

## ANNEXURE A

## SCOPE OF SERVICES and PERFORMANCE STANDARDS

**EXECUTIVE WELLNESS PROGRAMME (EWP)****PART A – GENERAL PROVISIONS****1. Implementation**

<b>Process</b>	<b>The Service Provider's Responsibilities</b>	<b>SARS's Responsibilities</b>
1. Planning.	<ul style="list-style-type: none"> <li>➤ Plan, draft and produce the Project Plan in consultation with SARS;</li> <li>➤ Present the Project Plan to SARS for sign-off; and</li> <li>➤ Sign-off by Key Account Manager after acceptance by SARS.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Supply relevant and accurate information for the development of a Project Plan based on the business needs as per the RFP;</li> <li>➤ Ensure that the Executive Wellness Programme is marketed and promoted to all the eligible executives, with the assistance of the Service Provider, to ensure the highest possible uptake;</li> <li>➤ Evaluate and consider adoption of the Project Plan presented by the Service Provider; and</li> <li>➤ Ensure sign-off by SARS's Designated Representative once satisfied with the Project Plan.</li> </ul>
2. Information.	<ul style="list-style-type: none"> <li>➤ Timeous request of relevant information / documentation which will enable the Service Provider to fully execute its mandate in terms of the Agreement.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Supply all information / documentation to enable the Service Provider to comply fully with a service request in terms of the Agreement. This includes a comprehensive list of names and contact details (email address, mobile telephone, landline numbers, etc.) for all eligible executives and their personal assistants.</li> </ul>
3. Coordination.	<ul style="list-style-type: none"> <li>➤ Communicate offsite health assessment appointments to the eligible executive at least 48 (forty-eight) hours in advance.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Provide accurate information, respond within a reasonable time period in respect of confirming the availability of a SARS employee for the comprehensive offsite health assessment.</li> </ul>

2. Account Management and Administration

Process	The Service Provider's Responsibilities	SARS's Responsibilities
<p>1. Account Management.</p>	<ul style="list-style-type: none"> <li>➤ The Service Provider must provide a Key Account Manager.</li> <li>➤ The Key Account Manager will:                             <ul style="list-style-type: none"> <li>○ ensure delivery of services in line with the Services Agreement;</li> <li>○ conduct a proper needs assessment to ensure that the project plan addresses the relevant needs of SARS;</li> <li>○ develop an integrated project plan which is aligned to SARS's strategic objectives;</li> <li>○ ensure resolution of any complaints, problems and/or disputes; and</li> <li>○ ensure the seamless national implementation and coordination of the Services;</li> </ul> </li> <li>➤ The Service Provider shall submit a list of SARS employees who have attended comprehensive offsite health assessments and invoice SARS for the monthly account management fee.</li> </ul> <p>The Service Provider shall bill SARS employees' medical aids or the employees themselves directly, depending on the employee's choice, for services rendered. The Service Provider shall notify SARS employees of their cancellation terms and conditions.</p> <ul style="list-style-type: none"> <li>➤ The Service Provider shall be responsible for co-ordination of all appointments related to the Executive Wellness Programme rendered in terms</li> </ul>	<ul style="list-style-type: none"> <li>➤ Support the Key Account Manager with relevant information about SARS's needs;</li> <li>➤ Maintain continuous communication; and</li> <li>➤ Review the Service Provider's invoice for the account management fee only, to which invoice a list must be attached of the SARS employees who attended complete offsite health assessments during the previous month; sign-off same and pay such undisputed account management fee within 30 (thirty) days.</li> </ul>

Process	The Service Provider's Responsibilities	SARS's Responsibilities
<p>2. Meetings.</p>	<p>of this Agreement.</p> <ul style="list-style-type: none"> <li>➤ The Service Provider shall meet with SARS on a quarterly basis to discuss and review projects planned or implemented.</li> <li>➤ The Service Provider shall attend an annual service relationship review.</li> <li>➤ The Service Provider shall meet with SARS for <i>ad hoc</i> meetings, on reasonable request by SARS.</li> <li>➤ The Service Provider shall carry all secretarial responsibilities relating to any meetings held with SARS.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Provide the Service Provider with the necessary facilities to hold the meetings, which meetings will take place at SARS's Head Office or any other venue agreed upon by the Parties;</li> <li>➤ Provide the Service Provider with 48 (forty-eight) hours' notice for cancellation of a scheduled meeting. SARS will schedule a new meeting and advise the Service Provider accordingly. The cancelled meeting's agenda items and matters for discussion will be tabled at the next scheduled meeting.</li> </ul>
<p>3. Complaints Procedures.</p>	<ul style="list-style-type: none"> <li>➤ The Service Provider must ensure that complaints relating to Service Level Failures are well documented in writing;</li> <li>➤ The Service Provider must ensure that information pertaining to Service Level Failures are consolidated by the Service Provider in its Monthly Performance Report to SARS;</li> <li>➤ The Service Provider must advise of risk mitigation measures that will be implemented to avoid the re-occurrence of the complaint / Service Level Failure;</li> <li>➤ Receipt of complaints must be acknowledged within 1 (one) working day of receipt;</li> <li>➤ The complaint remains active until closed by the Key Account Manager.</li> <li>➤ <b>Response times:</b> <ul style="list-style-type: none"> <li>○ initial feedback within 24 hours; and</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Handle the complaints / Service Level Failures in compliance with the agreed complaints' procedure.</li> </ul>

Process	The Service Provider's Responsibilities	SARS's Responsibilities
	<ul style="list-style-type: none"> <li>○ resolution of complaints within 72 hours of receipt thereof.</li> <li>➤ <b>NB:</b> The Service Levels regarding the Complaints Procedures do not prevent SARS from invoking Clause 17 of the Services Agreement, where the Service Provider is in default or breach of any obligation arising from the Services Agreement.</li> </ul>	

3. Review, Evaluation and Change Control Procedures

Process	The Service Provider's Responsibilities	SARS's Responsibilities
<p>1. Medical Record Keeping and Document Management.</p>	<ul style="list-style-type: none"> <li>➤ Ensure that the confidentiality and security of employees' information is maintained through a proper document security system;</li> <li>➤ Have an efficient and effective administrative process / procedure for audit purposes and for managing all medical files, results, enquiries and claims; and</li> <li>➤ Have a proper electronic and manual record keeping system.</li> </ul>	<ul style="list-style-type: none"> <li>➤ SARS to monitor from time to time that the Service Provider maintains a proper document security system to ensure confidentiality.</li> <li>➤ SARS to monitor from time to time that the Service Provider maintains a proper electronic and manual record keeping system.</li> </ul>
<p>2. Reporting.</p>	<ul style="list-style-type: none"> <li>➤ Data will be collected in the form of-                             <ul style="list-style-type: none"> <li>○ Monthly dashboard reports;</li> <li>○ Detailed quarterly reports;</li> <li>○ Detailed annual reports; and</li> <li>○ <i>Ad hoc</i> reports.</li> </ul> </li> <li>➤ Reports should meet the following requirements:                             <ul style="list-style-type: none"> <li>○ Identify common trends and offer relevant recommendations to address the issues identified in the reports.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Provide employee database;</li> <li>➤ Evaluate data;</li> <li>➤ Respond to the Service Provider regarding any issues related to the data; and</li> <li>➤ Cross reference data with other aspects of SARS's Human Capital and Development division and SARS, and provide feedback to the Service Provider, where applicable.</li> </ul>

Process	The Service Provider's Responsibilities	SARS's Responsibilities
<p>3. Substitution of Key Account Manager.</p>	<ul style="list-style-type: none"> <li>➤ In the event that the Key Account Manager is not available for a period of more than 24 (twenty four) hours, the Service Provider shall -                             <ul style="list-style-type: none"> <li>○ Provide SARS with the name of the person who will be standing in for the Key Account Manager, as soon as possible;</li> <li>○ Ensure that the person standing in for the Key Account Manager is familiar with the SARS account; and</li> <li>○ Ensure that the person standing in for the Key Account Manager reports fully on all information received and incidents / problems reported by SARS during the Key Account Manager's absence.</li> </ul> </li>   <li>➤ In the event that the Key Account Manager resigns or is replaced, the Service Provider shall –                             <ul style="list-style-type: none"> <li>○ Notify SARS of the change within 7 (seven) days of the new appointment;</li> <li>○ Ensure continuity of the Services to SARS; and</li> <li>○ Conduct a formal and proper handover of the account to the incoming Key Account Manager.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Acknowledge substitution notifications; and</li> <li>➤ Confirm its satisfaction with the handover process.</li> </ul>

PART B: SERVICES

1. Executive Wellness Programme (EAP)

Process	The Service Provider's Responsibilities	Accountable Person	SARS's Responsibilities	Accountable Person	Performance Standards
1. Comprehensive offsite health assessment, as and when required.	<ul style="list-style-type: none"> <li>➤ To inform SARS employees in advance that if they choose to attend comprehensive offsite health assessment, the Service Provider will bill either the employee or their medical aids directly for services rendered, depending on the employee's choice.</li> <li>➤ To ensure that during consultation the following assessments are conducted / provided:                             <ul style="list-style-type: none"> <li>○ Full Medical Review;</li> <li>○ Nutritional Assessment;</li> <li>○ Pathology Screen;</li> <li>○ Additional pathology tests such as Stool, PSA and PAP etc. will be charged to the medical aid of the employee. This will be negotiated and agreed to between the Service Provider and the employee, as these tests may be covered by the employee's medical aid but will depend on the</li> </ul> </li> </ul>	The Service Provider's multidisciplinary team	<ul style="list-style-type: none"> <li>➤ Provide the SARS executive employee database with contact details (email address, mobile telephone and landline numbers) and their personal assistants; and</li> <li>➤ Provide the employee time off from work for any appointment related to the Executive Wellness Programme and any appointment related to further referrals.</li> </ul>	SARS Designated Representative	<ul style="list-style-type: none"> <li>➤ Set-up a half day comprehensive offsite health assessment within 5 (five) Business days of receiving SARS's request;</li> <li>➤ Ensure that the Service Provider's third party service providers adhere to the agreed assessment appointment;</li> <li>➤ Comprehensive offsite health assessments should be completed in 1 (one) full day; and</li> <li>➤ Provide a detailed personal report to the employee within 7 (seven) days of completion of the assessments.</li> </ul>

Process	The Service Provider's Responsibilities	Accountable Person	SARS's Responsibilities	Accountable Person	Performance Standards
	<ul style="list-style-type: none"> <li>availability of medical aid funds; and</li> <li>○ Biokinetic Assessment.</li> <li>➤ To ensure that a detailed personal report is provided, after the assessments have taken place.</li> </ul>				