

## TERMS OF REFERENCE (ToRs)

### Development of an appointment scheduling software

#### Background

Health for All Project (HAP) is a project of the Swiss Agency for Development and Cooperation (SDC). Its overall goal is that the Albanian population benefits from better health due to improved primary health care services. As of 1 April 2019, HAP entered the second phase implemented by Swiss Tropical and Public Health Institute (Swiss TPH) through HAP Centre.

During Phase 2, HAP is supporting primary healthcare centers (HCs) in Fier and Dibra region to fulfill the requirements of quality standards for their accreditation. In this regard, HAP is supporting HCs to set up an appointment system for the consultations with Family medicine team(s) as of crucial importance for implementation of the family medicine concept in primary healthcare facilities. "A functional appointment system" is required in the framework of optimal standards for HC accreditation (A 4.1, Order of MoHSP nr.630. date 20.12 2017). A functional appointment system would overall improve the service offered at the health center as it would make possible:

- A better organization of work within the health center
- Better distribution of workload during the day
- More relevant referrals to the specialist physicians
- A wider range of services to the community
- Increase of satisfaction among patients and health professionals

In view of the above, a scheduling software is needed to facilitate the planning of visits at health center level, in addition to the telephone network.

The scheduling software will allow:

1. timely coordination among family medicine (FM) team members, and between FM team and other operational units of HC
2. better monitoring of progress of the appointment system operation by the HC management
3. better transparency of the scheduled consultations to the patients waiting for unplanned consultation, as the daily schedule will be displayed on the screens in the waiting areas.

#### Objective

HAP is seeking the services of an experienced consultant company to develop or adapt an internal appointment scheduling software that will be piloted initially in Patos HC and furthermore in PHC centers in Fier and Dibra region.

The company should be able to design (or adapt an existing software), develop, test, implement and maintain a responsive appointment scheduling software, **web-based or hosted in a local platform (within the existing server of the healthcenter)**. The basic features of the software should be as follows (the language of the software should be Albanian):

*Features of family team's interface:*

- Schedule and review patient's appointment at the health center, home-visits included (name, surname, timing, contact, notes on medical situation)
- Keep notes following the consultation/visit and the upcoming visit (if scheduled)
- Generate the appointment calendar on daily basis, weekly and monthly basis



#### *Features of administrator's interface:*

- Generate calendars (daily/weekly) of the appointments scheduled from all family medicine teams
- Upload guidelines, orders and additional documents for internal use
- Post comments for each family medicine team
- Generate weekly reports on working hours, appointment capacity, appointment types, appointment durations for each family medicine team
- Generate separate weekly report for home-visits

#### **Tasks and timeline for the consultant company:**

1. Visit the respective health center and collect all the required information based on health center needs
2. Adapt the selected software upon the needs /requests of the health center
3. Present for discussion of the selected proposal for “the appointment scheduling software solution” with HAP and Patos HC management and staff, including technical and financial aspects of the proposed solution.
4. Reflect the comments and insights following the discussion with HAP and Patos HC to the selected model of “the appointment scheduling software solution”
5. Install “the appointment scheduling software “at Patos health center and host it accordingly
6. Develop educational materials and provide training for the team of the Patos health center (max. 30 users)
7. Provide support and maintenance of software for 1 year once it is operational at Patos HC.

**Timelines of the activity** expected to be provided under this contract are given at *Annex 1*.

#### **Disclaimer**

The “appointment software” as well as the respective educational materials and any other documents elaborated in the frame of this consultancy are property of HAP and are subject to SDC rules on intellectual property.

The consultant company shall issue to HAP the source code and licenses (if applicable) and is not entitled to sell/share the developed software to third parties without a previous approval from HAP.

#### **Logistical aspects of the consultancy**

During the time of implementation of this consultancy, the Consultants will closely collaborate with HAP staff in charge of Communication and Quality of health care and Patos HC management.

HAP will arrange the visits to Patos HC and meetings with Patos HC management and staff in the preparatory phase and during presentation for discussion and selection among the 2 proposals of appointment software solutions.

The contractor will keep HAP informed about any difficulties or any hindrances that may affect or delay the implementation of this consultancy.

#### **Deliverables**

All the deliverables should be in English language, excluding the software:

- 1.The software fully developed and operational based on the HC needs and requirements.
- 2.The descriptive Report on the work done including Technical data (source code, database, CPanel)



etc. and Licenses (if applicable), *attached with*

2.1. Installed software performance report once it is operational at Patos HC

2.2. Educational material for the training for users of the software.

**3.** Monthly reports on support and maintenance of software for 1 year once it is operational at Patos HC

**Instruction to bidders:**

The interested providers in submitting offers must address and provide the following:

- Two software mock-up proposals as per the above-mentioned features. Each proposal should include a narrative description of the functionalities of “the appointment scheduling software solution” proposed
- Company Profile including list of references for similar works carried out by the company and examples of at least three software’s designed for different organizations.
- CV of the team members expected to be engaged with this service delivery, demonstrating his/their engagement with similar previous works, not less than 5 years.
- Registration documents of the company.
- A Document certifying that (your subject):
  - has met its fiscal obligations.
  - has paid all social insurance obligations, issued by the Tax Administration.
  - certification by the Tax Administration which indicates the annual turnover for the last 3 years
- Financial offer for each proposal (if more than one proposal is submitted), in a separate envelope, in ALL, VAT and tax included, filling out the budget lines as in *Annex 2*

The proposals should be sent in a sealed envelope. The deadline for submitting the proposals is no later than **4<sup>th</sup> of August 2020**.

**Annex 1- Timeline of activities**

N r.	Activity	w 1	w2	w3	w4	w5	m 1, 2, 3,	m 4,5, 6,	m 7,8, 9	m 10, 11, 12
1.	Visit the respective health center and collect all the required information based on health center needs.									
2.	Adapt the selected software upon the needs /requests of the health center									
3	Present for discussion the selected mock-up proposal of "appointment software" with HAP and Patos HC									
4	Consolidate the selected model of "appointment software"									
5	Install the selected "appointment software" at Patos Health Center									
6	Provide training/instructions session for the team of the Patos health center									
7	Provide maintenance of the "appointment software" for 12 consecutive months once it is operational at Patos HC									



## Annex 2 Budget Table

No.	Activity	Cost in ALL
1	Development of the appointment software (consultancy fee)	
2	Installment at Patos Health Center	
3	Hosting fee (for web-based proposals)	
4	Producing educational and instructional materials and provision of training/instructions sessions to the team of the Patos health center	
5	Maintenance of the appointment software system for 12 consecutive months, once it is operational at Patos HC	
6	<b>Total without VAT</b>	
7	<b>VAT</b>	
8	<b>TOTAL included VAT</b>	

**Note: In the case that one company submit more than 1 proposal, the financial offer (Annex 2 – Budget Lines) must be filled separately for each proposal submitted**