TERMS OF REFERENCE

SUPPLY, TESTING, COMMISSIONING OF OCCUPATIONAL PERMIT SYSTEM ENHANCEMENT (OPSE) FOR THE QUEZON CITY BUSINESS PERMITS AND LICENSING DEPARTMENT PHASE 4

I.   RATIONALE AND BRIEF BACKGROUND

The Business Permits and Licensing department aims to improve the Online Occupational Permit System by commissioning a comprehensive system enhancement which will enhance integration to Third Party Online Systems, Creation of New Online Modules and implement Feature changes and upgrades to existing online modules.

II.   PROJECT DESCRIPTION

The project's goal is to achieve a simplified, streamlined and user-friendly online system experience for current users of the Business Permits & Licensing Department and ancillary department users and ultimately, the citizen applicants who will be submitting their new and renewal applications for 2025 and beyond. The system enhancement will cover integration of third-party systems relevant to business owners, adding new online modules, and refining pre-existing system processes and modules.

III.   PROJECT SCOPE OF WORK

A. Integration to Third-Party Online Systems

    i. QC Health Department's Health Certificate System
        a. Process streamlining for those applications with industries under Joint Memorandum Circular (JMC)
        b. Inclusion of Health Certificate Number field with validation from the Health Certificate System
        c. Revisions on the CHD Validation module
            a. Remove initial CHD Validation queue tab
            b. Remove CHD Post Validation queue and display all applications under Released-For CHD Post Validation status
            c. Allow CHD evaluators to manually validate an application's health certificate details

d. Allow automatic system detection of Occupational Permit Numbers used during Health Certificate application within the Health Certificate System

e. Allow CHD evaluators to manually trigger the detection of Occupational Permit Numbers used during Health Certificate application within the Health Certificate System

B. New Online Modules

i. Applicant Access
   a. Occupational Permit Verification Page
      a. Allow applicants with QCeServices accounts to verify if their digital occupational permits are legitimate
      b. Allow the public to verify if their digital occupational permits are legitimate without logging into QCeServices portal
   b. Linking of Application
      a. Allow applicants to link their on-premise, on-site or kiosk applications to their QCeServices account through their Application List module
      b. Allow applicants to bind their kiosk applications to their QCeServices account during submission
   c. On-Site Visit Scheduler
      a. Allow company representatives to request an on-site schedule from BPLD to conduct mass occupational permit application for their company employees

ii. Evaluator Access
   a. BPLD Revalidation Module
      a. Allow BPLD to evaluate resubmitted applications
   b. Bind Application Module
      a. Allow BPLD internal users to bind any applications to an applicant's QCeServices account
   c. Representative Application Recommending Approval Module
      a. Allows BPD Chief to review and approve representative applications before forwarding to BPLD Head for approval
   d. Representative Application Final Approval Module
      a. Allows BPLD Head to review and approve representative applications before they can submit bulk applications

e. On-Site Visit Scheduler Management Module
   a. Allows Final Reviewer to manage available on-site visit schedule and approve on-site visit requests from company representatives
f. User Management
   a. Allows Final Reviewer to add, edit, and deactivate the access levels of all users within the system.
g. Cancellation of Application
   a. Allows Final Reviewer to cancel any pending applications individually or by bulk.

C. Feature and Change Requests on Pre-Existing Modules

i. Update the Occupational Permit Homepage Banner within QCeServices
ii. Rename 'Authorization Letter' to 'Authorization Form' in Representative Application Form requirement list
iii. Redesigned User-Interface User-Experience (UI-UX)
   a. Improved home page for public access
   b. Improved home page for internal access
   c. Enhanced individual and bulk tabs for applicable modules
iv. Renewal Application Adjustments
   a. Allow applicants to scan their permit QR code or input their Occupational Permit Number and other application details to renew their previous occupational permit
   b. Allow applicants to renew applications that are not bound to their QCeServices account if it has the same email address as their account
   c. Allow applicants to submit request to BPLD for updating of the email address of their previous applications to match their QCeServices account
   d. Allow applicants to immediately renew the applications bound in their Application List module
   e. Auto-load the applicant's previous application information, photo and signature in the Renewal application form
   f. Allow applicants to renew their occupational permits via kiosk only if their details haven't changed
v. Revisions on the application form
   a. Additional fields for SSS & Pag-IBIG No. (if available)
   b. Position Matrix Restructuring
      a. All Occupations are available regardless of the selected Industry Category
      b. JMC tagging is based on the selected Industry Category
      c. Add validation if job position already exists when 'Other' is selected as Occupation

      d. If 'Employed under recruitment agency' is tagged as 'Yes' and the selected Occupation is 'Others', the fee will be Rate B (₱95)

    c. Display submission timer in On-Premise application form

    d. Display submission timer in On-Site application form

    e. Upon submission, display a prompt with the list of blank required fields and redirect the applicant to the first field on the list.

vi. Revisions on the application process

    a. Remove printing & releasing stage for all applications

    b. Remove Set Appointment feature in Payment page to prevent application being forwarded to Printing stage

    c. Allow online applicants to access their digital Occupational Permit in their QCeServices account within the Application List module

    d. Allow BPLD to resend digital occupational permit within the Records module

vii. Revisions on the Representative application process

    a. Allow Final Reviewer to forward representative applications to BPD Chief for recommendation of approval to BPLD Head.

viii. Display ISO Code in Generated Forms

    a. Online, On-Prem, On-Site, & Bulk Application Form

    b. Individual & Bulk Order of Payment

    c. Digital Occupational Permit

ix. Revisions on the BPLD Validation module

    a. Separate the queue for New and Renewal applications

    b. Allow BPLD to get a specific application from the queue

    c. Allow BPLD evaluators to check if the applications they are evaluating have similar applications within the system

    d. Allow BPLD evaluators to tag an online application if the applicants need additional DPOS collatilla in their digital occupational permit

    e. Add "Return to Applicant" feature so BPLD evaluators can return the application to the applicants for updating of missing or incorrect details/requirements

    f. Display evaluation timer during online application evaluation.

x. Revisions on the PESO Validation module

    a. Separate the queue for New and Renewal applications

xi. Revisions on the Reports Module

    a. Allow Final Reviewer to extract Representative Applications list

    b. Allow Final Reviewer to extract Edited Applications list

    c. Additional KPI Reports

        a. Daily Online Applications

        b. Collected Fees

        c. Online Evaluation Time per Evaluator

        d. Accomplishment Report per Evaluator

    d. Allow Final Reviewer to extract custom fields within the Application List report

  e. Enhance the application list reports backend extraction
xii. Revisions on the Edit Application feature in Records module
  a. Add prompt if the selected application has a pending request to update its email address
  b. Add "Send Renewal Instructions" button to send renewal application guide to the applicant's email address
  c. Allow BPLD evaluators to edit applications
  d. Allow editing of PESO, NBI and Health Certificate requirement information fields
  e. Allow editing of Bulk Applications in Records module
xiii. Revisions on the digital Occupational Permit
  a. Password-protect the generated digital Occupational Permit
  b. Generate and display Occupational Permit Number in the permit
  c. Add the Occupational Permit Number in the permit QR Code
  d. Update the digital Occupational Permit template based on BPLD's new design
xiv. Revisions on the Customer Feedback Survey form and Extract Survey Data module
  a. Add the ARTA Client Satisfaction Measurement (CSM) Survey form within the Customer Feedback Survey form
  b. Add Applicant Email Address in extracted survey data of Customer Feedback Survey and ARTA CSM Survey
xv. Revisions on the Dashboard Module
  a. Dashboard User-Interface Enhancement
    a. Add a dropdown list to separate dashboard reports
    b. Allow Final Reviewer to select specific date range
  b. Additional Dashboard for Key Performance Indicators
    a. Occupational Permit Monthly Issuance Per Submission Type
    b. BPLD Monthly Turnaround Time of Occupational Permit Issuance Per Submission Type
    c. Overall Monthly Turnaround Time of Occupational Permit Issuance
    d. BPLD Monthly Turnaround Time of Issued and Pending Occupational Permits
    e. Overall Monthly Turnaround Time of Issued and Pending Occupational Permits
xvi. Revisions on the Email Blast Module
  a. Limit the emails sent to 25,000 emails monthly and display the limit within the module
xvii. Revisions on the BPLD Head Representative Approval module
  a. Allow BPLD Head to approve multiple representative applications at once.
xviii. Revisions on the Representative and Bulk application process
  a. Allow representatives to specify the total number of the employees during their representative application to set as a limit for their bulk application.

b. Add a batch number for each bulk application submitted by representatives.

xix. Revisions on the Email Notification
a. Enhance email notifications sent to the applicants based on BPLD's specifications

xx. Hardware Compatibility
a. System compatibility with mobile label printer device for printing of Order of Payment

D. Additional modules/features for CTO Access

i. Payment Validation Module Enhancement
ii. Validated Payment Report Module
iii. CTO Transmittal Report Extraction Module
iv. Allow CTO to search all individual and bulk applications and check their application status within the Payment Validation module
v. Allow CTO to extract all O.R. details that they processed within the POS for all online payments within the system regardless of application status

E. Hardware Requirements

i. Two (2) units of Queueing Kiosks, with minimum technical specifications:
   a. CPU
      a. Intel Core i5-6006U @ 2.00GHz
      b. RAM: 16 GB
      c. ROM: 64 GB
      d. OS: Windows 11 Pro
   b. Display
      a. Size: 32"
      b. Brightness: $300cd/m^2$
      c. Backlight: TFT-LCD
      d. Type: Touch Screen
      e. Touch Type: Capacitive multi-touch screen
      f. Resolution: 1920 x 1080
   c. Printer
      a. Built-in 80mm thermal printer
      b. Printing speed: 170mm/s
   d. Scanner
      a. Built-in scanner
      b. Supports 1D/2D barcodes

IV. AREA OF COVERAGE

The Business Permits & Licensing Department within the Quezon City Hall compound.

V. PROJECT STANDARDS AND REQUIREMENTS

The following are the minimum qualifications and requirements for the Contractor or Bidder:

i. Track Record
   a. The service provider must be in the same industry as per their DTI or SEC filing for at least five (5) years
   b. The service provider should have been in operation for at least five (5) years
   c. The service provider must have implemented a similar registration and web application project within the last three (3) years.
   d. The service provider should have implemented a public or private project with a single completed contract amounting to at least fifty percent (50%) of the ABC.

ii. Organization
   a. Service providers must have Platinum status in PHILGEPS
   b. The service provider must be filed with DTI or SEC as an IT company with the purpose of software development and the supply of IT-related goods and services
   c. The service provider must be duly registered under the National Privacy Commission
   d. The service provider shall guarantee that the system shall abide by the DATA PRIVACY ACT OF 2012 to ensure that the personal information is protected.
   e. The service provider shall guarantee that industry-standard measures are implemented to protect user data, prevent web fraud, mitigate bot attacks, secure APIs, and prevent unauthorized application access.

iii. Manpower
   a. The service provider must have their own headcount of software developers as defined by the listed staff complement below.
   b. The service provider must have their own support staff to conduct support tasks for the project such as system administrators and quality assurance testers.
   c. Staff complement:
      i. One (1) Overall Program Manager– college graduate (preferably IT-related courses) and with at least five (5) years experience in this field
      ii. One (1) Senior Web Development Project Manager– college graduate (preferably IT-related courses) and with at least two (2) years experience in this field

iii. One (1) Google Cloud Platform Server Administrator– college graduate (preferably IT-related courses) and with at least one (1) year of experience on this field

iv. One (1) Web Security Engineer– college graduate (preferably IT-related courses) and with at least one (1) year of experience on this field

v. One (1) Quality Assurance and Testing Staff– college graduate (preferably IT-related courses) and with at least one (1) year of experience on this field

VI. TRAINING

The service provider will provide the equivalent of three (3) total hours of training necessary for the proper usage of the software system inclusive of system manuals to at least two (2) users of the system as well as one (1) ITDD personnel.

VII. DELIVERY SCHEDULE

The delivery schedule will be within thirty (30) calendar days upon the issuance of the Notice to Proceed (NTP).

MILESTONES	CALENDAR DAYS
Project Preparation & Mobilization	2 calendar days upon receipt of Notice to Proceed
Process Mapping, Technical Specs Sign-Off	5 calendar days
Application Programming & Development to Minimum Viable Product	20 calendar days
UAT	2 calendar days
Training and Hand Over	1 calendar day
Project Support	12 months from handover date

VIII. APPROVED BUDGET FOR THE CONTRACT (ABC)

The Approved Budget for the Contract (ABC) amounts to Eight Million Eight Hundred Thousand Pesos and 00/100 Only **[P8,800,000.00]** VAT inclusive, with *deliverables and listed complete details specified in Section III, Project Scope of Work*, as stated in the following general components and itemized cost breakdown below:

A. Integration to Third-Party Online Systems
i. Integration to QC Health Department's Health Certificate System
ii. New Online Modules
iii. Feature and Change requests to Existing Modules

B. **Cost breakdown:**

Description	Amount
Due Diligence, System Design and Data Model	700,000.00
Software Development Cost - Integration to QC Online Systems - New Online Modules - Feature and Change Requests to Pre-Existing Modules	5,300,000.00
System Documentation, Training Module and Training	300,000.00
Technical & Customer Service Support – 12 months	1,200,000.00
Hosting & Administration	1,300,000.00
TOTAL AMOUNT	**8,800,000.00**

IX. **BASIS OF PAYMENT**

MILESTONES	ACCEPTANCE CRITERIA	PERCENTAGE BILLING
Project Preparation and Mobilization Process Mapping & Technical Specifications Sign-Off	Process Mapped and approved. Documentation signed off by the End-User.	15%
Application Programming & Development to Minimum Viable Product	Minimum Viable Product signed off by QA and client's authorized personnel.	35%
User Acceptance Testing (UAT) of the the Updated Web Portal	Beta Testing of the Web Portal in End-User Office at Quezon City Compound. Full documentation signed off by QA and client's authorized personnel.	35%
Training and Hand Over	Signed off by client's authorized personnel.	15%
	TOTAL	**100%**

A. Upon awarding of the contract, the procuring entity will release fifteen (15) percent of the total winning bid amount to the contract winning bidder as a mobilization fee.

B. Upon demonstration of the Minimum Viable Product based signed off technical specifications, the procuring entity will release thirty-five (35) percent of the total winning bid.

C. Upon submission and acceptance of the User-Acceptance Testing (UAT) of the new web modules and system changes to the procuring entity, the procuring entity will release thirty-five (35) percent of the total winning bid amount to the contract winning bidder.

D. Upon deployment of the new web modules and system changes to the production site of Occupational (Work) Permit System, the procuring entity will release fifteen (15) percent of the total winning bid amount to the contract winning bidder.

X. CONDITIONS AND PENALTIES FOR BREACH OF CONTRACT

A. Delivery

The failure of the Service provider to perform any of the obligations or covenants provided in this Section shall constitute a breach and shall make it liable for damages, without prejudice to the right of the CITY to seek other remedies as may be allowed by law.

The Service provider must deliver all system components within 30 days upon contract award. Failure to do so will be subject to penalties as prescribed by law.

B. Product Warranty

The following are the terms of the product/system warranty guaranteed by The Service provider:

Software Component shall have six (6) months warranty upon implementation. User manual and installer shall be provided for software components.
- User manual shall be provided for software components.
- All hardware requirements are existing and to be provided by BPLD department.

XI.   CANCELLATION OR TERMINATION OF CONTRACT

The guidelines contained in RA 9184 and its revised IRR shall be followed in the termination of any service contract. In the event the City terminated the Contract due to default insolvency, or for cause, it may enter negotiated procurement pursuant to RA 9184 and its IRR.
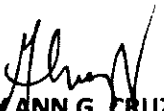
Submitted by:

MA. MARGARITA S. MEJIA
City Government Department Head III, Business Permits and Licensing Department

Noted by:

MARY ANN G. CRUZ
Officer-in-Charge, Quezon City Information Technology Development Department

MICHAEL VICTOR N. ALIMURUNG
City Administrator