

Request for Proposal

Abandoned Medical Records Management Services



July 20, 2026

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Purpose

The College of Physicians & Surgeons of Alberta (CPSA) is seeking proposals from qualified firms to provide comprehensive abandoned medical records management services.

The successful firm will provide services related to the intake, secure management, storage, retrieval, transfer, retention, patient access requests, and destruction of abandoned medical records, as required.

The purpose of this RFP is to identify and select a qualified firm capable of delivering a secure, compliant, and scalable solution to support CPSA's obligations related to abandoned medical records.

About CPSA

CPSA is Alberta's medical regulator and responsible for overseeing the practice of medicine in Alberta. [Alberta's Health Professions Act \(HPA\)](#) grants physicians and physician assistants the privilege of profession-led regulation, which is carried out by CPSA.

Our work to guide the medical profession ultimately protects Albertans. This work includes:

- Registering physicians, surgeons, osteopaths, and physician assistants
- Supporting continuing competence and performance in practice
- Investigating and resolving complaints related to physicians and physician assistants
- Contributing to public policy affecting health care delivery
- Accrediting health facilities
- Engaging in evidence-based medical regulation, research and program evaluation
- Guiding professional conduct and ethical behaviour

CPSA is governed by a Council that includes physicians, public members and representatives from Alberta's medical schools. Public members are appointed by Alberta's Lieutenant Governor, while regulated members are elected by their professional peers. Also on Council are Alberta's two medical deans, and medical learners who sit as observers. Dr. Colleen Forestier, the Chief Executive Officer and Registrar, is responsible for the day to day operations of CPSA and leads a team of about 185 staff in Edmonton.

To learn more about CPSA, please visit cpsa.ca.

Our Vision

Professional, ethical, and competent regulated members providing the highest quality care for all Albertans.

Our Mission

To serve and protect all Albertans, contributing to their health and wellness, by supporting and guiding regulated members to proudly provide high quality care together with healthcare partners and patients.

Our Strategic Directions

- **Highest Quality, Compassionate and Ethical Care** – Towards increasing the provision of excellent, regulated member care for all Albertans
- **Enhanced Partnerships** – Towards informed, engaged partners who help us provide quality care with Albertans
- **Proactive and Innovative Approach** – Towards being recognized as a leader and innovator in self-regulated professions who always strive for excellence
- **Anti-Racism and Anti-Discriminatory** – Towards becoming an anti-racism and anti-discrimination organization
- **Authentic Indigenous Connections** – Towards substantive and authentic connections and relationships that help us provide quality care in partnership with Indigenous Organizations

Project Definition

Introduction

CPSA regulates physicians and physician assistants in Alberta in the public interest.

Recent legislative changes require CPSA, through ministerial direction, to assume custody or control of abandoned medical records in certain circumstances.

As part of its preparation for these responsibilities, CPSA is seeking a qualified firm to provide comprehensive abandoned medical records management services. CPSA's objective is to establish a secure, compliant, and scalable solution capable of supporting the intake, management, storage, retrieval, transfer, retention, patient access requests, and destruction of abandoned medical records when required.

Through this RFP, CPSA seeks to identify a firm with demonstrated experience in healthcare records management and the ability to provide services that meet applicable legislative, privacy, security, and records management requirements.

Project and Business Sponsor

Jim Kiddoo, Chief Information and Privacy Officer
Information Management
College of Physicians & Surgeons of Alberta

Deliverables

Key deliverables of the project are:

- Firm-managed abandoned medical records solution.
- Secure intake and transfer of abandoned medical records.
- Secure storage of paper and electronic medical records.
- Retrieval and transfer of records to authorized recipients.
- Management of patient and authorized third-party record requests.

- Records retention and secure destruction services.
- Reporting and documentation to support CPSA oversight.
- Service documentation, forms, and procedures required to support service delivery.
- Management of paper records, electronic records, diagnostic images, and records exported from electronic medical record (EMR) systems.

Major Phases and Activities of the Project

Major phases and activities of the project include:

- Project initiation and implementation planning.
- Establishment of intake and transfer processes for abandoned medical records.
- Secure receipt and transportation of abandoned medical records.
- Records inventory, assessment, and processing.
- Storage and management of paper, electronic, and other healthcare records.
- Management of authorized requests for access to, or transfer of, records.
- Records retention management and lifecycle administration.
- Secure destruction of records at the end of the retention period, where authorized.
- Reporting, monitoring, and ongoing service delivery.

Other Resources

A number of resources will be available to assist with the project as needed including time and expertise from:

- Jim Kiddoo, Chief Information and Privacy Officer
- Sarah Monaghan, Advisor, Records Management
- Dawn Hartfield, Deputy Registrar and Hearings Director
- Representatives from Legal Services, Privacy, Information Technology, and other CPSA subject matter experts, as required

Proposals

To be considered, the proposal must contain:

- An overview of the firm's organization, experience, and qualifications relevant to medical records management and healthcare information services.
- A detailed description of the proposed service model, including intake, transportation, storage, retrieval, transfer, retention, and destruction processes.
- A description of how patient and authorized third-party record requests are managed.
- A description of privacy, security, compliance, and chain-of-custody controls.
- A description of the firm's experience managing paper, electronic, and other healthcare records.
- Proposed service levels, response times, and reporting capabilities.
- References from comparable healthcare or regulated-sector clients.
- A detailed pricing model, including all fees, charges, and optional services.
- Services are expected to commence on or about September 2026

- The successful firm will work with CPSA representatives to establish service implementation requirements and operational processes necessary to support service delivery.

Success will be demonstrated through:

- Establishment of a secure and compliant abandoned medical records management service.
- Effective management, storage, retrieval, transfer, retention, and destruction of records, as required.
- Compliance with applicable legislative, privacy, security, and records management requirements.
- Timely and effective service delivery to CPSA, patients, and other authorized requestors.
- Pricing must include all professional fees, subcontract fees (if applicable), expenses, and taxes. CPSA is not exempt from GST.

Services are expected to commence as soon as practicable following contract award.

Required Bidder Information

The following information should be included in your proposal to CPSA:

Firm Expertise

Describe your organization's expertise, qualifications, and experience in providing medical records management, healthcare information management, records storage, records retrieval, retention, transfer, and destruction services.

Firm Resources

Describe the expertise, qualifications and experience of each person who would be providing services to CPSA, including the proposed role of each individual.

Please identify key personnel who would be responsible for implementation, account management, and service delivery, and provide a summary of their relevant qualifications and experience.

Describe any project management or administrative support that would be part of the firm's services to CPSA. If any portion of the project is to be done by subcontractors, please include in the pricing information.

Pricing Information

Pricing should clearly identify all fees associated with implementation, storage, retrieval, scanning, transportation, patient requests, record transfers, destruction services, and any other applicable charges.

Conflicts of Interest

The proposals must identify any potential conflicts of interest known to the firm that may affect the provision of services to CPSA.

References

Please include three references from organizations for which similar healthcare records management, storage, retention, retrieval, or practice closure services have been provided.

Proposal Process

Procurement Schedule

July 20, 2026	RFP will be made available to invited firms.
August 10, 2026	All proposals must be submitted to CPSA by 4 pm of this day.
August 11 to August 18, 2026	Internal screening of proposals. CPSA will develop a short list of at least two firms whose references will then be contacted.
Week of August 24, 2026	Short listed firms may be invited to present their proposal virtually to the evaluation committee, if required.
Week of August 31, 2026	Selection of the successful firm will be made and negotiation of terms of engagement undertaken. Other short-listed firms will be notified.
September 2026	Service implementation will begin.

Proposal Requirements

Proposals must not exceed 15 pages in length, including all attachments and appendices.

Proposals are to be submitted in PDF format directly to CPSA via email, addressed to Jim Kiddoo at Jim.Kiddoo@cpsa.ab.ca.

Selection Criteria

Proposals will be evaluated against the following criteria:

Criteria	Weighting
Experience providing abandoned medical records, practice closure, or long term medical records custody services	30%
Proposed service model, including intake, secure storage, retrieval, patient record requests, retention, and destruction processes	30%
Fees and pricing	20%
Security, privacy, regulatory compliance, and records management practices	20%

Those firms whose proposals are selected for further consideration may be asked to make a personal presentation to us and/or answer questions in advance of our final selection.

CPSA will not necessarily select the lowest cost proposal.

Proposal Conditions

Contingencies

This Request for Proposals (RFP) does not commit CPSA to award a contract. CPSA reserves the right to accept or reject any or all proposals or waive irregularities if CPSA determines it is in the best interest of CPSA to do so.

Acceptance or Rejection of Proposals

Proposals shall remain open, valid and subject to acceptance anytime up to three months after the proposal opening date and time. CPSA realizes that conditions other than lowest cost are important and will award contract(s) based on the proposal(s) that best meet the needs of CPSA.

Modifications

CPSA reserves the right to issue addenda or amendments to this RFP.

Proposal Submission

To be considered, all proposals must be submitted in the manner set forth in this proposal. It is the Proposer's responsibility to ensure that its proposal arrives on or before the specified time.

Incurred costs

This RFP does not commit CPSA to pay any costs incurred in the preparation of a proposal in response to this request and Proposer agrees that all costs incurred in

Negotiations

CPSA may require the firms selected to participate in negotiations, and to submit cost, technical, or other revisions of their proposals as may result from negotiations.

Final Authority

The final authority to award contracts as a result of this RFP rests solely with CPSA.

Contact Information

All inquiries should be directed to the following individuals:

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2700, 10120 – 100 St NW
Edmonton, AB
T5J 0N3

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Chief Information Officer
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