**Annexure A**

**Scope of Services**

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| **STRATEGIC SERVICES** | | |
| **Service line item** | **Occurrence/Frequency** | **Service Provider’s Roles and Responsibilities** |
| Report on the previous year-end revision process | **Quarter 1** | Report on current and previous years to identify trends |
| Review the SARS’ demographic profile | **Quarter 3** | Review and report on active employees & pensioners, family size, income distribution, medical scheme option or plan type |
| Provide an update on legislative developments and comment on the potential impact on the organization | **Ongoing** | Summarise and report on Council for Medical Scheme reports, financial results and positioning of accredited medical schemes as well as other scheme and industry news |
| Member and employer education | **Ongoing** | Plan and discuss member communication and training requirements. |
| Scheme and option comparisons | **Annual/on request** | Provide comparative information on product developments, costing and market trends |
| In-depth scheme change analyses | **Quarter 3** | Provide an update on changes within the accredited medical schemes |
| Scheme demographics | **Annual** | Annually review financial and demographic data of the accredited medical scheme/s as well as the performance of the administrator |
| Impact analyses | **Ongoing** | Provide an update on scheme developments as required and comment on the impact on the organization and members |
| Review health care strategy and policy | **On request** | Benchmark the SARS’ strategies against that of the industry |
| Project planning and implementation | **Annual** | Discuss proposed services for the year and implementation of the service |
| Market trends & forecasting | **Ongoing** | Provide an update and comment on market trends. Analysis and forecasting of medical scheme trends |
| Health Care Committee | **Ongoing** | Participate in the Healthcare Committee |
| **ON-SITE CONSULTING SERVICES** | | |
| Provide a query helpdesk | **As per agreed scheduled visit** | Manage and resolve problematic member queries onsite |
| One-on-one consultations | **As per agreed scheduled visit** | Conduct individual member training and offer advice on the benefit structure and contributions |
| Induction sessions and training | **Ongoing** | Assist new members and HR with the processing of new member applications and scheme amendments. Induction and ad hoc training, one-on-one counselling |
| Query Management and Tracking Service | **Ongoing** | Record member participation and query type in order to identify trends within the organization |
| Independent consultations | **As per agreed scheduled visit** | Provide members with independent information regarding accredited medical schemes |
| Escalated query assistance | **On request** | Obtain escalated query details for members and provide written feedback to members |
| Process implementation | **Ongoing** | Establish processes and procedures to ensure effective scheme administration |
| Product presentations and training | **Ongoing** | Compile the information to be presented and design the presentation format |
| Member education | **Ongoing** | Facilitate focus group sessions and re-training where required |
| Product information | **Ongoing** | Provide, update and comment on product developments |
| **YEAR END REVISION SERVICES** | | |
| Project Plan | **Quarter 3** | Draft implementation plan for year-end revision |
| Year-end revision training (Members) | **Quarter 3 & 4** | Facilitate training of proposed benefit and contribution changes for the next year |
| Year-end revision training (HR) | **Quarter 3 & 4** | Provide training to the HR department on the medical scheme changes and processes on the implementation for employees |
| Year-end communication | **Quarter 3 & 4** | Plan and implement the rollout of the year-end communication plan |
| Attendance registers | **Quarter 3 & 4** | Record keeping on attendance by branch/region |
| Presentation facilitation | **Quarter 3 & 4** | Presentations done with the assistance of the schemes |
| **TRAINING SERVICES** | | |
| Comprehensive training | **Ongoing** | Implementation of new medical schemes |
| Induction or orientation training |
| Medical Scheme Policy changes |
| Benefit and option changes |
| Year-end revision training |

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| **COMMUNICATION SERVICES** | | |
| Communication Strategy | **Ongoing** | Implementation of the agreed strategy |
| Newsletters/Hot Topics/Newsflash | **Ongoing** | Update SARS on industry matters |
| Billing results | **Monthly** | Feedback on the resolution of billing issues and the status of historical billing statistics |
| Process Management | **Ongoing** | Training in terms of scheme processes and procedures |
| Quarter Report | **Quarterly** | Quarterly service, project and statistical report document |
| Risk management | **Ongoing** | Provide a report which identify and mitigate risks |
| Benchmark Review | **Annual** | Scheme analyses and benchmark against the industry |
| Executive Reports | **On request** | Claims utilisation and needs analyses report |
| **WEBSITE SERVICES** | | |
| Client specific website | **Ongoing** | Design and implement a medical scheme internet site for all employees to obtain information and assistance on their accredited medical scheme/s |
| User training | **Ongoing** | Formalise processes, procedures and communication to members |
| Updates | **Ongoing** | Website updated regularly |
| Website Utilisation | **Ongoing** | Monitor the usage of this facility |

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| **CONTACT CENTRE SERVICES** | | |
| Client specific contact centre | **Ongoing** | Client specific contact centre, trained to understand company policies, timelines and requirements |
| Accredited scheme/s information | **Ongoing** | Provide the Client with the services of a contact centre. The Contact Centre will assist the Clients’ employees with all healthcare related queries. Factual information. |
| Statistics identifying query trends | **Monthly** | Provide members with independent information regarding accredited medical schemes |
| **RISK MANAGEMENT SERVICES** | | |
| Risk Management Forum | **Ongoing** | Establish a risk management forum to identify and mitigate possible risks |
| Mitigation of risks | **Ongoing** | Develop solutions for the identified risks and keep a progress report of the actions implemented to better manage these risks |
| **CLIENT SURVEYS SERVICES** | | |
| Surveys | **On request** | Assessment of the SARS’ employees’ healthcare perceptions through a sample survey of individuals within the organisation. |
| **COMPLIANCE** | | |
| System | **Annual** | System accreditation |
| Disaster Recovery | **Quarterly** | Facilitate training of proposed benefit and contribution changes for the next year |
| FAIS | **Annual** | Provide training to the HR department on the medical scheme changes and processes on the implementation for employees |
| Insurance | **Annual** | Proof on Indemnity Cover |
| Maintenance of records | **Ongoing** | The Company will maintain records for a minimum period of five (5) years. |