



RETURN BIDS TO :
Canada Revenue Agency

Proposal to: Canada Revenue Agency

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

Bidder's Legal Name and Address (ensure the Bidder's complete legal name is properly set out)

Bidder is required to identify below the name and title of the individual authorized to sign on behalf of the Bidder

Signature of authorized representative

Date (yyyy-mm-dd)

Name of person authorized to sign (print)

Title of person authorized to sign (print)
(____)

Telephone No.
(____)

Fax No.

E-mail address

AMENDMENT TO REQUEST FOR PROPOSAL

Title CONSUMER IDENTITY REPORTS	
Solicitation No. 1000442172	Date 2023-08-30
Amendment No. 001	
Solicitation closes on 2023-09-15 at 2:00 P.M.	Time zone EDT Eastern Daylight Time
Contracting Authority Name: Samuel Snow Address: 320 Queen St. Ottawa, ON E-mail address: samuel.snow@cra.gc.ca	
Telephone No. (613) 324-0047	
Destination See herein	
THIS DOCUMENT CONTAINS A SECURITY REQUIREMENT.	



SOLICITATION AMENDMENT # 001

This solicitation amendment is raised to:

1. **Extend the solicitation closing date to 2023-09-15;**
2. **Amend Appendix 1: Mandatory Criteria of the RFP by removing the Accessibility Requirements; and**
3. **Address the following questions submitted during the solicitation period.**

1. EXTENSION TO THE SOLICITATION CLOSING DATE

On the cover page:

DELETE: Solicitation closes on 2023-09-08

INSERT: Solicitation closes on 2023-09-15

2. AT PART APPENDIX 1: MANDATORY CRITERIA,

Delete in its entirety:

	Mandatory Criteria	Page Reference or location within the Proposal where the information is located
M1.	<p>The Bidder’s consumer credit report database MUST generate and provide to CRA users (as detailed in Annex A – Statement of Work) consumer identity reports containing all of the data elements listed below.</p> <p>Data Elements: Consumer Identification a) Full name (first name and last name) i. current name and previous names b) Social Insurance Number (SIN) c) Addresses i. current address and previous addresses ii. dates added to consumer file d) Phone numbers i. residence number, work number, and cellular number ii. current and previous numbers iii. dates added to consumer file</p>	



	<p>To demonstrate compliance with M1, the Bidder MUST provide a sample consumer identity report containing all of the above data elements. If the Bidder utilizes a different naming convention for its data elements, the Bidder must clearly identify the different naming convention in its bid.</p>	
M2.	<p>The Bidder MUST provide online access to its consumer credit report database by permitting the search elements below, at a minimum, to be entered by CRA employees to conduct searches and generate consumer identity reports.</p> <p>Search Elements:</p> <ul style="list-style-type: none"> a) First Name and Last Name; b) Social Insurance Number (SIN); and c) Address. <p>To demonstrate compliance with M2, the Bidder MUST provide screenshots of its database search screen displaying all of the above search elements.</p>	
M3.	<p>The Bidder’s consumer credit report database MUST contain a minimum of ten (10) million consumer credit reports.</p> <p>To demonstrate the size of its consumer credit report database, the Bidder MUST state in its proposal the number of consumer credit reports contained in its consumer credit report database.</p>	
M4.	<p>The Bidder’s consumer credit report database MUST be able to process a minimum of 125,000 search requests annually.</p> <p>To demonstrate its capability to process high volumes of search requests, the Bidder MUST state in its proposal the minimum number of annual requests it can process.</p>	
M5.	<p>Corporate Environmental Policy</p> <p>The Bidder must have a corporate environmental policy in place.</p> <p>To demonstrate compliance with M5, the Bidder MUST submit its corporate environmental policy statement.</p> <p>The corporate environmental policy statement must:</p> <ul style="list-style-type: none"> a. be signed by an authorized officer of the company; and b. indicate the date the policy came into effect. 	
M6.	<p>Accessibility Requirements</p> <p>To demonstrate compliance with M6, the Bidder MUST provide a completed Accessibility Conformance Report (ACR) based on a Voluntary Product Accessibility Template (VPAT®) (preferably VPAT® 2.4 Rev EU or Rev INT) of the proposed consumer credit report database.</p> <p>The ACR must demonstrate that the accessibility testing and evaluation of the proposed consumer credit report database was performed in accordance with the “Essential Requirements and Best Practices for Information & Communications Technology (ICT) Vendors” section of the VPAT® used (refer to https://www.itic.org/policy/accessibility) by:</p> <ul style="list-style-type: none"> a) clearly demonstrating that the date of report publication was completed within twelve (12) months of the bid closing date; 	



	<ul style="list-style-type: none">b) documenting the consumer credit report database name and version evaluated;c) documenting that the consumer credit report database being offered to CRA was tested against the EN 301 549 V3.2.1 (2021-03) Accessibility Standard which includes WCAG 2.1;d) including a brief description of the consumer credit report database ;e) describing the evaluation methods used to produce the ACR including adaptive technology, manual, and automated testing processes;f) documenting features that help achieve accessibility and usability for persons with disabilities;g) documenting each success criteria of the consumer credit report database that:<ul style="list-style-type: none">I. which features are not supported and its impact on persons with disabilities;II. which features are partially supported and its impact on persons with disabilities; andIII. which features are fully supported.	
M7.	<p>Certifications</p> <p>To demonstrate compliance with M7, the Bidder MUST sign Page 1 (front page) of the Request for Proposal and the Joint Venture certification, if applicable, identified in Part 5.1 Certifications Required to Be Submitted at Time of Bid Closing.</p>	
M8.	<p>Financial Proposal</p> <p>To demonstrate compliance with M8, the Bidder MUST provide a financial proposal in accordance with Part 3, entitled “Proposal Preparation Instructions” and in accordance with Appendix 3: “Financial Proposal”.</p>	



Replace with:

	Mandatory Criteria	Page Reference or location within the Proposal where the information is located
M1.	<p>The Bidder’s consumer credit report database MUST generate and provide to CRA users (as detailed in Annex A – Statement of Work) consumer identity reports containing all of the data elements listed below.</p> <p>Data Elements: Consumer Identification</p> <ul style="list-style-type: none"> a) Full name (first name and last name) <ul style="list-style-type: none"> i. current name and previous names b) Social Insurance Number (SIN) c) Addresses <ul style="list-style-type: none"> i. current address and previous addresses ii. dates added to consumer file d) Phone numbers <ul style="list-style-type: none"> i. residence number, work number, and cellular number ii. current and previous numbers iii. dates added to consumer file <p>To demonstrate compliance with M1, the Bidder MUST provide a sample consumer identity report containing all of the above data elements. If the Bidder utilizes a different naming convention for its data elements, the Bidder must clearly identify the different naming convention in its bid.</p>	
M2.	<p>The Bidder MUST provide online access to its consumer credit report database by permitting the search elements below, at a minimum, to be entered by CRA employees to conduct searches and generate consumer identity reports.</p> <p>Search Elements:</p> <ul style="list-style-type: none"> a) First Name and Last Name; b) Social Insurance Number (SIN); and c) Address. <p>To demonstrate compliance with M2, the Bidder MUST provide screenshots of its database search screen displaying all of the above search elements.</p>	
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	To demonstrate the size of its consumer credit report database, the Bidder MUST state in its proposal the number of consumer credit reports contained in its consumer credit report database.	
M4.	The Bidder’s consumer credit report database MUST be able to process a minimum of 125,000 search requests annually. To demonstrate its capability to process high volumes of search requests, the Bidder MUST state in its proposal the minimum number of annual requests it can process.	
M5.	Corporate Environmental Policy The Bidder must have a corporate environmental policy in place. To demonstrate compliance with M5, the Bidder MUST submit its corporate environmental policy statement. The corporate environmental policy statement must: a. be signed by an authorized officer of the company; and b. indicate the date the policy came into effect.	
M6.	Certifications To demonstrate compliance with M6, the Bidder MUST sign Page 1 (front page) of the Request for Proposal and the Joint Venture certification, if applicable, identified in Part 5.1 Certifications Required to Be Submitted at Time of Bid Closing.	
M7.	Financial Proposal To demonstrate compliance with M7, the Bidder MUST provide a financial proposal in accordance with Part 3, entitled “Proposal Preparation Instructions” and in accordance with Appendix 3: “Financial Proposal”.	

3. QUESTIONS AND ANSWERS

Q1. With respect to item c) below at section 4.2 Monthly Usage Reports, will the CRA extend the date to the 10th of each month?

Monthly usage reports must:

- a) be provided on a monthly basis via email;
- b) be based on usage during the calendar month (first of the month to end of the month); and
- c) be delivered on the first working Monday of each month.

A1. Yes.

Q2. With respect to item d) below at section 4.3 Monthly National Usage Reports, can the province and not the entire address be acceptable to the CRA?



Each master national usage report must be presented as follows:

- a) Customer Identification (ID) number (referred to as an account)
- b) Department or Office name
- c) Name of OPI (if available)
- d) Address
- e) City
- f) Search or report type
- g) Unsuccessful searches
- h) Successful searches
- i) Cost of successful searches (as detailed above)

A2. Yes, the province is acceptable.

Q3. For report 4.2,

- a) we would like to confirm that this report is seeking the total volume usage each month and cumulative for the year.
- b) These reports do not require billing values as this is separate from a monthly invoice and excludes personal information on the consumer.
- c) Lastly, we would like to clarify that the date range of the report requirement in 4.2 are the only reports that follow the 1st – 31st.

A3.

- a) Yes.
- b) No, the reports require billing values. However, personal information is not required on the reports.
- c) Yes.

Q4. With reference to section 4.3 and 4.4, due to the sensitivity of consumer identity information and per the privacy legislations of the PIPEDA, the distribution of data must be via secure methods. As such, would the CRA consider secure forms of distributing/receiving consumer data that aligns to the PIPEDA legislation for each individual office?

A4. Yes, the CRA will consider secure forms of distributing/receiving consumer data. However, it must be noted that only 4.4 requires consumer identity information in the reports.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED