

Employer Guide Online Application Tool



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Purpose

The purpose of this document is to provide the **Employer*** with a guide as to how to initiate online applications on behalf of the employee. This guide also provides details regarding how to initiate, capture and track a health application as it moves through the Remedi application process.

***Note:** The term **"employer"** in this guide refers to the employer contact person or the payroll administrator.

Online application tool

There are many benefits to using the online application tool:

- As an employer you are able to track applications and ensure your employees select the right plans.
- When applying on behalf of an employee, you are immediately notified about missing information on the application form. This allows you to obtain the missing information from the employee in real time, saving you time and ensuring that cover begins on the date requested by the applicant.
- The Scheme is able to activate all memberships quickly and efficiently with less work required in billing.
- You receive an electronic copy of the application form for paperless and easy storage.
- Both you and your employees may capture the application allowing you, the employer, to approve it.

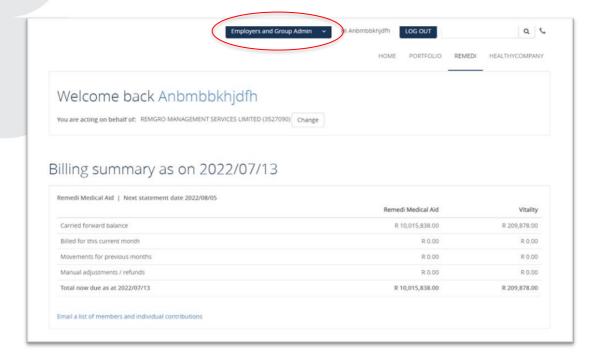
Employer online capture process

- Start the application for an employee and indicate whether you or the employee will be completing the application form.
- A username and password will be sent to the employee, should the employee be completing the application.
- You or the employee may log onto the website to complete the application form.
- Alternatively, you may opt to have a unique PIN sent to the employee once you have completed the application on the employee's behalf.
- Once complete, you may view a summary of the application in PDF format.
- You may select whether to approve the completed applications on behalf of your employer group.
- The complete application is automatically submitted to Remedi.



Logging in to the website

When logging in to the Remedi Medical Aid Scheme website <u>www.yourremedi.co.za</u>, you have the option to switch between your personal profile and the Employer and Group Admin profile. The **'Change'** button allows you to select a specific employer group.

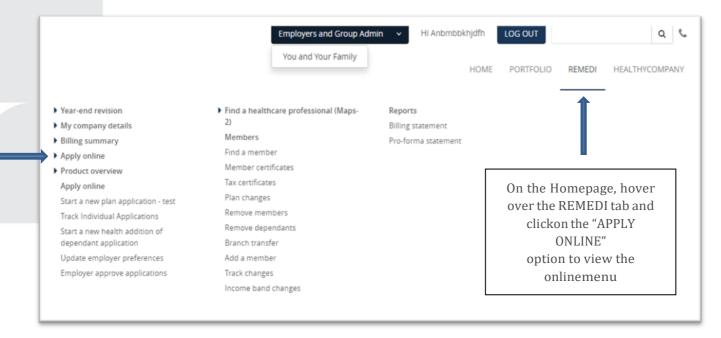


Accessing the online application tool

To access the online application tool, you are required to navigate to the 'APPLY ONLINE' link on the Remedi tab.



Once you have selected 'APPLY ONLINE' the system will proceed to the online applications process menu.

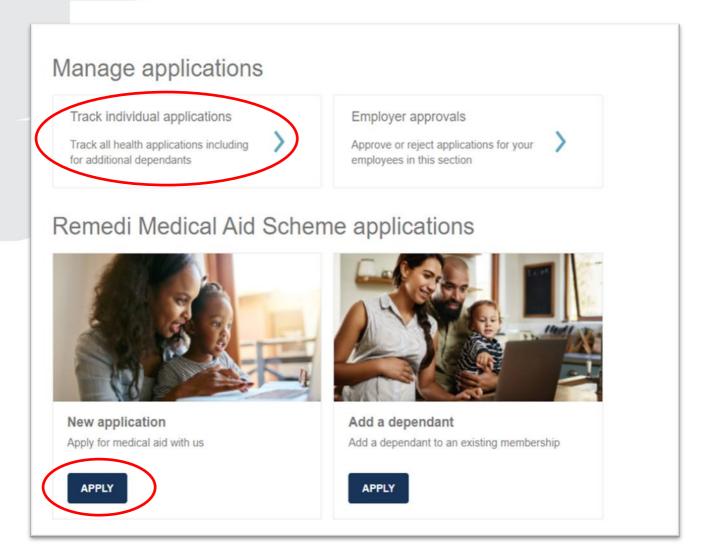


The 'Online application process' menu details all the online tool functionalities. As the Employer you may access any functionality by clicking on the various links.

Click on the 'Apply' link to initiate a new application.



You are also able to track your applications from this screen.

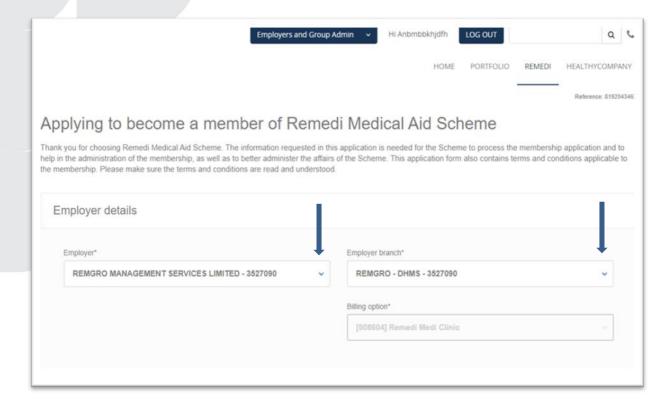


Selecting the employer and billing category

As an employer contact you have the option to select the employer and billing category applicable to the employee for whom you are submitting the application form.

Kindly note that the employers listed on the drop-down menu will reveal employers linked to your employer contact profile.





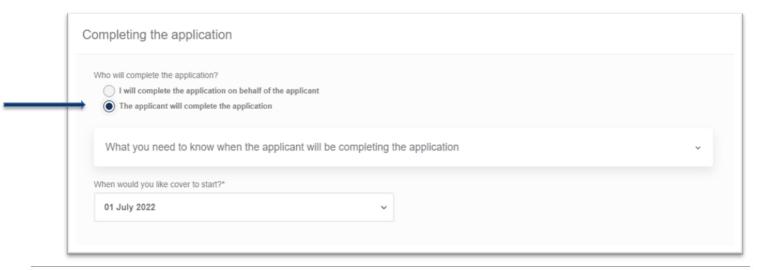
Selecting the capture method

You are required to nominate who will be completing the application by selecting one of the available methods:

- Complete an application on behalf of the employee using the unique PIN option
- Send the employee a username and password to capture the application themselves
- Complete the application on behalf of the employee and then upload a signed application form at the end of the online capture process.

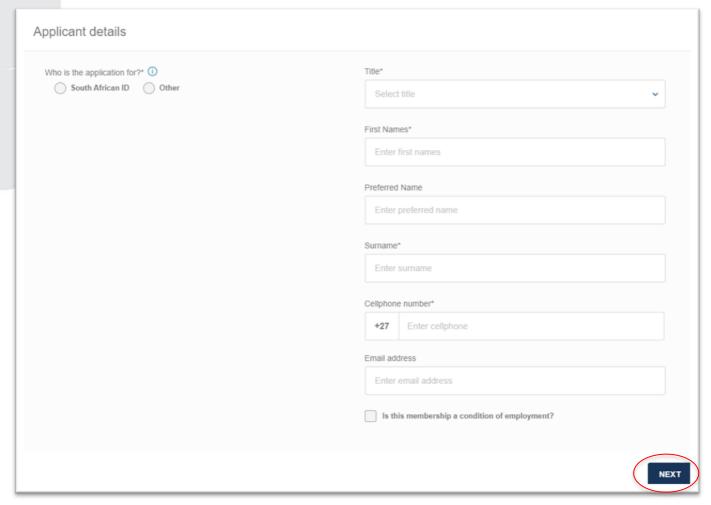
The applicant will complete the application process

Click on 'The applicant will complete the application'





The Applicant details screen will populate where you will need to complete basic member information. Kindly note, the cellphone number and email address are very important for the member to receive the link.



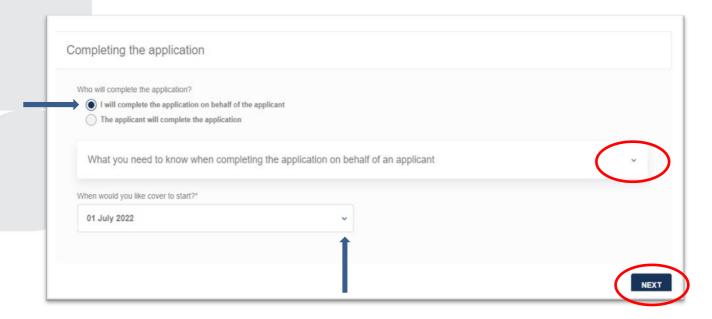
Once member information has been completed, select 'Next'.

The Confirmation message with reference number is important for your reference.





Completing the application on behalf of the employee



This drop down displays what information is required to complete the application.

Required applicant information

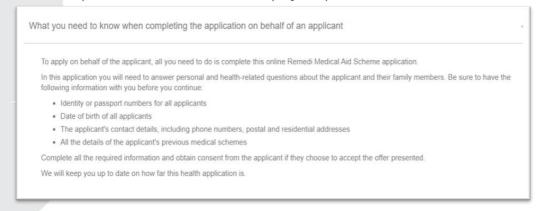
This section outlines the information required for the remainder of the application capture process. Having the specified information on hand will ensure that you (as the employer) do not delay the application as a result of outstanding information.

You may require the following information:

- ID or passport number
- Date of birth of all applicants
- Contact details
- Postal and residential address
- Previous medical scheme details
- Applicant's bank details where applicable.

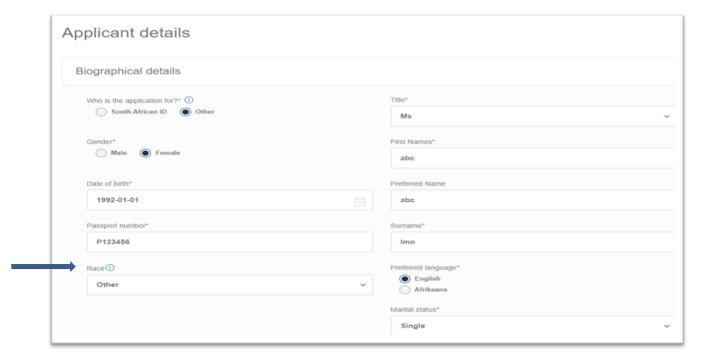


Once you are comfortable that you have all the required information for the health application click 'Next' to capture the remainder of the employee's personal and health information.



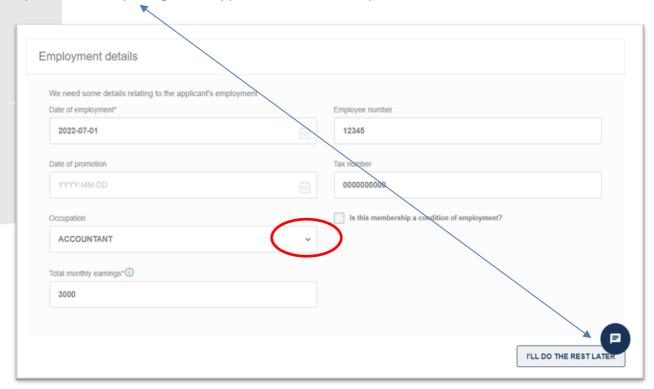
Capturing the main member details

The online tool will validate captured information and inform you of any errors or outstanding details. Kindly note that the employment date and date of submission to become a Remedi member are restrictions as per your Employer rules.

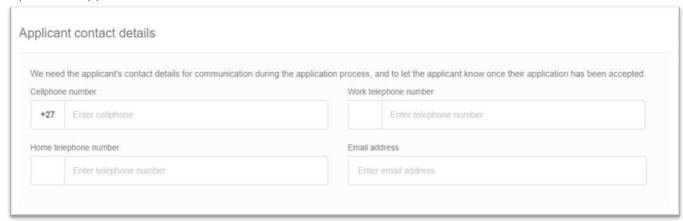




'I'll do the rest later' is new to the journey and allows the application to indicate provisional contribution impact, without capturing all the applicant's details at this point.

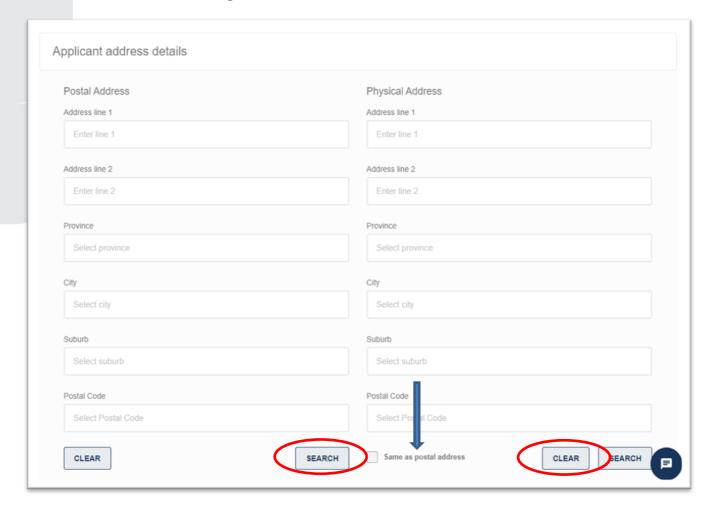


Capture the applicant's contact details to continue.





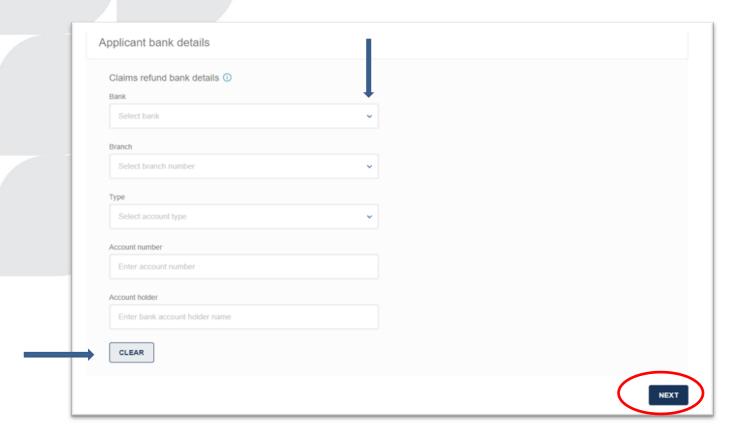
Capture the address details. The online tool will assist you in ensuring that the applicants address details are in fact valid and correct through the use of the available 'search' and 'clear' menus.



Once you have saved the postal address details, the physical address details capture screen will pop up. You have the option of allowing the system to auto complete the details by selecting the 'same as postal address' box, should they be the same as the postal address details.

Capturing banking details

- The banking details links for contributions and claims will only populate for billing categories 516102 and 516103, which require a portion of the contribution from the member.
- The banking details will not be required for billing category 516101 as the employer is responsible for all contributions.
- The banking details capture screen has built in validators which allow it to reveal an error message, should the captured details be incorrect.



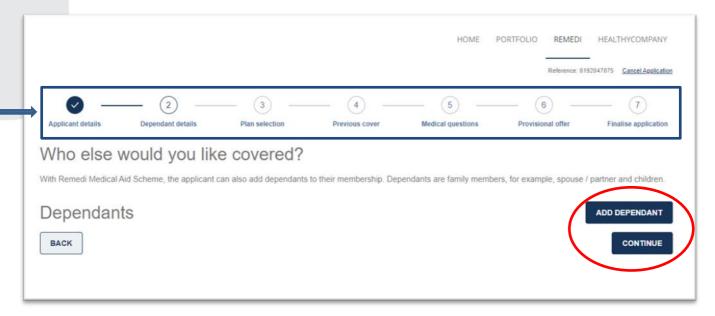
Once you have captured all the required details click 'Next' to continue.



Adding a dependant

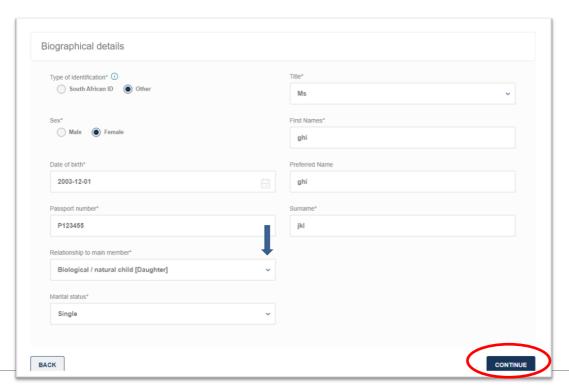
The dependant details capture tab follows the same process as the main applicant capture screen.

Note the addition of the stepper below. This is new to the journey and gives an indication of where you are in the application and what's still to come. It also allows you to click back to a specific page, but note that you cannot click forward, the next button on the page will move you forward.



Select 'Add Dependant' should you have dependant(s) to be added or continue should you not need this option.

Complete the details for your dependant and select 'Continue' once completed.



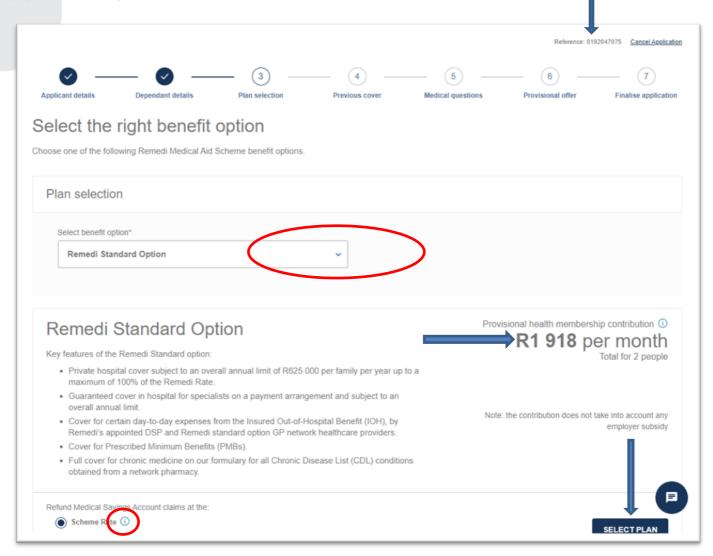


Capturing plan and benefit information

The screen below is the landing page for the health information capture.

Throughout the journey the reference number will be displayed in the top right-hand corner of the screen. In addition, there are 'tool tips' (i) with information to assist. Simply click on the tool tip icon and information will be displayed.

Select benefit option, once selection has been made, a provisional membership contribution will populate, **'select plan'** to move to the next screen.



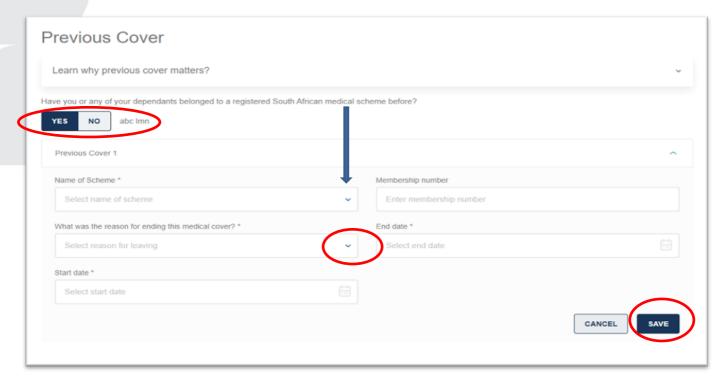
Capturing previous medical scheme details

Ensure the applicant details are captured correctly, as this information may impact the members underwriting category. Also note that the withdrawal date from their previous Scheme may not be after the date of commencement selected at the beginning of the application process.

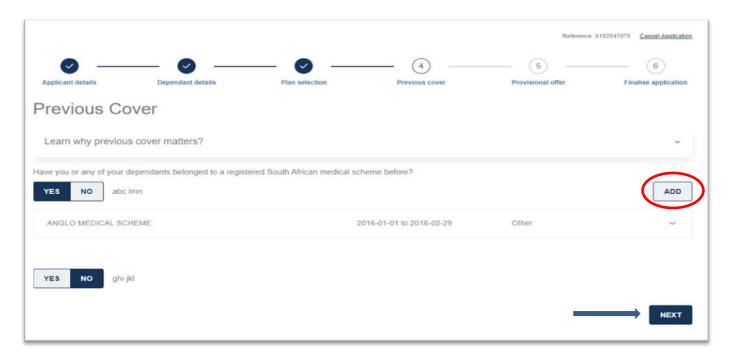


The online tool has a comprehensive list of medical schemes which you may access on the drop-down menu provided.

Select 'save' once completed to move to the next screen.



Should the employee have more than one medical scheme for previous cover, you may click on the 'Add' button to capture additional medical scheme details.



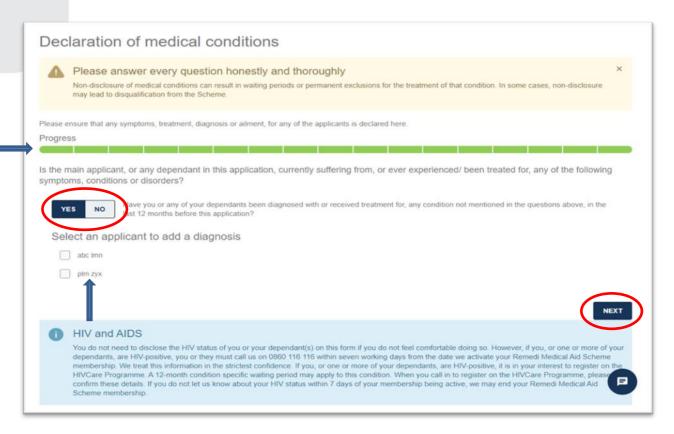


Once you have captured all previous medical scheme information in relation to the employee or applicant, select 'Next' in order to continue with the application process.

Answering health questions

The health questions will populate depending on the underwriting rules. You are required to answer all medical questions before you may continue to the next screen.

If 'Yes' has been answered for a particular health question, 'Select an applicant to add a diagnosis' field will populate to select the applicant this diagnosis is applicable to.



Select 'Next' to continue processing the application.

The description of the diagnosis box will populate where all fields have to be completed including the date of diagnosis and last treatment. Once all fields have been completed, select **'Save'** to continue with the application journey.

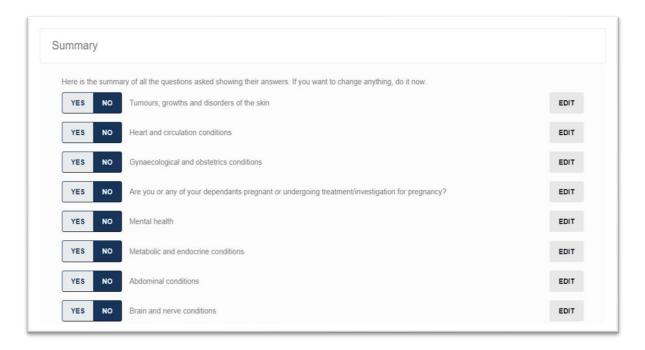
The online tool provides you with a comprehensive list of medical conditions related to each of the questions.

Use the drop-down menu to search for the condition

You may select **'Other'** as an option on the drop-down menu for an unlisted medical diagnosis, however you would be required to add a description or detail of the condition and diagnosis in the details box that pops up following your selection. This will assist with the underwriting of the employee or applicant.

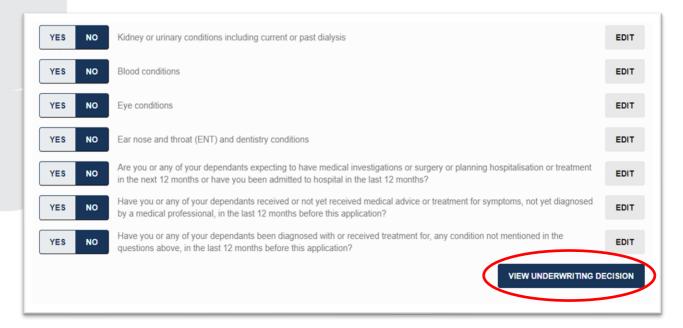


A summary of the completed health questions screen will populate which allows you to edit information where necessary.





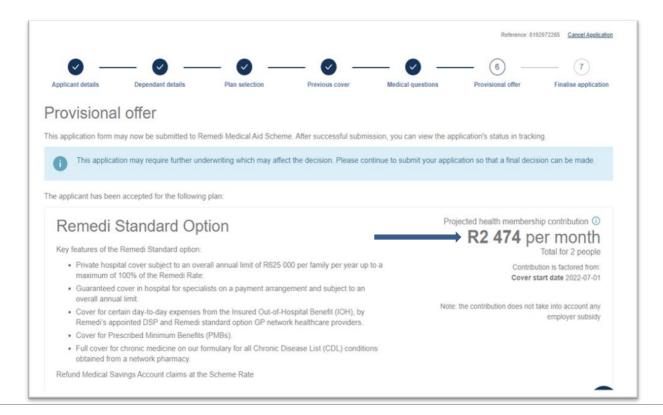
Once all has been completed, select 'View Underwriting decision'.



Click 'View underwriting decision' to proceed to the next screen.

Provisional offer

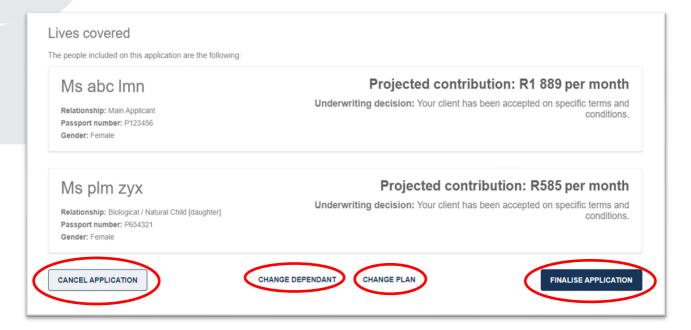
The **'Provisional offer'** screen will populate with a breakdown of the plan and key features, lives covered, projected contributions per month as well as the effective cover start date.





A further breakdown which displays the projected contribution per dependant. At any stage of the journey, you can cancel the application. You are also provided with the option to change the plan, change dependant or finalise the application.

Click on 'Finalise Application' to proceed to Network Providers.

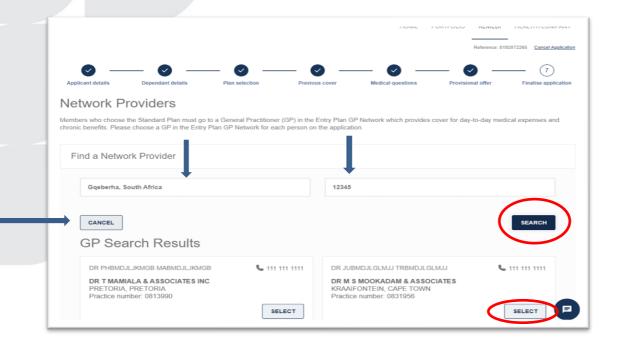


Selecting a General Practitioner (GP)

When capturing an application for an employee who has selected the Standard option, you will be asked to select a GP to link to the membership.

The online tool will provide options to locate a GP near the member's geographical location or by searching for a specific GP in the Remedi Network using the location or practice number.

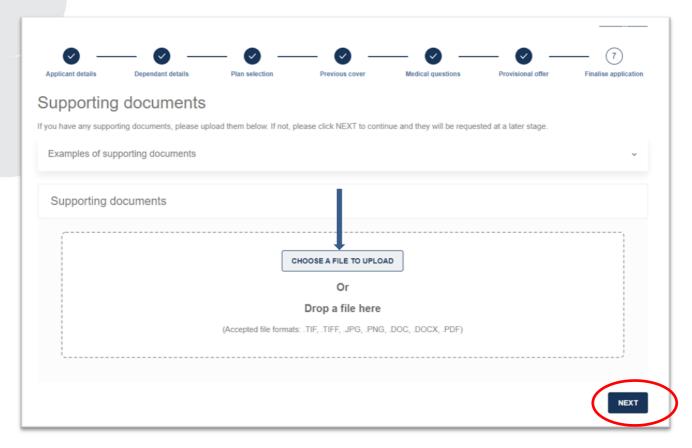
This section will only appear for Remedi Standard Option, as they require a network doctor to be selected. Once you have selected the area and entered the practice number, click 'search' to find the results then 'select' from the list which populates.





Supporting documents

If you have any supporting documents, you can upload it at this stage of the application process. Click, **'Choose a file to upload'**.



Select 'Next' to continue with the process. To upload more documents, please select 'Add another'.

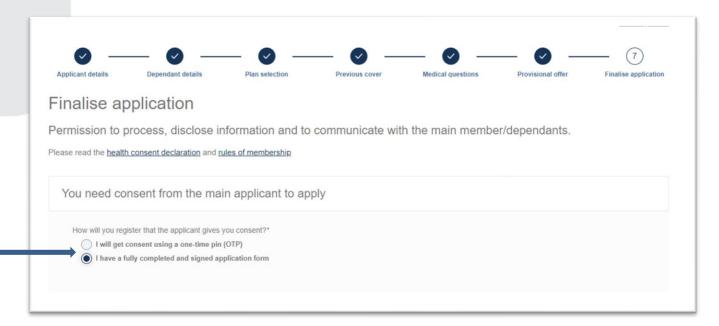




Accepting the terms of membership

You are able to accept the terms of membership on behalf of the applicant by simply uploading the signed application form or by entering the OTP which was sent to the member if requested.

Click on the permission link in the applicant information tab and select the relevant permission option, then click **'Save'** to proceed.



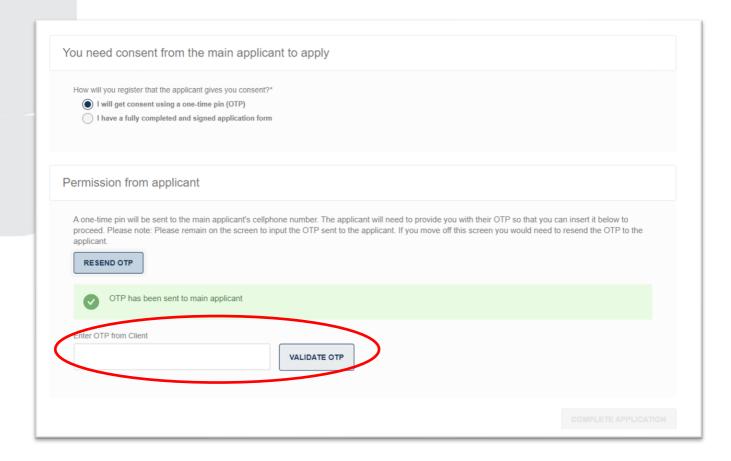
Uploading signed application



OTP Option – a one-time pin will be sent to the main applicant's cellphone number. The applicant will need to provide you with their OTP, insert the OTP below.



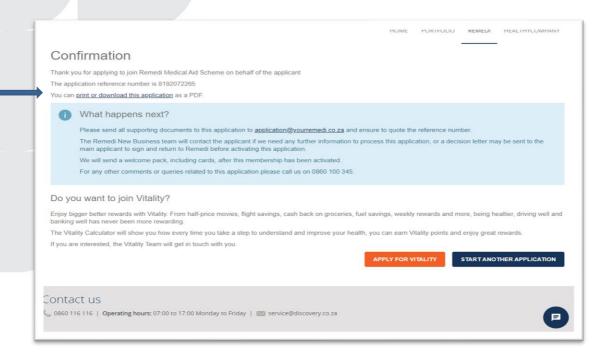
Click 'Validate OTP' to continue to the final screen.



Downloading the completed application form in PDF format

The application is now complete, and a PDF copy of the application is available for download by clicking on the **'print or download the application'** link.

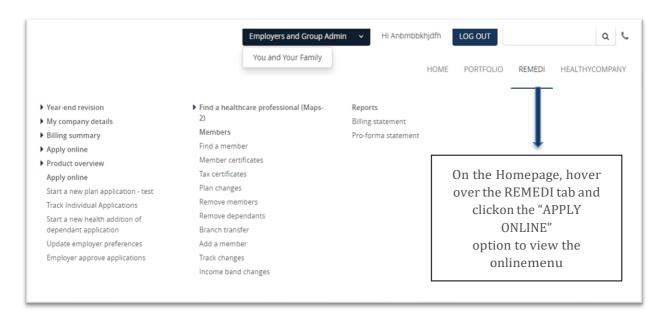




Employer approved applications

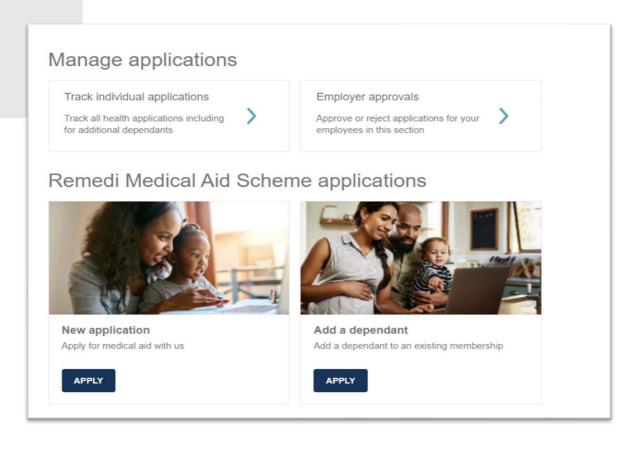
You may access the employer approved applications via the online application process. Here there will be instances where a link is sent to a member to capture their application. This application could come back to the employer, should the employer request for this, and the employer will be required to approve the application.

Select 'Remedi', then 'Apply online'.





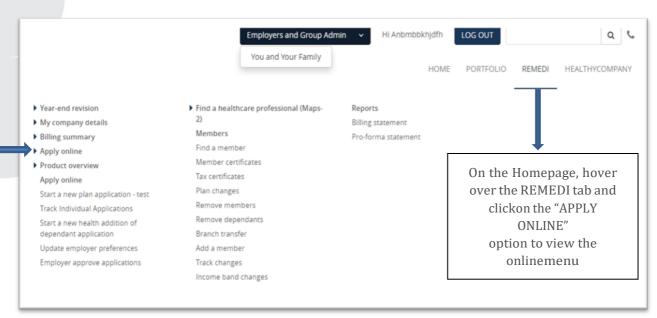
Select 'Employer approvals'

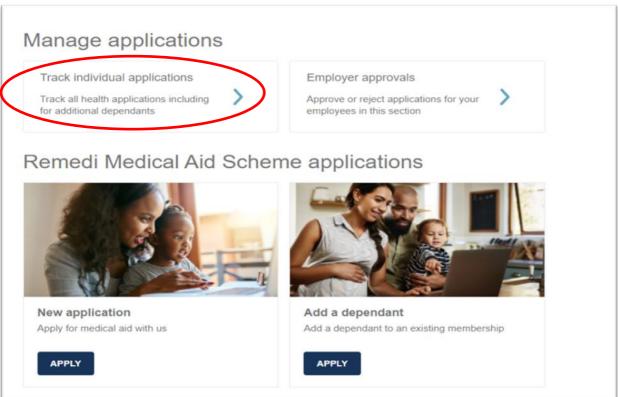




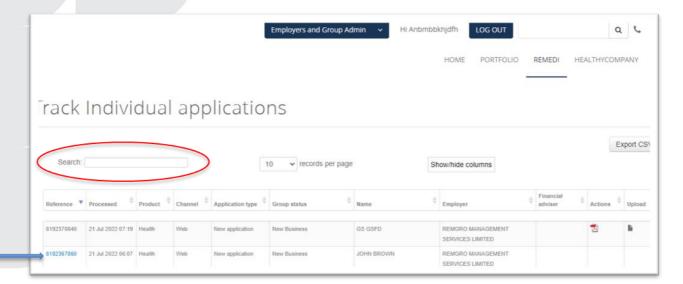
Application tracking

Once a reference number has been generated for the application, you may access the online tracking tool to track the status of the application.





This will open a screen showing the status of all applications you have made. In the search box, enter the reference number of the application you need to update, then press enter on your keyboard.



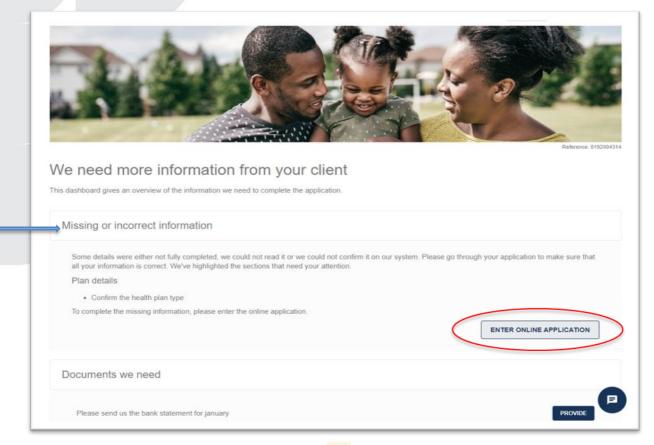
Click on the reference number that appears below the search box.

This will take you to a screen where you can:

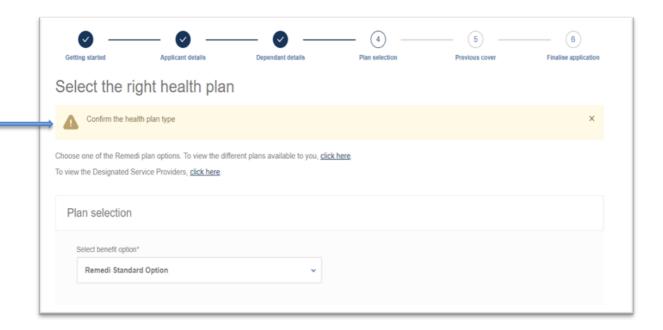
- View and fulfil proposal returns on behalf of your client
- View and fulfil underwriting requirements on behalf of your client
- Digitally accept (upload a signed offer letter) the offer for membership.

Manage proposal returns

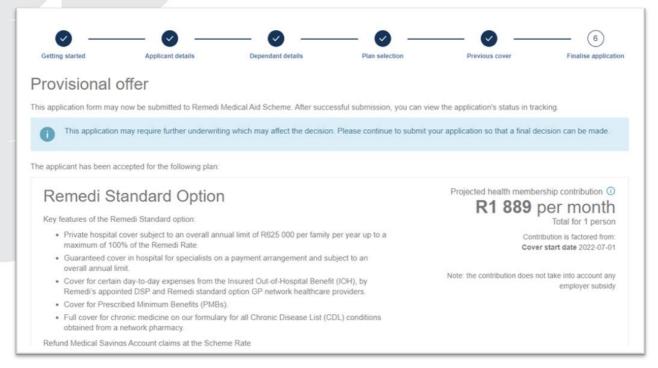
If information is missing or incorrect, an explanation of what we need will be shown on the dashboard. If we don't need any information updates, the dashboard will be empty. Click **'Enter Online Application'** to continue.



This will take you to the application. Look for the symbol to see where updates are needed and enter the information requested (as shown in the example below).



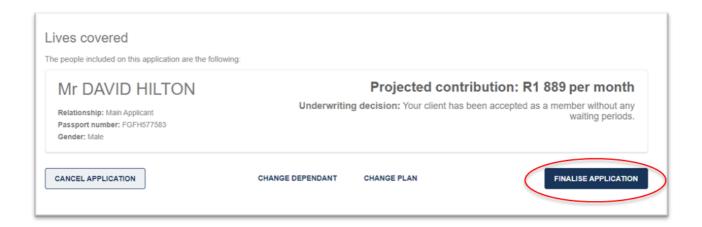
Click the **NEXT** button to move to the next screen, complete any missing information, and keep going until you get to the Provisional offer screen.



You will see the following options at the bottom of your screen:

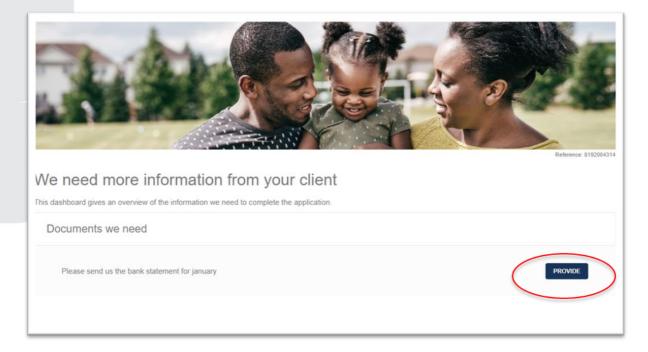
- Cancel application
- Change dependant
- Change cover start date
- Change plan
- Finalise application

Once you have made any changes and are ready to finish the application, click the 'Finalise Application' button.

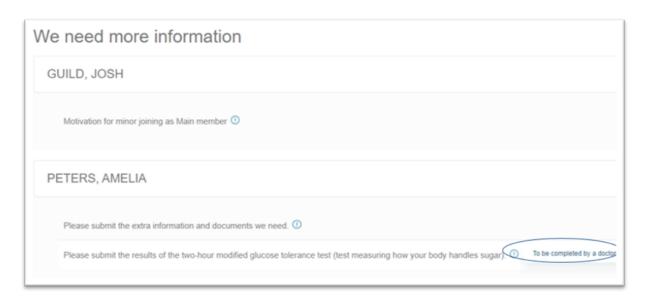




View and fulfil PR or underwriting requirements

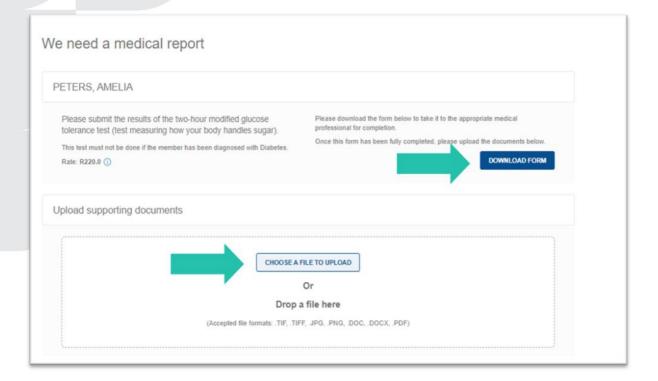


Tip: If you hover over the information icons for underwriting requirements, you will see who should complete the requested information (for example, the applicant or their doctor).

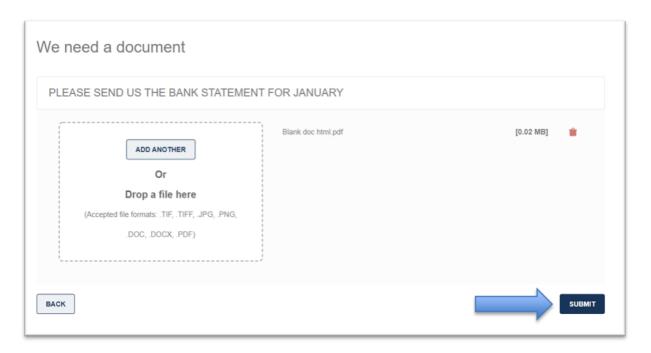


Click the **PROVIDE** button.

Download any forms that must be completed. Complete them and upload the completed forms.



Once you have answered all the questions and uploaded the documents that we asked for, click the **SUBMIT** button.



Once you have answered all the questions and uploaded the documents that we asked for, click the **SUBMIT** button.

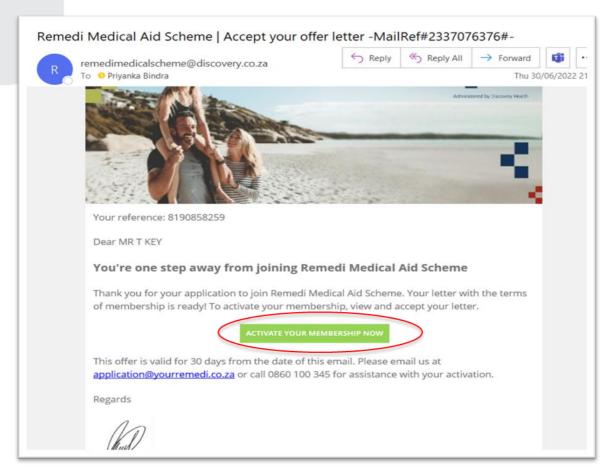
The dashboard will show that 'All requirements have been submitted'.



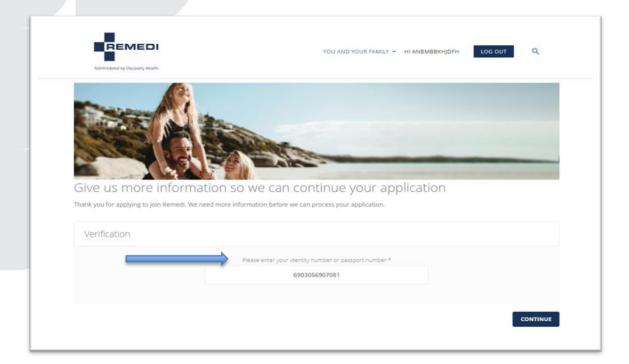
Accept the offer for membership

Once we've made an offer for membership, you can:

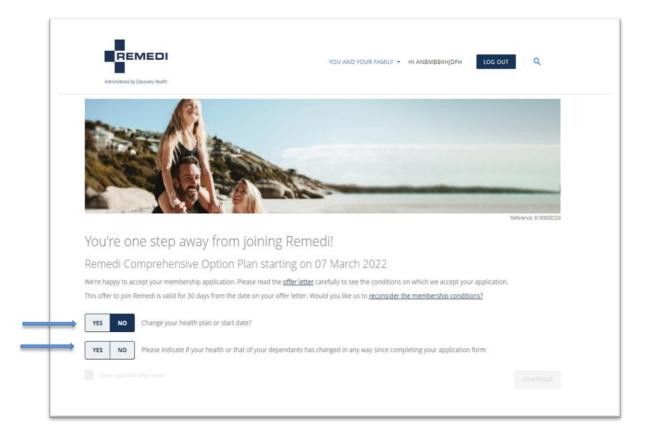
- View the offer letter
- Ask us to reconsider the membership conditions
- Upload a signed offer letter
- Accept the offer digitally
- Change the plan type or start date
- Note any changes to the health of the applicant (client) or their dependants since they applied



Select 'Activate your Membership Now'.



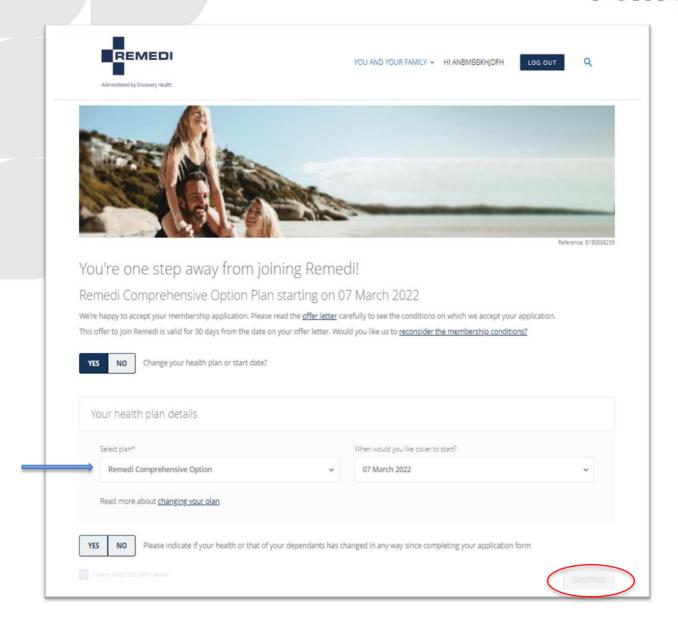
Enter your identity or passport number and click, 'Continue'.



At this stage of the application journey, you can change your health plan or start date. You will also have to indicate if your health or that of any dependant(s) has changed.

Should you wish to change your plan and have selected 'yes', the following screen will populate where you will need to indicate your preferred health plan.





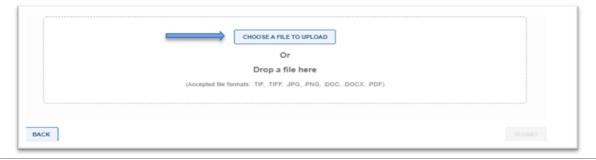
Complete all fields and select 'Continue'.

To upload the signed offer letter

Note: You cannot upload a signed letter if the client has already done so.

Click 'Choose a file to upload'.

Upload the file from your folders or drag and drop it into the box shown below:



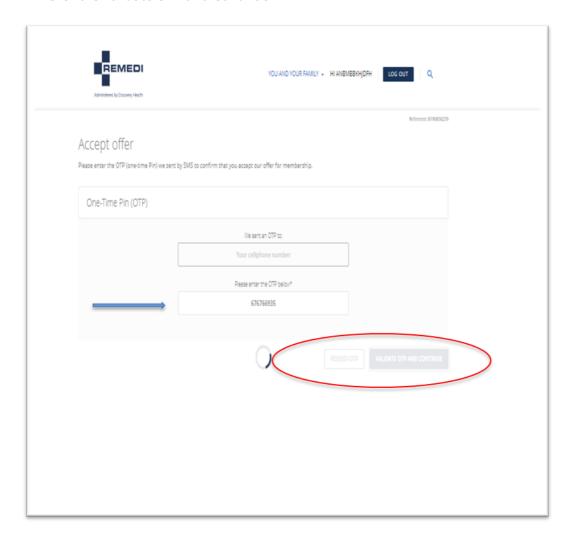


Click the 'Submit' button to continue.



To accept the offer digitally

- Enter the OTP sent to your client.
- Click the Validate OTP and Continue





You'll see a status message confirming that you have accepted the offer.

Thank you for accepting our offer

We'll be in touch once the membership starts. If you need any help, please call us on 0860 10 03 45.

Online tool support channels

Operating hours:

Monday to Friday 07:00 – 20:00 Saturdays 08:00 - 13:00

Contact number: 0860 116 116 Email: service@discovery.co.za Web: www.yourremedi.co.za