**ANNEXURE A:SCOPE OF SERVICES AND PERFORMANCE STANDARDS**

**PART A GENERAL PROVISIONS**

1. **Implementation**

|  |  |  |
| --- | --- | --- |
| **Process** | **Service Provider Responsibilities** | **SARS Responsibilities** |
| 1. Planning | * Plan, draft and produce the Implementation Plan in consultation with SARS      * Present the Implementation Plan to SARS for sign-off * Sign-off by Key Account Manager after acceptance by SARS | * Supply relevant and accurate information for the development of an Implementation Plan based on the business needs as per the RFP. * Evaluate and consider adoption of the Implementation Plan presented by the Service Provider. * Ensure sign-off by SARS’ Health and Wellness Management once satisfied with the Implementation Plan. |
| 1. Information | * Timeous request of guidelines that govern proper communication, branding and marketing from various SARS stakeholders: Wellness, Communications and IT as well as relevant information such as number of SARS sites, contact details of eligible employees or any other relevant information/documentation, which will enable the Service Provider to fully execute its mandate in terms of the Agreement. | * Supply all information/documentation and secure co-operation from the relevant IT personnel to provide the online services. |
| 1. IT | * Establishing a platform for online services such as a wellness management website with a dedicated email address and which platform is compliant with the SARS security, network and email policies. | * Supply the required information and secure co-operation from the relevant IT personnel to provide the online services. |
| 1. Coordination | * Setting up Implementation sessions in consultation with SARS | * Provide accurate information, respond within a reasonable time period and make available all necessary contact details of SARS’ Employee Wellness. |
| 1. Train - the - trainer workshops and psychosocial awareness sessions | * Facilitate Train - the - trainer workshops for SARS wellness consultants and facilitate psychosocial awareness sessions for SARS employees as and when required within wellness * complaints procedures. | * Ensure that the required facilities and training equipment are available to enable the Service Provider to facilitate the training sessions. |
| 1. Marketing | * The Service Provider must submit all promotional materials to SARS’ Health and Wellness Department for written approval at least 10 (ten) days prior to the date on which the material will be utilized by the Service Provider. * Employees must be informed by the Service Provider of – * services offered; * accessibility to services; * eligibility for services; * confidentiality obligations; * a toll free number; * contact persons; and * complaints procedure | * Verify and provide written approval of marketing material by virtue of sign-off from the Head of Health and Wellness or any other SARS employee authorized thereto within 3 days |

1. **Account Management and Administration**

|  |  |  |
| --- | --- | --- |
| **Process** | **Service Provider Responsibilities** | **SARS Responsibilities** |
| 1. Account Management | * The Service Provider must provide a dedicated national Key Account Manager who will attend to all day to day operational matters relating to the rendering of the Services. * The Service Provider shall not change a Key Account Manager or other key account personnel without giving reasonable prior written notice to SARS. * The Service Provider must do a complete hand-over to any new Key Account Manager to allow for a seamless transition of responsibilities. * The Key Account Manager shall be responsible for co-ordination of all interventions rendered in terms of this agreement, including being physically present during an intervention or sending a representative to a SARS site. * The Service Provider shall give SARS prior notice of the representative who will be present at an intervention. | * Support the Key Account Manager with relevant information about SARS’ needs. * Pro-actively alert the Service Provider of any themes, trends, risks, concerns and uncertainties. * Maintain continuous communication |
| 1. On-going account and /services Programme Management | * The core functions of the Key Account Manager will include: * Partnering with SARS * Seamless implementation of the services * Liaising between the Service Provider and SARS * Continuous assessment and analysis of statistical data * Pro-active alerting of observed risk/threats to SARS * Ongoing feedback on themes and trends * Complaints handling * Quality assurance relating to the delivery of the services * Investigation of service failures * Providing all required reports timeously | * Log complaints in line with the Service Provider’s Complaints Procedure, which is to be provided to SARS. |
| 1. Meetings | * The Service Provider shall attend the following meetings – * EAP – two meetings every month [schedule to be agreed between the parties] * The Service Provider shall have sufficient data for all virtual meeting. * The Service Provider shall draft an action plan at the end of every meeting which plan will contain timeframes. * The Service Provider shall perform regular follow-ups on action plans adopted at meetings and liaise with SARS’ Employee Wellness team for action plans that were indicated for SARS. * The Service Provider shall carry all secretarial responsibilities relating to any meetings held with SARS. | * Provide the Service Provider with the necessary facilities to hold the meetings, which meetings will take place at SARS’ Head Office and/or virtually * Provide the Service Provider with 48hours’ notice for cancellation of a scheduled meeting. * Where a scheduled meeting is cancelled less than 48 hours prior to the scheduled time, the cancelled meeting’s agenda items and matters for discussion will be tabled at the next scheduled meeting, as scheduled. |
| 1. Administration | * The Service Provider must attach a schedule to its monthly invoice of all services rendered to SARS during the relevant month. | * Review the Schedule; sign –off same and pay the Service Provider invoices within 30 (thirty) days of receipt of undisputed invoices |
| 1. Complaints Procedures | * The Service Provider must ensure that complaints relating to service failures are well documented by completion of complaint forms. * The Service Provider must ensure that information pertaining to service failures are consolidated in its Monthly Reports to SARS. * The Service Provider must advise of risk mitigation measures that will be implemented to avoid the re-occurrence of the complaint/service failure. * All complaints will be logged on the shared folder by the Key Account Manager, call centre or Clinical Director depending on the point of entry. * Receipt of complaints must be acknowledged within 1 working day of receipt. * The Key Account Manager is responsible for ensuring appropriate referral within the Service Provider * The complaint remains active until closed by the Key Account Manager.      * **Response times:** * Immediate auto reply if complaint sent electronically * Initial feedback within 24 hours * Resolution of complaints within 72 hours of receipt thereof | * Handle the complaints /service failures in compliance with the agreed complaints procedure |

1. **Review , Evaluation and Change Control Procedure**

| **Process** | **Service Provider Responsibilities** | **SARS Responsibilities** |
| --- | --- | --- |
| 1. Reviews and Reports | * Data will be collected in the form of – * Monthly dashboard reports * Monthly reports on cases taken over from the outgoing Service Provider * Monthly reports on chronic disease cases * Quarterly sets of uptakes and utilization * Trends and themes * Bi-annual meetings with SARS’ designated persons * Annual reporting * Annual reviews (i.e surveys of employee satisfaction with the Service Provider services) * Ad hoc reports | * Evaluate data * Respond to the Service Provider regarding any issue related to the data * Cross reference data with other aspects of HR and the Organization and provide feedback to the Service Provider |
| 1. Format of Reports | * The Service Provider must provide reports to SARS as and when required in the form of – * Statistics and calculations * Uptake & utilization * Themes and trends * Training and Interventions * Benchmarking * Conclusions & recommendations | * Evaluate Reports and give feedback to the Account Manager |
| 1. Substitution of Staff | * In the event that Key Account Manager is not available , the Service Provider shall: * Provide SARS with the name of the person who will be standing in for the Key Account Manager; report fully on all information received and incidents/ problems reported by SARS during his/her absence * In the event that the Key Account Manager resigns or is replaced, the Service Provider shall – * Notify SARS of the change within seven (7) business days of such appointment. * Ensure continuity of the services to SARS * Conduct a formal and proper hand over of the account to the incoming Key Account Manager | * Acknowledge substitution notifications * Confirm its satisfaction with the hand over process |

**PART B: SERVICES**

1. **EMPLOYEE ASSISTANCE PROGRAMME SERVICES**

| **Process** | **Service Provider Responsibilities** | **Accountable Person** | **SARS Responsibilities** | **Accountable Person** | **Performance standards** |
| --- | --- | --- | --- | --- | --- |
| 1. Psychosocial virtual and/ or face to face counselling | * Diagnostic, evaluation and referral services for employees, their family members and household members. * A maximum of 6 virtual and/or face to face counselling sessions per person , per case, per year. * If a referral is done to an institution outside the scope of services whereby an employee will incur costs (e.g. psychiatric institution and rehabilitation institution etc.) the Service Provider shall verbally and in writing inform the employee accordingly. | Key Account Manager | * Provide employee data base * Assistance with marketing and promotion of the services * In addition, if necessary, avail the employee time off from work for any face to face consultation sessions. | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * Ensure that third party service providers adhere to the agreed consultation appointment. * **Response Time** * Requests for counselling must be allocated to a case manager immediately * Cases must be referred to an affiliated professional within 24 hours of the initial call * Affiliate must arrange an appointment with 24 hours * The appointment must take place within 1-7 days of the referral subject to the employee’s availability |
| 1. Unlimited telephonic Counselling | * Provide telephonic access through a country-wide network of professional EAP counsellors. * The telephone counselling should be staffed by qualified and registered psychologists, social workers and counsellors. * The Service Provider shall ensure that the toll free number provide employees with language options in all 11 official languages immediately after the welcome prompt and before the caller is requested to exercise any service selection. | Key Account Manager | * Assistance with marketing and promotion of the services | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * **Response Time** * Immediate |
| 1. Trauma Debriefing | * Provide group virtual assistance in the event of a traumatic incident. | Key Account Manager | * Assistance with marketing and promotion of the services * Referral of trauma incidents to the Service Provider. * The SARS Wellness representative, the service requestor and/or HRBP will assist with the logistical arrangements with the service | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * The Service Provider shall dispatch a counsellor to the designated SARS site within 12-24 hours of receiving the service request * In the event that the 12-24 hours’ response time falls on a Saturday, Sunday or a public holida,y the counselling must take place on the next working day * Where appropriate, trauma de-briefing will only take place after medical care and /or site evacuation have taken place. |
| 1. Online services / email | * A dedicated email address must be made available to SARS * The dedicated email address must have an automated response which indicates expected turn-around times | Key Account  Manager | * Assistance with marketing and promotion of the services | SARS Wellness Team | * Response Time * automated response within 30 minutes * actual response within 4 hours from receipt of email |
| 1. Please call me service and Whatsapp service | * New 10 digit number must be made available to SARS | Key Account Manager | * Assistance with marketing and promotion of the services | SARS Wellness Team | * **Response Time** * automated response within 30 minutes * actual response within 4 hours from receipt of email |
| 1. Money   Management | * Provide access to Service Provider’s network of financial advisor * Provide financial advice and debt counselling, assistance with garnishee orders etc. | Key Account Manager | Assistance with marketing and promotion of the services | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * **Response Time** * The caller must be referred to a financial advisor, as soon as is reasonably possible, where the call must be dealt with. |
| 1. Legal Advice | * Provide access to Service Provider’s network of legal advisors. * Provide legal advice and assistance with contractual, family law, property matters etc. | Key Account Manager | Assistance with marketing and promotion of the services | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year. * **Response Time**   The caller must be referred to a legal advisor, as soon as is reasonably possible, where the call must be dealt with |
| 1. Family Care | * Provide access to Service Provider’s network of family advisors | Key Account Manager | Assistance with marketing and promotion of the services | SARS Wellness Team | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * **Response Time**   The caller must be immediately diverted to an advisor where the call must be dealt with. |
| 1. Formal Referrals by managers | * Provide access for managers that refer cases, formal referral forms, feedback and assistance with telephonic/online managerial consultancy * Provide the requestor with a reference number relating to the service request | Key Account Manager | * Assistance with marketing and promotion of the services * Formal referral of cases * SARS must ensure that the formal referral document is completed and signed by both the manager and employee in order for the require intervention to proceed. | SARS Wellness Team  SARS business units’ managers | * The services must be accessible through a toll free number 24 hours a day / 7 days a week / 365 days per year * **Response Time** * The Service Provider must furnish the requestor with an initial report within 48 hours of receiving the completed referral documentation * The Service Provider must furnish the requestor with a close –up report within 48 hours after the assessment has taken place and after having received the completed referral documents form SARS. |
| 1. Wellness Website Management | * Provide comprehensive health, wellness and disease management content and interactive offerings online to SARS personnel. * On-going review and update of the website content. | Key Account Manager | * Assistance with marketing and promotion of the services * Commitment from IT personnel to assist with providing intranet access to the programme | SARS Wellness Team | * The services must be accessible through a web-link on the SARS’ intranet 24 hours a day / 7 days a week / 365 days per year. |
| 1. Train - the - trainer workshops and psychosocial awareness sessions | * Arrange and implement the training and interventions as requested by SARS. * Provide booklets (hard or soft copy as may be relevant) for all training sessions. | Key Account Manager | * Assistance with marketing and promotion of the services * Training and interventions requests * Provide relevant tools and facilities for the purpose of training and interventions * Ensure the registration of relevant training topics with SIOL | SARS Wellness Team | * Training and intervention requests will be directed through the SARS Wellness consultants at least 1 week prior to implementation * The Service Provider must make available suitably qualified and experienced personnel for such services * Training and intervention services will be provided at time and location specified by SARS * The Service Provider will utilise its own training materials for all the required sessions |
| * Behavioural risk management survey | * The Service Provider must conduct behavioural risk management survey every two years. | * Key Account Manager | * Wellness unit to market and communicate the survey to the workforce * SARS (?) IT to assist with dissemination of questionnaires | * SARS Wellness unit | * The Service Provider to commence the survey in March of the second and the last year of the contract |

1. **Marketing Wellness Program and creating awareness through Campaigns**

| **Process** | **Service Provider Responsibilities** | **Accountable Person** | **SARS Responsibilities** | **Accountable Person** | **Performance standards** |
| --- | --- | --- | --- | --- | --- |
| 1. Health Calendar Days | * Assist SARS in creating awareness around the Health Calendar Days through health campaigns based on the identified calendar days by SARS. * The Service Provider must organize 1 campaign per month to region determined by SARS (other regions will receive soft copy material related to the campaign). * The Service Provider must provide all promotional material for the Health Calendar Days. * The Service Provider must submit proposal to SARS in respect of each campaign within 10 days after receiving SARS’ required Health Calendar Day | Key Account Manager | * Provide the roll-out Health Calendar plan for a year in advance * Indicate the specific Health Calendar activities 35 days before the start of every quarter. * Confirm acceptance of the Service Provider’s proposal within 7 days of receipt of such proposal * Provide contact details for the responsible person to assist at least 7 days prior to a Health Calendar Day event * Notify the Service Provider of any cancellation of an event at least 48 hours prior to the Health Calendar Day event * Where a Health Calendar Day event is postponed, the postponement date shall at least be 10 days to any subsequent Health Calendar Day Event | SARS Wellness Team | * Presence of the Service Provider or representative at all sites as per the Health Calendar Days plan * Provide suitably qualified resources or presenters * Provide appropriate health and wellness related promotional items: e.g. educational literature, virtual, online, and e-learning, posters (in physical or format) and /or communication (e.g. e-mail or portal content where feasible) |