

# Applying to join Discovery Health Medical Scheme as part of an employer group in 2024



## Who we are

Discovery Health Medical Scheme, registration number 1125, is a not-for-profit organisation registered with the Council for Medical Schemes, and is the medical scheme that you are a member of.

Discovery Health (Pty) Ltd, registration number 1997/013480/07, is a separate company and an authorised financial services provider and is the administrator and managed care organisation for Discovery Health Medical Scheme and takes care of the administration of your membership.

## Contact us

Tel (members): 0860 99 88 77, Tel (health partners): 0860 44 55 66, [www.discovery.co.za](http://www.discovery.co.za), PO Box 784262, Sandton, 2146, 1 Discovery Place, Sandton, 2196

## Purpose of the form

Thank you for deciding to apply to join the Discovery Health Medical Scheme. This document is an application form for membership. The information requested in this application form is required to enable the Scheme to process your membership application and to help in the administration of your membership as well as to better administer the affairs of the Scheme.

This application form also contains terms and conditions applicable to your membership (Section 10). Please make sure you read and understand these terms and conditions. This document is valid for 90 days from date of signing it. Make reference to the footnote that indicates the expiry date of the form.

Download the latest version of all forms from [www.discovery.co.za](http://www.discovery.co.za), under Medical Aid > Find documents and certificates.

## What you must do

- Fill in the form in black ink and print clearly, or complete the form digitally. You can access a list of the approved digital signatures from [www.discovery.co.za](http://www.discovery.co.za), under Medical Aid > Find documents and certificates > Application forms.
- All relevant sections must be signed by the main applicant. The main applicant must sign and date any changes.
- Read and understand the terms and conditions for membership (Section 13) and the Scheme Rules. The full set of Scheme Rules is available on request at [www.discovery.co.za/medical-aid/scheme-rules](http://www.discovery.co.za/medical-aid/scheme-rules).
- Sign section 5, 9 and 10.
- Email the completed and signed form to [application@discovery.co.za](mailto:application@discovery.co.za).
- Please attach a copy of each applicant's identity document. We also accept valid passports and birth certificates for children.
- Provision is made in this form for you and your dependants to provide information relating to your race. This information is required by the Council for Medical Scheme for statistical purposes only. You are not compelled to provide this information.

Once you submit your application form, here is what will happen:

- You will be contacted if any details are missing or if more information is required for underwriting purposes and to process your application.
- You and your financial adviser (if you have chosen one) will receive a message or an email to let you know when your application is considered to have been fully and completely made. This date may differ from the date on which you sign the application form.
- If standard terms of acceptance are offered (no waiting periods or late-joiner penalties), your membership will be activated and you (or your financial adviser if you appointed one) will receive a welcome letter. For any non-standard terms, a counter-offer letter will be issued, which will indicate any conditions applicable to your membership (waiting periods and/or late-joiner penalties). You may accept the offer by signing and returning this letter to activate your membership. Once we receive your acceptance, you and your financial adviser will receive a welcome letter.

If you do not hear from the Scheme within seven days after submitting your application form, please contact us on **0860 100 345** or your financial adviser.

**When you sign this application, you confirm that you have read and understood the terms and conditions (section 11 of this form) for membership and agree to them.**

I consent to my spouse and/or adult dependant, that is part of this application process, acting on my behalf and providing personal information, including health information, to Discovery Health for the purpose of my application to join Discovery Health Medical Scheme

Yes  No

## 1. About yourself (main applicant)

When do you want your cover to start? 

D	O	D	1	M	M	Y	Y	Y	Y
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Title 

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 Initials 

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Surname 

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First names (according to identity document)

Gender M  F

Race African  Coloured  Indian/Asian  White  Other

*You do not have to give us this information about your race. The Scheme is required by the Council for Medical Schemes to collect this data and it will be used for statistical purposes.*

Do not want to disclose race

Date of birth  Occupation

Tax Number

Gross monthly earnings R

ID or passport number  Telephone (H)

Telephone (W)  Cellphone

Email

### Physical address while in South Africa

Suite/unit number  Complex name

Street number  Street name

Suburb  Postal code

### Postal address (post collected from post box, suite or private bag)

Same as residential address  Yes  No

If you do not complete a postal address, we will use your physical address for post.

PO Box  Private Bag Box number

Suite  PostNet Suite Number

Suburb  Postal code

## 2. About your spouse or partner (only complete if applying for cover)

Title  Initials

Surname

First name (as per identity document)

Gender M  F

Race African  Coloured  Indian/Asian  White  Other

*You are not compelled to provide the information required on race. The Scheme is required by the Council for Medical Schemes to collect this data and it will be used for statistical purposes.*

Do not want to disclose race

Date of birth

Marital status Married  Single  Divorced  Widowed

ID or passport number

Telephone (H)  Telephone (W)

Cellphone

Email

## 3. About your dependants (only complete if they are also applying for cover)

### Dependant 1

Title  Initials

Surname

First names (according to identity document)

Gender M  F

Race African  Coloured  Indian/Asian  White  Other

*You do not have to give us this information about your race. The Scheme is required by the Council for Medical Schemes to collect this data and it will be used for statistical purposes.*

Do not want to disclose race

Date of birth 

D	D	M	M	Y	Y	Y	Y
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ID or passport number 

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Relationship to main member

(For example mother or child. Where your child is not your biological child, please state your relationship, for example adopted child or foster child. Please give us legal proof of the relationship.)

If your dependant is 21 years and older, are they:

Married  Yes  No Financially dependant on you?  Yes  No

Does your dependant earn an income?  Yes  No How much does your dependant earn each month? R 

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Does your dependant's spouse earn an income?  Yes  No How much does your dependant's spouse earn per month? R 

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### Dependant 2

Title 

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 Initials 

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Surname

First names (according to identity document)

Gender M  F

Race African  Coloured  Indian/Asian  White  Other

*You do not have to give us this information about your race. The Scheme is required by the Council for Medical Schemes to collect this data and it will be used for statistical purposes.*

Do not want to disclose race

Date of birth 

D	D	M	M	Y	Y	Y	Y
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ID or passport number 

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Relationship to main member

(For example mother or child. Where your child is not your biological child, please state your relationship, for example adopted child or foster child. Please give us legal proof of the relationship.)

If your dependant is 21 years and older, are they:

Married  Yes  No Financially dependant on you?  Yes  No

Does your dependant earn an income?  Yes  No How much does your dependant earn each month? R 

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Does your dependant's spouse earn an income?  Yes  No How much does your dependant's spouse earn each month? R 

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### Dependant 3

Title 

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 Initials 

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Surname

First names (according to identity document)

Gender M  F

Race African  Coloured  Indian/Asian  White  Other

*You do not have to give us this information about your race. The Scheme is required by the Council for Medical Schemes to collect this data and it will be used for statistical purposes.*

Do not want to disclose race

Date of birth 

D	D	M	M	Y	Y	Y	Y
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ID or passport number 

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Relationship to main member 

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(For example mother or child. Where your child is not your biological child, please state your relationship, for example adopted child or foster child. Please give us legal proof of the relationship.)

If your dependant is 21 years and older, are they:

Married  Yes  No      Financially dependant on you?  Yes  No

Does your dependant earn an income?  Yes  No      How much does your dependant earn each month? R 

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Does your dependant's spouse earn an income?  Yes  No      How much does your dependant's spouse earn each month? R 

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Are you applying for more than 3 Dependants?  Yes  No

**Note:** If you are applying for more than 3 dependants, please add the details on a separate page.

**4. Please select your health plan**

Executive Plan	Comprehensive Series	Priority Series	Saver Series	Smart Series	Core Series	KeyCare Series
<input type="checkbox"/> Executive	<input type="checkbox"/> Classic	<input type="checkbox"/> Classic	<input type="checkbox"/> Classic	<input type="checkbox"/> Classic	<input type="checkbox"/> Classic	<input type="checkbox"/> KeyCare Plus
	<input type="checkbox"/> Classic Smart	<input type="checkbox"/> Essential	<input type="checkbox"/> Classic Delta	<input type="checkbox"/> Essential	<input type="checkbox"/> Classic Delta	<input type="checkbox"/> KeyCare Core
			<input type="checkbox"/> Essential	<input type="checkbox"/> Essential Dynamic	<input type="checkbox"/> Essential	<input type="checkbox"/> KeyCare Start
			<input type="checkbox"/> Essential Delta		<input type="checkbox"/> Essential Delta	<input type="checkbox"/> KeyCare Start Regional
			<input type="checkbox"/> Coastal		<input type="checkbox"/> Coastal	

You have the right to ask for help in selecting a health plan that suits your needs. Whether you have requested help or made the decision on your own, by signing this application, you confirm that you are familiar with the conditions and benefits of the plan you select.

I would like to select that my health plan complies with the requirements of Shariah Yes  No

How would you like us to refund claims from the Medical Savings Account if your plan has one? Discovery Health Rate  Cost

**Discovery Health Rate** is the medical scheme rate subject to funds available.

**Cost** is the full amount of the claim subject to funds available.

When you make a claim that is eligible for payment, the Scheme will use the money available in your Medical Savings Account (MSA) to pay for it. Your MSA is a combination of your annual MSA allocation, which is the amount of money you receive at the start of each year, and your accumulated MSA, which is the money that you didn't spend in previous years and that carried over to the current year.

**Please complete this if you have selected the KeyCare Plus, KeyCare Start or KeyCare Start Regional Plan**

- For KeyCare Plus please select a GP on the KeyCare GP Network
- For KeyCare Start please select a GP on the KeyCare Start GP Network
- For KeyCare Start Regional please select a GP on the KeyCare Start Regional GP Network
- If you have selected the KeyCare Start Regional Plan, which offers comprehensive and affordable cover in and around Polokwane, Tzaneen, Mbombela, Trichardt, Bellville and George, please make sure that you stay or work in one of these locations so that the full benefit suite is available to you

	Name	GP name	Practice number																					
Main applicant			<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																					
Spouse or partner			<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																					
Dependant 1**			<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																					
Dependant 2**			<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																					
Dependant 3**			<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																					

\*\* Please make sure that the dependant information you give above is the same as the dependant information in section 3 of this form.

Please provide the details on a separate page if you are applying for more than 3 dependants.

**5. Your banking details for claims refund**

Your contributions will be paid by your employer as a salary deduction, you only need to give us banking details for claim refunds.

By signing this application, you agree that once claims have been refunded into the bank account you have chosen, the Scheme will not be

responsible in any way for the amounts refunded.

**Please note:** We cannot accept credit card account details and only South African banking details are accepted. We no longer issue cheques. If no details are provided we will not be able to refund your claims. If we are paying a third party bank account, the main member must insert the ID number of the third party.

Bank name	<input type="text"/>		
Branch name	<input type="text"/>	Branch Code	<input type="text"/>
Account number	<input type="text"/>	Type of account	<input type="checkbox"/> Cheque <input type="checkbox"/> Savings
Account holder	<input type="text"/>		

If third party bank details, please insert the third party ID number.

ID Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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If third party bank account is a  Joint account  Company account  or Trust account

please provide proof of bank account. Refer to Annexure A at the back of the application form for the proof of bank account required.

By signing this application, you agree that once claims have been refunded into the bank account you have chosen, the Scheme will not be responsible in any way for the amounts refunded and you understand that you may not transfer, assign, pledge or cede the payment or receipt of any benefit by or from the Scheme to any person and if you do or attempt to do so, the Scheme may withhold, suspend or discontinue the payment of such benefit.

Signature of account holder	<input type="text"/>
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Signature of main applicant	<input type="text"/>
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Please only sign if information is true, complete and correct.

## 6. Previous medical scheme details (please give us proof in the form of a membership certificate)

Please give us the details of all registered South African medical schemes that you and your dependants previously belonged to. **We will use this information to determine if we need to apply any late-joiner penalty fees. We may also use the information on the membership certificate to determine if we can apply waiting periods.**

Were all your dependants on the same medical scheme  Yes  No

If you and your dependants applying for cover belonged to different medical schemes, please complete them below:

Name	Scheme name	Start date	End date if already resigned	Are they still a member?	Reason for leaving
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	
				<input type="checkbox"/> Yes <input type="checkbox"/> No	

## 7. About your employer

Please ask your employer to complete this section.

Please attach a clear copy of your salary slip or the letter of employment

Name of employer	<input type="text"/>	Employer or billing number	<input type="text"/>
Employee number	<input type="text"/>	Date of employment	<input type="text"/>
Branch name	<input type="text"/>	Branch number	<input type="text"/>

If you are joining Discovery Health Medical Scheme more than three months after you were employed, please give one of the following reasons:

I was previously covered by my spouse or partner's medical scheme but:

I am now divorced  My spouse or partner has been retrenched

Date 

D	D	M	M	Y	Y	Y	Y
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My spouse or partner resigned  My spouse or partner is deceased

Date 

D	D	M	M	Y	Y	Y	Y
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I was a wage earner now earn a salary or I was a temporary or contract worker and I am now permanent

Date 

D	D	M	M	Y	Y	Y	Y
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I am now offered medical aid due to my new salary level or job grade

Date 

D	D	M	M	Y	Y	Y	Y
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### Employer warranty

Please ensure your employer completes this warranty if this application form is not submitted with an employer application form:

Employer warranty

7.1. We warrant that the main applicant detailed in section 1 is an employee of our organisation.

7.2. The Discovery Health Medical Scheme may bill us for the amount due for this member in the same way as it does for our other employees with the Discovery Health Medical Scheme.

Employer's signature

Name

Designation



**Please only sign if information is true, complete and correct.**

### 8. Your financial adviser's details (to be completed by your financial adviser)

Do you want an adviser? Yes  No

**Please complete this section if you already have a financial adviser**

Financial adviser's name  Code

Intermediary house  Code

Financial adviser's telephone number (W) 

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 Lead number

Email

Bank reference number (if applicable)  (Mandatory for all ABSA and FNB financial advisers)

**I declare that:**

- 8.1. I am an accredited financial adviser in terms of the Medical Schemes Act 131 of 1998 and licensed by the Financial Services Board in terms of the Financial Advisory and Intermediary Services Act 37 at the date of signing this application form
- 8.2. I am appointed by the employer to provide advice about this application.
- 8.3. I have a valid contract with Discovery Health Medical Scheme and I have made the client aware of the commission I receive from Discovery Health Medical Scheme.
- 8.4. I am responsible for providing the employer with:
  - my name, physical address, postal address and telephone number
  - impartial advice that is in its best interest.
- 8.5. I am accountable for any advice I give to the employer and main applicant about the completion of this application form and joining Discovery Health Medical Scheme.

Signature of financial adviser

Date 

D	D	M	M	Y	Y	Y	Y
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**Please only sign if this information is true, complete and correct.**

## 9. Our Privacy Statement – How we will process and disclose your personal information and communicate with you

When you engage with Discovery Health Medical Scheme, you are entrusting us with your personal information. We are committed to protecting your right to privacy and keeping your information safe. Our Privacy Statement tells you how we collect, use and share your personal information, including personal information about your spouse, employees, dependants, beneficiaries and life assureds, where applicable. To view and read our Privacy Statement, please follow this link: <https://www.discovery.co.za/medical-aid/about-discovery-health-medical-scheme> and scroll to, "YOUR PRIVACY IS IMPORTANT TO US" click on the **Privacy Statement** link.

Signature of main member

Date 

D	D	M	M	Y	Y	Y	Y
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The main applicant must sign and date any changes.



Please only sign if you have read and understand this statement

## 10. Terms and Conditions applicable to Discovery Health Medical Scheme membership

### Definitions

**The Scheme** refers to Discovery Health Medical Scheme, registration number 1125, registered with the Council for Medical Schemes.

**Administrator** refers to Discovery Health (Pty) Ltd, registration number 1997/013480/07, an authorised financial services provider, the administrator and managed care organisation for Discovery Health Medical Scheme and a subsidiary of the Discovery Group.

Do you agree that we may send you direct electronic marketing from time to time

No, thank you  Yes, I agree

### 10.1. **Scheme rules for membership**

The rules of the Scheme record your rights and responsibilities for your membership. They may change from time to time. You may ask us for a copy of these rules at any time or view these rules on [www.discovery.co.za](http://www.discovery.co.za).

When you sign this application, you confirm that you have read and understood these terms and conditions and you agree that you and those you apply for will be bound by these and Scheme Rules.

Where applicable you also acknowledge and confirm that you, your financial adviser, or your employer, may communicate with us on this application and your membership of the Scheme.

You give permission that the Scheme or Administrator can share your medical information and other relevant Personal Information about you and your dependant/s with your chosen financial adviser. The information will be shared so that he or she can help us if necessary while we process your membership application.

Please speak to your financial adviser or the Administrator if there is anything you do not understand.

### 10.2. **Who you are applying for**

You may apply to join the Scheme on your own or together with other people – your spouse, your partner and people who are financially dependent on you as defined in the Scheme rules, as referred to above. For anyone to be treated as financially dependent for this application, you must have a responsibility to provide financially for that dependant. The Scheme or Administrator might ask you to give us proof of financial or legal responsibility.

You may be called the principal member or main member in our future communications to you.

### 10.3. **Acting for others**

You confirm you have the right to act for others.

By signing this document, you confirm that:

- you have the right to apply for membership and to act for those you apply for in any matter relating to this application.
- you have received permission from your spouse/partner and any dependant(s) over 18 to act for them in any matter relating to this application.

### 10.4. **Giving and getting information**

**You must give true, correct and complete information.**

To consider your application for membership, the Scheme must learn more about you and those you apply for.

Information about you and those you apply for must be true, correct and complete. This includes the details you give in this application form and in future dealings with us. It is important that you tell us about any medical condition, symptom or illness relating to you or those you apply for, even if you do not consider it relevant to your application. We may ask those you apply for who are 18 and older for more information about themselves.

#### **Your legal address**

The Scheme or Administrator will send documents to you at the address you indicated as the communication channel you prefer to be contacted on. If it is necessary to send you any legal notices or summonses, our legal team will serve these at the physical address you have given, or at any other address you have given us. It is your responsibility to make sure we have the correct address for you.

#### **The Scheme and Administrator may record telephone calls**

The Scheme and Administrator may record telephone conversations with you and with those you apply for.

The recordings and all information we get during the recordings will be processed and kept as required by law.

#### **The Scheme and Administrator may get information about you from other relevant sources**

The Scheme and Administrator may (at any time and on an ongoing basis) obtain your personal information from other relevant sources, including medical practitioners, contracted service providers, financial advisers, credit bureaus or industry regulatory bodies ("relevant sources") and further process such information to consider your membership application, to conduct underwriting or risk assessments, or to consider a claim for medical expenses, to profile and analyse risk or to investigate fraud, waste and/or abuse (including by medical

practitioners, contracted service providers or financial advisers). We may (at any time and on an ongoing basis) verify with the relevant sources that your personal information is true, correct and complete.

You give your permission that the Scheme and Administrator may get any information that is relevant to your application from your employer.

### **Tell the Scheme or Administrator immediately if your information changes**

You, your employer or your financial adviser must tell the Scheme or Administrator in writing if any of the information you gave, in your application for membership, changes between the day you sign this document and the day your membership starts. This includes information about your health and the health of those you apply for. We need advance notice of any administrative changes such as cancellation of membership, as we do not accept backdated changes.

### **When the Scheme may cancel your membership/s**

The Scheme may cancel any membership if you and those you apply for:

- do not give us information that later turns out to be relevant to this application.
- give us any information that is not true, correct and complete.
- do not tell us about any relevant changes (including about your health and the health of those you apply for) between the day you sign this document and the day cover starts.

Providing false information may lead to criminal charges being brought against you. You will have to pay any amount owing to the Scheme as a result of this cancellation.

### **Monitor for possible non-disclosure.**

To exclude the possibility of non-disclosure of material information, for the first 12 months we will monitor membership in the following cases:

- a) Claims of new beneficiaries with less than 24 months continuous medical scheme membership and with less than 90 days break, immediately prior to date of application.
- b) When an application is made for membership or admission for a person who was not a beneficiary of a medical scheme for a period of at least 90 (ninety) days preceding the date of application.

In accordance with the Medical Schemes Act, we implore new applicants to disclose true and complete information to the Scheme. It is always better to disclose too much than too little.

Please note that if membership is subject to the above-mentioned 12-month monitor period, the Scheme may request additional medical history upon receiving a claim and/or a request for authorisation. In this case, the Scheme will only confirm benefits once it is satisfied with the additional information received.

## **10.5. About becoming a member**

### **The Scheme might not pay for certain expenses immediately after you become a member**

The Scheme may have waiting periods that apply in certain circumstances. This means there may be a set time period before the Scheme starts paying for any general or specific medical conditions. We will advise if any waiting periods apply. Please speak to your financial adviser or the Administrator with regard to any waiting periods applicable to your membership and the memberships of those you apply for.

### **Resign from current medical schemes when accepted**

It is illegal to be a member of more than one medical scheme at the same time. You and those you apply for must resign from your current medical schemes when you receive notice from the Scheme by letter, email or SMS telling you that you and those you apply for have been accepted.

### **You must ensure contributions are paid on time**

As the main member of the Scheme, you are responsible for ensuring that your contributions and the contributions of those you apply for are paid on time every month to avoid suspension of benefits. The Scheme has the right to amend monthly contributions and benefits from time to time with prior notification.

## **10.6. Repaying money owed to the Scheme**

The Scheme has the right at any time to collect from you any amount that you owe.

We will notify you if there is any amount that you owe to the Scheme.

### **You must repay any medical savings owing if you leave the Scheme**

When you become a member, depending on the plan you chose, you may have money available in advance to use for medical expenses during the year. This money is allocated to an account called the 'Medical Savings Account'. If you leave the Scheme before the year is up, you must repay the portion of medical savings you have used that is more than you have paid back to the Scheme over the year.

By signing this form, you agree that any money you owe to the Scheme may be deducted from any future claim payment amounts that are due to be paid to you. You will be able to identify the debit order for the money owing to the Scheme on your bank statement, the reference number DISCSETTLE will be used.

Signature of main applicant

Date 

D	D	M	M	Y	Y	Y	Y
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**Please only sign if information is true, complete and correct.**

**This form is only a complete application when it contains all the information we need to fully process your application. We take the date on which we receive the complete application as the application date, and not the date on which you sign the form**



## 11. Third Party Bank Details - Annexure A

### Banking details for a third party

Please attach the relevant proof of bank account if you give a third party's bank account details for claim refunds and / contribution debit orders

### Documents we need for a third-party bank account

(A third party can be anyone, such as your spouse, aunt, uncle, friend, father or son.)

- Proof of the account (bank statement or bank letter not older than three months)
- A copy of the third party's (accountholder) ID, passport or driving licence
- A copy of the main member's ID, passport or driving licence

### Documents we need for a joint bank account

- Proof of account (bank statement or bank letter not older than three months)
- A copy of the ID, passport or driving licence of each of the joint owners.

### Documents we need for a company account

- Proof of account (bank statement or bank letter not older than three months)
- A copy of the ID, passport or driving licence of the persons who have authority to sign on behalf of the company
- A letter of authority. The letter must:
  - State that the account can be used
  - State the membership details (including the membership or policy numbers) for which the bank account will be used
  - Include the details of the signatory
  - Be dated and signed by an authorised person on behalf of the company
- A copy of the company's certificate of registration.
- A copy of the main member's ID, passport or driving licence

### Documents we need for a trust account

- Proof of account (bank statement or bank letter not older than three months)
- A copy of the ID, passport or driving licence of each of the trustees of the account
- A copy of the certificate of registration of the trust
- A copy of the trust resolution. The resolution must:
  - Show the trustees
  - Be dated and signed by an authorised person on behalf of the trust
  - Contain the membership or policy numbers
- A copy of the main member's ID, passport or driving licence

If you are completing the request on behalf of the main member, please include proof that you have the necessary authority to do so, for example, a letter of authority or a letter of executorship.