



**Workers' Compensation Board of British Columbia  
Corporate and Health Care Purchasing**

**ADDENDUM #1**

***Request for Information & Qualification (RFIQ)***

**Small Case Management Solution**

**RFIQ #041-2011**

**Issue Date: August 4, 2011**

**WorkSafeBC requests that responses be submitted by:**

**2:00 PM Pacific Time on August 11, 2011**

**Delivery Instructions:**

**Mail / Courier / By Hand:**

**Worker and Employer Services – Main Entrance/Security Desk  
WorkSafeBC  
6951 Westminster Highway  
Richmond, BC V7C 1C6  
Attn: Corporate and Health Care Purchasing**

**Electronically**

Electronic copies of the RFIQ may be submitted in accordance with the BC Bid instructions for e-bidding.  
Only pre-authorized e-bidders registered on the BC Bid system will be able to submit electronic bids.

**Email & Fax responses will NOT be accepted.**

**ADDENDUM #1**

Answers to questions received.

<b>RFIQ Reference #</b>	<b>Question:</b>	<b>Answer:</b>
6.2.B	<p>What format will the form be in (more detail than Outlook Form please)</p> <p>Can we have an example of one of these forms?</p>	<p>WorkSafeBC is currently transitioning from Outlook forms to Infopath forms. Where applicable, the Infopath form could be used to create cases in the case management tool.</p>
6.2.C	<p>What are the potential external sources? How would the interaction with the external sources be performed?</p>	<p>The case management tool may need to leverage data found in other system such as Claims system.</p> <p>See Sect III Technical Requirements #8.8.</p> <p>Ex. If case involves a claim, the contact information for the claimant is populated in the case management system.</p> <p>Or, if there are external participants, they can be added to a case, their contact information is populated in the case management tool and notifications can be sent to them.</p>
6.3.C	<p>Are there specific custom fields that apply to different case types?</p>	<p>Different case types will need to have some user-defined/configurable fields.</p> <p>Ex. 1 Legal case types will need to capture the Court type &amp; Trial type which other business areas may not need to capture.</p> <p>Ex. 2. Compliance Administrative Penalty case types will need to capture the cause of the penalty &amp; specific Prevention Programs which is not relevant to other business areas.</p> <p>Also, please be aware that each business area can have more than one case type and they will need to have the ability to create their own user-defined/configurable fields for each type as needed.</p>

RFIQ Reference #	Question:	Answer:
6.3.E	<p>What type of emails would need to be sent?</p> <p>- Internal? / External?</p> <p>Can this be satisfied by potentially pumping information to outlook? Or another email client? Are you talking about sending Notices / letters or other documents generated by the system by email?</p>	<p>Emails may need to be sent to internal or to external addresses. Emails can contain attachments.</p> <p>And if the vendor's product allows auto-generation of emails based on business rules, that functionality would be utilized.</p> <p>Yes - Outlook is fine. Emails that are linked to a case can be sent out from the case management system or from Outlook.</p> <p>However, security is a concern, so if sensitive information is being sent via email there must be encryption. Or another means instead of email to send sensitive information.</p>
6.5.A	<p>Can you provide examples of Line Of Business Applications that would need to have content:</p> <p>- Imported From</p> <p>- Exported To</p>	<p>Case content can be comprised of files of various formats. The case management tool may need to import those files from other systems such as Claims systems, Prevention (Health &amp; Safety) , etc.</p> <p>In some situations, files from the case management tool may need to be sent to another system.</p> <p>Ex. An Administrative Penalty file contains evidence and is stored both on a CD and in hardcopy. The evidence comes from documents and photos which are stored electronically within WorkSafeBC's Prevention Application as well as hardcopy documents, video (e.g. DVD) and sound (e.g. CD, tape). There is a requirement to provide the ability to upload soft copy evidence relevant to the case from the Prevention Application to the Administrative Penalty file contained within the case system.</p>

<b>RFIQ Reference #</b>	<b>Question:</b>	<b>Answer:</b>
6.5.B	What is an intelligent link?	Example is a link in a document that will take the user to another section of the document or to another document.
6.5 & 6.6	Are you willing to use Microsoft Sharepoint as a backend for Document Management Processes?	Yes. If the vendor's product can use Sharepoint, please describe how they use Sharepoint to meet the requirements.
6.7.d	How do you envision searching Calendar Entries? - What will be searched for? - What will the search format be?	Would like the ability to search for meetings/events related to a specific case or by key word search within the subject line/ body of the meeting/event, by who sent the meeting request, by attendee.
6.7F	Can you elaborate, and provide examples of Core Systems	The case management tool may need to leverage contact information in other systems such as Claims system, Prevention (Health & Safety) system, etc.
6.9A	Can you provide WorkSafeBC's Security Management protocols and standards	Once the vendor provides details on how their product ensures that case information is kept securely, WorkSafeBC will assess if this meets WorkSafeBC's Security management protocols & standards.
6.10C	Does this requirement preclude the use of Windows Authentication?	No, it is acceptable if the product uses Windows Authentication.

RFIQ Reference #	Question:	Answer:
6.10E	Can you explain or elaborate on 'separation of incompatible duties'?	<p>There needs to be segregation of duties to ensure a user is not granted rights to perform all duties in a system.</p> <p>Segregation of duties is often used as a financial control tool.</p> <p>Ex. Prevent a user from being able to both create a new employee in a system and also set up pay for the new employee they just created. If this is allowed, the user can potentially commit fraud by setting up a false employee profile.</p>
6.11C	Can you provide examples of other WorkSafeBC applications that would require integration?	<p>The case management tool may need to leverage data found in other systems or send data to other systems such as Claims system, Prevention (Health &amp; Safety) system, Assessments (Employer Premiums), etc.</p> <p>See Sect III Technical Requirements #8.8.</p> <p>Ex. synchronize case event/milestone/status between both the Prevention application and the case management system.</p>
6.11D	Can you provide examples of systems that the software will have to exchange data with?	<p>The case management tool may need to leverage data found in other systems such as government agency, courts, etc.</p> <p>Ex. Business area may need to send a disclosure package to the court.</p> <p>See Sect III Technical Requirements #8.8.</p>
Other	Does WorkSafeBC have an estimate on when they would like to start implementing of the solution?	Q4 2011

<b>RFIQ Reference #</b>	<b>Question:</b>	<b>Answer:</b>
	It is unclear whether or not there is a legacy database to be converted into the new system? If so, could more information be provided to help understand the scope of this project?	We would like the vendor to provide information about their integration services (See Scope of Work Sect III #7.0). Based on their response, we can better assess if data conversion should be considered for implementation (for each business area).

Addenda are the only means of verifying, clarifying or changing any of the information contained in this RFIQ. Other than the Corporate and Health Care Purchasing, no employee or agent of WorkSafeBC is authorized to change the content of this RFIQ and/or any addenda. Receipt of all addenda must be acknowledged in the space provided on the Response Form.

Any questions related to the RFIQ must be directed to the Purchasing Officer whose name appears below. The Respondents shall **NOT** contact or ask questions of the WorkSafeBC department for which the contracts being procured, unless so directed elsewhere in this document.

**RFIQ INQUIRIES:**

**Rachel Lemos, Senior Purchasing Officer**

Corporate and Health Care Purchasing

Phone #: (604) 276-3179

Fax #: (604) 276-3260

Email: [purchase@worksafebc.com](mailto:purchase@worksafebc.com)