Ontario
Health atHome

Service Provider Organization (SPO) Prequalification Process – Information Session

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Welcome

Land Acknowledgement

About This Information Session

- **This session (recording and slides) will be available on**
  - Ontario Tenders Portal
  - Ontario Health atHome website

- **Questions**
  - We will not be taking questions today
  - Please submit questions on the prequalification process to prequalification@ontariohealth.ca

Content

Executive Summary

Key Dates

Date	Milestone
January 28	Go Live of Prequalification Process on Ontario Tenders Portal (OTP)
April 8	Information Session
April 9	Recording posted to OTP and Ontario Health atHome website
May 1	By 12noon EDT, deadline to submit for final questions
May 16	Final Questions & Answers posted to OTP
By May 30	Submit request to access Ontario Health SharePoint Submission Site
June 6	**Application Submission Deadline (no extensions)**
September	Applicants will receive an update on evaluation status

How To Apply

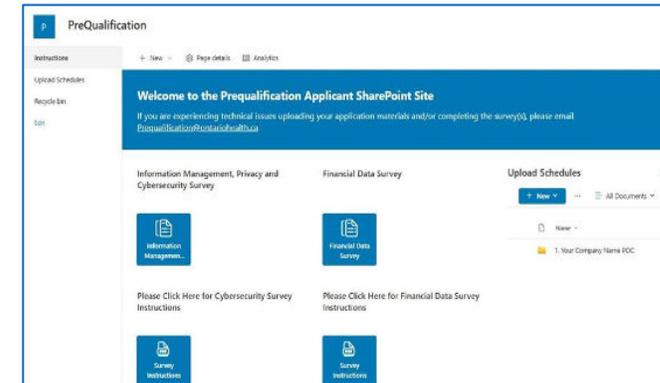| Requires Accessing Two Portals	
1. Ontario Tenders Portal → download instructions and forms	**2. Ontario Health SharePoint Submission site** → complete digital survey, upload application material

- Applicants must first register with the **Ontario Tenders Portal** to access required all required materials – forms, surveys, instructions

- **https://ontariotenders.app.jaggaer.com/esop/ nac-host/public/web/login.html**

- Then, request access/user account for the **Ontario Health SharePoint submission site**

- **Email: prequalification@ontariohealth.ca**

8

Submission Requirements

Schedules 1 to 5:

- 1 – Letter of application
- 2 – Information Forms
    - #1 Corporate Information
    - #2 Expertise
- 3 – Bank Reference Letter Form
- 4 – Survey – Information Management, Privacy, Cybersecurity
- 5 – Survey – Financial Data

Other Financial Information: Financial statements, Budget, Letter of accountability

Checklist provided

For Help or Questions

1. Regarding the Ontario Tenders Portal	2. Regarding this prequalification process:
Contact OTP support team at: • Email: Etenderhelp_CA@jaggaer.com • Phone: (484) 335-4586 • Toll-Free: 1 (866) 722-7390	**Contact Ontario Health:** 1. In OTP Prequalification documents, refer to the ***Applicants' Questions for Clarification*** document 2. Fill out the ***Applicants' Questions for Clarification document*** 3. Submit to **prequalification@ontariohealth.ca** 4. Final questions must be submitted by Thursday, May 1, 2025, 12noon (EDT) 5. Final Q&As will be available on OTP on Friday, May 16, 2025 (EOD).

Prequalification Process: An Overview

Overview

The Ministry of Health mandates a prequalification of Service Provider Organizations (SPO) to ensure safe, high-quality home care services.

Prequalification allows Ontario Health atHome to ensure all existing and new SPOs have passed a robust process that assesses their ability to safely provide high quality care to patients, and are financially and operationally stable.

Ontario Health atHome, with support from Ontario Health, is administering the prequalification process to support the procurement of home care services across the province.

All service providers of home care services are required to pre-qualify to provide home care services – this includes providers who are currently prequalified as well as prospective applicants.

Purpose

SPOs who are successful in the prequalification process will be eligible to respond to procurement requests to bid on home care service contracts.

*Note: The prequalification process **does not** guarantee an Ontario Health atHome contract.*

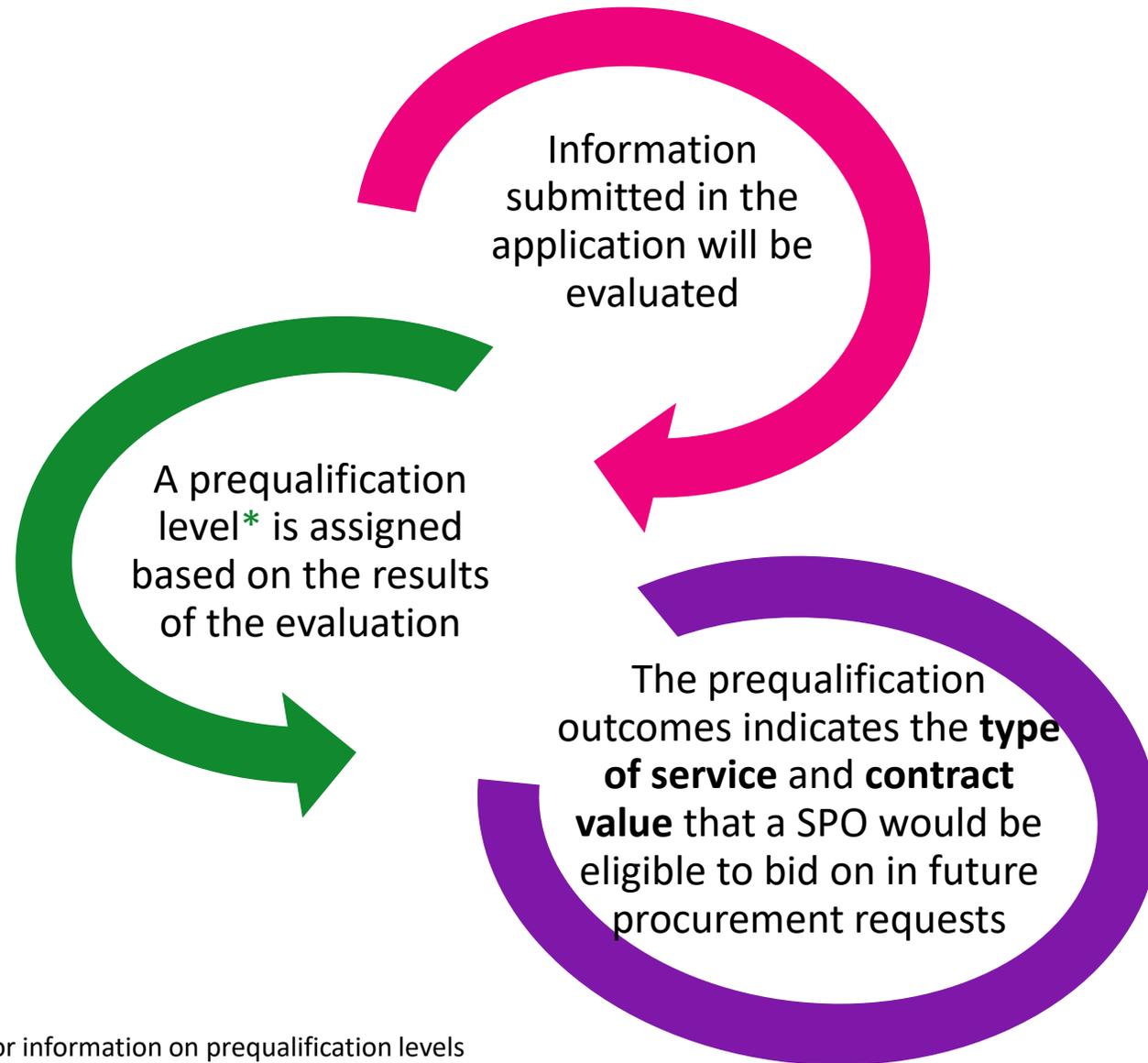Develop a vendor of record for the delivery of home care services.

Home care contracts are competitively procured through subsequent Ontario Heath atHome specific procurement requests.

Prequalification Requirements

The prequalification process requires applicants to provide information related to:

Health Care Services Experience

Financial Capacity and Stability

Organizational and Human Resources Polices and Practices

Information Management, Privacy and Cybersecurity

Risk Management and Quality Improvement

Prequalification Results

Information submitted in the application will be evaluated

A prequalification level* is assigned based on the results of the evaluation

The prequalification outcomes indicates the **type of service** and **contract value** that a SPO would be eligible to bid on in future procurement requests

* See data sheets for information on prequalification levels

Steps to Complete The Application

Steps to Complete the Application

1

Access the Prequalification Application Materials on the Ontario Tenders Portal (OTP)

- Register on the OTP
- Locate the prequalification opportunity
- Access forms and guidelines

2

Complete the Application

- Review the materials
- Obtain your organizational documents
- Complete the forms and surveys
- Request access to the Ontario Health SharePoint submission portal

3

Submit the Application through the Ontario Health SharePoint Submission Portal

- Complete the digital versions of the surveys on Ontario Health's SharePoint submission portal
- Upload your application materials

1. Accessing Prequalification Application Materials on the Ontario Tenders Portal

- Ontario Tenders Portal (OTP) is the Government of Ontario's bidding portal for procurement opportunities and hosts the prequalification forms and requirement guidelines

- To access the materials, your organization must **first** be registered on the OTP

- See "**New Supplier Registration**" for instructions and support
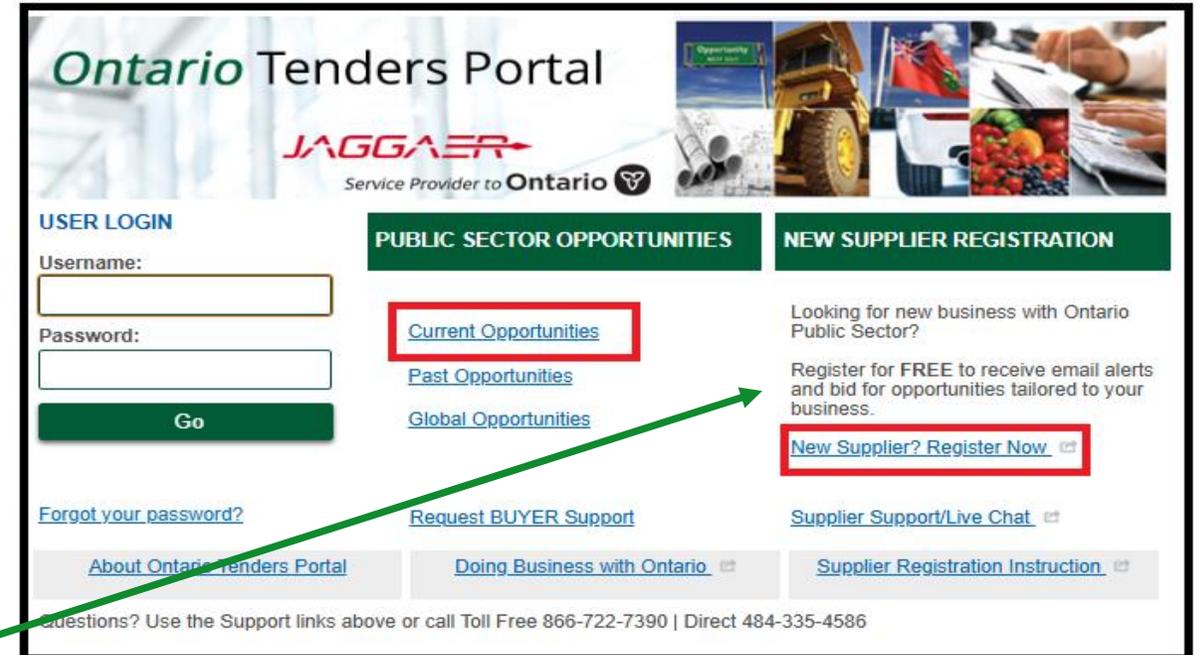
- Important: OTP is maintained independently.
- For OTP site functionality support, please contact OTP's support team at:
  - Email: **Etenderhelp_CA@jaggaer.com**
  - Phone: **(484) 335-4586**
  - Toll-Free: **1 (866) 722-7390**

- This Prequalification opportunity is listed on the OTP under the following:

  - **Buyer Organization**: Government of Ontario

  - **Project Reference**: RFP # 2025 SPO Prequal

  - **Project Title**: Prequalification for Home Care Service Provider Organizations

PROCUREMENT ROUTE	BUYER ORGANIZATION	PROJECT REFERENCE	PROJECT TITLE	PUBLICATION DATE	WORK CATEGORY	LISTING EXPIRY DATE (DD/MM/YYYY HH:MM) ↑
Open	Government of Ontario	RFP # 2025 SPO Prequal	Prequalification for Home Care Service Provider Organizations	28/01/2025 15:50	Other	06/06/2025 12:00

> ➤ Access the **Responding to a Tender Guide** for instructions on how to view documents, express interest, view Buyer Attachments (prequalification materials).

In "**Responding to a Tender Guide**":
- Buyer Attachments – materials and instructions – page 10
- Under "RFx Details" tab, there is a button for Buyer Attachments

- Click on "**Buyer Attachments**" to access a folder with all documents for the prequalification package

  - Instructions for New & Renewing Applicants

  - All Forms, Data Sheets and Surveys

  - Prequalification *Applicants' Questions for Clarification* template

  - Checklist

1	📁 Addendum (5)
2	📄 1. 2025_Prequal_InstructionsToApplicants - FINAL.docx
3	📄 10. 2025 Prequal_Checklist - FINAL.docx
4	📄 11. 2025 Prequalification_Information_Session_Details_FINAL.docx
5	📄 12. 2025 Prequal_Applicants' Questions for Clarification - FINAL.docx
6	📄 2. 2025 Prequal_Schedule _1_LetterofApplication - FINAL.docx
7	📄 3. 2025 Prequal_Schedule_2_ Information Forms - FINAL.docx
8	📄 4. Prequal_Schedule_3_BankReferenceLetterForm - FINAL.docx
9	📄 5. Prequal_Schedule_4_CybersecuritySurvey - FINAL.docx
10	📄 6. 2025 Prequal_Schedule_5_FinancialDataSurvey - FINAL.docx
11	📄 7. 2025 Prequal_DataSheet_Nursing - FINAL.docx
12	📄 8. 2025 Prequal_Data Sheet_PersonalSupport_FINAL_REVISED.docx
13	📄 9. 2025 Prequal_DataSheet_Therapy - FINAL.docx
14	📄 Prequalification for Home Care Service Providers - Questions & Answers.docx.pdf
15	📄 Supplemental Form – Application Server Security.docx

2. Completing the Application

Requires Accessing Two Portals

1. Ontario Tenders Portal	2. Ontario Health SharePoint Submission site
→ access instructions and forms here	→ submit applications here
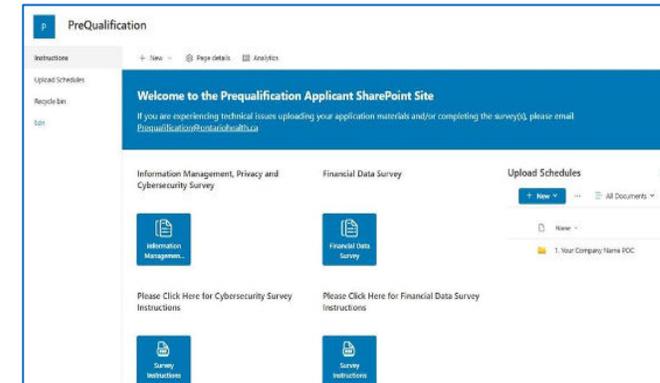
- Applicants must first register with the **Ontario Tenders Portal**

- **https://ontariotenders.app.jaggaer.com/esop/ nac-host/public/web/login.html**

- All pre-qualification process instructions, application forms, documentation requirements and instructions, required surveys, etc.

- Then, request access/user account for the **Ontario Health SharePoint submission site**

- **Email: prequalification@ontariohealth.ca**

- Here, applicants will complete the online versions of the surveys and upload application materials

2. Completing the Application

To obtain access to the Ontario Health SharePoint submission site:

- Submit request for a user account and/or for technical support regarding the Ontario Health SharePoint submission site to:

<div align="center">

prequalification@ontariohealth.ca

</div>

- Please submit requests by **May 30, 2025, 12noon** (EDT), to ensure access to the portal

- Requestors will receive instructions on:
    - Two-step multi-factor authentication
    - How to navigate the portal

- Once authenticated, requestors will be able to upload application materials and complete the online surveys

Individual and Team Applications

- Applicants may apply to prequalify to deliver **multiple service types** in the same application

- **Individual and team applications** are accepted

- When **submitting as a team**, please only submit one application
  - A single user will receive the portal account access to upload all information to support that application

- For an organization **participating in more than one application**, please clarify this when requesting access to the SharePoint submission portal, as you may require more than one account
  - e.g., submitting an individual application and participating in a team application
  - e.g., participating in two different team applications

25

The application package consists of the following sections:

1. Letter of Application

2. Information Forms

   - Corporate Information → New Requirements, per O. Regulation 187/22
   - Experience → Per each applicable contract area

3. Bank Reference Letter Form

4. Survey - Information Management, Privacy and Cybersecurity

   - NEW: Supplemental Form – Application Server Security

5. Survey - Financial Data

6. Other Financial Information → Financial Statements, Budget, Letter of Accountability

Checklist Provided

Schedule 1 – Letter of Application	Complete and sign (including name of legal entity) the Letter of Application.	☐
Schedule 2 – Information Forms		
Information Form 1 – Corporate Information	Complete the Corporate Information Form and provide: • Organizational Structure Information (Sec 1 to Sec 10) • Accreditation Information (Sec 11) • Human Resources Information (Sec 12) • Risk and Quality Management Information (Sec 13)	☐
	For those with existing Ontario Health atHome contracts provide the requested information including but not limited to insurance and WSIB certificates. (Sec 14)	☐
Information Form 2 – Experience	Complete the Level of Expertise Form for each applicable contract.	☐
Schedule 3 – Bank Reference Letter Form	Provide a completed and signed Bank Reference Letter.	☐
Schedule 4 – Information Management, Privacy and Cybersecurity Survey	Complete the Information Management, Privacy and Cybersecurity Survey. Upload Supplemental Form – Application Server Security (as required)	☐
Schedule 5 – Financial Data Survey	Complete the Financial Data Survey.	☐
Other Financial Information	Provide: • Financial statements • Budget • Letter of Accountability from parent entity if required as per Instructions to Applicants, section 2.6	☐

Additional Tips

1. **Accreditation**
   - Prequalification applicants are not required to be accredited to submit an application, or to become prequalified
   - However, specific procurement requests or contract agreements may require accreditation

2. **SPO Experience** - do not include client or caregiver references

3. **Financial and cybersecurity surveys**
   - Download survey questions from OTP
   - Confirm responses with your financial, cybersecurity, privacy leads
   - Complete the digital versions of the survey in the SharePoint submission site
   - **Complete the survey in a single session, as <u>there is no SAVE function</u>**

3. Submitting the Application on Ontario Health SharePoint submission site

The Ontario Health SharePoint submission site is the **ONLY** method to submit an application for this prequalification process

- Submit all requested application materials into the appropriate folder

  - Use the folder navigation instructions. Failure to upload information into the appropriate folder may result in the information not being evaluated

  - Complete the digital versions of the Financial and Cybersecurity surveys. Instructions are in the portal

  - Check the submission against the prequalification checklist

- Applications are due **June 6, 2025 – there are no extensions!**
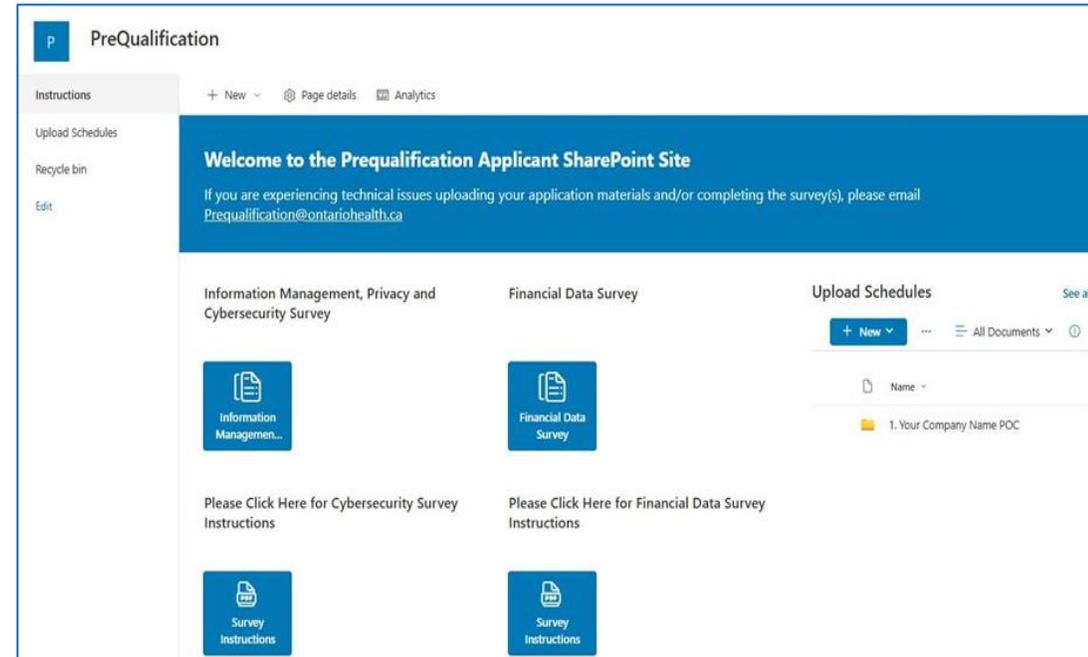
Not accepted:

- Material submitted via any other method (e.g., OTP, email, courier) will not be accepted.

- The Ontario Tenders Portal does not have functionality for users to submit their prequalification materials or response.

- Late applications will not be accepted.

Application Evaluation Process

Evaluation Overview

- Evaluation Teams will review all applications and establish the Applicant's Prequalification Level

- Only the information submitted by the Applicant will be considered

  - It is the applicant's responsibility to submit all required information in the package into the appropriate folder; failure to do so may result in information not being evaluated

  - Do not include materials that were not requested; they will not be reviewed

- Applicants will receive an update on evaluation status in September

Next Steps

Reminder: Prequalification Process Timelines

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Thank You | Merci

The session recording and presentation will be posted to the Ontario Tenders Portal and Ontario Health atHome website on April 9, 2025