



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Medical Scheme Performance Evaluation Criteria

Business, Commerce and Management Studies / Finance, Economics and Accounting

Unit Standard 242616 · NQF Level 5 · 10 Credits · 7 Days

COURSE OVERVIEW

This course equips learners with the skills to objectively evaluate the criteria that materially affect the performance of a medical scheme and its administration. Participants will learn to assess financial, operational, and governance factors that influence scheme sustainability and member value. The focus is on applying analytical frameworks to real-world medical scheme data.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	242616
Accreditation	SAQA Accredited · NQF Level 5 · 10 Credits
Duration	7 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyze the key financial and operational criteria affecting medical scheme performance.
- Evaluate the impact of risk management and solvency requirements on scheme sustainability.
- Apply regulatory frameworks to assess the administration and governance of medical schemes.
- Interpret performance indicators to identify areas for improvement in scheme operations.
- Demonstrate the ability to compile a performance evaluation report based on objective criteria.

WHO SHOULD ATTEND

- This course is designed for medical scheme administrators, healthcare fund managers, and professionals involved in the oversight or management of medical schemes.
- It is also suitable for auditors, consultants, and regulatory compliance officers in the healthcare financing sector.

COURSE OUTLINE

Day 1: Introduction to Medical Schemes and Regulatory Framework

- Overview of the South African healthcare system
- History and evolution of medical schemes
- Medical Schemes Act 131 of 1998
- Role of the Council for Medical Schemes (CMS)
- Key stakeholders: schemes, administrators, managed care organisations
- Medical scheme types: open, restricted, and closed schemes
- Regulatory compliance requirements
- Glossary of terms: risk pool, solvency, contribution, benefit option

Day 2: Financial Performance Indicators

- Financial statements of medical schemes
- Solvency ratio: definition, calculation, and regulatory minimum
- Net healthcare result and underwriting result
- Contribution income analysis
- Claims ratio and cost management
- Non-healthcare expenditure: administration, managed care, and broker fees
- Risk equalisation fund (REF) and its impact
- Financial sustainability indicators

Day 3: Operational Efficiency and Member Services

- Claims processing efficiency: turnaround time and accuracy
- Member satisfaction surveys and complaint handling
- Access to healthcare: benefit design, network adequacy, and waiting periods
- Managed care interventions: pre-authorisation, formularies, and preferred providers
- Administration and customer service quality
- Member retention and growth analysis
- Benchmarking operational indicators
- Reporting and transparency to members

Day 4: Clinical Quality and Healthcare Outcomes

- Clinical quality indicators: hospitalisation rates, readmission rates, and length of stay
- Disease management programmes for chronic conditions (e.g., HIV, diabetes, hypertension)
- Preventive care: screening, immunisation, and wellness programmes
- Maternal and child health indicators
- Clinical governance frameworks
- Patient safety and adverse event monitoring
- Evidence-based medicine and treatment protocols
- Quality improvement initiatives

Day 5: Risk Management and Solvency Assessment

- Risk management framework for medical schemes
- Solvency assessment and statutory requirements
- Reserve adequacy and valuation methods
- Demographic risk: age profile, gender, and health status
- Utilisation trends and their impact on claims

- Reinsurance: types, benefits, and costs
- Risk pooling and cross-subsidisation
- Stress testing and scenario analysis

Day 6: Regulatory Compliance and Governance

- Regulatory reporting: annual returns, financial statements, and statutory submissions
- Governance frameworks: King IV, medical scheme governance
- Board of trustees: composition, duties, and fiduciary responsibilities
- Principal officer: role and accountability
- Compliance with Medical Schemes Act: prescribed minimum benefits, benefit options
- Protection of Personal Information Act (POPIA) compliance
- Audit and risk committees
- Regulatory interventions: curatorship and liquidation

Day 7: Performance Benchmarking and Integrated Evaluation

- Balanced scorecard for medical schemes: financial, operational, clinical, and member perspectives
- Benchmarking: data sources, comparators, and interpretation
- Performance dashboards and reporting tools
- Case studies: evaluating a real-world medical scheme
- Comprehensive evaluation report structure
- Recommendations for improvement
- Stakeholder communication and action planning
- Course review and assessment

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **10 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 29,600.00	R 29,600.00
1	In-House	R 38,500.00	R 38,500.00
1	On-Campus (Pretoria)	R 44,400.00	R 44,400.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	18 Aug 2026	On-Campus	Dubai, UAE
11 Aug 2026	19 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	20 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	21 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	21 Aug 2026	On-Campus	Mauritius
14 Aug 2026	24 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	25 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	26 Aug 2026	On-Campus	Abu Dhabi, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 242616) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za