

Applications and quotes on your iPad

How the EMI (Electronic Membership Interface) system for iPad saves you time and improves your efficiency



LIBERTY
Health

What is EMI for iPad?

EMI is an online tool offered by Liberty Health. It is available on the Liberty Medical Scheme website at www.libmed.co.za and enables you to do certain tasks on your iPad.

Effortless applications and quick quotes

With EMI for iPad you can:

1. Generate a new quote for a member or group.
2. Open a saved quote that you have already captured.
3. Open a saved application that you have already captured.
4. Capture a new application.
5. Track the progress of applications, view online enquiries and access all your client information.

EMI for iPad

The Liberty iPad system that helps you **save time** and **improves your efficiency**

Better service, happier clients

1. Faster membership activations, which means more satisfied clients.
2. Better service by calculating a quote for a client in seconds.
3. By submitting information online, you reduce your paper trail and save time.

Downloading EMI for iPad is easy

We will send you instructions on how to download the application via email.

We're here to help

If you need any help with downloading or using EMI for iPad, give us a call on 0860 002 168. We will gladly help.

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EMI on your iPad

What is EMI for iPad?

EMI is an online tool on the Liberty Medical Scheme website that you can access on your iPad that enables you to:

- complete, save and submit member applications electronically, and
- calculate and save a member or group quote.

How you benefit from using EMI for iPad

Your clients' memberships are activated faster, which means more satisfied clients

Electronic applications have a faster turnaround time. The member can sign the declaration on the iPad and it will be saved to the membership application as well as to the uploaded documents section. This means new members are loaded, reviewed and activated much quicker.

You can calculate a quote for a client in seconds, which means better service

By completing selected details on the EMI for iPad system, you can provide clients with a quote in no time and calculate their premium and, if applicable, Late Joiner Penalty fees. The information captured in the quote can also be carried over to an application, saving you time.

By submitting information online, you reduce your paper trail and save time

Doing things online saves you the effort of organising and filing hard copy forms. It also saves you time – clicking a button is much more time efficient than faxing or scanning and emailing.




Please note: There are two iPad editions: wireless and wireless with 3G. When you have 3G you can use your iPad wherever you have cell phone reception.

How to access EMI on your iPad

You will receive an email with the necessary links and instructions on how to download the application. You can also refer to the LMS website at www.libmed.co.za

1. Go to the login page on www.libmed.co.za.
2. Enter your access code (which is your username) and password, and tap on 'Login'. When logging on, please use just your Financial Adviser code without the "AG" prefix.



LIBERTY MEDICAL SCHEME
We care. **For you**

LIBERTY

Username

Password

Login

Enter your access code without the "AG" prefix and password.

Tap on 'Login'.

Version: 1.2

Copyright 2012 Liberty Health



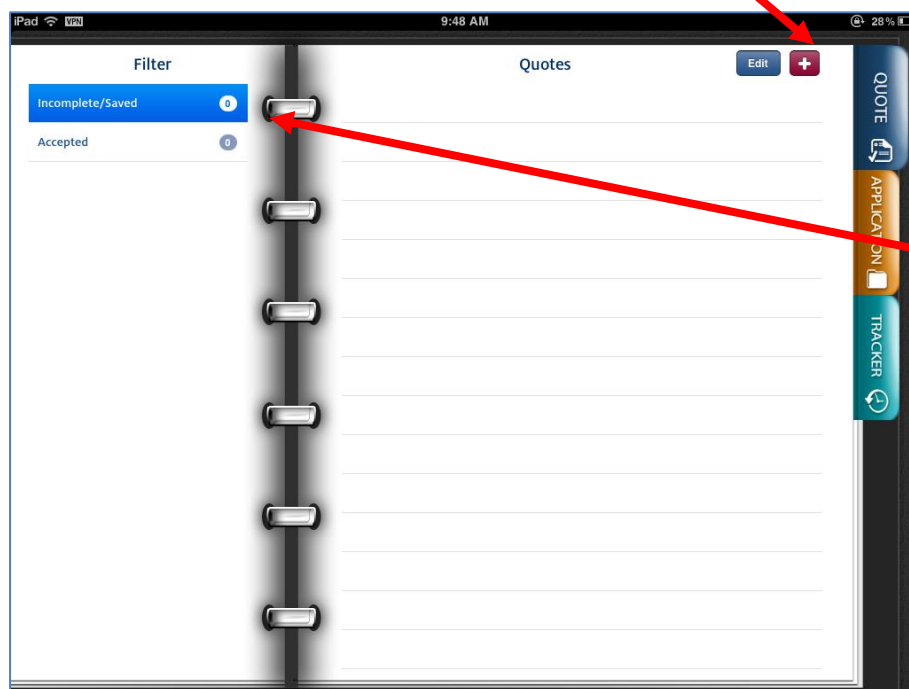
Having trouble? We'd be happy to help

If you have trouble accessing EMI on your iPad, please contact our support team on 0860 002 168. We will gladly help you install this useful tool.

Quotes

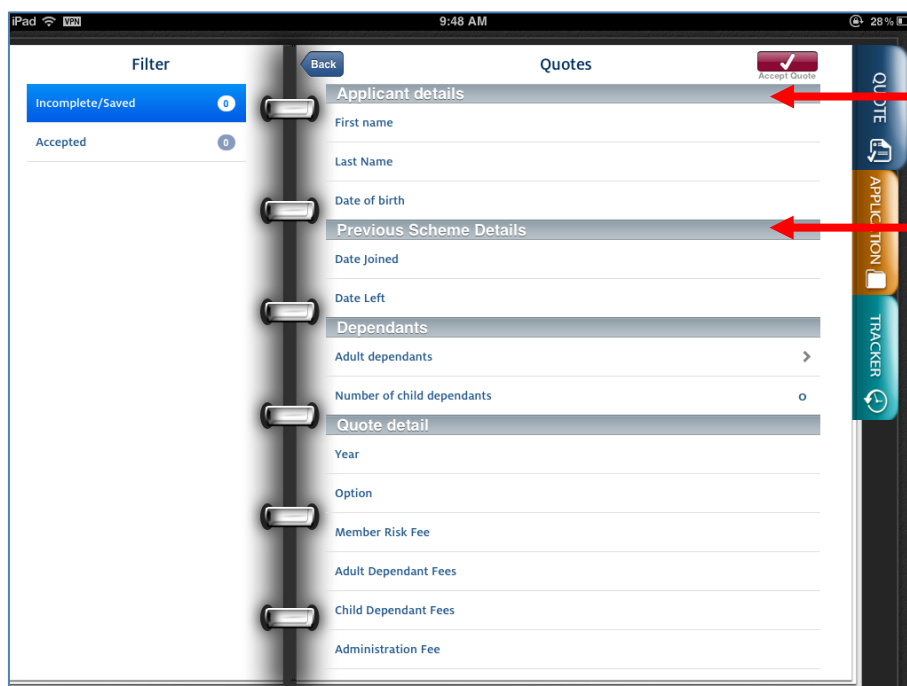
How to calculate a quote on EMI for iPad

1. Tap the red + icon next to the 'Quotes' tab on the top right.



These are the quotes you have saved but have not submitted yet.

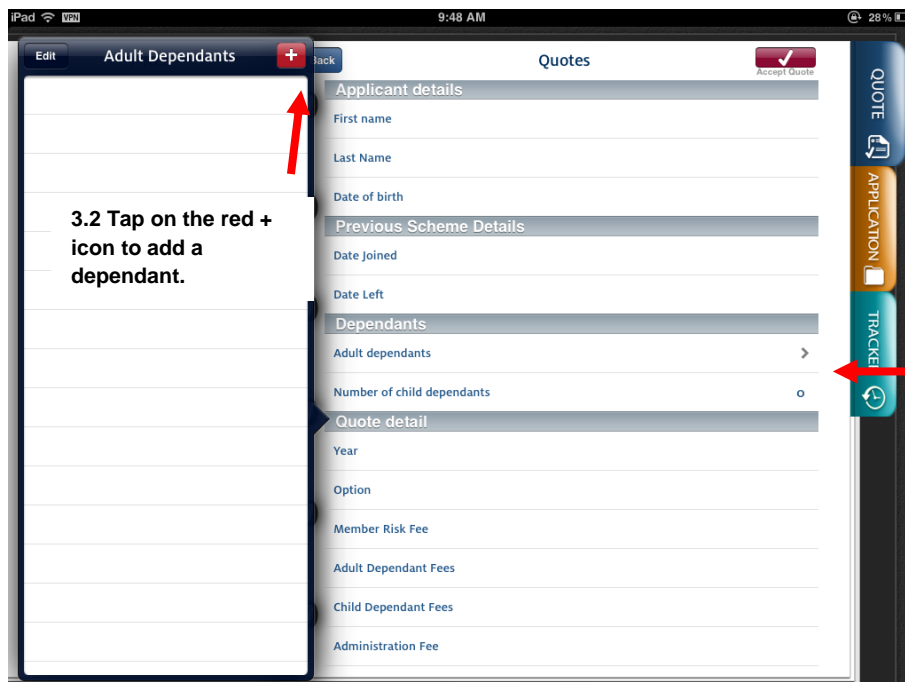
2. Enter the principal member details.



Enter the applicant's personal details.

Enter previous scheme details.

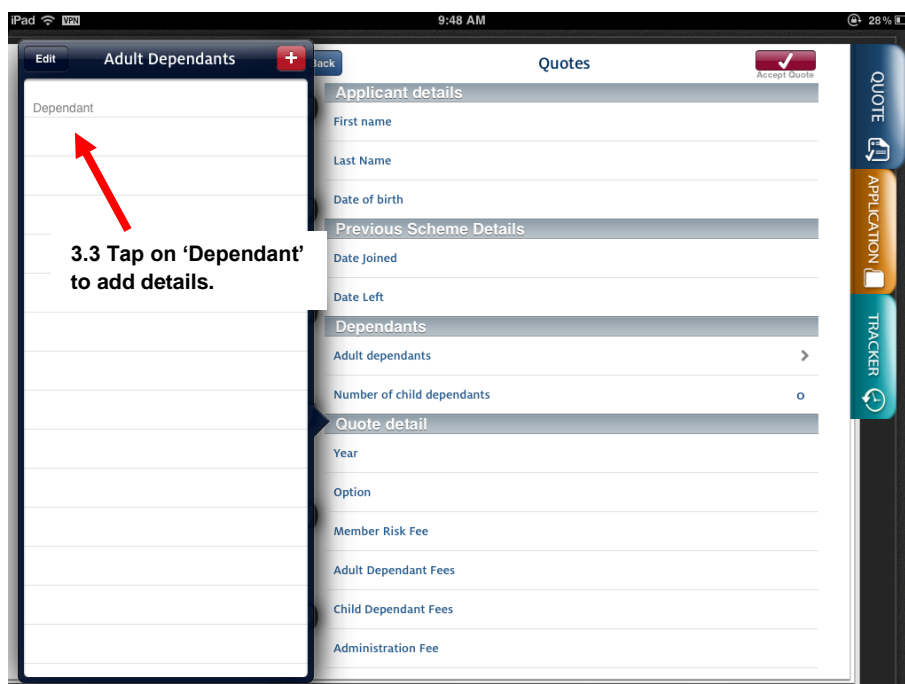
3. Enter the adult dependant details if applicable.



3.2 Tap on the red + icon to add a dependant.

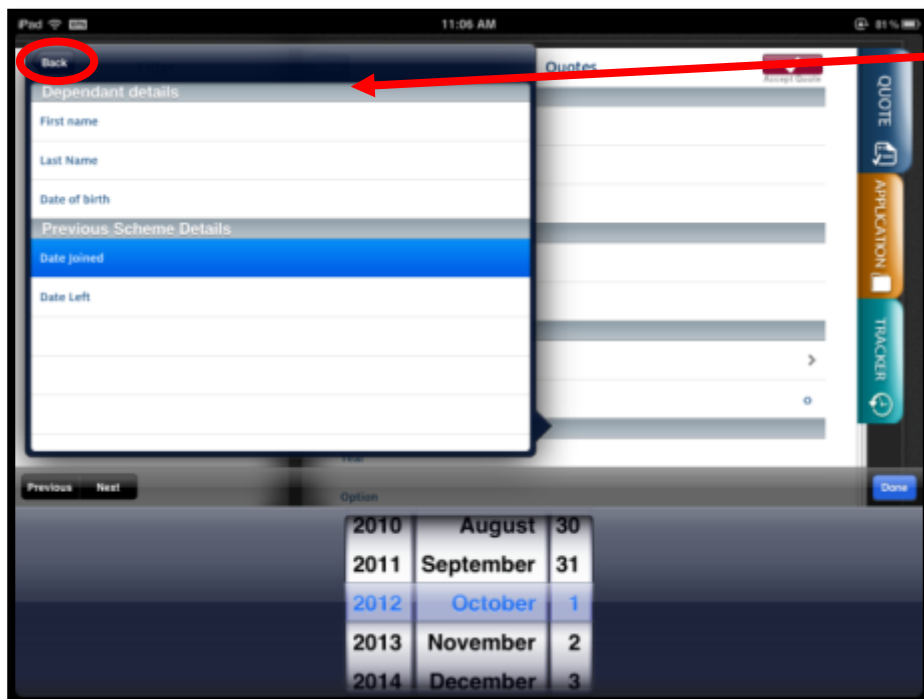
The screen displays the 'Adult Dependants' section on the left and the 'Quotes' section on the right. The 'Quotes' section includes fields for Applicant details (First name, Last Name, Date of birth), Previous Scheme Details (Date Joined, Date Left), Dependants (Adult dependants, Number of child dependants), and Quote detail (Year, Option, Member Risk Fee, Adult Dependant Fees, Child Dependant Fees, Administration Fee). A red arrow points to the red '+' icon in the top right corner of the 'Adult Dependants' list.

3.1 Tap on '>' to add adult dependants.



3.3 Tap on 'Dependant' to add details.

The screen displays the 'Adult Dependants' section on the left and the 'Quotes' section on the right. The 'Quotes' section includes fields for Applicant details (First name, Last Name, Date of birth), Previous Scheme Details (Date Joined, Date Left), Dependants (Adult dependants, Number of child dependants), and Quote detail (Year, Option, Member Risk Fee, Adult Dependant Fees, Child Dependant Fees, Administration Fee). A red arrow points to the 'Dependant' label in the top left corner of the 'Adult Dependants' list.



Back

Dependant details

First name

Last Name

Date of birth

Previous Scheme Details

Date joined

Date Left

Previous Next

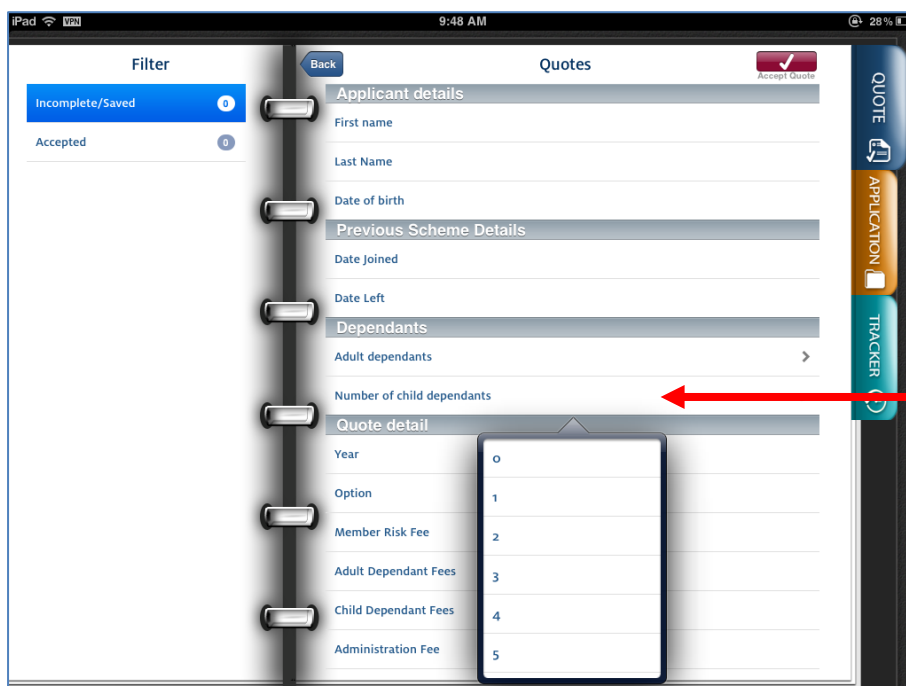
Option

2010	August	30
2011	September	31
2012	October	1
2013	November	2
2014	December	3

QUOTE APPLICATION TRACKER

3.4 Enter the dependant details and tap on 'Back'.

4. Enter the number of child dependants if applicable.



Filter

Incomplete/Saved 0

Accepted 0

Back

Quotes

Accept Quote

Applicant details

First name

Last Name

Date of birth

Previous Scheme Details

Date joined

Date Left

Dependants

Adult dependants

Number of child dependants

Quote detail

Year

Option

Member Risk Fee

Adult Dependant Fees

Child Dependant Fees

Administration Fee

0

1

2

3

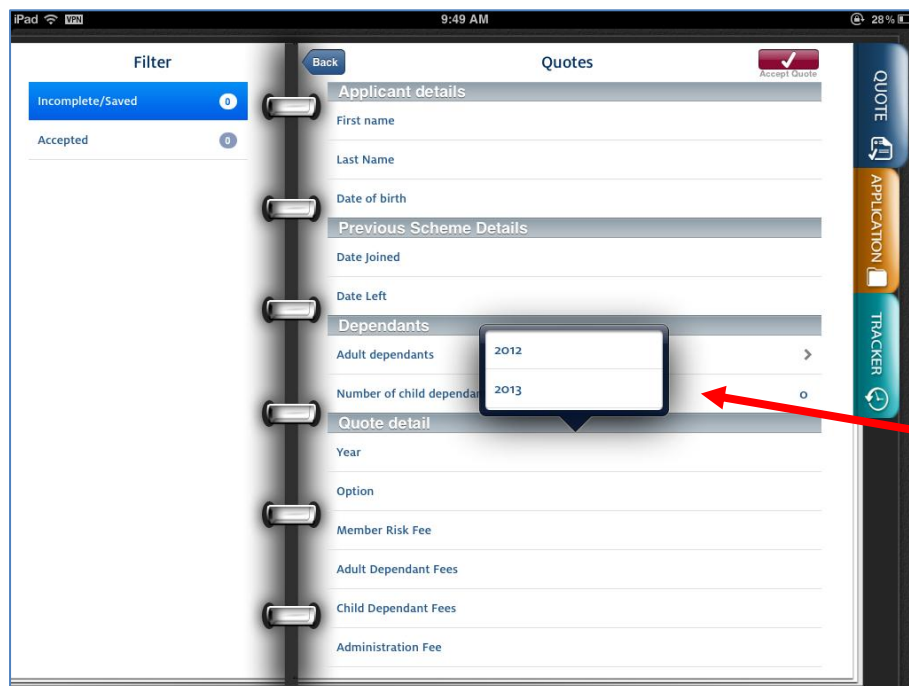
4

5

QUOTE APPLICATION TRACKER

Tap on 'Number of child dependants' and select the number of child dependants from the dropdown list.

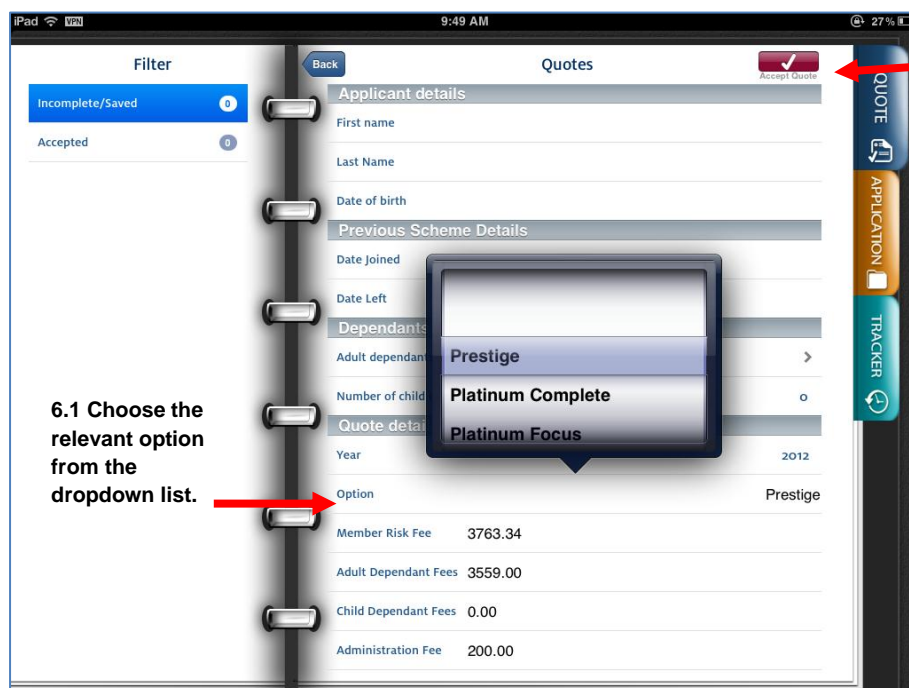
5. Choose the benefit year.



The screenshot shows the 'Quotes' screen on an iPad. The 'Quote detail' section is expanded, showing a dropdown menu for 'Year' with options 2012 and 2013. A red arrow points to the 2013 option.

Tap on 'Year' and select the relevant year. You will be restricted to the current and following benefit year.

6. Choose the relevant option and submit the quote. Once the quote has been submitted and accepted, you can view it under the 'Application' section.



The screenshot shows the 'Quotes' screen on an iPad. The 'Option' dropdown menu is expanded, showing options: Prestige, Platinum Complete, and Platinum Focus. A red arrow points to the 'Option' field.

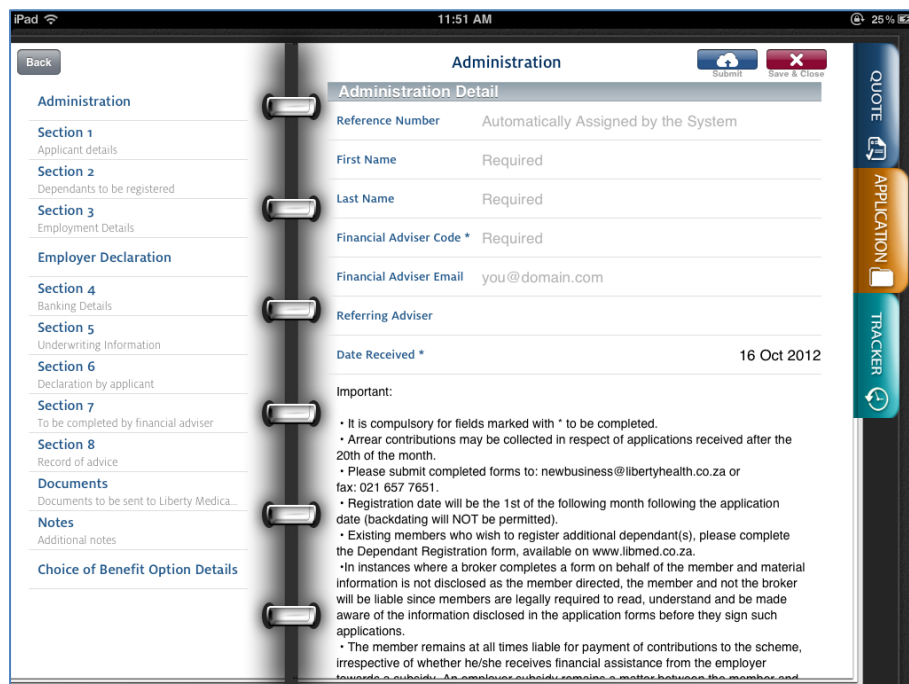
6.1 Choose the relevant option from the dropdown list.

6.2 When you have entered all the relevant details, tap on '✓' to submit the quote.

Applications

How to complete a member application on EMI for iPad

1. Tap on the 'Applications' tab to open up the first page – 'Administration'. If you have submitted a quote for the specific client, the basic details will already be captured. You can simply add the rest of the information.
2. Complete the details on the 'Administration' page.



The screenshot shows an iPad screen displaying the 'Administration' page of the EMI application. The page is divided into a left sidebar with a table of contents and a main content area. The sidebar includes sections 1 through 8, documents, notes, and choice of benefit options. The main content area is titled 'Administration Detail' and contains the following fields:

- Reference Number:** Automatically Assigned by the System
- First Name:** Required
- Last Name:** Required
- Financial Adviser Code *:** Required
- Financial Adviser Email:** you@domain.com
- Referring Adviser:**
- Date Received *:** 16 Oct 2012

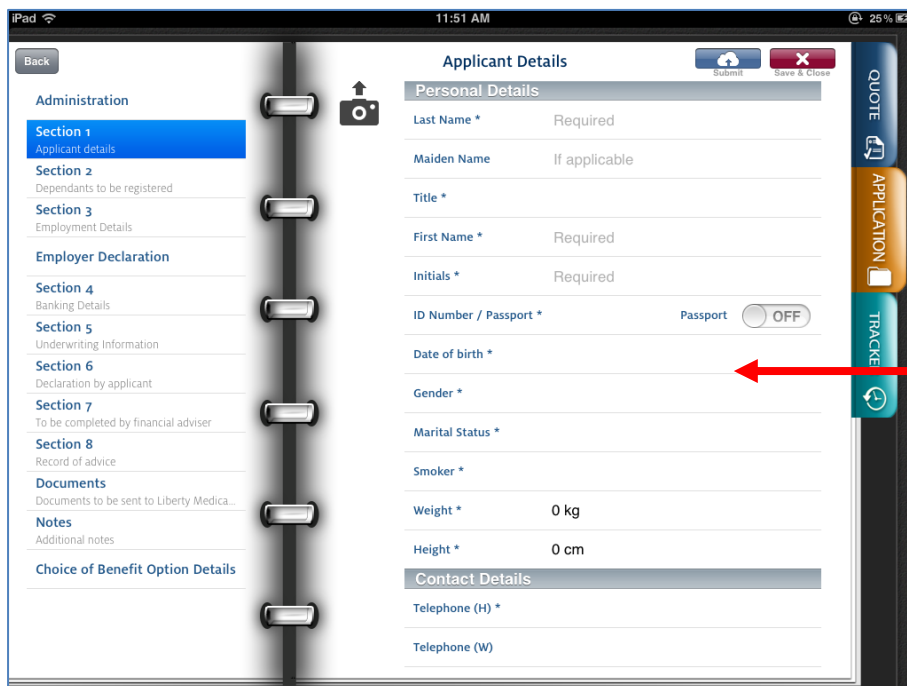
Below the fields, there is an 'Important:' section with the following text:

- It is compulsory for fields marked with * to be completed.
- Arrear contributions may be collected in respect of applications received after the 20th of the month.
- Please submit completed forms to: newbusiness@libertyhealth.co.za or fax: 021 657 7651.
- Registration date will be the 1st of the following month following the application date (backdating will NOT be permitted).
- Existing members who wish to register additional dependant(s), please complete the Dependant Registration form, available on www.libmed.co.za.
- In instances where a broker completes a form on behalf of the member and material information is not disclosed as the member directed, the member and not the broker will be liable since members are legally required to read, understand and be made aware of the information disclosed in the application forms before they sign such applications.
- The member remains at all times liable for payment of contributions to the scheme, irrespective of whether he/she receives financial assistance from the employer

At the bottom of the main content area, there is a small disclaimer: 'founder's subsidy - An employee subsidy scheme is a contract between the member and the employer'.

- The system will allocate the 'Reference number' as soon as the application has been submitted and processed successfully.
- 'First name' and 'Surname' refer to the details of the person capturing the application.
- 'Financial Adviser Code' is the code that will be linked to the membership.
- 'Referring Adviser Code' is either the in-house Liberty code or the sales team code.
- Complete 'Referring adviser' only if applicable.
- The system will insert the 'Date Received'.

3. Complete Section 1 by entering the principal member's details.



Applicant Details

Personal Details

Last Name * Required

Maiden Name If applicable

Title *

First Name * Required

Initials * Required

ID Number / Passport * Passport ☐ OFF

Date of birth *

Gender *

Marital Status *

Smoker *

Weight * 0 kg

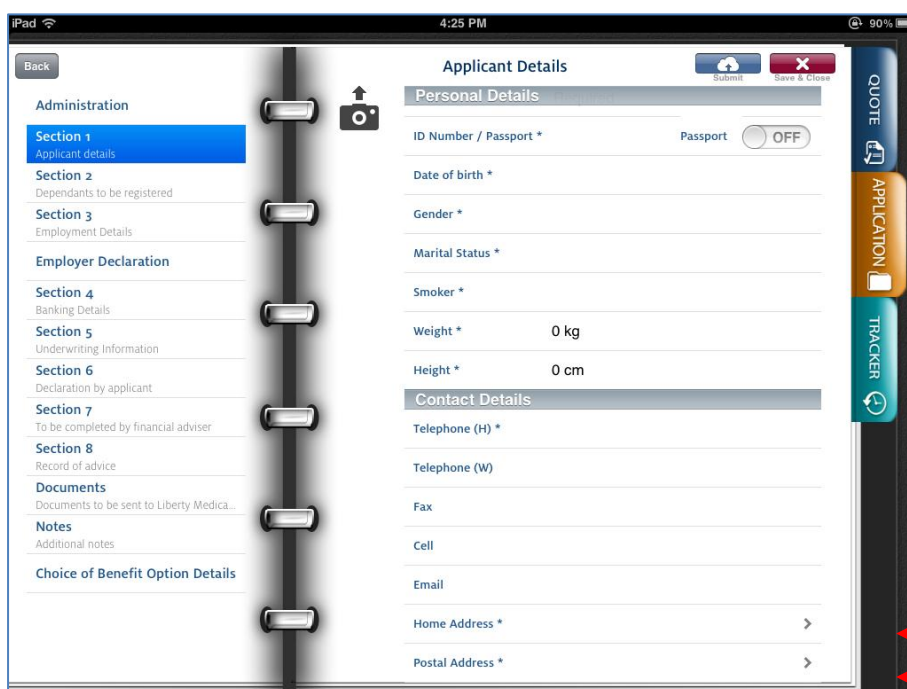
Height * 0 cm

Contact Details

Telephone (H) *

Telephone (W)

If you insert a valid ID number, the 'Date of birth' and 'Gender' fields will be updated automatically.



Applicant Details

Personal Details

ID Number / Passport * Passport ☐ OFF

Date of birth *

Gender *

Marital Status *

Smoker *

Weight * 0 kg

Height * 0 cm

Contact Details

Telephone (H) *

Telephone (W)

Fax

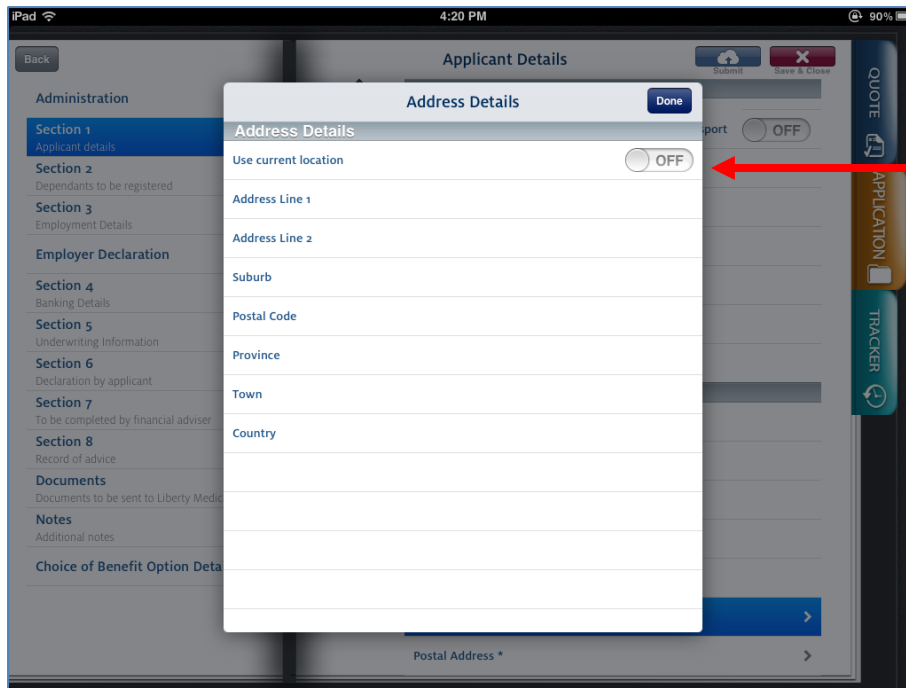
Cell

Email

Home Address * >

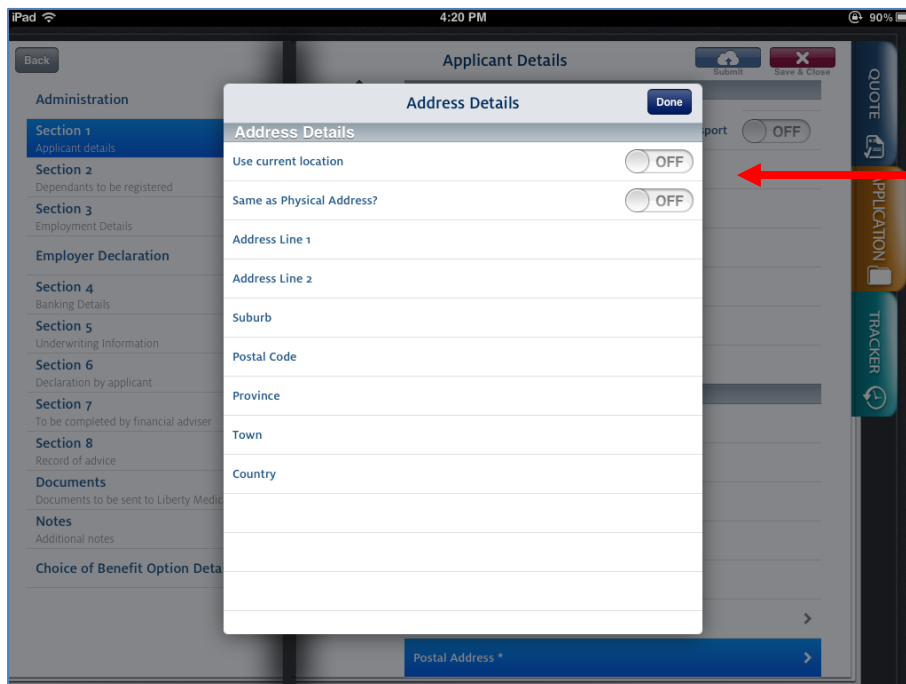
Postal Address * >

To open the 'Physical Address' and 'Postal Address' boxes, tap on the relevant '>'.



The screenshot shows the 'Applicant Details' screen on an iPad. A modal titled 'Address Details' is open, displaying fields for 'Address Line 1', 'Address Line 2', 'Suburb', 'Postal Code', 'Province', 'Town', and 'Country'. The 'Use current location' toggle is currently set to 'OFF' and is highlighted with a red arrow. The background screen shows a sidebar menu with sections 1 through 8 and a 'Postal Address *' field at the bottom.

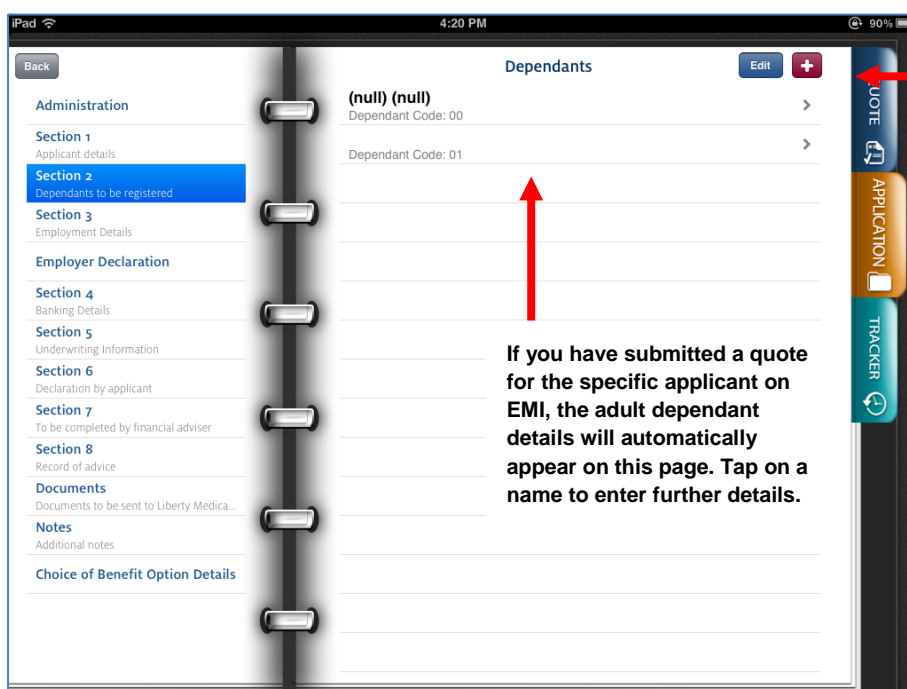
Physical address: Enter the relevant details or activate 'Use current location', which links to Google Maps. Tap on 'Done' once you've completed all the details.



The screenshot shows the 'Applicant Details' screen on an iPad. A modal titled 'Address Details' is open, displaying fields for 'Address Line 1', 'Address Line 2', 'Suburb', 'Postal Code', 'Province', 'Town', and 'Country'. The 'Same as Physical Address?' toggle is currently set to 'OFF' and is highlighted with a red arrow. The background screen shows a sidebar menu with sections 1 through 8 and a 'Postal Address *' field at the bottom.

Postal address: Enter the relevant details or activate 'Same as physical address' if you don't have a separate postal address. Tap on 'Done' once you've completed all the details.

4. Complete Section 2 by entering the dependants' details if applicable.



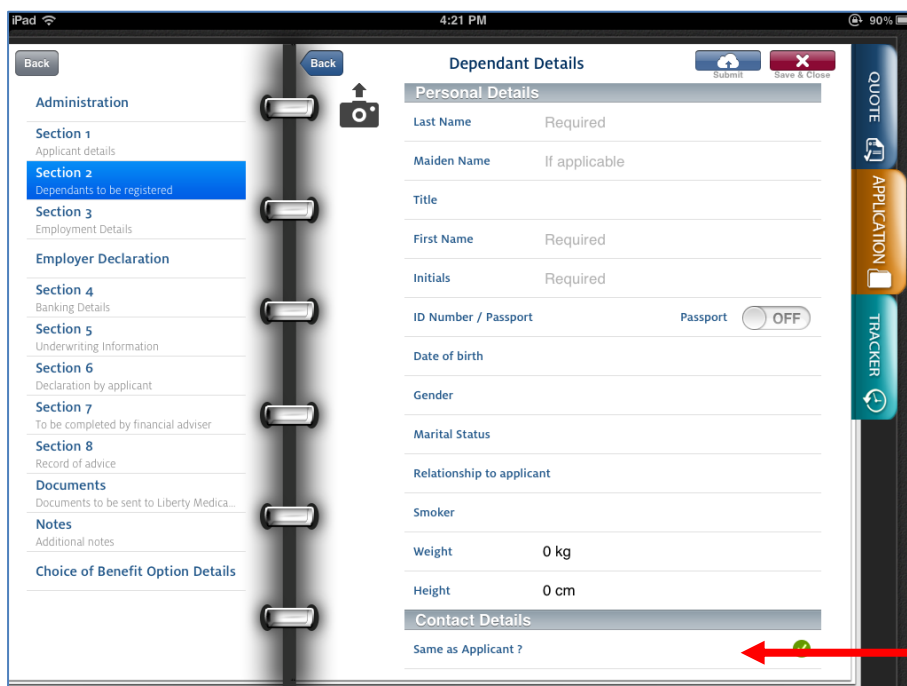
Dependants

(null) (null)
Dependant Code: 00

Dependant Code: 01

If you have submitted a quote for the specific applicant on EMI, the adult dependant details will automatically appear on this page. Tap on a name to enter further details.

Tap on the red + icon if you want to add child dependants.



Dependant Details

Personal Details

Last Name Required

Maiden Name If applicable

Title

First Name Required

Initials Required

ID Number / Passport Passport OFF

Date of birth

Gender

Marital Status

Relationship to applicant

Smoker

Weight 0 kg

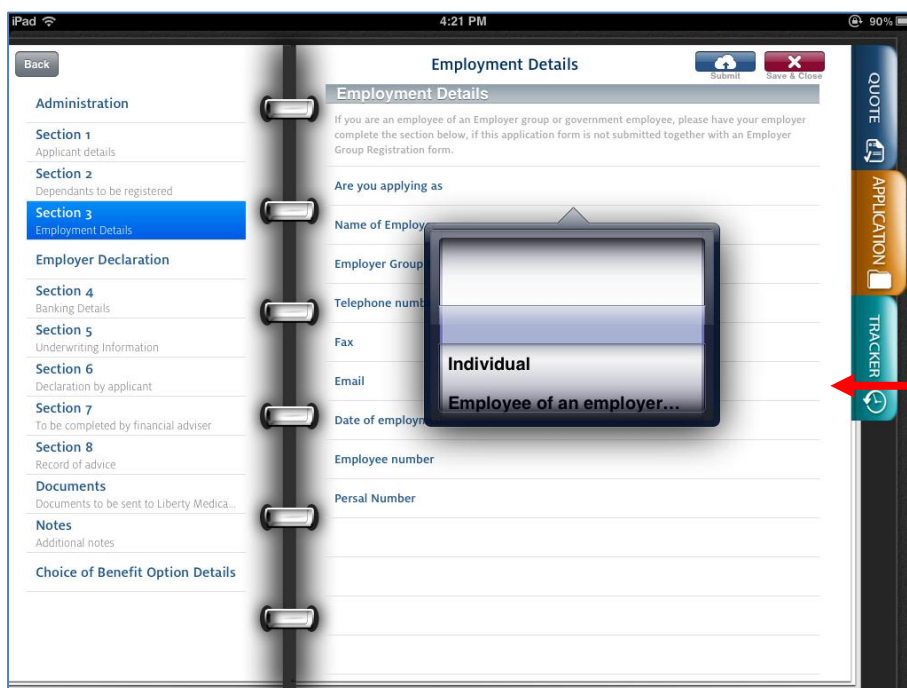
Height 0 cm

Contact Details

Same as Applicant ?

You don't need to capture separate address details for dependants on the current system. Simply indicate if the details are the same as for the principal member or not.

5. Complete Section 3 by entering the applicant's employment's details if applicable.



Employment Details

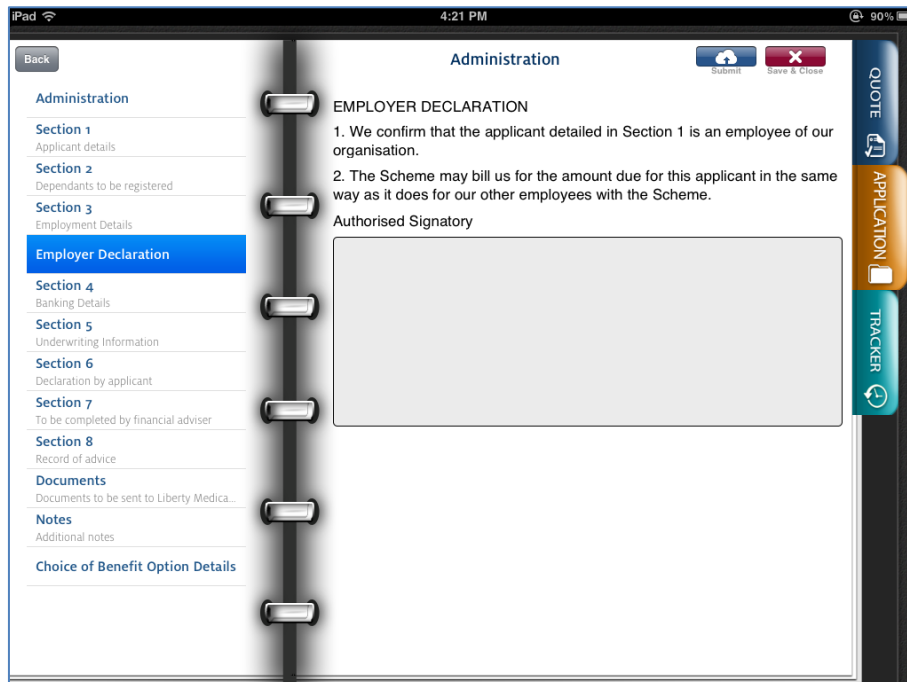
If you are an employee of an Employer group or government employee, please have your employer complete the section below, if this application form is not submitted together with an Employer Group Registration form.

Are you applying as

Individual

Employee of an employer...

Depending on whether the applicant joins as an individual or as part of an employer group, tap the relevant option.



Administration

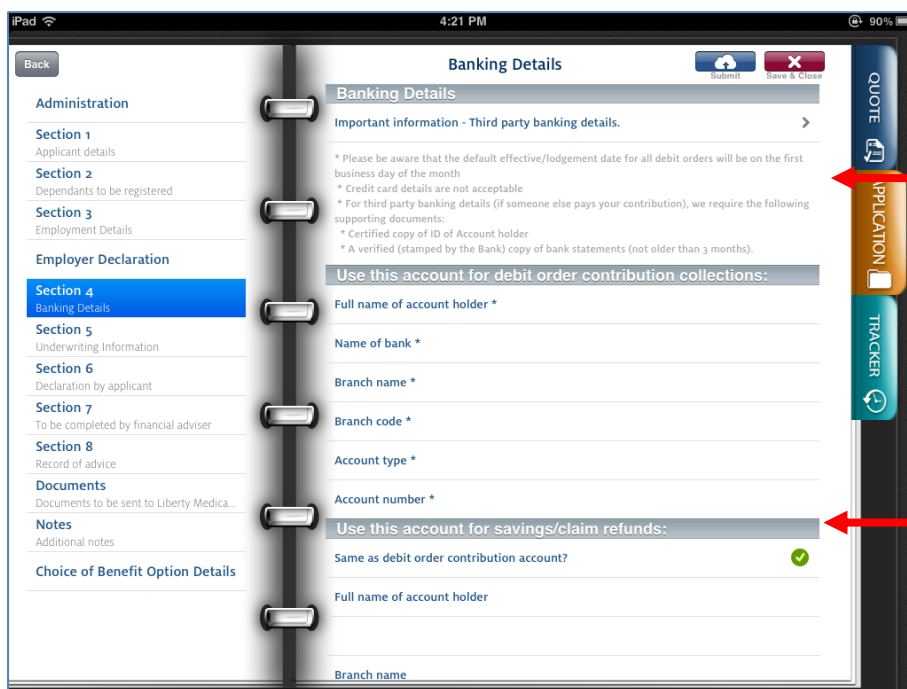
EMPLOYER DECLARATION

1. We confirm that the applicant detailed in Section 1 is an employee of our organisation.

2. The Scheme may bill us for the amount due for this applicant in the same way as it does for our other employees with the Scheme.

Authorised Signatory

6. Complete Section 4 by entering the applicant's banking details.

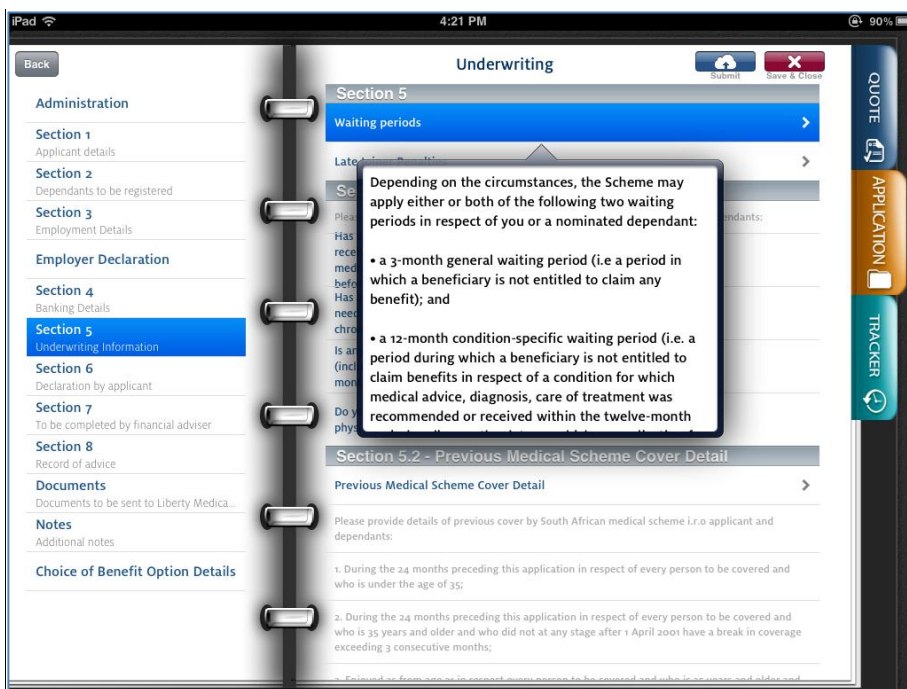


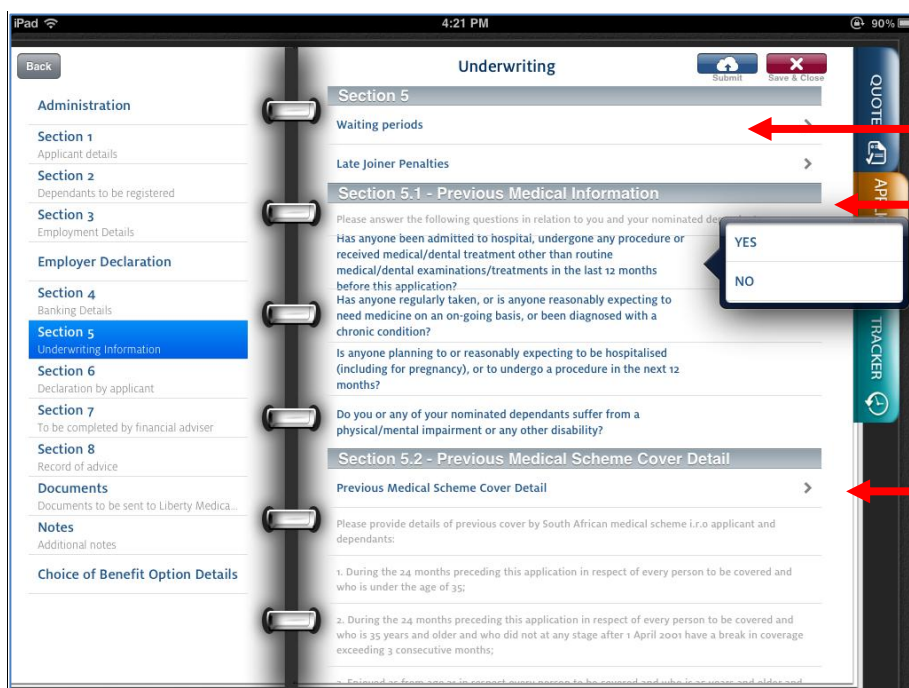
Please note that applicants applying as an employee of an employer group must provide supplementary documentation.

Please note that if the applicant has a separate bank account for savings or claim refunds, you should specify these details separately.

7. Complete Section 5 about the underwriting conditions. This is the same as Section 6 in the paper application. It describes how certain member profiles will be affected by circumstances related to:

- waiting periods (including the definitions for a 12-month condition-specific waiting period, 3-month general waiting period and PMB waiting periods), and
- Late Joiner Penalty fees.





Underwriting

Section 5

Waiting periods

Late Joiner Penalties

Section 5.1 - Previous Medical Information

Please answer the following questions in relation to you and your nominated dependants.

Has anyone been admitted to hospital, undergone any procedure or received medical/dental treatment other than routine medical/dental examinations/treatments in the last 12 months before this application?

Has anyone regularly taken, or is anyone reasonably expecting to need medicine on an on-going basis, or been diagnosed with a chronic condition?

Is anyone planning to or reasonably expecting to be hospitalised (including for pregnancy), or to undergo a procedure in the next 12 months?

Do you or any of your nominated dependants suffer from a physical/mental impairment or any other disability?

Section 5.2 - Previous Medical Scheme Cover Detail

Previous Medical Scheme Cover Detail

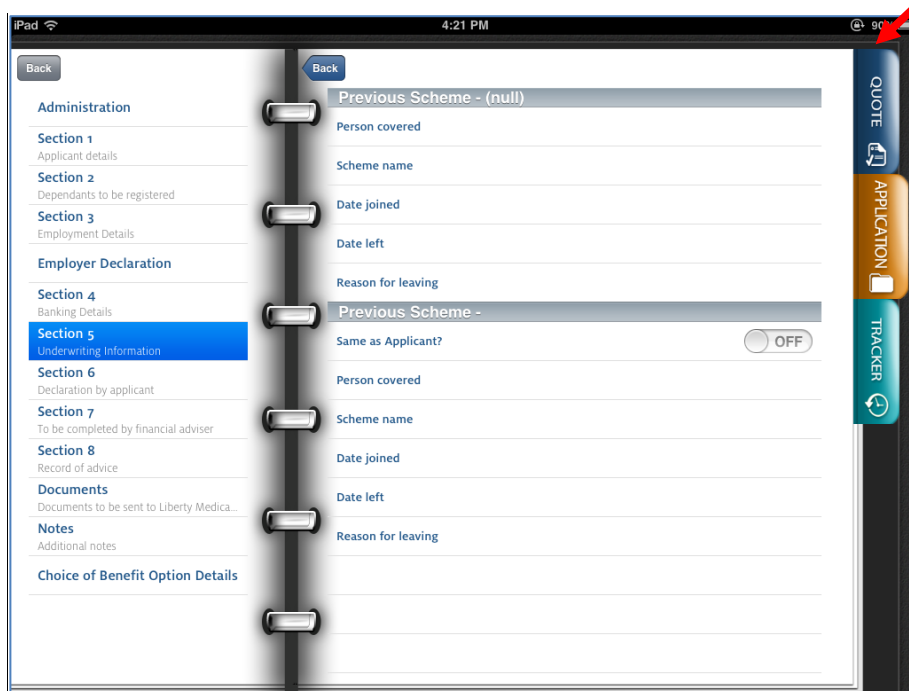
Please provide details of previous cover by South African medical scheme i.r.o applicant and dependants:

- During the 24 months preceding this application in respect of every person to be covered and who is under the age of 35;
- During the 24 months preceding this application in respect of every person to be covered and who is 35 years and older and who did not at any stage after 1 April 2001 have a break in coverage exceeding 3 consecutive months;

If you tap 'Waiting periods' or 'Late Joiner Penalty fees' a pop-up box will be displayed with the relevant definitions.

Please note that you must answer all four questions in Section 5.1 by selecting either 'Yes' or 'No'.

Tap on the '>' to complete the details about the applicant's previous medical scheme, as below.



Previous Scheme - (null)

Person covered

Scheme name

Date joined

Date left

Reason for leaving

Previous Scheme -

Same as Applicant? ☐ OFF

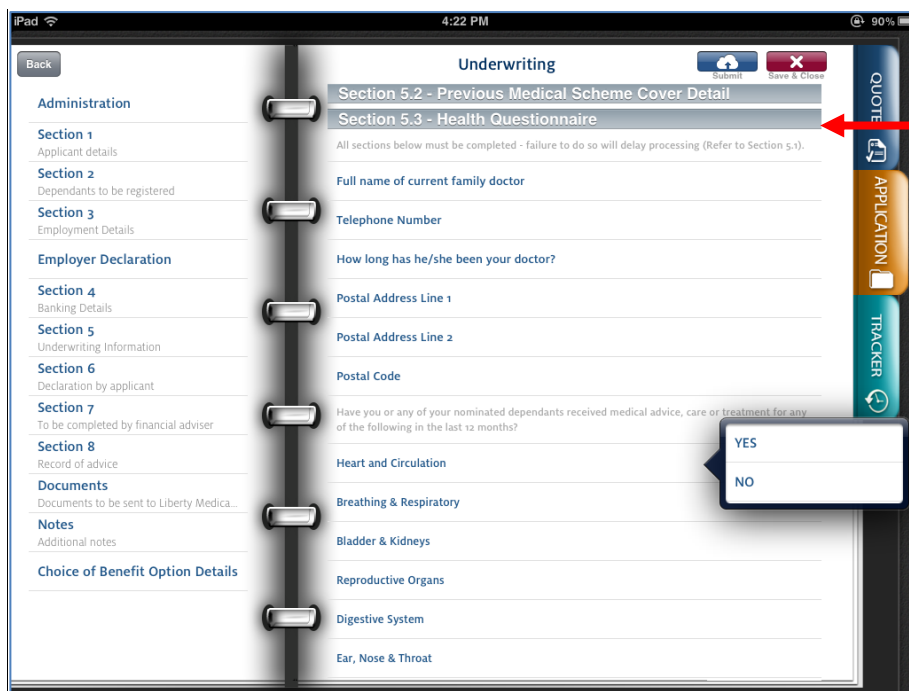
Person covered

Scheme name

Date joined

Date left

Reason for leaving



Underwriting

Section 5.2 - Previous Medical Scheme Cover Detail

Section 5.3 - Health Questionnaire

All sections below must be completed - failure to do so will delay processing (Refer to Section 5.1).

Full name of current family doctor

Telephone Number

How long has he/she been your doctor?

Postal Address Line 1

Postal Address Line 2

Postal Code

Have you or any of your nominated dependants received medical advice, care or treatment for any of the following in the last 12 months?

YES

NO

Heart and Circulation

Breathing & Respiratory

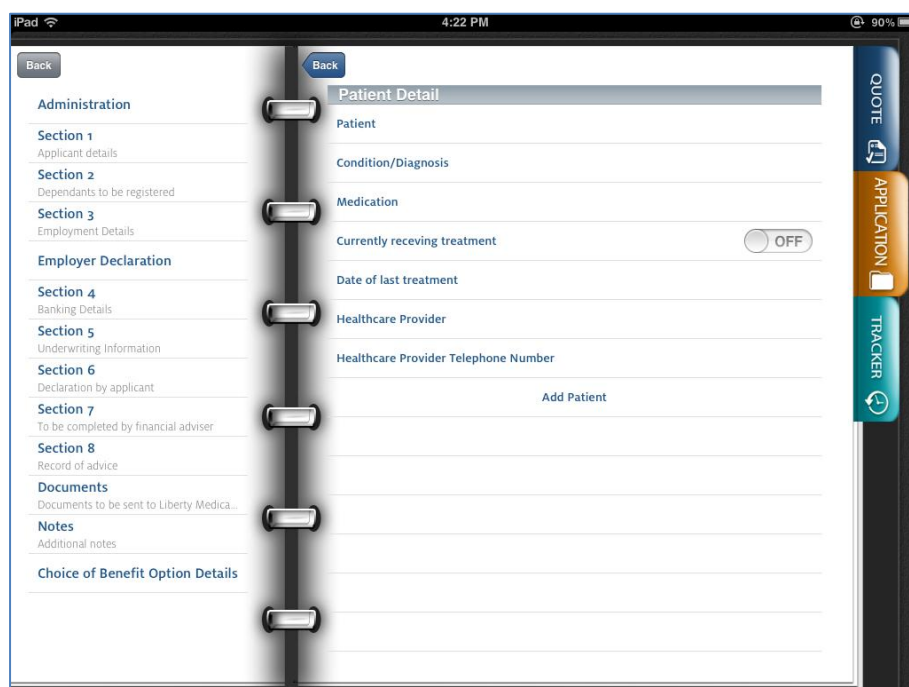
Bladder & Kidneys

Reproductive Organs

Digestive System

Ear, Nose & Throat

Please note that you must answer all questions in Section 5.3. If you answer 'Yes' to any of the questions in this section, you must complete the relevant info screens (as below). Otherwise we will request additional information from you and this will delay the application process.



Patient Detail

Patient

Condition/Diagnosis

Medication

Currently receiving treatment ☐ OFF

Date of last treatment

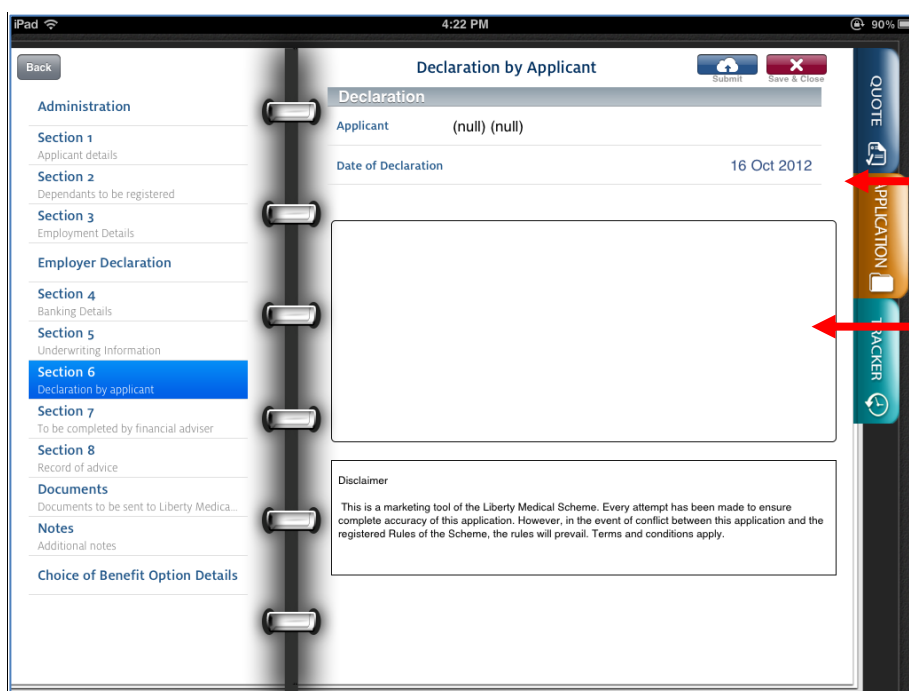
Healthcare Provider

Healthcare Provider Telephone Number

Add Patient

This page will open automatically when you select 'Yes' to any of the questions in 5.3. .

8. Complete Section 6, which is the member declaration.



Declaration by Applicant

Declaration

Applicant (null) (null)

Date of Declaration 16 Oct 2012

Disclaimer

This is a marketing tool of the Liberty Medical Scheme. Every attempt has been made to ensure complete accuracy of this application. However, in the event of conflict between this application and the registered Rules of the Scheme, the rules will prevail. Terms and conditions apply.

Navigation Sidebar:

- Back
- Administration
- Section 1: Applicant details
- Section 2: Dependants to be registered
- Section 3: Employment Details
- Employer Declaration
- Section 4: Banking Details
- Section 5: Underwriting Information
- Section 6: Declaration by applicant**
- Section 7: To be completed by financial adviser
- Section 8: Record of advice
- Documents: Documents to be sent to Liberty Medica...
- Notes: Additional notes
- Choice of Benefit Option Details

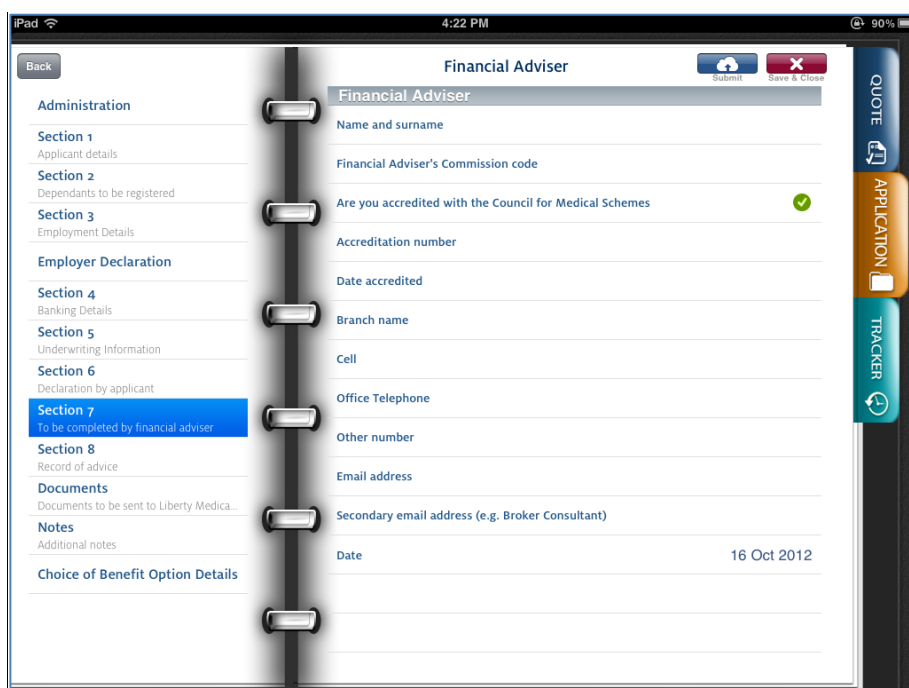
Right Sidebar:

- QUOTE
- APPLICATION
- TRACKER

The system will automatically generate the 'Date of declaration'.

The applicant can sign directly on the iPad. The signature will be saved.

9. Complete Section 7 by filling in your details.



Financial Adviser

Financial Adviser

Name and surname

Financial Adviser's Commission code

Are you accredited with the Council for Medical Schemes ☒

Accreditation number

Date accredited

Branch name

Cell

Office Telephone

Other number

Email address

Secondary email address (e.g. Broker Consultant)

Date 16 Oct 2012

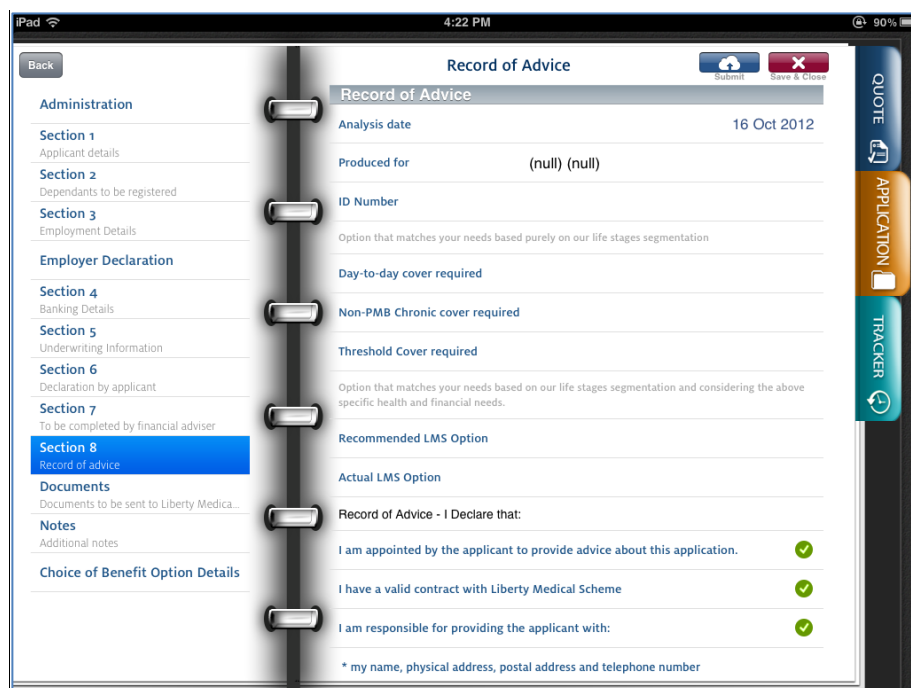
Navigation Sidebar:

- Back
- Administration
- Section 1: Applicant details
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- Section 3: Employment Details
- Employer Declaration
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- Section 6: Declaration by applicant
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- Documents: Documents to be sent to Liberty Medica...
- Notes: Additional notes
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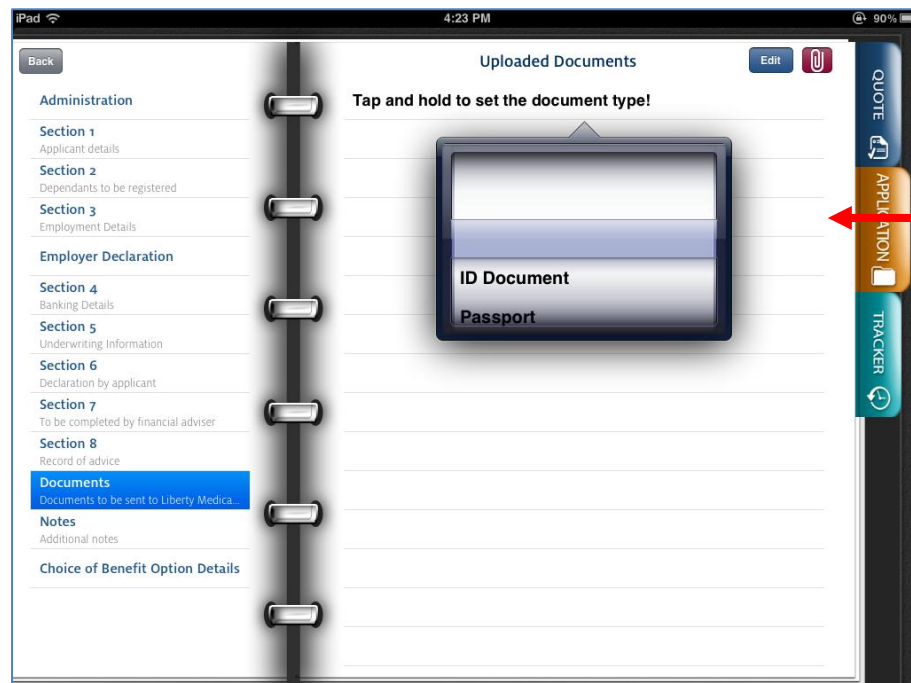
Right Sidebar:

- QUOTE
- APPLICATION
- TRACKER

10. Complete Section 8 – this is the Record of Advice and should be completed by you as the financial adviser.

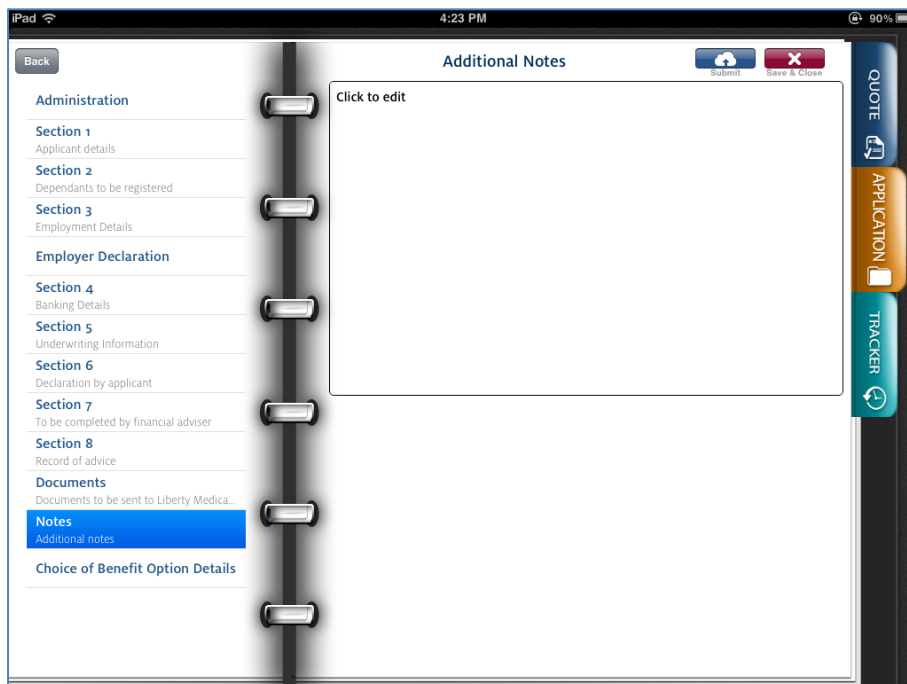


11. In the 'Documents' section you can upload the documents that we need to process the application.

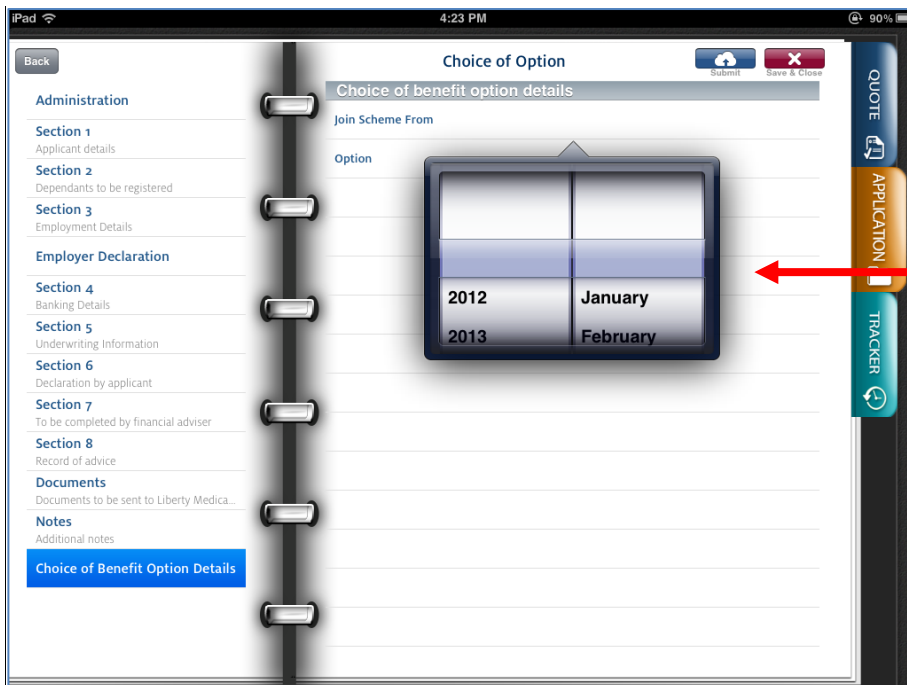


Add documents by tapping on the paper clip icon. To delete uploaded documents, tap on 'Edit'.

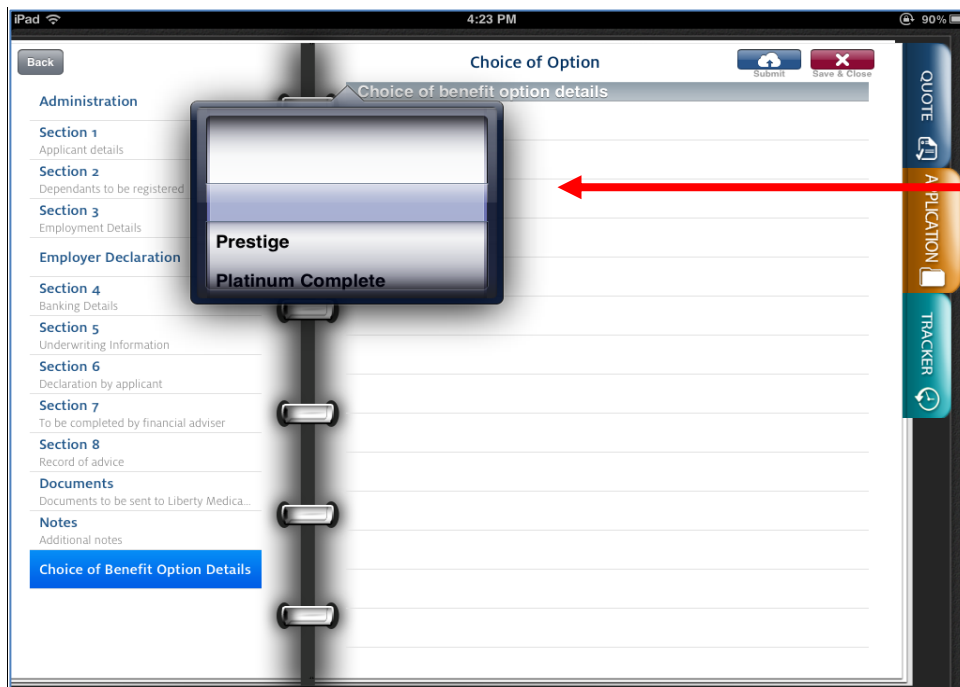
12. Use the 'Additional notes' section to include information like additional notifications or the DCZ number of the declaration form/additional documentation.



13. Complete the 'Choice of Benefit Option Details' section by selecting the benefit year and option.



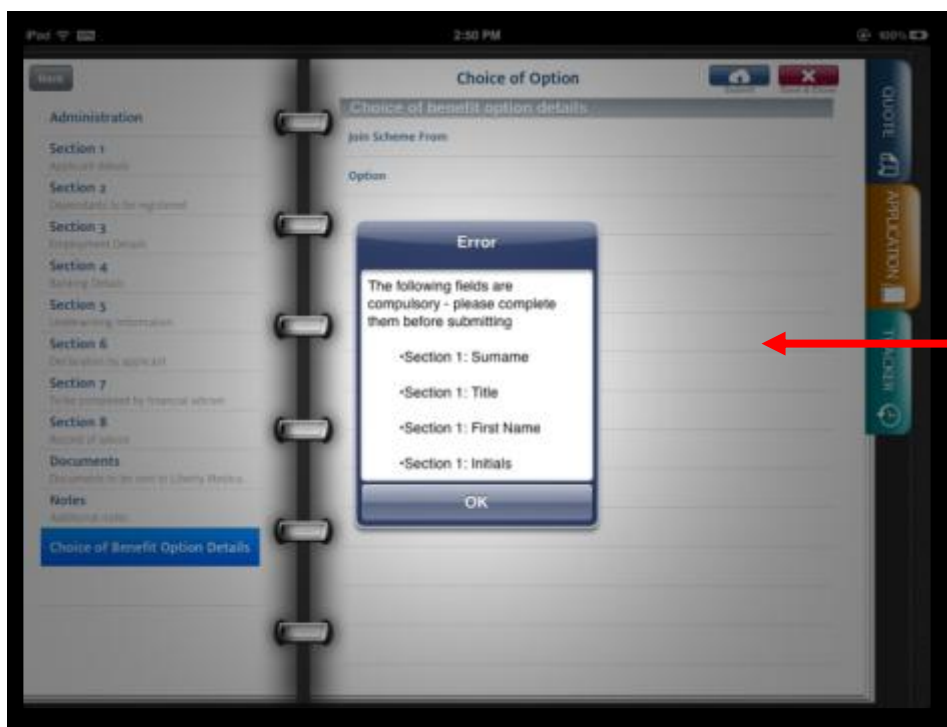
The effective date from when the applicant will join the Scheme.



Tap the relevant option the applicant has selected.

14. Finalising the application process:

- After you have completed all the sections of the application, simply tap on 'Submit'.
- The application information is submitted directly to LMS and you will receive a reference number. Use this number on the 'Declaration' that you will send us.



If you haven't completed all the compulsory fields, a pop-up box will be displayed that will list the outstanding fields.

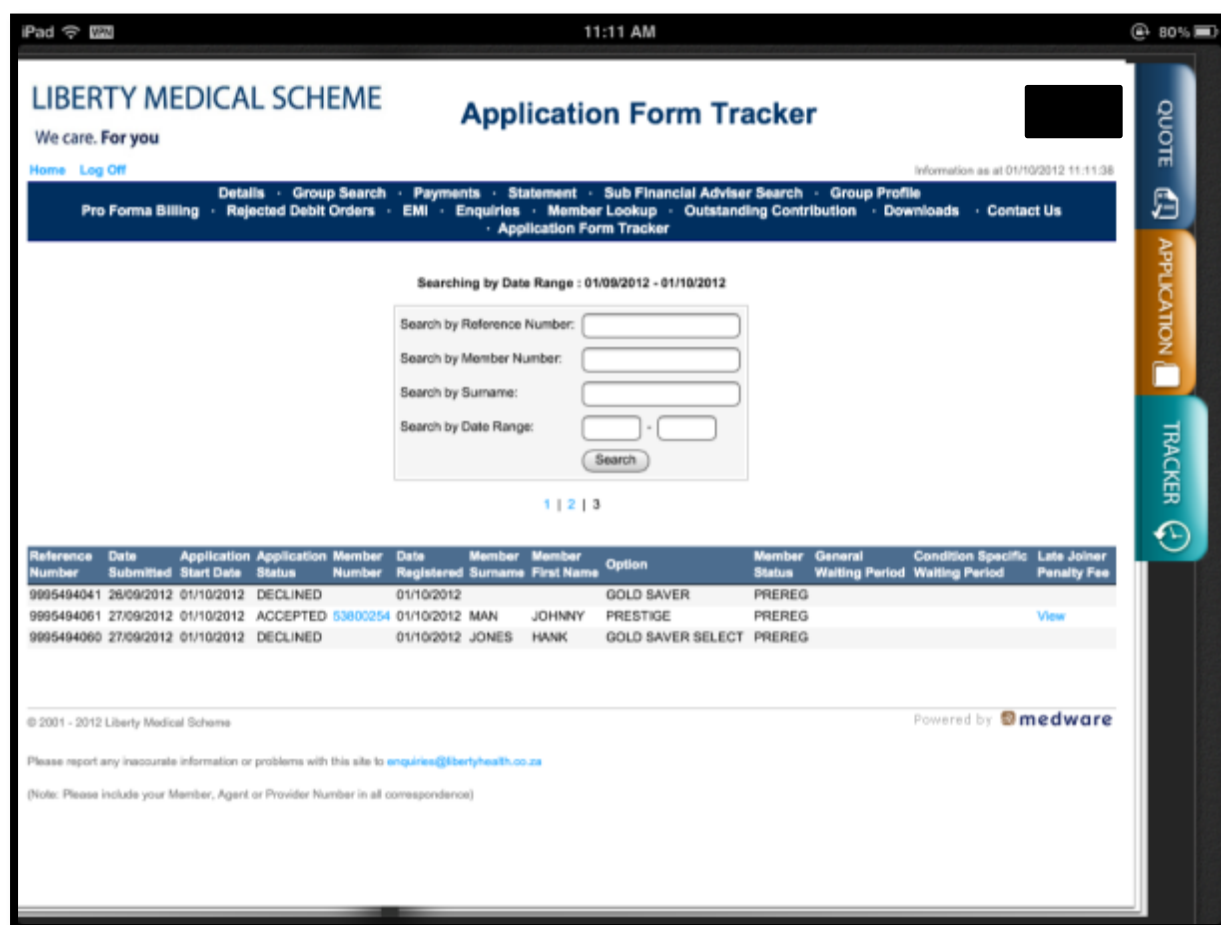
Tracker

How to track application progress and view online enquiries

On the Tracker page you can:

- access various active links to all your client information,
- search for specific information according to different criteria
- track the status of applications you submitted, and
- view online enquiries.

Please note: All live data has been blocked out from the below screenshot.



LIBERTY MEDICAL SCHEME
We care. For you

Application Form Tracker

Home Log Off

Information as at 01/10/2012 11:11:38

Details · Group Search · Payments · Statement · Sub Financial Adviser Search · Group Profile
Pro Forma Billing · Rejected Debt Orders · EMI · Enquiries · Member Lookup · Outstanding Contribution · Downloads · Contact Us
Application Form Tracker

Searching by Date Range : 01/09/2012 - 01/10/2012

Search by Reference Number:
Search by Member Number:
Search by Surname:
Search by Date Range: -

1 | 2 | 3

Reference Number	Date Submitted	Application Start Date	Application Status	Member Number	Date Registered	Member Surname	Member First Name	Option	Member Status	General Waiting Period	Condition Specific Waiting Period	Late Joiner Penalty Fee
9995494041	26/09/2012	01/10/2012	DECLINED		01/10/2012			GOLD SAVER	PREREG			
9995494061	27/09/2012	01/10/2012	ACCEPTED	53800254	01/10/2012	MAN	JOHNNY	PRESTIGE	PREREG			View
9995494060	27/09/2012	01/10/2012	DECLINED		01/10/2012	JONES	HANK	GOLD SAVER SELECT	PREREG			

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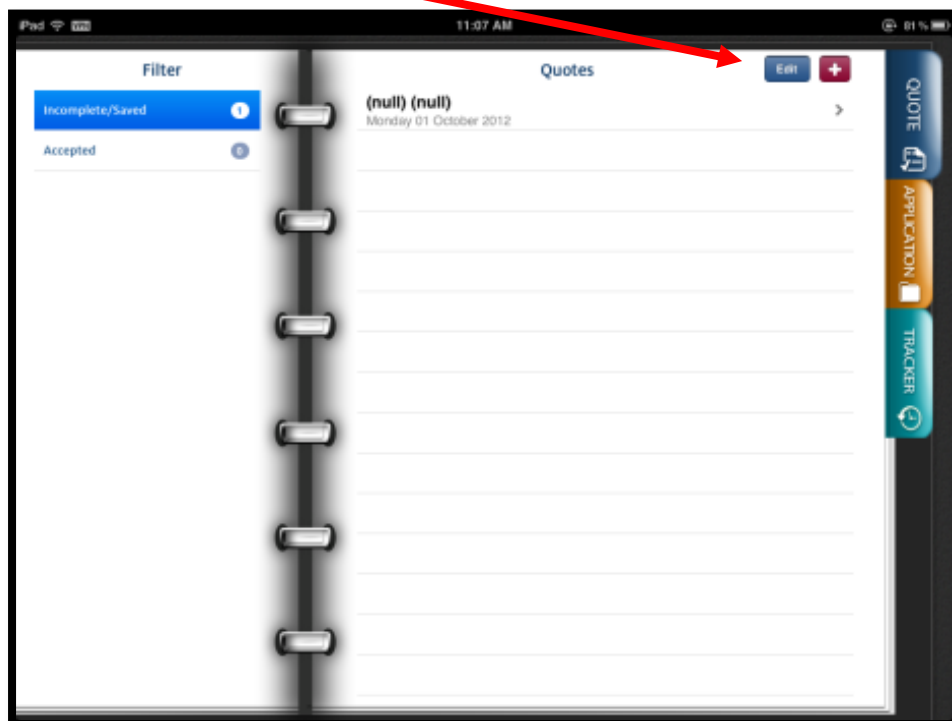
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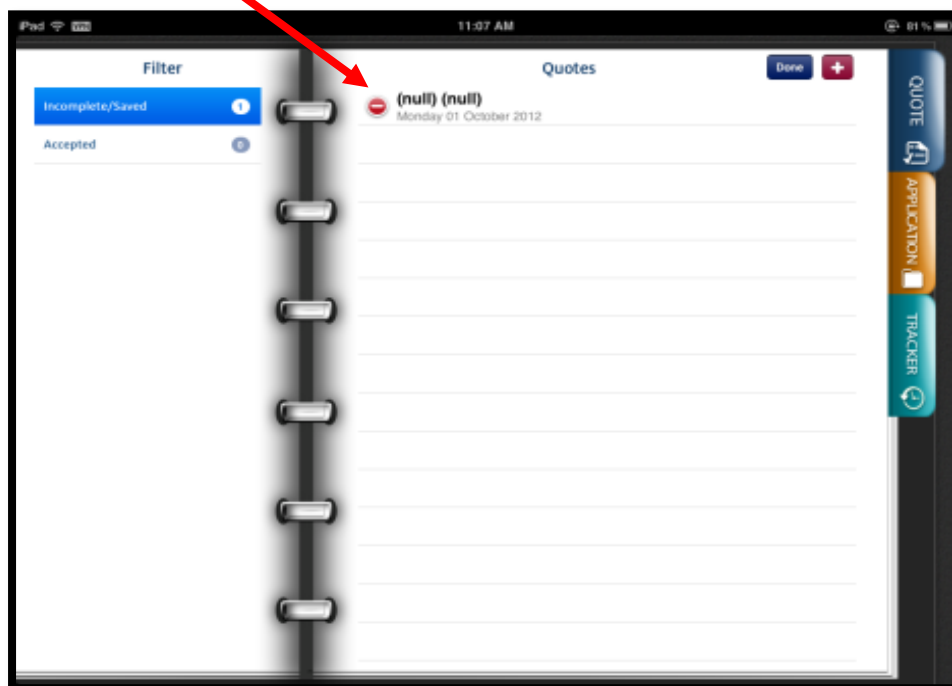
(Note: Please include your Member, Agent or Provider Number in all correspondence)

How to delete headings

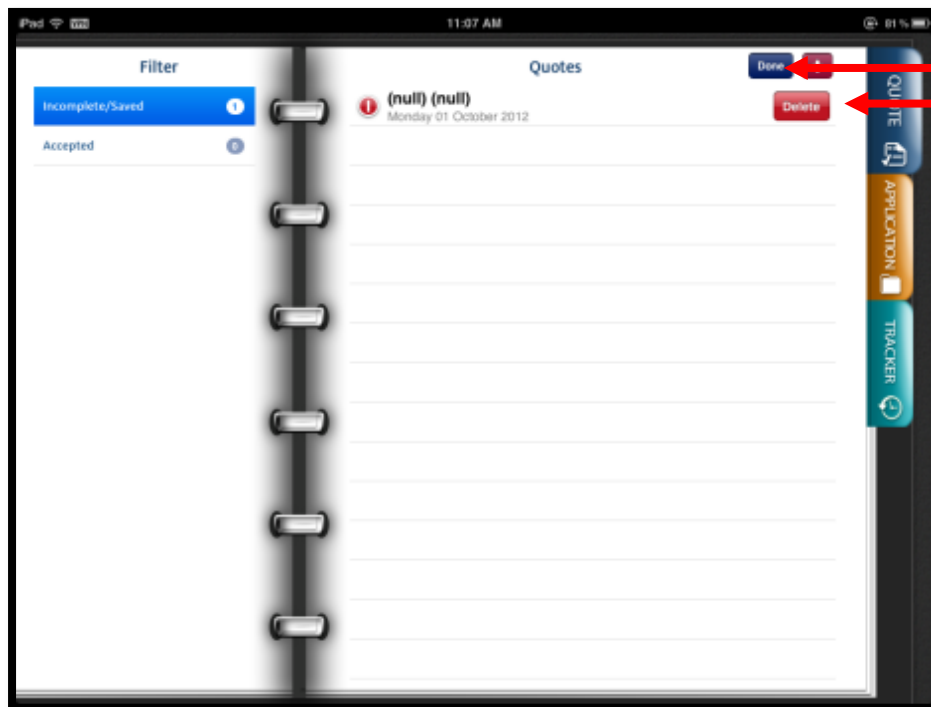
1. Tap on 'Edit'.



2. Tap on the '-' symbol



3. Tap on 'Delete' and then on 'Done'.



Tap 'Delete' to remove a heading and then tap 'Done' once you're finished.

