excess of the lowest price or rate charged anyone else, including the Contractor's most favoured customer, for the like quality and quantity of the goods, services or both, is subject to verification by government audit, at the discretion of Canada, before or after payment is made to the Contractor.

If the audit demonstrates that the certification is in error after payment is made to the Contractor, the Contractor must, at the discretion of Canada, make repayment to Canada in the amount found to be in excess of the lowest price or rate or authorize the retention by Canada of that amount by way of deduction from any sum of money that may be due or payable to the Contractor pursuant to the Contract.

If the audit demonstrates that the certification is in error before payment is made, the Contractor agrees that any pending invoice will be adjusted by Canada in accordance with the results of the audit. It is further agreed that if the Contract is still in effect at the time of the verification, the price or rate will be lowered in accordance with the results of the audit.

## 7.7 Invoicing Instructions

### 7.7.1 Invoicing Instructions - Progress Payment Claim - Supporting Documentation Required

In the case of the Work described in Table of Deliverables at 7.2 of Annex A – Statement of Requirement which is subject to a milestone payment, the Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html) [http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html] Claim for progress payment.

1. The Contractor must submit a claim for payment using form [PWGSC-TPSGC 1111](http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html) [http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html], Claim for Progress Payment.

Each claim must show:

- a) all information required on form [PWGSC-TPSGC 1111](http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html) [http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html];
- b) all applicable information detailed under the section entitled "Invoice Submission" of the general conditions 2030 (2020-05-28) General Conditions - Higher Complexity;

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c) the description and value of the milestone claimed as detailed in the Contract.

2. Applicable Taxes must be calculated on the total amount of the claim

3. The Contractor must prepare and certify one original and two (2) copies of the claim on form [PWGSC-TPSGC 1111](#) [<http://www.tpsgc-pwgsc.gc.ca/app-acq/forms/1111-eng.html>], and forward it to the Project Authority identified under the section entitled "Authorities" of the Contract for appropriate certification after inspection and acceptance of the Work takes place. The Project Authority will then forward the original and two (2) copies of the claim to the Contracting Authority for certification and onward submission to the Payment Office for the remaining certification and payment action.

4. The Contractor must not submit claims until all work identified in the claim is completed.

### 7.7.2 Invoicing Instructions – Task Authorizations

a) The Contractor must submit invoices in accordance with Annex A the section entitled "Invoice Submission" of the general conditions [2030 \(2020-05-28\) General Conditions - Higher Complexity](#). Invoices cannot be submitted until all work identified in the invoice is completed; [PWGSC-TPSGC 1111](#)

b) Each invoice must be supported, as applicable, by the following:

- i. Task Authorization number
- ii. Date of invoice;
- iii. Invoice number
- iv. Contractor's name and address;
- v. Contractor's Procurement Business Number; and
- vi. Item / reference number, deliverable and / or quantity or description of work.

c) Invoices must be distributed as follows:

- i. The original must be forwarded, by email, to the Project Authority identified under the section entitled "Authorities" of the Contract.
- ii. One soft copy must be forwarded by email to the Contracting Authority identified under the section entitled "Authorities" of the Contract at the following email address: [carlos.robles@tpsgc-pwgsc.gc.ca](mailto:carlos.robles@tpsgc-pwgsc.gc.ca)  
The Contract number and the Contracting Authority name must be entered in the subject line of the email.

## 7.8 Certifications and Additional Information

### 7.8.1 Compliance

Unless specified otherwise, the continuous compliance with the certifications provided by the Contractor in its bid or precedent to contract award, and the ongoing cooperation in providing additional information are conditions of the Contract and failure to comply will constitute the Contractor in default. Certifications are subject to verification by Canada during the entire period of the Contract.

## 7.9 Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

## 7.10 Priority of Documents

If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the supplemental general conditions:
  - [4002](#) (2010-08-16) Software Development or Modification Services;
  - [4003](#) (2010-08-16) Licensed Software; and
  - [4004](#) (2013-04-25) Maintenance Support Services of Licensed Software.
- (c) the general conditions:
  - [2030](#) (2020-05-28) General Conditions - Higher Complexity - Goods
- (d) Annex A, Statement of Requirement;
- (e) Annex B, Basis of Payment;
- (f) Annex C, Task Authorization Form PWGSC-TPSGC 572;
- (g) the signed Task Authorizations (including all of its annexe D);
- (h) the Contractor's bid dated \_\_\_\_\_, (*insert date of bid*).

## 7.11 Insurance Requirements

The Contractor is responsible for deciding if insurance coverage is necessary to fulfill its obligation under the Contract and to ensure compliance with any applicable law. Any insurance acquired or maintained by the Contractor is at its own expense and for its own benefit and protection. It does not release the Contractor from or reduce its liability under the Contract.

## 7.12 Limitation of Liability

1. This section applies despite any other provision of the Contract and replaces the section of the general conditions entitled "Liability". Any reference in this section to damages caused by the Contractor also includes damages caused by its employees, as well as its subcontractors, agents, and representatives, and any of their employees. This section applies regardless of whether the claim is based in contract, tort, or another cause of action. The Contractor is not liable to Canada with respect to the performance of or failure to perform the Contract, except as described in this section and in any section of the Contract pre-establishing any liquidated damages. The Contractor is only liable for indirect, special or consequential damages to the extent described in this section, even if it has been made aware of the potential for those damages.
2. First Party Liability:

- 
- a. The Contractor is fully liable for all damages to Canada, including indirect, special or consequential damages, caused by the Contractor's performance or failure to perform the Contract that relate to:
    - i. any infringement of intellectual property rights to the extent the Contractor breaches the section of the general conditions entitled "Intellectual Property Infringement and Royalties";
    - ii. physical injury, including death.
  - b. The Contractor is liable for all direct damages caused by the Contractor's performance or failure to perform the Contract affecting real or tangible personal property owned, possessed, or occupied by Canada.
  - c. Each of the Parties is liable for all direct damages resulting from its breach of confidentiality under the Contract. Each of the Parties is also liable for all indirect, special or consequential damages in respect of its unauthorized disclosure of the other Party's trade secrets (or trade secrets of a third party provided by one Party to another under the Contract) relating to information technology.
  - d. The Contractor is liable for all direct damages relating to any encumbrance or claim relating to any portion of the Work for which Canada has made any payment. This does not apply to encumbrances or claims relating to intellectual property rights, which are addressed under (a) above.
  - e. The Contractor is also liable for any other direct damages to Canada caused by the Contractor's performance or failure to perform the Contract that relate to:
    - i. any breach of the warranty obligations under the Contract, up to the total amount paid by Canada (including Applicable Taxes) for the goods and services affected by the breach of warranty; and
    - ii. any other direct damages, including all identifiable direct costs to Canada associated with re-procuring the Work from another party if the Contract is terminated either in whole or in part for default, up to an aggregate maximum for this subparagraph (ii) of the greater of **0.25** times the total estimated cost (meaning the dollar amount shown on the first page of the Contract in the block titled "Total Estimated Cost" or shown on each call-up, purchase order or other document used to order goods or services under this instrument), or \$1,000,000.00.

In any case, the total liability of the Contractor under paragraph (e) will not exceed the total estimated cost (as defined above) for the Contract or \$1,000,000.00, whichever is more.

f. If Canada's records or data are harmed as a result of the Contractor's negligence or willful act, the Contractor's only liability is, at the Contractor's own expense, to restore Canada's records and data using the most recent back-up kept by Canada. Canada is responsible for maintaining an adequate back-up of its records and data.

### 3. Third Party Claims:

- a. Regardless of whether a third party makes its claim against Canada or the Contractor, each Party agrees that it is liable for any damages that it causes to any third party in connection with the Contract as set out in a settlement agreement or as finally determined by a court of competent jurisdiction, where the court determines that the Parties are jointly and severally liable or that one Party is solely and directly liable to the third party. The



amount of the liability will be the amount set out in the settlement agreement or determined by the court to have been the Party's portion of the damages to the third party. No settlement agreement is binding on a Party unless its authorized representative has approved the agreement in writing.

- b. If Canada is required, as a result of joint and several liability, to pay a third party in respect of damages caused by the Contractor, the Contractor must reimburse Canada by the amount finally determined by a court of competent jurisdiction to be the Contractor's portion of the damages to the third party. However, despite paragraph (a), with respect to special, indirect, and consequential damages of third parties covered by this section, the Contractor is only liable for reimbursing Canada for the Contractor's portion of those damages that Canada is required by a court to pay to a third party as a result of joint and several liability that relate to the infringement of a third party's intellectual property rights; physical injury of a third party, including death; damages affecting a third party's real or tangible personal property; liens or encumbrances on any portion of the Work; or breach of confidentiality.
- c. The Parties are only liable to one another for damages to third parties to the extent described in this paragraph 3.

### 7.13 Dispute Resolution

- (a) The parties agree to maintain open and honest communication about the Work throughout and after the performance of the contract.
- (b) The parties agree to consult and co-operate with each other in the furtherance of the contract and promptly notify the other party or parties and attempt to resolve problems or differences that may arise.
- (c) If the parties cannot resolve a dispute through consultation and cooperation, the parties agree to consult a neutral third party offering alternative dispute resolution services to attempt to address the dispute.
- (d) Options of alternative dispute resolution services can be found on Canada's Buy and Sell website under the heading "[Dispute Resolution](#)".

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## **ANNEX A – STATEMENT OF REQUIREMENTS**

**Separate Attachment**

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## ANNEX B – BASIS OF PAYMENT

### 1. General

1.1 This Basis of Payment describes the framework and fee structure that Canada will use to establish payments to the Contractor for Work performed pursuant to the Contract. The framework and fee structure will be in place for the duration of the Contract including any applicable option periods.

1.2 All prices and amounts of money in the Contract are exclusive of Goods and Services Tax (GST) or Harmonized Sales Tax (HST), as applicable, unless otherwise indicated. The GST or HST, whichever is applicable, is extra to the price herein and will be paid by Canada.

1.3 The Contractor's detailed cost breakdowns provided in it's Financial Bid will form part of the Contract.

### 2. Milestone payment - Base Solution Delivery

The firm price indicated below will be paid for Base Solution Delivery in accordance with payment milestone in section 7.3\_Delivery Table of SOR.

TABLE 1. INITIAL DELIVERABLE – MILESTONE PAYMENT		
Item No.	Initial Deliverables Description	Fixed Firm Price (CAD \$)
1	Firm price for the costs associated with tasks under the section 7_Base Solution Delivery of SOR	

### 3. Firm Price – Perpetual Floating License & Software Maintenance and Support services

3.1 The payment for Perpetual Floating Licenses and the associated software maintenance and support services will be payable in advance upon successful completion of the Base Solution Delivery under SOR and as accepted pursuant to the Acceptance Procedure under the section 9 of SOR.

3.2 The Software Maintenance and Support for the Initial Deliverable will be for 1 year starting from the successful completion of the Base Solution Delivery under SOR and as accepted pursuant to the Acceptance Procedure under the section 9 of SOR .

**3.3 INITIAL DELIVERABLE – PERPETUAL FLOATING LICENSE****TABLE 2. INITIAL DELIVERABLE – FIRM PRICE**

No	<u>Initial Deliverables Description</u>	<u>Type of License</u>	<u>Unit Price</u>	<u>Quantity</u> <u>(*Evaluation Purpose Only)</u>	<u>Extended Price</u> <u>(*Evaluation Purpose Only)</u>
1	License for Production Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	13	\$ _____
2	License for QA Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	7	\$ _____
3	License for Development Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	2	\$ _____
4	License for Test Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	1	\$ _____
	<b>Sub-Total (CAD):</b>	100%			\$ _____

**Notes:** “For evaluation purpose only” means that the quantities showed are estimates and do not represent any type of commitment by Canada. However, by submitting pricing for this “Extended Price” column, the bidder commits to be able to provide the given quantity.

### 3.4 INITIAL DELIVERABLE – SOFTWARE MAINTENANCE AND SUPPORT SERVICES FOR PERPETUAL FLOATING LICENSE

<b>TABLE 3. INITIAL DELIVERABLE – FIRM PRICE</b>					
<b>No</b>	<b><u>Initial Deliverables Description</u></b>	<b><u>Type of License</u></b>	<b><u>Unit Price</u></b>	<b><u>Quantity (*Evaluation Purpose Only)</u></b>	<b><u>Extended Price (*Evaluation Purpose Only)</u></b>
<b>1</b>	Software Maintenance and Support services for <b>Production Environment</b> license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	13	\$ _____
<b>2</b>	Software Maintenance and Support services for <b>QA Environment</b> license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	7	\$ _____
<b>3</b>	Software Maintenance and Support services for <b>Development Environment</b> license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	2	\$ _____
<b>4</b>	Software Maintenance and Support services for <b>Test Environment</b> license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	1	\$ _____
	<b>Sub-Total (CAD):</b>	100%			\$ _____
<b>Notes:</b> “For evaluation purpose only” means that the quantities showed are estimates and do not represent any type of commitment by Canada. However, by submitting pricing for this “Extended Price” column, the bidder commits to be able to provide the given quantity.					

**3.5 OPTIONAL DELIVERABLE - FLOATING PERPETUAL LICENSE**

<b>TABLE 4. OPTIONAL DELIVERABLE – FIRM PRICE</b>					
<b>No</b>	<b><u>Optional Deliverables Description</u></b>	<b><u>Type of License</u></b>	<b><u>Unit Price</u></b>	<b><u>Quantity</u> <u>(*Evaluation Purpose Only)</u></b>	<b><u>Extended Price</u> <u>(*Evaluation Purpose Only)</u></b>
<b>1</b>	License for Production Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	13	\$ _____
<b>2</b>	License for QA Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	7	\$ _____
<b>3</b>	License for Development Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	2	\$ _____
<b>4</b>	License for Test Environment as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	1	\$ _____
	<b>Sub-Total (CAD):</b>	100%			\$ _____
<b>Notes:</b> "For evaluation purpose only" means that the quantities showed are estimates and do not represent any type of commitment by Canada. However, by submitting pricing for this "Extended Price" column, the bidder commits to be able to provide the given quantity.					
<b>PRICE FOR OPTIONAL PERPETUAL LICENSES IN THIS TABLE MUST BE VALID FOR 5 OPTION YEARS AFTER THE END OF INITIAL YEAR.</b>					

**3.6 OPTIONAL DELIVERABLE – SOFTWARE MAINTENANCE AND SUPPORT SERVICES**

<b>TABLE 5. OPTIONAL DELIVERABLE – FIRM PRICE</b>					
<b>No</b>	<b><u>Optional Deliverables Description</u></b>	<b><u>Type of License</u></b>	<b><u>Unit Price</u></b>	<b><u>Quantity</u> <b>(*Evaluation n Purpose Only)</b></b>	<b><u>Extended Price</u> <b>(*Evaluation Purpose Only)</b></b>
<b>1</b>	Software Maintenance and Support services for Production Environment license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	13	\$ _____
<b>2</b>	Software Maintenance and Support services for QA Environment license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	7	\$ _____
<b>3</b>	Software Maintenance and Support services for Development Environment license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	2	\$ _____
<b>4</b>	Software Maintenance and Support services for Test Environment license as described in SOR, Including complete documentation (User Manual & Training Material)	Floating Perpetual License	\$ _____	1	\$ _____
	<b>Sub-Total (CAD):</b>	100%			\$ _____
<b>Notes:</b> “For evaluation purpose only” means that the quantities showed are estimates and do not represent any type of commitment by Canada. However, by submitting pricing for this “Extended Price” column, the bidder commits to be able to provide the given quantity.					
<b><u>PRICE FOR OPTIONAL DELIVERABLE SOFTWARE MAINTENANCE AND SUPPORT SERVICES IN THIS TABLE MUST BE VALID FOR 5 OPTION YEARS AFTER THE END OF INITIAL YEAR.</u></b>					

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### **Annex C – ELECTRONIC PAYMENT INSTRUMENTS**

The Bidder accepts to be paid by any of the following Electronic Payment Instrument(s):

<input type="checkbox"/>	VISA Acquisition Card;
<input type="checkbox"/>	MasterCard Acquisition Card;
<input type="checkbox"/>	Direct Deposit (Domestic and International);
<input type="checkbox"/>	Electronic Data Interchange (EDI);
<input type="checkbox"/>	Wire Transfer (International Only);
<input type="checkbox"/>	Large Value Transfer System (LVTS) (Over \$25M)



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## ANNEX D – TASK AUTHORIZATION FORM PWGSC-TPSGC 572



Public Works and Government  
Services Canada

Travaux publics et Services  
gouvernementaux Canada

Annex  
Annexe

### Task Authorization Autorisation de tâche

Contract Number - Numéro du contrat

Contractor's Name and Address - Nom et l'adresse de l'entrepreneur	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu
	Total Estimated Cost of Task (Applicable taxes extra) Coût total estimatif de la tâche (Taxes applicables en sus) \$
Security Requirements: This task includes security requirements Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité <input type="checkbox"/> No - Non <input type="checkbox"/> Yes - Oui If YES, refer to the Security Requirements Checklist (SRCL) included in the Contract Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat	

#### For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu	Total Estimated Cost of Task (Applicable taxes extra) before the revision Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision \$	Increase or Decrease (Applicable taxes extra), as applicable Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu \$
--	--	---

**Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.**

**Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.**

#### 1. Required Work: - Travaux requis :

A. Task Description of the Work required - Description de tâche des travaux requis	See Attached - Ci-joint <input type="checkbox"/>
B. Basis of Payment - Base de paiement	See Attached - Ci-joint <input type="checkbox"/>
C. Cost of Task - Coût de la tâche	See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement	See Attached - Ci-joint <input type="checkbox"/>

PWGSC - TPSGC 572 (2014-04)

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**Annex**  
**Annexe** \_\_\_\_\_

Contract Number - Numéro du contrat

## 2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

\_\_\_\_\_  
Name and title of authorized client - Nom et titre du client autorisé à signer

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
PWGSC Contracting Authority - Autorité contractante de TPSGC

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## 3. Contractor's Signature - Signature de l'entrepreneur

\_\_\_\_\_  
Name and title of individual authorized - to sign for the Contractor  
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

PWGSC - TPSGC 572 (2014-04)

[https://buyandsell.gc.ca/cds/public/2021/05/12/ebc1a43514c96dc05567ae9e7772a05d/annex\\_f\\_taks\\_aut\\_hORIZATION\\_form-autorisation\\_de\\_tache\\_572.pdf](https://buyandsell.gc.ca/cds/public/2021/05/12/ebc1a43514c96dc05567ae9e7772a05d/annex_f_taks_aut_hORIZATION_form-autorisation_de_tache_572.pdf)

## **ANNEX E – Policy Notification (PN)-152U1 – COVID -19 Vaccination Policy for Supplier Personnel.**

### **Purpose**

The purpose of Policy Notification (PN)-152 is to inform Government of Canada contracting authorities of new vaccination requirements for supplier personnel who access Government of Canada workplaces.

Contracting authorities should consult this Policy Notification regularly to ensure they are apprised of any updates, as it is subject to change.

### **Effective date**

This Policy Notification is effective immediately and immediate action must therefore be taken to ensure the requirements of the COVID-19 Vaccination Policy for Supplier Personnel are implemented in affected solicitations and contracts. The vaccination requirements for supplier personnel enter into effect on November 15, 2021.

Related changes to the Public Works and Government Services Canada (PWGSC) Supply Manual (SM), Standard Acquisition Clauses and Conditions (SACC) Manual, and Standard Procurement Templates are included in the attached annexes. These changes will be made to the online versions of these manuals at a later date.

### **Background**

The COVID-19 pandemic continues to have an unprecedented impact on the health of Canadians. COVID-19 vaccines are a critical tool that reduce the risk of COVID-19 and protect broader public health.

As a responsible employer, the Government of Canada is committed to protecting the health and safety of its employees. On October 6, 2021, the Government of Canada announced its [Policy on COVID-19 Vaccination for the Core Public Administration Including the Royal Canadian Mounted Police.](#)

In alignment with this important measure, all supplier personnel (including subcontractor personnel) who access federal government workplaces will also be required to be fully vaccinated against COVID-19. This requirement will enter into effect on November 15, 2021.

A [notice to federal contractors](#) informing them of this vaccination requirement was published on BuyandSell on October 6, 2021. The information contained in this Policy Notification will assist contracting authorities in implementing the vaccination requirement in affected solicitations and contracts.

---

## Scope

To align with the Policy on COVID-19 Vaccination for the Core Public Administration including the RCMP, the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel **applies to all new and existing Government of Canada contracts that involve services** (including goods contracts that have a services component and construction services) **where, in order to perform the work, supplier and subcontractor personnel access Government of Canada workplaces** (i.e., places of work owned or operated by the Government of Canada) **where they may come into contact with public servants**. The vaccination requirements of this Policy also apply to supplier and subcontractor personnel who access Government of Canada workplaces where they may come into contact with public servants for the purpose of bidders' conferences or site visits. For the purpose of this Policy Notification, the term 'supplier' includes bidders, contractors, offerors, and suppliers (in the context of Supply Arrangements).

The COVID-19 Vaccination Policy for Supplier Personnel does not apply to, for example:

- contracts where the only services component is delivery;
- contracts where services are solely performed in non-Government of Canada workplaces; or
- contracts that are solely for the provision of goods (i.e. no services components).

It also does not cover situations where public servants must enter contractor facilities (e.g., to conduct compliance audits or security verifications).

## Duration

In line with the Policy on COVID-19 Vaccination for the Core Public Administration including the RCMP, the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel will be time-limited to the COVID-19 pandemic. It will be reassessed at a minimum every six months, or as prescribed by the Treasury Board of Canada Secretariat.

Once the Policy on COVID-19 Vaccination for the Core Public Administration including the RCMP no longer applies, the COVID-19 Vaccination Policy for Supplier Personnel will also be rescinded. When that occurs, contracting authorities will no longer be required to include the requirements and certifications relating to COVID-19 vaccinations in solicitation documents and contracts. Ongoing contracts will not require amendment; however, the vaccination requirement will no longer be enforced. Contracting authorities will receive further information and guidance when vaccination requirements for supplier personnel are no longer required.

## Implementation

this COVID-19 Vaccination Policy should apply for Supplier Personnel where the work involves supplier or subcontractor personnel accessing Government of Canada workplaces where they may come into contact with public servants, departments and agencies must undertake the steps described below. Contracting authorities may need to communicate with technical authorities to determine which contracts and solicitations are in scope of this Policy.

### New and active solicitations

When preparing solicitation documents and contracts for new requirements where supplier or subcontractor personnel will or might access Government of Canada workplaces where they may come into contact with public servants, contracting authorities must ensure that clause 2035 05 (5) or clause 2040 05 (5) are incorporated either by reference or in full. This should be achieved automatically if contracting authorities are using SACC Manual clause [2035 - General Conditions - Higher Complexity – Services](#) or [2040 - General Conditions - Research and Development](#).

If SACC Manual clauses 2035 or 2040 are **not** being utilized, contracting authorities are required to include the new SACC Manual clause 4013 - Compliance with on-site measures, standing orders, policies, and rules in the solicitation and the resulting contract.

In addition to clause 2035, 2040, or 4013, contracting authorities are required to include the following in solicitation documents that are subject to the COVID-19 Vaccination Policy for Supplier Personnel:

- New SACC Manual clause A3080T - COVID-19 vaccination requirement;
- New SACC Manual clause A3081T - COVID-19 Vaccination Requirement Certification;
- If equivalent language is not already included in the solicitation, clause [A3015T: Certifications - Bid](#); and
- If a 'Suspension of the work' clause is not already included in the general conditions, new SACC Manual clause 4014 – Suspension of the work.

For active procurements, the solicitation documents **must be amended** before the closing date to include the above clauses. This may require providing bidders with additional time in order to complete their bids.

Finally, if equivalent language is not already included, SACC Manual clause [A3015C: Certifications - Contract](#) must be included in all new contracts that fall under the scope of the COVID-19 Vaccination Policy for Supplier Personnel. Such a clause will incorporate the conditions of the COVID-19 Vaccination Requirement Certification that was submitted as part of the bid by reference into the contract, therefore making the certification form part of the legally binding agreement between Canada and the contractor.

If the bidder advises the contracting authority that there are personnel who are unable to be vaccinated, refer to the [Duty to accommodate](#) section below. If the bidder does not complete and submit the Certification Form as part of the bid, refer to the [Non-compliance](#) section. The Certification Form includes an optional section that is for data purposes only – bidders are not required to fill in this optional section. Filling in the optional section is also not a substitute for completing the mandatory part of the certification.

For solicitations subject to this Policy that did not include the vaccination requirement that are in the bid evaluation stage, or are in the process of being awarded, refer to the section below.

### **Bidders' conferences and site visits**

If bidders' conferences or site visits will occur at Government of Canada workplaces where bidder/offeror/supplier representative(s) may come into contact with public servants, then the vaccination requirements of the COVID-19 Vaccination Policy for Supplier Personnel will apply to those representatives. In such cases, bidder/offeror/supplier representatives will be required to submit a separate certification indicating that they meet the requirements of the COVID-19 Vaccination Policy for Supplier Personnel to

the contracting authority in advance of the conference or site visit. Contracting authorities should keep these completed certifications in the procurement file. Additionally, once the completed certification has been received, contracting authority must inform the business owner(s) or technical authority(s) as defined in the resulting contract, if applicable. SACC Manual clauses relating to bidders' conferences and site visits have been amended to include this new requirement.

### **Duty to accommodate**

Some supplier and subcontractor personnel may not be able to be vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the *Canadian Human Rights Act*.

In such cases, suppliers should first seek to provide alternative personnel that are fully vaccinated. In circumstances where replacements cannot occur, suppliers are expected to inform the responsible contracting authority as soon as possible of the number of such personnel, the impacted work locations, and the steps the supplier proposes to undertake to mitigate any associated risks. Accommodation and mitigation measures are subject to approval by the technical authority and must be adequate to ensure the health and safety of public servants. The contracting authority must forward any requests for accommodation and mitigation measures to the technical authority as soon as possible to determine if the proposed measures are acceptable.

Acceptable accommodation and mitigation measures could be as follows:

1. Personnel who are unable to be vaccinated will telework (if possible and subject to approval by the technical authority); or
2. Personnel who are unable to be vaccinated or telework will undergo COVID-19 rapid testing and report their results to their employer. If the rapid test is positive, the personnel will not access the Government of Canada workplace, or, if already at the workplace, will leave immediately. The employer will retain a record of the rapid test results. In addition to the rapid testing, the personnel must follow local public health guidelines and any other required COVID-19 preventative measures in the workplace (e.g., masks, physical distancing, as required).

Suppliers are responsible for providing the resources and covering the costs of the accommodation and mitigation measures for their personnel.

If neither of the above accommodation or mitigation measures can be utilized, contracting authorities should email [TPSGC.PACertificatsVaccins-APVaccinesCertificates.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.PACertificatsVaccins-APVaccinesCertificates.PWGSC@tpsgc-pwgsc.gc.ca) for further guidance. Please include in the email the reason(s) why the supplier is unable to follow either of the above mitigation measures.

Under this Policy, accommodation and mitigation measures are not available to supplier personnel who are unwilling to get vaccinated.

Suppliers should not share any personal information, such as any specifics about medical contraindications or religion with the contracting authority. Contracting and technical authorities are not responsible for reviewing or approving the exemptions themselves – that responsibility remains with the supplier only. The

technical authority only needs to approve the mitigation measures as sufficient to ensure the health and safety of the public servants at the workplace pursuant to the above guidance.

### Verification of vaccination certifications

If contracting or technical authorities have concerns about a supplier's compliance with their COVID-19 Vaccination Requirement Certification or have concerns about a supplier's COVID-19 Vaccination Requirement Certification being untrue, they must contact Legal Services to determine next steps with respect to verifying the certification.

### Non-Compliance

Where suppliers are unwilling to certify that they will provide fully vaccinated personnel (this does not include where certain personnel are unable to be vaccinated, as outlined in [Duty to accommodate](#), where a COVID-19 Vaccination Requirement Certification has been determined to be untrue, or, where a contractor has a pattern of non-compliance, the following applies:

- **For new and active solicitations:** completing and providing the COVID-19 Vaccination Requirement Certification is a mandatory requirement of the bid. If the bidder was unwilling to provide the certification, then the bid is found to be non-responsive, and the bidder is ineligible for contract award.

### Reporting

Departments and agencies will be responsible for reporting on COVID-19 vaccination requirements for supplier personnel. While the reporting template is still being finalized, it is likely to require reporting on, at a minimum:

- The number of existing contracts that have been impacted by the vaccination requirement;
- The number of completed vaccination certifications received from current contractors;
- The number of refusals by current contractors to complete the vaccination certification;
- The number of active solicitations that include the vaccination requirement; and
- The number of active solicitations that had to be amended to include the vaccination requirement.

### Contact information

For further questions on the COVID-19 Vaccination Policy for Supplier Personnel, contracting authorities may contact [TPSGC.PACertificatsVaccins-APVaccinesCertificates.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.PACertificatsVaccins-APVaccinesCertificates.PWGSC@tpsgc-pwgsc.gc.ca).

For assistance with terminations and for other legal assistance, contact Legal Services.

For further information on the Policy on COVID-19 Vaccination for the Core Public Administration including the RCMP, see [COVID-19 vaccination for federal public servants](#).

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Questions regarding the Supply Manual can be sent by email to the following email:  
[TPSGC.PASPSPublications-APSPSPublications.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.PASPSPublications-APSPSPublications.PWGSC@tpsgc-pwgsc.gc.ca).

Questions regarding the SACC Manual may be sent to the following email:  
[TPSGC.PAOutilsdAchats-APPProcurementTools.PWGSC@tpsgc-pwgsc.gc.ca](mailto:TPSGC.PAOutilsdAchats-APPProcurementTools.PWGSC@tpsgc-pwgsc.gc.ca).

## **Template letter to contractors**

*[Insert contractor name and address]*

*[Insert date]*

Dear *[Insert contractor representative's name]*,

The COVID-19 pandemic continues to have an unprecedented impact on the health of Canadians. COVID-19 vaccines are a critical tool that reduce the risk of COVID-19 and protect broader public health.

As a responsible employer, the Government of Canada is committed to protecting the health and safety of its employees. On October 6, 2021, the Government of Canada announced its [Policy on COVID-19 Vaccination for the Core Public Administration Including the Royal Canadian Mounted Police](#).

**In alignment with this important measure, all contractor and subcontractor personnel who access federal government workplaces where they may come into contact with public servants will also be required to be fully vaccinated against COVID-19. This requirement will enter in effect on November 15, 2021.**

**Please note that this is a mandatory requirement and that personnel that are unwilling to be vaccinated will not be permitted to work at federal government workplaces where they may come into contact with public servants, as of November 15, 2021. Government of Canada contracting authorities will be pursuing means to ensure compliance, up to and including contract terminations with contractors who do not comply with this requirement.**

***[Optional:***

***If expecting contractors to initially self-identify in-scope contracts, add:***

**If any of your contracts involve services where, in order to perform the work, your personnel or your subcontractors' personnel (if applicable) access Government of Canada workplaces where they may come into contact with public servants, then your business must certify that you will comply with the vaccination requirement on these contracts. This includes, for example, goods contracts that have a services component.**

The vaccination requirement does not apply to contracts such as:



- contracts where the only services component is delivery;
- contracts where services are solely performed in non-Government of Canada workplaces; or
- contracts that are solely for the provision of goods.

You are **not required** to submit a vaccination certification with respect to these types of contracts.

We have identified contract(s) with your business that are subject to the vaccination requirement. The contracts for which we require certification are:

*[insert contract number(s)]*

If you have affected personnel that are not able to get fully vaccinated due to a certified medical contraindication, religion or other prohibited grounds of discrimination under the *Canadian Human Rights Act*, if possible, consider replacing these personnel with personnel that are fully vaccinated. In circumstances where replacements cannot occur, please inform me as soon as possible of:

- The number of such unvaccinated personnel;
- The impacted work locations; and
- The steps you propose to undertake to mitigate any associated risks (such as regular rapid testing).

Please do not provide any personal information, such as any specifics about an individual's medical contraindications or religion with Government of Canada contracting authorities.

Accommodation and mitigation measures are subject to approval by the technical authority and must be adequate to ensure the health and safety of public servants. Accommodation and mitigation measures will not be approved for personnel that are able but not willing to be fully vaccinated.

**In order to certify that your business accepts and will comply with the vaccination requirement, please complete the COVID-19 Vaccination Requirement Certification Form that is included with this letter and return it to me, if possible, by October 29, 2021 in order to avoid follow-ups or delays. Certifications must be returned by November 12, 2021 at the latest.**

Please let us know if you have any questions.

Thank you,

*[Insert signature and contact information of sender]*

#### **Legal text for SACC item**

The Contractor must comply and ensure that its employees and subcontractors comply with all security measures, standing orders, policies or other rules in force at the site where the Work is performed.

#### **\*NEW\* Suspension of the work**

ID

4014

Effective Date

2021-XX-XX

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<b>SACC Manual item status</b>	Active
<b>Parent Section</b>	Supplemental General Conditions
<b>SACC Item usage</b>	Full Text

#### Remarks – Recommended Use of SACC Item

Use this clause in the 'Resulting Contract Clauses' section of any solicitations that are subject to the COVID-19 Vaccination Policy for Supplier Personnel that **do not** already include a 'Suspension of the work' clause in the general conditions.

In paragraph 1, the contracting authority must:

1. fill in the section(s) of the general conditions that refer to Default by the Contractor and Termination for Convenience or cancelling an order; and
2. indicate which general conditions are being used.

Use this clause in conjunction with:

- 4013: Compliance with on-site measures, standing orders, policies, and rules;
- A3080T: COVID-19 vaccination requirement;
- A3081T: COVID-19 Vaccination Requirement Certification;
- [A3015T: Certifications - Bid](#) (only if equivalent language is not already included in the solicitation; clause not needed if using PWGSC Standard Procurement Templates); and
- [A3015C: Certifications - Contract](#) (only if equivalent language is not already included in the contract; clause not needed if using PWGSC Standard Procurement Templates).

#### Legal text for SACC item

1. The Contracting Authority may at any time, by written notice, order the Contractor to suspend or stop the Work or part of the Work under the Contract for a period of up to 180 days. The Contractor must immediately comply with any such order in a way that minimizes the cost of doing so. While such an order is in effect, the Contractor must not remove any part of the Work from any premises without first obtaining the written consent of the Contracting Authority. Within these 180 days, the Contracting Authority must either cancel the order or terminate the Contract, in whole or in part, under section(s) *[insert section entitled "Default by the Contractor"]* \_\_\_\_\_ or *[insert section entitled "Termination for convenience"]* \_\_\_\_\_ of general conditions \_\_\_\_.
2. When an order is made under subsection 1, unless the Contracting Authority terminates the Contract by reason of default by the Contractor or the Contractor abandons the Contract, the Contractor will be entitled to be paid its additional costs incurred as a result of the suspension plus a fair and reasonable profit.
3. When an order made under subsection 1 is cancelled, the Contractor must resume work in accordance with the Contract as soon as practicable. If the suspension has affected the Contractor's ability to meet any delivery date under the Contract, the date for performing the part of the Work affected by the suspension will be extended for a period equal to the period of suspension plus a period, if any, that in the opinion of the Contracting Authority, following consultation with the Contractor, is necessary for the Contractor to resume the Work. Any equitable adjustments will be made as necessary to any affected conditions of the Contract.

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**\*NEW\* COVID-19 vaccination requirement**

<b>ID</b>	A3080T
<b>Effective Date</b>	2021-XX-XX
<b>SACC Manual item status</b>	Active
<b>Parent Section</b>	Instructions to Bidders / Contractors
<b>SACC Item usage</b>	Full text

**Remarks – Recommended Use of SACC Item**

Use this clause in the 'Summary' section of any solicitations that are subject to the COVID-19 Vaccination Policy for Supplier Personnel.

Use this clause in conjunction with:

- [2035 - General Conditions - Higher Complexity – Services](#), [2040 - General Conditions - Research and Development](#), or 4013: Compliance with on-site measures, standing orders, policies, and rules;
- 4014 – Suspension of the work (only if a 'Suspension of the work' clause is not already included in the general conditions);
- A3081T: COVID-19 vaccination requirement certification;
- [A3015T: Certifications - Bid](#) (only if equivalent language is not already included in the solicitation; clause not needed if using PWGSC Standard Procurement Templates); and
- [A3015C: Certifications - Contract](#) (only if equivalent language is not already included in the contract; clause not needed if using PWGSC Standard Procurement Templates).

**Legal text for SACC item**

This requirement is subject to the COVID-19 Vaccination Policy for Supplier Personnel. Failure to complete and provide the COVID-19 Vaccination Requirement Certification as part of the bid will render the bid non-responsive.

**\*NEW\* COVID-19 vaccination requirement certification**

<b>ID</b>	A3081T
<b>Effective Date</b>	2021-XX-XX
<b>SACC Manual item status</b>	Active
<b>Parent Section</b>	Instructions to Bidders / Contractors
<b>SACC Item usage</b>	Full text

**Remarks – Recommended Use of SACC Item**

Use this clause in the 'Certifications' section of any solicitations that are subject to the COVID-19 Vaccination Policy for Supplier Personnel.

Use this clause in conjunction with:

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- 2035 - General Conditions - Higher Complexity – Services, 2040 - General Conditions - Research and Development, or 4013: Compliance with on-site measures, standing orders, policies, and rules;
- 4014 – Suspension of the work (only if a 'Suspension of the work' clause is not already included in the general conditions);
- A3080T: COVID-19 vaccination requirement;
- A3015T: Certifications - Bid (only if equivalent language is not already included in the solicitation; clause not needed if using PWGSC Standard Procurement Templates); and
- A3015C: Certifications - Contract (only if equivalent language is not already included in the contract; clause not needed if using PWGSC Standard Procurement Templates).

Contracting authorities may include the COVID-19 Vaccination Requirement Certification in the body of the solicitation or as an Annex to the solicitation, as preferred.

#### Legal text for SACC item

In accordance with the COVID-19 Vaccination Policy for Supplier Personnel, all Bidders must provide with their bid, the COVID-19 Vaccination Requirement Certification attached to this bid solicitation, to be given further consideration in this procurement process. This Certification incorporated into the bid solicitation on its closing date is incorporated into, and forms a binding part of any resulting Contract.

#### COVID-19 Vaccination Requirement Certification

I, \_\_\_\_\_ (*first and last name*), as the representative of  
\_\_\_\_\_ (*name of business*) pursuant to  
\_\_\_\_\_ (*insert solicitation number*), warrant and certify that  
all personnel that \_\_\_\_\_ (*name of business*) will provide on  
the resulting Contract who access federal government workplaces where they may come into  
contact with public servants will be:

- (a) fully vaccinated against COVID-19 with Health Canada-approved COVID-19 vaccine(s); or
- (b) for personnel that are unable to be vaccinated due to a certified medical contraindication,  
religion or other prohibited grounds of discrimination under the *Canadian Human Rights Act.*, subject to  
accommodation and mitigation measures that have been presented to and approved by Canada;  
until such time that Canada indicates that the vaccination requirements of the COVID-19  
Vaccination Policy for Supplier Personnel are no longer in effect.

I certify that all personnel provided by \_\_\_\_\_ (*name of business*) have been notified of  
the vaccination requirements of the Government of Canada's COVID-19 Vaccination Policy for Supplier  
Personnel, and that the \_\_\_\_\_ (*name of business*) has certified to their compliance with this  
requirement.

N° de l'invitation - Solicitation No.

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File No. - N° du dossier

45045-190134/001

Id de l'acheteur - Buyer ID

047eem

N° CCC / CCC No./ N° VME - FMS

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I certify that the information provided is true as of the date indicated below and will continue to be true for the duration of the Contract. I understand that the certifications provided to Canada are subject to verification at all times. I also understand that Canada will declare a contractor in default, if a certification is found to be untrue, whether made knowingly or unknowingly, during the bid or contract period. Canada reserves the right to ask for additional information to verify the certifications. Failure to comply with any request or requirement imposed by Canada will constitute a default under the Contract.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## ANNEX A – STATEMENT OF REQUIREMENT

# STATISTICS CANADA

## CANADIAN HEALTH MEASURES SURVEY (CHMS) LABORATORY INFORMATION MANAGEMENT SYSTEM (LIMS)

### ANNEX A

#### Statement of Requirements

Version 2.3

December 01, 2021

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## 1 Introduction

Statistics Canada (hereinafter referred to as “StatCan”) has a requirement for a Laboratory Information Management System (LIMS) Solution (hereinafter referred to as “the Solution”). The Solution must be a complete and bug free “Commercial Off the Shelf Solution” (COTS) that must meet the requirements in this document. StatCan is looking for Perpetual User Floating Licenses to be installed on its own Cloud network. The Solution must enable and support the Canadian Health Measures Survey (CHMS) to manage biological sample (biospecimen) collection across the 6 time zones of Canada.

In order to fully understand the terms found in this Statement of Requirements (SOR), please you should refer to the definition list found in **APPENDIX H** (Glossary of Terms & Acronyms).

## 2 Project Context

The Canadian Health Measures Survey (CHMS), is a national survey conducted by Statistics Canada in partnership with Health Canada and the Public Health Agency of Canada (PHAC). The purpose of the survey is to collect nationally representative information regarding the general health and lifestyles of Canadians.

The CHMS is collecting information on the health of Canadians by means of questionnaires, physical measures and biospecimen collection. Analyses of biospecimens, for blood, urine, and saliva are done for a variety of biomarkers such as nutrition, chronic and infectious diseases, environmental exposure, etc.

Data is collected through personal interviews at two of Statistics Canada’s Mobile Examination Centers (MEC). During the MEC visit, the respondents are interviewed and basic information on demographics and health is collected. Later on, during the interview, blood, urine, and saliva samples are collected based on the respondent’s given consent and their answers to a series of screening questions in order to ensure their safety.

Approximately 2500 respondents participate in the CHMS every year. During that time, the survey collects data and biospecimens from 8 different sites (for a duration of 6 weeks each). Only one Mobile Examination Center (MEC) is used at a time and the same teams travel from one site to another. The CHMS then collaborates with external laboratories across Canada to analyse and store the samples collected.

For respondent visits to its mobile examination center, the CHMS is currently using an application that was developed in-house. At this time, the CHMS is performing a redesign of all its applications and seeking ways to improve its processes, which includes the management of biospecimen collection.

The MEC is run by 2 teams of around 8 employees that alternate shifts (MEC collection runs from early morning to late evening).

The following short video gives a tour of the inside of the MEC: <https://youtu.be/z7w0avNMUtk>

The layout of the MEC can be found in **APPENDIX A** (Layout of the Production MEC).

### 3 People involved in the MEC operations

This section describes the different levels of people involved in and around the MEC operation.

Roles	Description
StatCan Head Office Manager	<p>The person responsible for managing the collection site, including configuring new sites, updating business rules, extracting results, producing/printing reports, modifying report templates, etc.</p> <p>This is a Super User.</p> <p>There are a few people at StatCan Head Office that can fulfill that role.</p>
MEC Manager	<p>The person responsible for proper MEC operation in general.</p> <p>There is only one MEC manager, who is responsible for all work shifts (early day, late day, weekday or weekend).</p>
MEC Health Measures Specialist (HMS)	<p>The person responsible for greeting and guiding the respondents through the MEC process. The HMS obtains consent from the respondents, records a given respondents information, and takes physical measures. The HMS obtains urine samples from the respondent, records its delivery in the CHMS Collection application, and delivers the sample to the MEC lab. The HMS does not use the LIMS; information they collect is transferred between the CHMS Collection application and the LIMS.</p> <p>There are 2 teams of 2 to 4 Health Measure Specialists who cover early and late day shifts, and weekends.</p>
MEC Team Leader	<p>The person who oversees the teams (HMS and MLT) during the collection process. Can also perform collection procedures when required (staff replacement, etc.).</p> <p>There are 2 MEC Team Leaders, one for each shift.</p>
MEC Medical Lab Technologist (MLT)	<p>The person responsible for managing the samples (collect, register, aliquot, store, ship, track, etc.) with the help of the LIMS. The MLT is responsible for Phlebotomy and collecting saliva from the respondent.</p> <p>There are 2 teams of 2 MLTs to cover early and late day shifts, and weekends.</p>
MEC Lab Supervisor	<p>The person responsible for ensuring the timeliness and quality of the operations in the MEC Lab.</p> <p>There is one MEC Lab Supervisor for each MLT team.</p>
Health Canada Lab Technologist	<p>The person responsible for receiving the samples shipped to the Health Canada lab, acknowledging reception of the samples in the StatCan LIMS, running tests, and sending the test results to StatCan (exporting the test results from the Health Canada LIMS and sending them to StatCan)</p>
IT Administrator	<p>The person responsible for software configuration and maintenance.</p> <p>This is a Super User.</p>

## 4 Description of a typical appointment flow

A graphic representation of the appointment flow can be found in “**APPENDIX B – CHMS MEC visit sequence diagram**”. Additional information can be found in “**APPENDIX F – Reference Tables**” and “**APPENDIX G – Selection of specimen and tests**”.

1. The respondent’s basic profile information (age, sex, medical conditions, health habits, consent, etc.) is captured using a custom survey collection application.
2. Key data collected from the survey application informs the LIMS’ downstream biosampling collection. Based on the information received from the survey application, the LIMS (requires Application Programming Interface call(s)) creates the respondent profile and outlines the biosampling procedure for the technologist to follow.
3. Biospecimens are collected at different times during the administration of the respondent interview. Based on the data collected in the custom survey collection application, LIMS informs the technologist of the type of biospecimen and volume required to be collected.
  - a) Non-Blood biospecimens (urine, saliva, etc.)
    - i. collected during the respondent interview using the survey application;
    - ii. volume of biospecimen collected is registered in the survey application and is transferred to the LIMS;
  - b) Blood samples
    - i. collected directly using the LIMS;
    - ii. volume of blood to be collected by technologist is defined by the respondent profiles stored in the LIMS;
    - iii. the LIMS informs the custom survey application regarding the blood collection status (i.e. Outcome code; complete, partial, etc.).
4. The LIMS registers the time and prints barcode label(s) for the biospecimens collected.
5. The LIMS interacts with the barcode reader (1D), flatbed tray scanner (2D), and barcode printer to ease the technologist’s task of tracking samples through the workflow.
6. The LIMS determines the tests required for each biospecimen (based on respondent profile information against business rules and random selection)
  - a) The LIMS guides the technologist into the aliquoting of the sample for the selected tests and storage conditions.
7. Tubes of aliquoted or processed samples are tracked and stored by their associated test in the Mobile Examination Centre’s fridges/freezers.
8. The LIMS tracks the transitory biospecimen inventory between the Mobile Examination Centre and the External Reference Laboratories.
  - a) Using business rules and sample barcodes, the LIMS prevents biospecimen shipments from being sent to the wrong labs;
  - b) External Reference Laboratories provides information on the status of the biospecimen shipments and reports pending test results back into the LIMS.

## 5 Description of a typical Lab flow

A graphic representation of the appointment lab can be found in “**APPENDIX D – Lab Task Workflow**”. Additional information can be found in “**APPENDIX F – Reference Tables**” and “**APPENDIX G – Selection of specimen and tests**”.

1. During the MEC Appointment (as described in “Description of a typical appointment flow” in the section above):
  - a) The LIMS facilitates the collection of blood, urine and saliva samples by accessing loaded respondent profiles and Lookup tables that outlines the biospecimen’s minimum volume requirements for each test requested;
  - b) the LIMS decides the appropriate Vacutainer tubes, sizes, cap color, volume of blood to draw as well as saliva and urine to be collected based on respondent profile and Lookup tables;
  - c) The LIMS prints labels based on the volume and type of biospecimen the technologist collected during the interview.
2. During the Laboratory Processing of the samples collected during the MEC Appointment:
  - a) The LIMS decides the appropriate aliquots for each matrix (serum, whole blood, plasma, urine, and saliva) based on the respondent profile and Lookup tables;
  - b) The LIMS guides the technologist through aliquoting of the different matrices of specimens (showing optimum and minimum volumes, priority, etc.) and prints the required labels;
3. During tracking and shipment of samples:
  - a) The aliquoted samples are tracked and stored according to TestID and External Reference lab in fridges or freezers;
  - b) On shipment days to External Reference Labs, the samples are removed from the fridges/freezers and tracked in LIMS;
  - c) The External Reference lab confirms in LIMS receipt of shipped samples.

## 6 CHMS Operational Requirements

### 6.1 Overview

The CHMS needs a Solution able to determine the types of collection tubes and the sample volumes for each respondent based on the respondent's profile (e.g. age, sex, consent etc.). The collected blood and urine samples are then aliquoted into smaller tubes for further testing. Samples are sent to laboratories across Canada for analysis and storage. All the operations are overseen at the Statistics Canada Head Office located in Ottawa, Ontario.

The Solution must have the ability to use business rules to determine the required tests and prioritize them (in cases where the sample collected does not have the required volume), for each respondent based on the respondent's profile and other variables (refer to **APPENDIX B, C, D, F & G** for details on workflow). Some tests are chosen for all respondents, while other tests are randomly chosen from the eligible respondents based on the predetermined probability weights set on the sample file, imported into the application. The sample file contains information on each respondent (respondent profile) such as the name, respondent ID, age, sex, requirement for fasting, smoker/non-smoker, consent for DNA blood and urine, conditions for screen outs, etc. This file is prepared prior to the start of a site.

The Solution must have the ability to guide the MLTs through the workflow (refer to **APPENDIX B, C, D, F & G** for detail on workflow) by displaying the type of tubes to be filled for each step and must record the respondent information and the collected sample tubes information, so that the results can be linked back to the respondent.

The Solution must offer complete sample management throughout its life cycle. This includes, but is not limited to, the following steps: collect and register samples, provide barcodes, aliquot samples, store samples, track locations, review data, generate reports, perform data query, and archive data.

The Solution must also offer functionalities related to the equipment maintenance. This includes, but is not limited to, the following steps: configure and receive automated notification for scheduling of equipment maintenance, store instrument calibration records or other related documents, and track instrument locations as well as inventory.

## 6.2 Solution Required User Licenses

The Solution's initial contract must provide Perpetual User Floating Licenses; Estimated number of licenses required listed in the tables below.

The Solution must provide licenses for 4 different environments: Dev, Test, QA and Prod.

The Production and QA environments require the use of user roles, while Dev and Test don't require user roles.

In order to allow CHMS to possibility run both MECs simultaneously in the future, the Solution must allow the option to purchase additional Perpetual User Floating Licenses as per the tables below. Those Floating Licenses are going to be managed by a license server installed within StatCan Cloud environment.

### Production environment:

User type	User Role	Prod estimated number of Perpetual User Floating Licenses in Initial Contract	Prod estimated number of Optional Perpetual User Floating Licenses
User	MEC Medical Lab Technologist (MLT)	4	4
	MEC Lab Supervisor	1	1
	MEC Team Leader	2	1
	Health Canada Lab Technologist	1	2
Super User	StatCan Head Office Managers	3	2
	IT Administrator	2	1

### QA environment:

User type	User Role	QA estimated number of Perpetual User Floating Licenses in Initial Contract	QA estimated number of Optional Perpetual User Floating Licenses
User	MEC Medical Lab Technologist (MLT)	2	1
	MEC Lab Supervisor	1	1
	MEC Team Leader	1	1
	Health Canada Lab Technologist	1	1
Super User	StatCan Head Office Managers	1	1
	IT Administrator	1	1

### Dev and Test environment – Estimated number of Perpetual User Floating Licenses:

User Role	Initial Qty for Dev Environment	Initial Qty for Test Environment	Optional Qty for Dev env	Optional Qty for Test env
N\A (no roles used)	2	2	1	1

### 6.3 Solution functionalities required

The Solution must provide the following functionalities:

1. Must have the ability to set up specific workflows (tubes to fill and amount of blood to be drawn). Following the setup of the workflows, the Solution must guide the MLT for every step of the collection;
2. Must have the ability to implement validation and business rules to facilitate the data entry process and to ensure the consistency, integrity, and standardization of the data;
3. Must have the ability to provide Application Programming Interface (API) for integration with other applications, allowing for the creation of a respondent's profile, registering biospecimen tracking info data, and allowing data queries;
4. Must have the ability to record the respondent's information and the collected sample tubes information, so that the results can be linked back to the respondent;
5. Must have the ability to create barcode labels for biospecimen collection tubes, containers, or equipment, and to communicate with a printer to print the barcodes;
6. Must have the ability to scan barcodes (1D and 2D) in order to track the samples and equipment or search the data from any sample collected and sort the search results by any field of the search criteria;
7. Must have the ability to display the respondent's profile upon scanning the ClinicID barcode;
8. Must have the ability to display notes and instructions during workflow dependent on previously collected respondent data (for example: history of vasovagal attacks (feeling dizzy, fainting, etc.);
9. Must have the ability to display warning texts with different font options (e.g. use right arm, use washed pipette tips, etc.);
10. Must have the ability to verify if the samples were collected (i.e. aliquot) for the selected tests or to specify the reason, if not collected;
11. Must have the ability to allow multiple tests to be added to one sample. When a sub sample is created; the Solution must allow the sub sample to retain the original continuity of evidence of the parent sample up to the point when the sample was aliquoted;
12. Must have the ability to track the location, through time, of the lab equipment and every sample from the time the sample is collected until it is destroyed or stored in the biobank (further referenced as Chain of Custody). This includes, but is not limited to tracking of the specific location of the sample or the equipment within the laboratory. For example: room, cabinet, refrigerator, freezer, etc. The Solution must also have the ability to generate, export, and print reports of this data;
13. Must have the ability to record information, for all Laboratory Users who access the system. If data has been added and/or updated in any of the data fields such as data field name, current and updated data, User Identification, and date and time (further referenced as Audit Trail). The Solution must also have the ability to generate, export, and print reports of this data;
14. Must have the ability to conduct queries and produce reports on the variables collected;

- 
15. Must have the ability to interact with other LIMS (used in External Reference Labs) to exchange shipment information using HL7 standard data exchange;
  16. Must have the ability to load shipment tracking and test results sent from External Reference Labs as custom .csv files;
  17. Must have the ability to create different user roles or groups, control the platform capabilities, and restrict information available, based on those roles or groups;
  18. Must have the ability to provide full user interfaces in both of Canada's official languages (French and English)



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## 7 Base Solution Delivery

### 7.1 Scope of Work

The Base Solution Delivery includes work and services as set out in this section “**7 – Base Solution Delivery**”, including but not limited to “**7.2 – Initial Solution Implementation**” and its deliverables (as per section “**7.3 – Delivery Table**”) and the initial User Training (as per section “**7.5 – Training - Initial User Training Requirements**”).

The costs associated with the Base Solution Delivery will be at firm price basis as specified in the section “2. Milestone payment - Base Solution Delivery” of Annex B\_ Basis of Payment.

The payment of Base Solution Delivery will be made through milestone payment basis in accordance with the section “**7.3 – Delivery Table**”.

## 7.2 Initial Solution Implementation

The Initial Solution Implementation is to be completed within 6 month of Contract award (as per “**7.3 – Delivery Table**”).

The Initial Solution Implementation consists of installing, customising and configuring the Bidder's COTS's solution into the Client's cloud environment pursuant to the requirements stated in **APPENDIX I**.

The Contractor will not have access to StatCan IT platform; StatCan employees will install and configure the Solution based on Contractor's instructions and guidance.

There will be no data migration from the old CHMS system; although configuration data will need to be loaded.

The Contractor's responsibilities related to the Initial Solution Implementation may include but are not limited to:

- a) Configuring the Solution in a container (as per section **10.1 – IT Platforms**) or providing the scripts and instructions for StatCan IT to install and configure the Solution;
- b) Providing installation & configuration instructions to StatCan as well as assisting with operational start-up;
- c) Providing design and architecture documentation describing the Solution components and their interactions (equipment, networking, component assembly, etc.);
- d) Producing documentation on the Solution Implementation that is specifics to StatCan (customisation, component assembly, etc.) and its operation.

Contractor's resource(s) must have relevant professional experience (a minimum of 2 years experience) in implementing, configuring and customizing the COTS Solution with diverse clients.

The Contractor must provide the list of the intended resources in the Implementation Plan, for Canada's approval.

Once the Initial Solution Implementation is accepted by Canada in accordance with “**9 – Acceptance Procedure**”, additional implementation changes other than the Initial Solution Implementation, will be executed through the Task Authorisation Process as defined in section “**8 – Post Implementation Professional Services as Required (Task Authorisation)**”.

### 7.3 Delivery Table

Unless otherwise agreed, the Contracteur must follow the chronological order of the tasks listed in the following table:

No.	Tasks / Activities / Deliverables	Deliverable	Delivery Schedule (a)	Review Meeting Schedule (b)	Approval by Canada schedule (c)	Payment milestone
<b>1</b>	<b>Initial kick-off meeting</b>	The Contracteur must organise and schedule a meeting with the StatCan team in order to initiate the work.	Within 7 days of contract award - unless otherwise agreed by the technical authority.	N/A	N/A	
<b>2</b>	<b>Scope Study</b>	The Contracteur must conduct a full Scope Study. The Scope Study will be conducted in collaboration with the Solution Configuration Specialist and StatCan using mediums such as videoconference, email, etc.  The Contracteur must organise and schedule a meeting with the StatCan team to review the Scope Study for approval.	Within 14 days of contract award - unless otherwise agreed by the technical authority.	Within 7 days of delivery - unless otherwise agreed.	Within 7 days of review - unless otherwise agreed.	
<b>3</b>	<b>Technological Blueprint</b>	The Contracteur must provide a Technological Blueprint (using diagrams and written descriptions) showing the mapping between the Solution components and the underlying technology.  The Contracteur must organise and schedule a meeting with the StatCan team to review the Technological Blueprint for approval.	Within 30 days of contract award - unless otherwise agreed by the technical authority.	Within 7 days of delivery - unless otherwise agreed.	Within 7 days of review - unless otherwise agreed.	

No.	Tasks / Activities / Deliverables	Deliverable	Delivery Schedule (a)	Review Meeting Schedule (b)	Approval by Canada schedule (c)	Payment milestone
4	<b>Implementation Plan</b>	<p>The Contracteur must provide an implementation plan as per the requirements identified in the Statement of Requirements.</p> <p>The Contracteur must organise and schedule a meeting with the StatCan team to review the Implementation Plan for approval.</p> <p>See section <u>"7.4 – Project Implementation Plan"</u></p>	Within 30 days of contract award - unless otherwise agreed by the technical authority.	Within 7 days of delivery - unless otherwise agreed.	Within 7 days of review - unless otherwise agreed.	<p>15% upon approval (item 4(c))</p> <p>Item #1 to 4 must be completed for this milestone payment</p>
5	<b>Training Plan</b>	<p>The Contracteur must provide a Training Plan as per the requirements identified in the Statement of Requirements.</p> <p>The Contracteur must organise and schedule a meeting with the StatCan team to review the Training Plan for approval.</p> <p>The Training Plan must include, for each course: course name, description, prerequisite(s), audience, duration and medium used.</p> <p>See section <u>"7.5 – Training - Initial User Training Requirements"</u></p>	Within 30 days of contract award - unless otherwise agreed by the technical authority.	Within 7 days of delivery - unless otherwise agreed.	Within 7 days of review - unless otherwise agreed.	

No.	Tasks / Activities / Deliverables	Deliverable	Delivery Schedule (a)	Review Meeting Schedule (b)	Approval by Canada schedule (c)	Payment milestone
6	<b>Customization of the Solution as per StatCan requirements</b>	<p>The Contracteur must provide complete customisation of the Solution, in order to meet RFP requirements, and based on the results of the performed Scope Study. Any customisation required are to be included in the implementation cost provided in the RFP submission.</p> <p>If required, any Solution's software modifications must become part of the COTS offering.</p> <p><b>Note:</b> Subject to Final User Acceptance after final Implementation Delivery.</p>	Within 6 months of contract award - unless otherwise agreed by the technical authority.	N/A	N/A	
7	<b>Documentation of the customization</b>	<p>The Contracteur must provide complete documentation (including User Manual &amp; Training Material) explaining the customization performed on the initial Solution in order to be compliant with all StatCan requirements.</p> <p>If required, any Solution's software modifications must be part of the COTS standard documentation.</p> <p>Documentation must be submitted in PDF format.</p> <p><b>Note:</b> Subject to Final User Acceptance after final Implementation Delivery.</p>	Within 6 months of contract award - unless otherwise agreed by the technical authority.	N/A	N/A	

No.	Tasks / Activities / Deliverables	Deliverable	Delivery Schedule (a)	Review Meeting Schedule (b)	Approval by Canada schedule (c)	Payment milestone
8	First software implementation delivery	Delivery of the implemented Solution as per the requirements identified in the Statement of Requirements. The Solution Delivery can be incremental until the complete Solution delivery.  <b>Note:</b> Subject to Final User Acceptance after final Implementation Delivery.	Within 6 months of contract award - unless otherwise agreed by the technical authority.  <b>Note:</b> Final Software Implementation Delivery must be done within 6 months of contract award, unless otherwise agreed.	N/A	N/A  <b>Note:</b> Might be subject to item 9, Final User Acceptance	25%  Item #1 to 8 must be completed for this milestone payment
9	Final User Acceptance	Canada will evaluate the provided Solution implementation as described in section "9 – <u>Acceptance Procedure</u> " of the SOR	Canada will provide results of its tests and evaluation within 3 weeks <sup>1</sup> of the Solution implementation delivery and successful installation and operation in StatCan Cloud environment.  As per SOR Section "9 – <u>Acceptance Procedure</u> ", Canada can either accept or reject the provided implementation.	N/A	N/A	50%  Item #1 to 9 must be completed for this milestone payment

<sup>1</sup> 3 weeks does not include the time for StatCan to install and configure the Solution in its computing environment. Installation and configuration delay will vary from a single software delivery compare to an incremental delivery where procedures already exists.

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No.	Tasks / Activities / Deliverables	Deliverable	Delivery Schedule (a)	Review Meeting Schedule (b)	Approval by Canada schedule (c)	Payment milestone
10	Training sessions	The Contracteur must provide training as described in section “ <u>7.5 – Training - Initial User Training Requirements</u> ” of the SOR.	To be delivered <u>following</u> “Final User Acceptance” and <u>completed</u> within 2 months following “Final User Acceptance” or within 6 months following contract award - unless otherwise agreed by the technical authority.	N/A	N/A	10% upon completion  Item #1 to 10 must be completed for this milestone payment

## 7.4 Project Implementation Plan

Finalization of the Project Implementation Plan must be completed by the Bidder within 30 working days of the Contract being awarded. Following the delivery of the Project Implementation Plan, the Bidder must organise a meeting with StatCan to discuss the implementation of the Solution within 7 days.

The Project Implementation Plan should include, but is not limited to:

### 7.4.1 Project Overview:

- a) Purpose, Scope and Objectives;
- b) Assumptions, Constraints and Dependencies;
- c) Deliverables highlighting key milestones.

### 7.4.2 Solution Design:

- a) Proposed Application Architecture (conceptual view) showing components and the way in which components will interact with StatCan systems and databases.

### 7.4.3 Implementation Activities:

Description and information on the major system implementation activities, including the following:

- a) Resources required to accomplish the activity (key person(s) responsible for the activity);
- b) Proposed approach for installation and configuration of base software;
- c) Proposed approach for performance testing and system acceptance testing for the base software;
- d) Criteria for successful completion of the activity (e.g., "user acceptance").

### 7.4.4 Prerequisites requirements:

- a) Provide a list of prerequisites for installing and testing;
- b) Provide a list of software components for example: software, databases, compilers, operating systems, etc.;

### 7.4.5 System Configuration:

- a) Proposed approach for performing a gap analysis on requirements and developing a plan to fill the gaps (to configure data fields, tests, report templates, inventory, etc.);
- b) Proposed approach for loading data (reference file, lookup tables, etc.) from the existing StatCan data sources to the Solution.

### 7.4.6 Implementation Schedule:

- a) Proposed schedule for completion of all activities to implement the new Solution;
- b) Proposed method to provide updates to StatCan on the progress of the implementation in relation to the initial plan.



7.4.7 Risk Management Log:

- a) Identify foreseen risks, estimated impacts, and define risk response.

7.4.8 Project Closeout Plan:

- a) Proposed approach for closing the project after complete implementation of the Solution and conducting a knowledge transfer to StatCan staff.

## 7.5 Training - Initial User Training Requirements

The Bidder must provide training on the software Solution in accordance with the requirements found in this document, such as:

- a) The training must be role oriented and must include relevant information on the Solution components, configuration, operation, and maintenance;
- b) Initial training sessions must be delivered within 3 weeks, or as agreed by the Bidder and StatCan, following the “**Final User Acceptance**” of final implementation (as per “**7.3 – Delivery Table**” item #9 & #10);
- c) The Bidder must provide electronic documentation, all presentations, and related reference documents used for training in English. If available, the Bidder must also provide the French version of the documents. StatCan reserves the right to translate the training material to French;
- d) At least 10 working days in advance of the first training session, the Bidder must submit the course syllabus and schedule, an electronic copy of all the training materials, and the names and qualifications of the instructors to the Technical Authority for approval;
- e) The training must take place via web conference;
- f) The training must take place during normal business hours (between 8:00 am and 4:00 pm, Canada Eastern Time);
- g) The training material must reflect StatCan’s environment and operational requirements.

Initial training will only be required for the initial users of the Solution, of which the associated cost must be included in the Implementation cost to be provided in the RFP submission.

A minimum of 15 hours of training, in total, must be provided by the Bidder. The training will be partitioned in a generic training, allowing every type of user to gain basic knowledge of the platform, and role or type specific trainings, allow specific type of user to learn the specific functionalities pertaining to their role.

The detail of the training schedule and material (i.e. PPT, PDF, etc.) should be explained in the Training Plan as outlined in the section “**7.3 – Delivery Table**”.

Here is an estimate number of users, per role, for which training will be required following the Solution implementation:

User Role	Estimated Number of Users
MEC Medical Lab Technologist (MLT)	4
MEC Lab Supervisor	1
MEC Team Leader	2
Health Canada Lab Technologist	1
StatCan Head Office Managers	3
IT Administrator	2

## 8 Post Implementation Professional Services as Required (Task Authorisation)

Once the Initial Solution Implementation is accepted by Canada in accordance with “9 –Acceptance Procedure”, additional implementation changes other than the Initial Solution Implementation will be executed through the Task Authorisation Process as defined in this section.

Post implementation customisation might be required to fulfill future needs by Canada.

If such Task Authorisation (TA) is requested by Canada, Bidder will suggest the appropriate resource in light of customisation required, for Canada’s approval.

Bidder’s proposed resource(s) must have relevant professional experience (a minimum of 2 years experience) in configuring and customizing the COTS Solution with diverse clients.

Task Authorisations are subject to section “9 –Acceptance Procedure”.

## 9 Acceptance Procedure

The Technical Authority is the Inspection Authority. All reports, deliverables items, documents, goods and all services rendered under the Contract, including the list deliverables as set out in the section “7.3 – Delivery Table” under Statement of Requirements are subject to inspection by the Inspection Authority or representative. Should any report, document, deliverables, good or service not be in accordance with the requirements of the Statement of Requirements or Task Authorisation and to the satisfaction of the Inspection Authority, as submitted, the Inspection Authority will have the right to reject it or require its correction at the sole expense of the Contractor before recommending payment.

All the work and professional services to be performed by the bidder are subject to inspection and acceptance by Canada. Inspection and acceptance by Canada do not relieve the Contractor of its responsibility for defects or other failures to meet the requirements of the Contract. Canada will have the right to reject any work that is not in accordance with the requirements of the Contract and require its correction at the Bidder’s expense.

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## 10 Department Computing Environment

### 10.1 IT Platforms

StatCan is moving most of its computing systems to Government of Canada's (GC) approved public Cloud Service Providers (CSP). By the time this Solution will be implemented, most of StatCan computing platforms will be hosted on public cloud.

StatCan has committed to a container-based Docker application infrastructure for cloud-native and micro services applications. All new development must use .Net CORE automated through Continuous Integration & Deployment (CI/CD), while the container deployment and management are executed by Kubernetes.

The StatCan container OS of choice is LINUX (mostly Alpine, Ubuntu otherwise), while a Windows container is reserved for exceptional cases (mainly legacy apps/tech).

StatCan will continue to use Virtual Machine (LINUX and Windows) for the foreseeable future, but only to provide a home for legacy applications.

StatCan default Database Management System (DBMS) is now SQL Server 2019. MySQL and Postgress are being used for some exceptional specific use cases, while Oracle DB will only be used to support legacy applications.

Once all StatCan applications/systems are hosted on the cloud, all StatCan DBMS will be on a Platform as a Service (PaaS) model and all data will be encrypted as part of the DBMS service offering.

### 10.2 Workstation Environment

StatCan's workstation environment is based on Windows 10 Operating Systems secured by HP Sure Click Enterprise (Bromium Security Platform) version 4.2 or higher.

StatCan's main Web browsers are MS Edge (version 95 or newer) and HP Sure Click Secure Browser (Chromium) version 88 or newer. StatCan also make use of Firefox (version 94 or newer), Chrome (Version 95 or newer), Opera (version 81 or newer) and Internet Explorer 11.x in parsimony. All Web Browsers are secured by HP Secure Click.

### 10.3 Directory Services

StatCan directory services is based on Microsoft Active Directory (MS-AD). In order to avoid infrastructure dependencies, StatCan is implementing its Authentication and Authorisation on the OpenID connect / Oauth 2.0 standards.

### 10.4 Security Policies

- a) Users' authentication and authorisation must be done using the central directory services.
- b) Users' sessions must be locked after 10 minutes of inactivity (requiring the user to login again).
- c) All network communication must be encrypted using Transport Layer Security (TLS) or an equivalent/better protocol.

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## 10.5 Office Suite

Statistics Canada is currently using Microsoft Office 365 Suite (Word, Excel and Outlook) and the Government of Canada Document Management System (GCDOCS).

## 11 CHMS Networks Environment

StatCan Cloud make uses of 4 different mandatory environments; Development (Dev), Test, Quality Assurance (QA) and Production (Prod).

- Dev & Test environments are to be used by IT staff to implement the IT systems,
- QA allows client to test that requirements were properly implemented and to execute the user acceptance testing,
- Prod is the ultimate production environment.

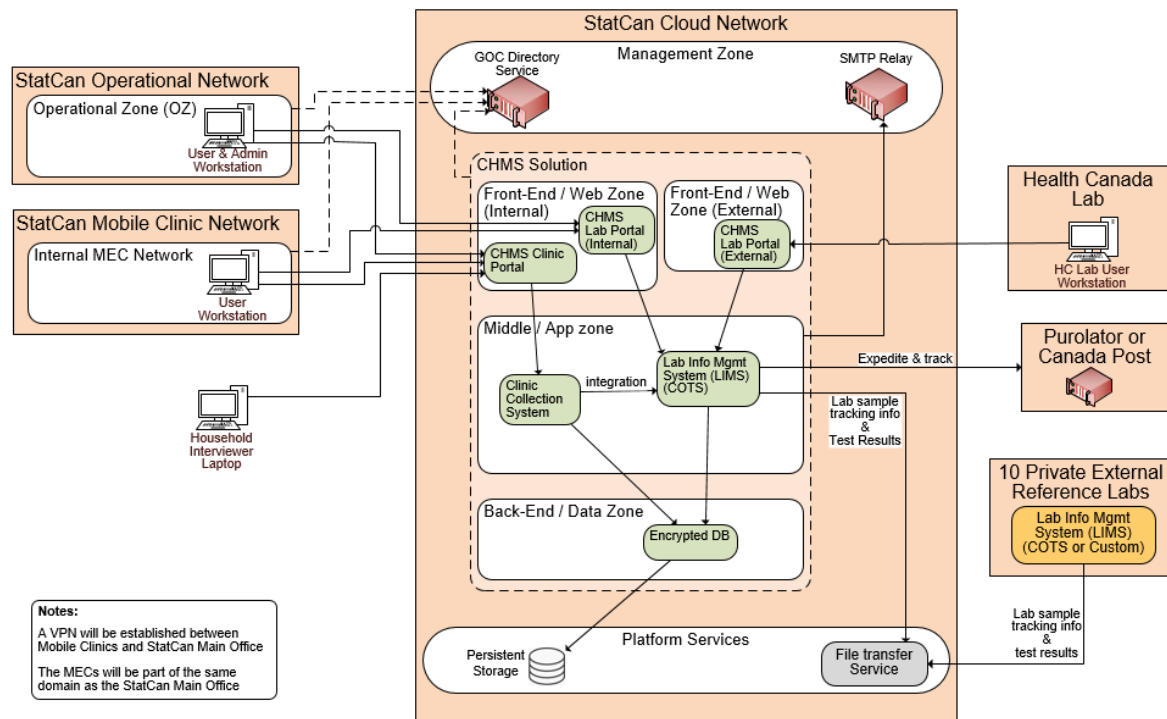
Dev & Test are minimal in size (can vary depending of project), while QA & Prod are to be equivalent to each other in size and controls in order to allow for QA to be used for performance testing and to be replicated and analysed Production issues.

The CHMS Solution will be hosted on the StatCan Cloud. Its systems' web interface will be exposed internally for StatCan Main office & MEC Staff and externally for the Health Canada lab to access (as depicted in the diagram below). For security reasons, the internal and the external Web Front-End will be hosted separately (see diagram).

The SMTP server requires user Authentication (No Anonymous connection allowed).

All communications must be secured by a Transport Layer Security (TLS) or an equivalent/better protocol.

**Figure 1: Abstract of the CHMS System Interconnection**



## 12 Contract duration

Initial contract duration is 1 year + up to 10 additional optional years.

## 13 Location of Work

All work will be done at the Bidder's premises. StatCan will install the provided Solution components on its network. Meetings and training sessions will be provided by videoconference.

## 14 Language

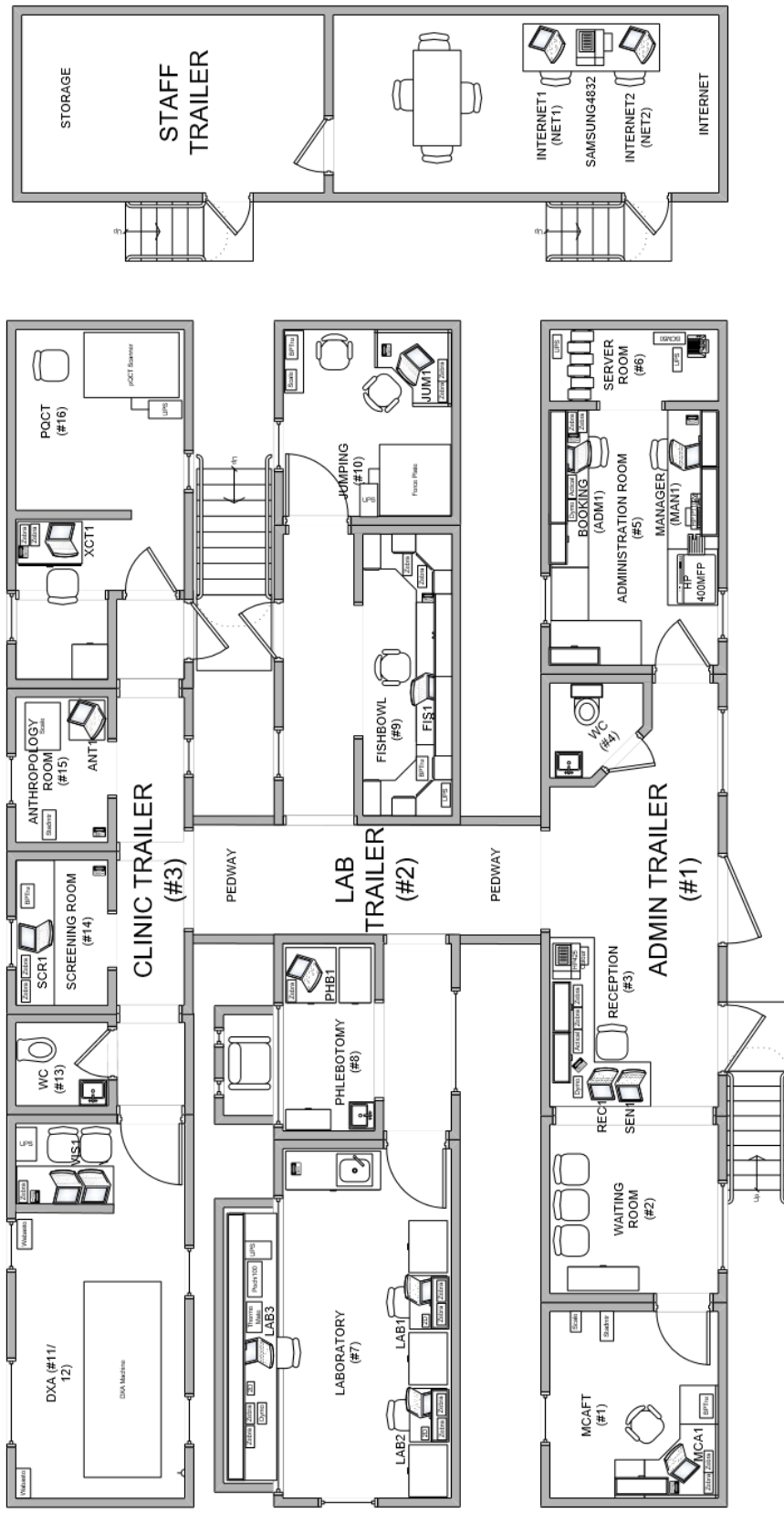
The language of correspondence and documents will be English or French.

StatCan reserves the right to translate, as required, any material provided (implementation documents or Solution documentation) in either French or English, in order to fulfil its requirement for French and English documentation.

## APPENDIX A

### Layout of the Production MEC

This represents the current layout of a Mobile Examination Center (MEC) when installed at a site. The MEC is comprised of 3 x 53' long trailers which are interconnected. A fourth trailer is used as storage and a meeting place for the MEC staff.

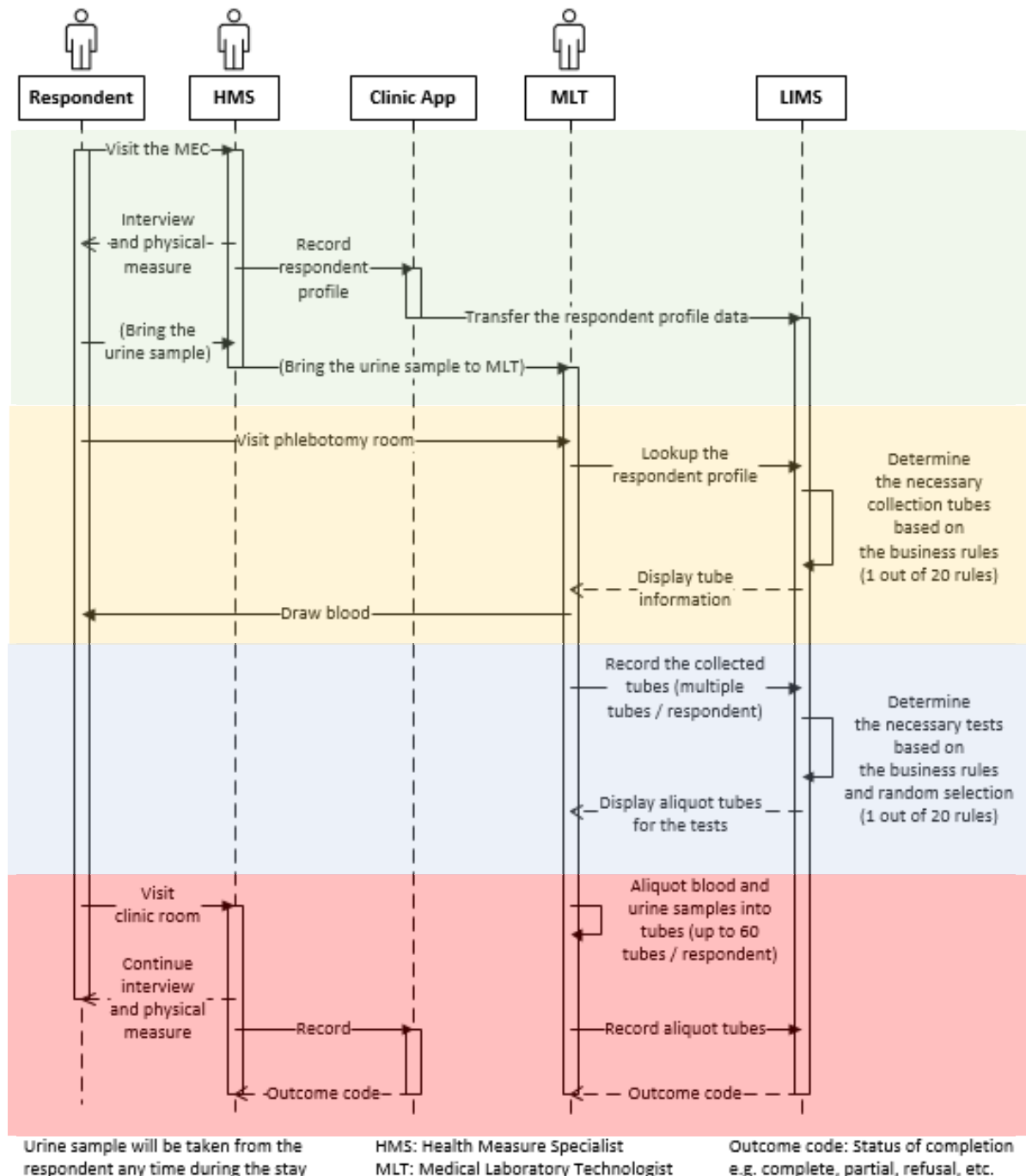




## APPENDIX B

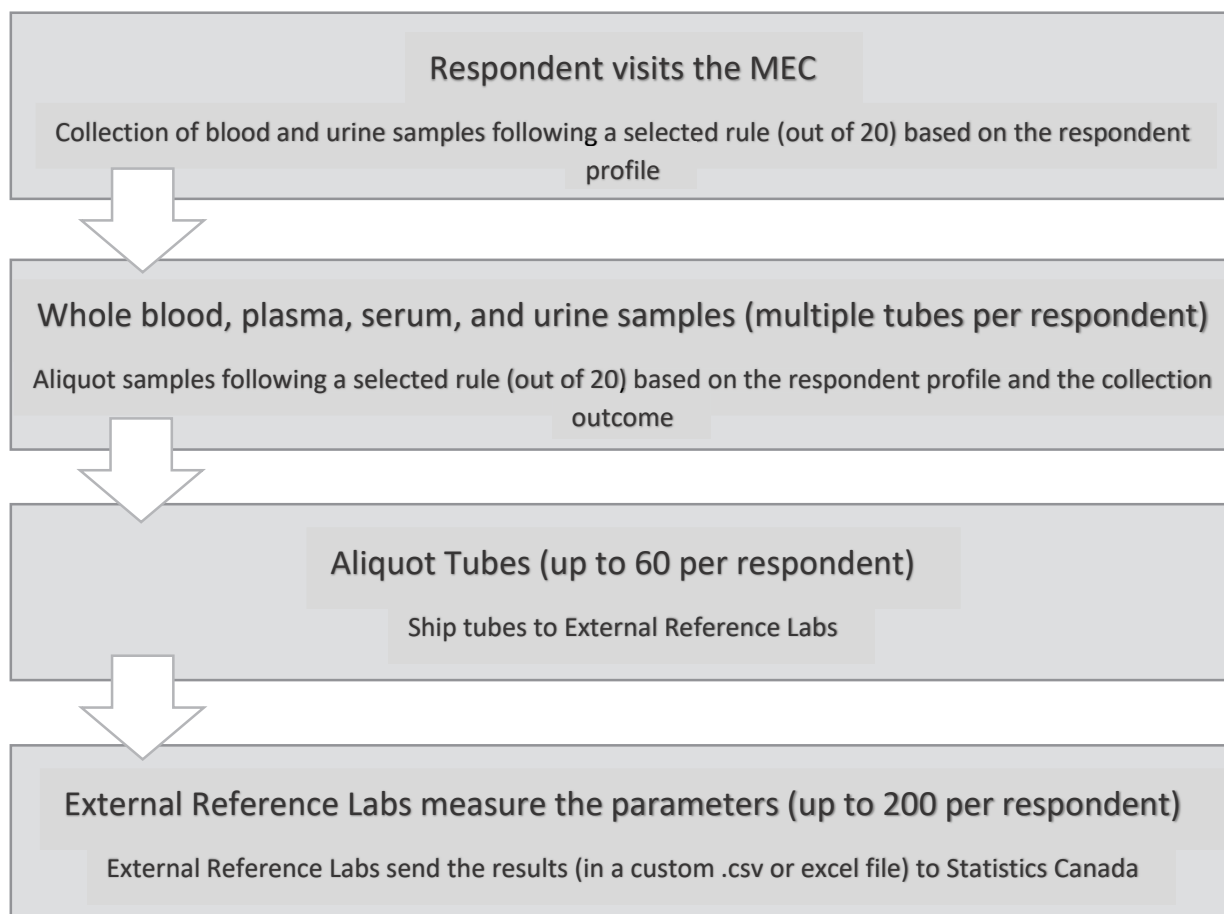
## CHMS MEC visit sequence diagram

This sequence diagram explains the stages of a respondent's visit at the MEC, as well as the required actions from the staff. For a written description, please refer to section "4 – Description of a typical appointment flow".



## APPENDIX C Sample Collection Steps

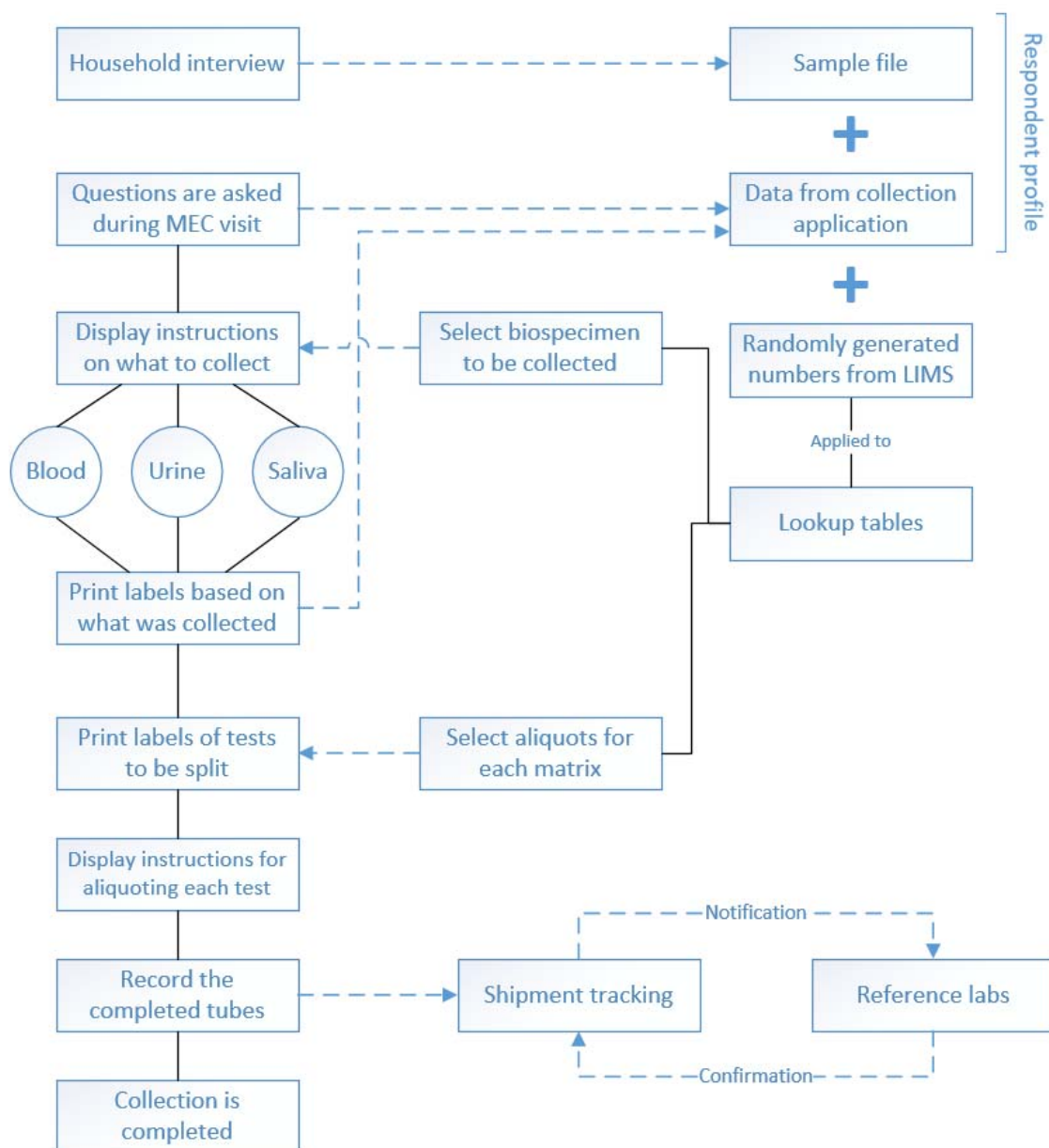
This diagram explains the steps required for sample collection during a respondent visit at the MEC.



## APPENDIX D Lab Task Workflow

This diagram explains the intended flow of tasks as well as the dependency on data for each respondent's visit to the MEC.

For textual description, please refer to section "5 – Description of a typical Lab flow"



### Legend

— Flow of tasks

- - -> Flow of information

## APPENDIX E List of Laboratory Equipment and Instruments

This is a list of the Laboratory Equipment and Instruments the LIMS must interface with, their specific instrument software (where is applicable), and their Resulting File Format (where applicable).

Equipment & Instrument	Instrument Software	Resulting File Format
1D scanner	N/A (regular keyboard emulation)	N/A
2D scanner	Tracxer Code Reader	.txt or .csv
PocHi	Sysmex	.txt or .csv Connect: Serial Format: K-1000 Transfer Rate: 2400 bps Data Length: 7 bits Stop Bit: 2 bits Protocol: Class A Transfer Interval: 2 s
Dymo Label Writer	DYMO Label	N/A
Zebra Printer	Zebra Driver	N/A

## APPENDIX F Reference Tables

Tube information: For workflow, e.g. 'scan the whole blood Lavender cap 2.0mL cryotube'. The tube type determines the method of scanning, e.g. a 2D tube is scanned differently compared to a cryotube. The tube\_id can be used to print labels (tube\_id identifies what specific test or test panel for the tube, together with the clinic\_id identifies a specific tube for a specific respondent).

tube_id	tube_type	tube_size_E	tube_size_F	cap_colour	tube_description_E	tube_description_F
tube_011	Cryotube	2.0 mL	2,0 mL	Lavender	whole blood	sang entier
tube_030	2D	1.4 mL	1,4 mL	Orange	whole blood	sang entier
tube_050	2D	0.75 mL	0,75 mL	White	plasma	plasma
tube_051	2D	0.75 mL	0,75 mL	Green	plasma	plasma
tube_060	2D	0.75 mL	0,75 mL	Blue	serum	sérum

Collection information (this also includes priority)

specimen_id	specimen_type	collection_volume	specimen_description_E	specimen_description_F	priority
specimen_763	Urine	120	urine container	réipient d'urine	7.9
specimen_93	Urine	120	pooled urine container	réipient du pool d'urine	7.94
specimen_10	Serum	10	red (serum)	rouge (sérum)	5.5
specimen_11	Serum	6	red (serum)	rouge (sérum)	5.51
specimen_12	Serum	4	red (serum)	rouge (sérum)	5.52

Test information: The matrix is used to group tests together so that they can be split at the same step, e.g. when it's time to split plasma, look for all plasma tests and those will be listed together.

test_id	Matrix	Measure_E	Measure_F	Fasting	Priority
test_011	Whole Blood	Complete Blood Count (CBC)	Hémogramme	No	3.01
test_012	Urine	General characterization	Densité	No	
test_013	Water	Fluoride in water	Fluorure dans l'eau	No	
test_015	Water	Metals in water	Métaux dans l'eau	No	
test_030	Whole blood	Stored QC Whole blood 1	Échantillon de CQ Sang entier 1	Yes	3.06
test_050	Plasma	Stored QC Plasma 1	Échantillon de CQ Plasma 1	Yes	1.05
test_051	Plasma	Stored QC Plasma 2	Échantillon de CQ Plasma 2	Yes	1.06
test_060	Serum	Stored QC Serum 1	Échantillon de CQ Sérum 1	Yes	5.19

Tube instructions: These are other dynamic text. Currently there are no post splitting instructions

tube_id	Presplitting_E	Presplitting_F	Postsplitting_E	Postsplitting_F	Article_F
tube_99	Pool the serum vacutainers into bottle 99	Combinez le sérum des vacutainers dans la bouteille 99			
tube_512					de
tube_701					d'

**NB:** Article\_F is used in our current application in order to allow for correct French grammar when displaying the French text instructions for splitting that is provided to the lab staff on the screen. Our instructions need to be available in both French and English.

## APPENDIX G Selection of specimen and tests

Please refer to section “**4 – Description of a typical appointment flow**” and “**5 – Description of a typical Lab flow**” for workflow context.

The **specimen collection information** is decided based on the **respondent information**. The LIMS refers to information from the respondent profile in order to select specimen to collect and tubes to use for each respondent from the lookup table.

Since collection will vary between respondents, not all of these tubes will be filled. The priority column lists the tubes in increasing order so that the most important tubes are collected first. The main\_alt\_tube column is used to display the type of tube: main tube, sub tube or stand-alone tube. Based on the situation, the phlebotomist may decide to only use one main tube or use multiple sub tubes in order to collect the volume necessary. For example, specimen\_10 can be collected with just main tube\_10 or with sub tube\_11 and/or sub tube\_12. A stand-alone tube means that there is only one tube for the specimen.

Respondent information					Specimen collection information (ID, volume, priority)				
dryrun	age_min	age_max	blood_storage	DNA_storage	specimen_id	tube_id	collection_vol	main_alt_tube	priority
3	12	14	2	2	specimen_10	tube_10	10	main	5.5
3	12	14	2	2	specimen_10	tube_11	6	sub	5.51
3	12	14	2	2	specimen_10	tube_12	4	sub	5.52
3	12	14	2	2	specimen_20	tube_20	10	main	5.58
3	12	14	2	2	specimen_20	tube_21	6	sub	5.59
3	12	14	2	2	specimen_20	tube_22	4	sub	5.6
3	12	14	2	2	specimen_24	tube_24	2	stand	3.5

selected for dryrun = 3 (not dryrun), age = 12-14, blood\_storage = 2 (No), and DNA\_storage = 2 (No) – this is only an example of rows

The **test information** is decided based on **respondent information** and **subsampling rates**. The LIMS refers to information from the respondent profile, sample file and its own randomly generated numbers in order to determine the tests for which each respondent is eligible from the lookup table.

Some tests are selected for all respondents while others are only selected for a random subsample. The ss\_rate\_var represents a variable that is a randomly generated number from the LIMS that is compared against t\_flag which is the subsample rate from the sample file. As an example, ARSC05 is the randomly generated number for the test for Arsenic. For example, if 10% of respondents in a given demographic should be selected for a certain test, the subsample rate would be 0.1. The respondent would only be eligible for the test if the randomly generated number is 0.1 or less. Other tests are selected for all respondents (ON) and others are not selected for any respondents (OFF). Certain tests also have a minimum and optimal volume that is used when splitting the tubes.

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As with the specimen selection table above, this test selection table has a priority column which orders the tests in priority so that if there isn't enough biospecimen collected, the most important tests will be split first.

Respondent information						Subsample		Test information				
dryrun	age_min	age_max	sex	smoke_type	selfast	ss_rate_var	t_flag	test_id	tube_id	min_vol	opt_vol	priority
3	12	20	1	0	0	ARSC05	ARSCFLG	test_758	tube_758			7.1
3	12	20	1	0	0	BHT05	BHTFLG	test_768	tube_768			7.18
3	12	20	1	0	0	NNAL04	NNALFLG	test_760	tube_760	1.8	2.5	7.06
3	12	14	1	0	0		OFF	test_030	tube_030	0.98	0.98	3.06

selected for dryrun = 3 (not dryrun), age = 12, sex = 1, smoke\_type = 0, selfast = 0 – this is only an example of rows

#### Valid values:

Column name	Valid values
Dryrun	1 & 2 = dry run 3 = Not a dry run
blood_storage & DNA_storage	1 = Yes 2 = No
Sex	1 = Male 2 = Female
Smoke Type	0 = Non-smoker but cannot determine if this person is exposed or not 1 = Non-Smoker non-exposed to smoke 2 = Non-Smoker exposed to smoke 3 = Smoker 6 = 1-2-year age group not eligible for measure 9 = Cannot determine if this person is a smoker or not
Selfast	0 = fasting not applicable (either 1 or 2 can be in the respondent info) 1 = fasting 2 = non-fasting
Main_alt_tube	Main = Main tube (collection) Sub = Sub-tube (splitting/aliquoting) Stand = Standalone tube

## APPENDIX H

## Glossary of Terms & Acronyms

Term	Definition
1D & 2D barcode	1D and 2D are barcode types. 1D is for One Dimensional and 2D is for Two Dimensional.
.Net CORE	A free and open-source, managed computer software framework for Windows, Linux, and macOS operating systems.
Admin User	User who operates the Solution, performs designated operational and upkeep activities such as User Security, User Auditing, User Authentication, Database administration, and maintenance. This person is also responsible for the software installation, upgrades, and maintenance.
Alpine	A Linux distribution designed for security, simplicity, and resource efficiency.
Analysis	Detailed examination of a sample.
Application	In IT, this term refers to a defined software product designed for end-user-oriented tasks or a set of related tasks. As such, Application differs from Operating Systems and Utilities which manage, respectively, the computer itself and some specific function(s) of the operating system or communication between the operating system and application. An application may in reality consist of several computer programs residing on several computers. On occasion, the term "Application" may refer to automation created by personal productivity tools such as MS Office.
Audit Trail	An audit trail is a security-relevant chronological record, set of records, and/or destination and source of records that provides documentary evidence of the sequence of activities that have affected a specific operation, procedure, or event over time.
Biospecimen (biological sample)	A sample of material (such as urine, blood, tissue, cells, DNA, RNA, or protein) from humans, animals, or plants. Biospecimens may be used for a laboratory test or stored in a biobank to be used later for research.
Business Rule	The capability to abstract decisions from the application code allowing for more flexible processes; Business rules can be modified, by non-IT people, without having to alter the application code. There is an emerging standard in the OMG Decision Model & Notation (DMN) for the implementation of Business Rules ( <a href="https://www.omg.org/spec/DMN">https://www.omg.org/spec/DMN</a> ).
Certification	A process performed by the Departmental Information Technology Security Coordinator wherein the technical evaluation of an application or a system's security features, made as part of and in support of the approval/accreditation process, establishes the extent to which a particular application or computer system design and implementation meet a set of specified security requirements.
Chain of Custody	A Chain of custody is the chronological documentation or paper trail that records the sequence of custody, control, transfer, analysis, and disposition of physical or electronic evidence.
CHMS Employee	Person working for the CHMS.
ClinicID	A unique identifier attributed to each MEC respondent.



Term	Definition
Cloud	Cloud computing is the on-demand availability of computer system resources, especially data storage and computing power, without direct active management by the user. The term is generally used to describe data centers available to many users over the Internet. Large clouds, predominant today, often have functions distributed over multiple locations.
Developer	User who uses the Solution and provides or uses tools and APIs to develop enhanced process flows or applications in which the centralized Solution, its content, APIs and tools are embedded, analysis functionality and reporting materials.
Docker	A set of products allowing packaging of an application and its dependencies into an isolated container, which can be run on any server. Containers are isolated from one another and bundle their own software, libraries and configuration files.
Equipment	Machine used to conduct test on sample in the laboratory OR Machine used to calibrate an instrument in the laboratory.
External Reference Laboratories (External Labs)	A laboratory that conducts analyses of specimens for Statistics Canada's Canadian Health Measures Survey.
Perpetual User Floating Licenses	<p>also known as concurrent licensing or network licensing, is a software licensing approach in which a limited number of licenses for a software application are shared among a larger number of users over time on a "first come, first server" basis. Example: 20 users can share 10 floating licenses, but only 10 users can actually use the software concurrently.</p> <p>As per the Perpetual License definition, these licenses authorize a customer to use a program indefinitely</p> <p>The licenses (token or key) are managed by a software license server responsible to distribute the floating licenses to users, and limit the number of concurrent users to the quantity of licenses available/registered.</p> <p>As opposed to Named-User licenses, the users don't have to be identified in advanced.</p>
Health Measures Specialist (HMS)	CHMS employee performing various health measures on respondents during the MEC visit.
HL7	Health Level Seven or HL7 refers to a set of international standards for transfer of clinical and administrative data between software applications used by various healthcare providers. These standards focus on the application layer, which is "layer 7" in the OSI model. The HL7 exchange standards are produced by Health Level Seven International, an international standards organization, and are adopted by other standard issuing bodies such as American National Standards Institute (ANSI) and the International Organization for Standardization (ISO).
Instrument	Instruments are used to measure units, like flow, pressure, weight, etc. Equipment consists of one or more instruments to perform different kinds of activities. For example: barcode scanners and weight scales are equipment, while a blood pressure monitor or a haematological analyser (Pochi) are instruments.

Term	Definition
ISO 20387 Standard	Biobank Standard; general requirements for the competence, impartiality, and consistent operation which includes quality control requirements
Kubernetes (K8s)	An open-source container-orchestration system for automating computer application deployment, scaling, and management
Laboratory Staff	Person working in the CHMS Laboratory.
LINUX	A family of open-source Unix-like operating systems based on the Linux operating system kernel
Medical Laboratory Technologist (MLT)	A regulated Healthcare professional in Canada who performs a variety of laboratory tests and procedures to assist physicians in diagnosing, monitoring, treating and preventing diseases. The tests cover a wide range of areas like chemistry, hematology, microbiology, immunology, and blood banking.
Perpetual License	A perpetual software license is a type of software license that authorizes a customer to use a program indefinitely. Generally, outside of termination, a perpetual software license allows the holder to use a specific version of a given software program continually with payment of a single fee. Extra cost can occur for ongoing support and upgrades.
Platform as a service (PaaS)	A category of cloud computing services that provides a platform allowing customers to develop, run, and manage applications without the complexity of building and maintaining the infrastructure typically associated with cloud services.
Process	In the context of business administration, a structured set of activities designed to accomplish a specific objective, or a deliverable in a qualified service offering. A process takes one or more defined inputs and turns them into defined outputs. It may include any of the roles, responsibilities, tools, and management controls required to reliably deliver the outputs. A process may define policies, standards, guidelines, activities, and work instructions if they are needed.
Reference interval (normal reference range)	In health-related fields, a reference interval is the range of values that is deemed normal for a physiologic measurement in healthy persons (for example, the amount of creatinine in the blood, or the partial pressure of oxygen).
RESTful API	is an application programming interface (API or web API) that conforms to the constraints of REST architectural style and allows for interaction with RESTful web services. REST stands for representational state transfer. The main guidelines of the RESTful architectural style are: Client-Server, Stateless, Cacheable, Uniform Interface, Layered System.
Sample	Specimen obtained during collection.
Sample File	The sample file contains information on each respondent (respondent profile) such as the name, respondent ID, age, sex, requirement for fasting, smoker/non-smoker, consent for DNA blood and urine, etc. This file is prepared prior to the start of a site.
Single Sign-On	Mechanism allowing users to log in only once and access multiple applications without re-authentication.

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Term	Definition
Site	The geographic locations (town or city) where the Mobile Examination Center (MEC) is travelling to and collecting data there for a duration of 6 weeks.
Super User	A type of User with access to more capabilities than other Users, including system administration privileges.
Ubuntu	LINUX Operating System distribution composed mostly of free and open-source software.
Users	means an individual authorized by the Client to use the Licensed Software under the Contract and for the purposes of these supplemental general conditions, includes any employee, agent or contractor authorized to use the Licensed Software.

Acronym	Full Name
1D & 2D	One-dimensional & Two-dimensional barcode
API	Application Programming Interface
CHMS	Canadian Health Measures Survey
CI/CD	Continuous Integration & Deployment
COTS	Commercial Off-The-Shelf
CSP	Cloud Service Provider
DB	Database
DBMS	Database Management System
FDA	U.S. Food and Drug Administration
HL7	Health Level Seven
HMS	Health Measures Specialist
ISO	International Organization for Standardization
LIMS	Laboratory Information Management System
MEC	Mobile Examination Center
MLT	Medical Laboratory Technologist
MS-AD	Microsoft Active Directory
PaaS	Platform as a Service
PHAC	Public Health Agency of Canada
REST	Representational State Transfer
SOR	Statement of Requirements
SSO	Single Sign-On
StatCan	Statistics Canada

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Acronym	Full Name
TA	Technical Authority
USG	Urine Specific Gravity
UTF	Unicode Transformation Format

APPENDIX I LIMS Components Requirements

This section contains the Solution requirements, both mandatory and rated.  
The requirements are identified using a sequential number, preceded by the type of requirement (M - Mandatory, R - Rated).

Mandatory Requirements

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M01	<u>Official Languages</u> The Solution must offer user interfaces in both of Canada's official languages (French and English). The Bidder must describe how their Solution is rendered bilingual (French & English); automated translation functionality is not acceptable.			
M02	<u>Computing Environment – Cloud Environment</u> The Solution must install, deploy, work, and interoperate on StatCan's Department Computing Environment as described in the SOR sections <b>10</b> & <b>11</b> .			
M03	<u>Database Management System (DBMS)</u> The Solution must install, deploy, work, and interoperate with Cloud based COTS and/or Open Source DBMS as its data repository; Home made DBMS are not acceptable.			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M04	<p><u>Implementation &amp; User Interface</u></p> <p>The Solution must be implemented in such way that its Business Logic is separated from its user interface (as in a 3-tier system; front-end/web tier, middle/Application tier, and back-end/data tier).</p> <p>The Solution's user interface(s) must be Web based and compatible with StatCan's main web browsers (see SOR section "<u>10.2 – Workstation Environment</u>").</p>			
M05	<p><u>User Notification – Authenticated SMTP</u></p> <p>The Solution must be able to send email notification using "<u>authenticated</u>" Simple Mail Transfer Protocol (SMTP).</p>			
M06	<p><u>Authentication &amp; Authorisation</u></p> <p>The Solution must be capable to use the OpenID Connect &amp; OAuth 2.0 technology standards for user authentication &amp; Authorisation purposes, as per SOR section "<u>10.3 – Directory Services</u>"</p>			
M07	<p><u>UTF Encoding</u></p> <p>The Solution must be able to process (Read/Import, Write/Export, Store, etc.) UTF encoding.</p>			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M08	<p><b>Basic LIMS functionalities</b></p> <p>The Solution must satisfy all requirements listed in SOR section “6.3 – <u>Solution functionalities</u>”.</p> <p><b>NOTE:</b> The Bidder must make sure it complies with the above-mentioned section items and fill the “Meet (Y/N)” column; no need to provide reference or statement for this requirement. Most of the items will be properly evaluated in requirements further down in this table.</p>		N/A	N/A
M09	<p><b>Time of events</b></p> <p>The Solution must store the time of events with the information related to the time zone the event occurred-in, using established standards, in order to allow for the event to stand by itself (once the information is separated from the other records).</p> <p>The Bidder must demonstrate how time is stored (UTC, offset, time zone id, etc.) and how it can be retrieved and converted for reporting or other usage.</p>			
M10	<p><b>Users access restriction</b></p> <p>The Solution must restrict access to information and capability, based on the user role/group it belongs (authorization). More specifically, the external web access must only allow users (from External Reference Labs) to see and update tracking information, for the purpose of package reception, without ever having access to see the user specific information like name, address, age, etc.</p> <p><b>NOTE:</b> The External Reference Lab must not be able to see any information that is not related to the TestID it is responsible for. TestID related data must be visible to only the External Reference Lab they were sent to.</p>			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
<b>M11</b>	<b><u>Multi-site Management</u></b> The Solution must have the ability to: a) manage samples across different distant sites, teams or laboratories. b) centrally manage all sites and their data access			
<b>M12</b>	<b><u>Documented API</u></b> The Solution must expose an Application Programming Interfaces (API) to allow integration with other application including the following: a) creation of a respondent profile (name, address, age, etc.); b) creation of biospecimen information related to a respondent profile; c) query of data (respondent profile, quantity to collect, specimen tracking, etc.); d) sufficiently documented to allow their complete use by developers.			
<b>M13</b>	<b><u>Document Format Compatibility</u></b> The Solution must be compatible with the following document formats: a) XML, Excel, .csv for the purpose of importing & exporting data; b) PDF & Word, for the purpose of reporting (search result, test results, audit & chain of custody report, etc.).			
<b>M14</b>	<b><u>Peripheral device integration</u></b> The Solution must integrate with our existing lab equipment and instruments (Refer to <b>APPENDIX E</b> ).			
<b>M15</b>	<b><u>Information Exchange – HL7</u></b> The Solution must have HL7 data exchange capability.			



Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M16	<u>Data Export &amp; Import – Shipment Tracking</u> The Solution must be capable of exporting and importing data related to the expedition of biospecimen (packaging and tracking data) in order to permit the exchange of information with External Reference Labs that don't support HL7. <b>Note:</b> As required in section 6.3 item #16, custom csv file must be supported.			
M17	<u>Data Import – Test Results</u> The Solution must be capable of importing test result data coming from External Reference Labs in an already agreed and pre-established format (custom .csv file).			
M18	<u>Workflow – Implementation &amp; Guidance</u> The Solution must have the ability to set up customized workflows and guide the MLTs by displaying the type of tubes to be filled for each step.			
M19	<u>Workflow - Guidance</u> The Solution must have the ability to display pre-scripted question wording and instruction to guide the interview with the respondent.			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M20	<p><u>Workflow - Test Selection</u></p> <p>The Solution must have the ability to determine the required tests for each respondent based on the respondent's profile, consents, and other variables (some tests are chosen for all respondents, while other tests are randomly chosen from the eligible respondents based on the predetermined probability weights set on the respondent's profile). The LIMS respondent profile will be created using the API.</p> <p>Refer to section "4 – Description of a typical appointment flow", "APPENDIX F – Reference Tables" and "APPENDIX G – Selection of specimen and tests" for details.</p>			
M21	<p><u>Workflow – Prioritization</u></p> <p>The Solution must have the ability to set a prioritized list of tests to be run on biospecimen in cases where the sample collected does not have the required volume.</p> <p>Refer to section "5 – Description of a typical Lab flow", "APPENDIX F – Reference Tables" and "APPENDIX G – Selection of specimen and tests" for details.</p>			
M22	<p><u>Workflow – Note and Text Display</u></p> <p>The Solution must have the ability to:</p> <ul style="list-style-type: none"><li>a) display notes and instructions during workflow dependent on previously collected respondent data</li><li>b) display warning texts with different font options (e.g. use right arm, use washed pipette tips, etc.).</li></ul>			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M23	<u>Workflow – Sample Verification</u> The Solution must have the ability to verify if the samples were collected (i.e. aliquot) for the selected tests or to specify the reason, if not collected.			
M24	<u>Data – Manual Entry</u> The Solution must allow MLTs to manually enter the test results for multiple tests that can be run on a sample.			
M25	<u>Data – Business Rules</u> The Solution must have the ability to implement validation and business rules to facilitate the data entry process and to ensure the consistency, integrity, and standardization of the data. <b>Note:</b> Although the business rules are set at the beginning of the collection cycle (2 years), the business rules need to be updated between cycles, and potentially during a cycle.			
M26	<u>Information Management</u> The Bidder must demonstrate that a record stored is authentic and is an accurate representation of all transactions to which it attests; therefore, the Solution must have the capability to prove that the record: a) is what it purports to be; b) was created by the person purported to have created it; c) was created at the time purported; and d) is complete and was unaltered, or, if the record was altered with different data values, it was done by an authorized person at a specified date and time.			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
<b>M27</b>	<p><b><u>Test Result Export - Reporting</u></b></p> <p>In order to provide test results, the Solution must offer functionalities to:</p> <ul style="list-style-type: none"> <li>a) export test results to a PDF file;</li> <li>b) customize reports or report templates (by Admin Users);</li> <li>c) set reference intervals (also known as normal reference ranges);</li> <li>d) identify out of range values;</li> <li>e) add manual notes prior to final report generation.</li> </ul>			
<b>M28</b>	<p><b><u>Search Function – Data from Samples</u></b></p> <p>The Solution must allow MLTs to search the data from any sample collected using the information collected (including but not limited to; clinic ID, participant ID, test ID, tubes ID, etc.) in the Solution. The search must display the data that meets the requirements of the search criteria and allow MLTs to sort the search results by any field of the search criteria.</p>			
<b>M29</b>	<p><b><u>Bar-coding – New Labels</u></b></p> <p>The Solution must have the ability to create barcode labels for biospecimen collection tubes/containers and communicate with a printer to print the barcodes.</p>			
<b>M30</b>	<p><b><u>Chain of Custody</u></b></p> <p>The Solution must track the location of equipment and every sample as described in SOR section “6.3 – <u>Solution functionalities</u>” item #12.</p>			
<b>M31</b>	<p><b><u>Audit Trail</u></b></p> <p>The Solution must provide audit trail capability as described in SOR section “6.3 – <u>Solution functionalities</u>” item #13.</p>			

Requirement No.	Mandatory Requirement	Met (Y / N)	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
M32	<p><u>Customer Service &amp; Technical Support</u></p> <p>All products composing the Solution must be fully supported by one single customer service, providing technical help via telephone and website support.</p> <p>The Bidder must provide unlimited technical phone support during regular Ottawa, Canada business hours through a Toll-free Telephone number.</p> <p>Maintenance &amp; Support must be provided in accordance with Canada Maintenance and Support Services for Licensed Software (<a href="https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4004/5">https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual/4/4004/5</a>)</p>			

## Rated Criteria

Requirement No.	Rated Criteria	Rating Scale	Scoring	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
<b>R01</b>	<u>Official Languages</u> The Solution should offer French and English user interfaces with the capability to easily toggle between the two without leaving the interface.	<b>10</b> points if the Solution can toggle between French & English 0 points otherwise			
<b>R02</b>	<u>Database Management System - Microsoft</u> The Solution should install, deploy, work, and interoperate with multiple (more than one) Cloud Based COTS and/or Open Source Database Management Systems (DBMS) of different vendor or source. <b>NOTE:</b> StatCan is not looking for a DBMS licenses; the vendor does not have to supply a DBMS license.	<b>25</b> points if 4 or more <b>20</b> points if 3 <b>15</b> points if 2 <b>Extra 5</b> points if PostgreSQL capable <b>Extra 5</b> points if SQL Server capable 0 points otherwise Max 35 points			
<b>R03</b>	<u>Single Sign-On &amp; Session Timeout</u> The Solution should allow single sign-on for Internal users (Internal LIMS Web portal), while External users must authenticate directly to the application (External LIMS Web Portal). <b>NB:</b> A session timeout is therefore only required for the External user sessions. See the following section for reference: a) SOR section " <u>10.4 – Security Policies</u> " b) SOR section " <u>11 – CHMS Networks Environment</u> "	<b>15</b> points if met (including session timeout) 0 points otherwise.			

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<b>R04</b>	<u><b>External Users Access Licenses</b></u> The Solution should allow StatCan to limit the number of users that can connect from any given External Reference Lab. <b>NB:</b> If an External Reference Lab is allocated only two licenses, but they actually have 5 persons who could do the work (not on same schedule, fill-in during absence, etc.), in order to prevent floating licenses to be stolen from our MEC users and preventing them from doing their work.	<b>10</b> points if met 0 points otherwise			
<b>R05</b>	<u><b>Containerised Deployment</b></u> The Bidder should provide and support containerised deployment compatible with StatCan's production environment (Docker & Kubernetes)	<b>15</b> points if available as Linux Docker containerised deployment <b>5</b> points if available as Windows Docker containerised deployment Maximum of 15 points.			
<b>R06</b>	<u><b>Restful API</b></u> The Solution's APIs (as required in Mandatory Requirement <b>M12</b> – " <u>Documented API</u> ") should be RESTful APIs.	<b>10</b> points if met directly from the LIMS COTS <b>5</b> point if using external library 0 points otherwise.			

Requirement No.	Rated Criteria	Rating Scale	Scoring	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
<b>R07</b>	<u>Peripheral device integration</u> The Solution should integrate with existing lab equipment and instruments (Refer to <b>APPENDIX E</b> ), <u>as already requested in M14</u> , using simple configuration or scripting.	<b>10</b> points if met directly from software <b>5</b> point if requiring hardware gateway device 0 points otherwise.			
<b>R08</b>	<u>Standard 21 CFR part 11.30 Compliance</u> The Bidder should demonstrate how the Solution is compliant with FDA Code of Federal Regulations (CFR), Title 21 part 11.30 (Electronic Records; Electronic Signatures).	<b>10</b> points if met 0 points otherwise.			
<b>R09</b>	<u>ISO 20387 Standard Compliance</u> The Vendor should demonstrate how the Solution is compliant with ISO 20387 (Biobank Standard; general requirements for the competence, impartiality, and consistent operation including quality control requirements)	<b>10</b> points if met 0 points otherwise.			
<b>R10</b>	<u>Multi-site Parameters</u> The Solution should provide an API to allow the configuration of a new MEC site with parameters such as; Site number, name, Start & End Date, Duration, etc.	<b>10</b> points if met 0 points otherwise.			



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<b>R11</b>	<p><b><u>Workflow – Reminders</u></b></p> <p>The Solution should provide configurable capabilities to generate and display reminders and alerts to the MLT.</p> <p>The Solution should display reminders and alerts to the MLT as follows:</p> <ul style="list-style-type: none"> <li>a) for instruments requiring calibration.</li> <li>b) for instruments requiring preventive maintenance.</li> </ul>	<p><b>10</b> points if both a) and b) are met</p> <p><b>5</b> points if only a) or only b) is met.</p> <p>0 points otherwise.</p> <p>Maximum of 10 points</p>			
<b>R12</b>	<p><b><u>Laboratory Instruments – Scheduling</u></b></p> <p>The Solution should allow the MLT to schedule preventative quality checks and maintenance for instruments and set notifications.</p>	<p><b>10</b> points if met</p> <p>0 points otherwise.</p>			
<b>R13</b>	<p><b><u>Laboratory Instruments - Tracking</u></b></p> <p>The Solution should be able to track the instrument identifier used to analyze a sample.</p>	<p><b>10</b> points if met</p> <p>0 points otherwise.</p>			
<b>R14</b>	<p><b><u>Report - Configuration</u></b></p> <p>The Solution should allow non-IT user to configure customized report templates.</p>	<p><b>10</b> points if met</p> <p>0 points otherwise.</p>			
<b>R15</b>	<p><b><u>Search Function – Multi fields</u></b></p> <p>The Solution should allow MLTs to sort the search results by more than one field of the search criteria (i.e. a nested sort). For example: sort by year and within a year by instrument number.</p>	<p><b>10</b> points if met</p> <p>0 points otherwise.</p>			

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<b>R16</b>	<u><b>Search Function</b></u> The Solution should allow MLTs to select which data fields to display in the search result.	<b>10</b> points if met 0 points otherwise.			
<b>R17</b>	<u><b>Temperature Sensor</b></u> The Solution should provide the capability to <ul style="list-style-type: none"> <li>a) monitor fridge/freezer temperatures (fridge/freezer will be equipped with electronic temperature sensors)</li> <li>b) monitor sample shipping temperatures (shipping temperature will be monitored using temperature strips/labels),</li> <li>c) track temperature of the tubes and trays by retrieving data from temperature sensors (storage &amp; shipping).</li> </ul>	<b>10</b> points if met 0 points otherwise.			
<b>R18</b>	<u><b>Audit Log - View</b></u> The Solution should allow access to view audit trails through the user interface by Laboratory Staff Users and IT Users.	<b>10</b> points if met 0 points otherwise.			

Requirement No.	Rated Criteria	Rating Scale	Scoring	Bid Reference Paragraph and Page No.	Statements from the Bidder explaining how the criterion is met and relevant narrative and/or documentation to support these statements
R19	<p><u>Documentation</u></p> <p>All products composing the Solution should be sufficiently documented to allow their installation, configuration, use, and operation. The documentation may include but is not limited to, user guides, configuration guides, developer guides, administration and management guides, online help, books, white papers, and “How To” guidance.</p> <p>The Bidder must provide a list (per product) of provided documentation and a list (per product) of available documentation.</p>	<p><b>4</b> points if the documentation is available in English and in French (no points if only in French or English).</p> <p><b>3</b> points if video presentation available (English or French).</p> <p><b>4</b> points if documentation is available online.</p> <p>Maximum of 10 points</p>			
R20	<p><u>Compatibility with Canada Post Web Services AND/OR Purolator E-Ship Web Services</u></p> <p>The Solution should have the capacity to integrate with the Canada Post AND/OR Purolator suite of services to generate shipping labels and recording tracking number.</p>	<p><b>25</b> points if compatible with both.</p> <p><b>10</b> points if only compatible with one.</p> <p>0 points otherwise.</p> <p>Maximum of 25 points</p>			
Score out of a maximum of 250 points					