



**A. DETAILS OF APPLICANT** (Note: Please complete all sections in **BLACK** and attach copy of SA ID document / Passport)

Surname																									Title				
First name(s) (in full)																									Initials				
ID number									Date of birth	D D M M Y Y Y Y				Gender	M F														
Race	Black		Coloured		White		Asian or Indian		Other																				
Passport number													Income Tax number																
Employer name																													
Occupation full details																													
Date of employment	D D M M Y Y Y Y								Language																				

**B. FAMILY MEMBERS TO BE INCLUDED** (Note: Please attach copies of SA ID document / Passport:)

1) Dependant children or other members of immediate family in respect of whom the member is liable for care and support

Dependant type	<b>1</b>	Spouse / Partner / Dependant 1	<input type="checkbox"/>
Surname			
First name(s) (in full)			
Initials		Title	
		Gender	M F
ID number			
Passport number			
Email			
Contact No.			
Date of birth	D D M M Y Y Y Y		Age
Relationship to applicant	Married Disabled Full-time student		
	Is your dependant financially dependent on you?		Y N
	Does your dependant earn an income?		Y N
	If yes, what is the monthly income?		
Dependant type	<b>2</b>	Dependant 2	<input type="checkbox"/>
Surname			
First name(s) (in full)			
Initials		Title	
		Gender	M F
ID number			
Passport number			
Email			
Contact No.			
Date of birth	D D M M Y Y Y Y		Age
Relationship to applicant	Married Disabled Full-time student		
	Is your dependant financially dependent on you?		Y N
	Does your dependant earn an income?		Y N
	If yes, what is the monthly income?		
Dependant type	<b>3</b>	Spouse / Partner / Dependant 3	<input type="checkbox"/>
Surname			
First name(s) (in full)			
Initials		Title	
		Gender	M F
ID number			
Passport number			
Email			
Contact No.			
Date of birth	D D M M Y Y Y Y		Age
Relationship to applicant	Married Disabled Full-time student		
	Is your dependant financially dependent on you?		Y N
	Does your dependant earn an income?		Y N
	If yes, what is the monthly income?		
Dependant type	<b>4</b>	Spouse / Partner / Dependant 4	<input type="checkbox"/>
Surname			
First name(s) (in full)			
Initials		Title	
		Gender	M F
ID number			
Passport number			
Email			
Contact No.			
Date of birth	D D M M Y Y Y Y		Age
Relationship to applicant	Married Disabled Full-time student		
	Is your dependant financially dependent on you?		Y N
	Does your dependant earn an income?		Y N
	If yes, what is the monthly income?		

A child dependant who is self-supporting will have to enrol as a principal member.

**C. CONTACT DETAILS**

Residential address  Postal address   
   
 Code   Code   
 Telephone (W)  Cell  Alt. Cell   
 Telephone (H)  Fax   
 Email address   
 SMS correspondence  YES  NO Email statement  YES  NO Email newsletter  YES  NO

**D. DETAILS OF PREVIOUS MEMBERSHIP - APPLICANT**

(Should membership certificates not be attached at time of submission, waiting periods and/or late joiner penalty may be imposed)

Name of scheme  from  DDMMYYYY to  DDMMYYYY  
 Name of scheme  from  DDMMYYYY to  DDMMYYYY  
 Proof attached  YES  NO  
 Have you ever been declined, or had late joiner penalties, exclusions or waiting periods imposed by a medical scheme?  YES  NO  
 If yes please provide details: \_\_\_\_\_

**DETAILS OF PREVIOUS MEMBERSHIP - SPOUSE / PARTNER**

(Should membership certificates not be attached at time of submission, waiting periods and/or late joiner penalty may be imposed)

Name of scheme  from  DDMMYYYY to  DDMMYYYY  
 Name of scheme  from  DDMMYYYY to  DDMMYYYY  
 Proof attached  YES  NO  
 Have you ever been declined, or had late joiner penalties, exclusions or waiting periods imposed by a medical scheme?  YES  NO  
 If yes please provide details: \_\_\_\_\_

**E. PLAN AND PRODUCT SELECTION (Please indicate with an X where applicable)**

Only complete this section if plan selection was not made at employer group level on the Employer Application form or if your employer has allowed you to override the group level selection.

<input type="checkbox"/> Rise	<input type="checkbox"/> Flex	<input type="checkbox"/> Flex Plus	<input type="checkbox"/> Aspire	<input type="checkbox"/> Advance	<input type="checkbox"/> Cobalt
<input type="checkbox"/> Optimum	<input type="checkbox"/> Ultimate	<input type="checkbox"/> Millennium	<input type="checkbox"/> Millennium Select		

Foundation Income category  R0 - R5 100  R5 101 - R6 850  R6 851 - R10,010  R10,011+

Income category on the Foundation option will be based on the income of the spouse/partner if higher than that of principal member. Find attached to my application (please tick the appropriate box):

Latest income tax return  Commission / fee statement (submit 6 months statements)  
 Latest salary advice  Auditor / accountant's letter  Certified Bank statements for the last 3 months (mandatory)

4.45.1. "Income", for the purposes of calculating contributions in respect of –  
 4.45.2. a Member who is an Participating Employee – his total cost of employment, from all sources, including all allowances, incentives and emoluments (taxable or not);  
 4.45.3. an individual Member, including self-employed individual Members, the higher of his or her Spouse's or Partner's (if applicable) total gross monthly earnings from all sources, including all allowances, incentives and emoluments (taxable or not);  
 4.45.4. a continuation Member – his gross monthly pensionable earnings and all income from other sources, including interest earned, (taxable or not);  
 4.45.5. for Members or dependents earning a commission, in full or in part of his / her total remuneration, the monthly contribution shall then be based on the average monthly income for the twelve (12) months prior to signing the application to be admitted as a Member or dependant. The Scheme, at the sole discretion of the Board of Trustees, reserves the right to call for such proof of income (including, but not limited to, bank statements, tax assessment and commission statements) as may be necessary

**The following documents are mandatory for Pensioner and Partner/Spouse:**

- Certified Bank statements for the last 3 months (mandatory)
- Grinrod Bank Statement for the last 3 months (mandatory)
- Pension Fund Statement for the last 3 month (mandatory)
- Signed letter of undertaking (mandatory)
- Latest income tax returns if the member is not registered, a letter from SARS is required.

Should no proof of income be attached, you will be placed in the highest income bracket. Proof of income must be submitted annually before December each year. Members with registered Adult Dependants must complete the Household Income Verification form on page 9 and submit proof of income as per the form's specifications.

**REFERENCE & CREDIT BUREAU CONSENT**  
 I/We hereby consent to you or your administrator/s making enquiries to my/our credit records and references with any credit reference agency or any third party to confirm the details provided. I confirm that this consent shall apply in every respect to every director, shareholder, member and/or associate of the applicant. I/We irrevocable authorise Health Squared or their administrator to obtain from any person any information that Health Squared requires to assess the information contained in this application.

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ / \_\_\_\_\_

SIGNATURE

Signature of Applicant



8a. Gynaecological and obstetrical disorders e.g. ectopic pregnancy, caesarean section, fibroids, endometriosis, menstrual irregularities, abnormal papsmear, receiving hormone treatment, vaginal bleeding, laparoscopic surgery, dilatation and curettage, miscarriages, pregnancy related problems, cysts, infertility, breast disorders	YES	NO
8b. Pregnancy - expected date of delivery	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	YES NO
9. Male genitourinary system e.g. testes, prostate, abnormalities of the penis, scrotum, reproductive system	YES	NO
10. Musculoskeletal disorders e.g. osteo-arthritis, rheumatoid arthritis, back problems, gout, osteoporosis, all joint problems e.g. knee, shoulder, bones, limbs, spine, fractures, carpal tunnel syndrome, bunion, spondylosis, hernia, kyphosis / scoliosis	YES	NO
11. Neurological disorders e.g. epilepsy, muscular weakness, stroke, brain or spinal cord disorders, chronic fatigue, headache, migraine, polio, paralysis, Guillian-Barre, meningitis, Parkinson's disease, Alzheimer disease, dementia	YES	NO
12. Psychological disorders e.g. insomnia, anxiety, depression, stress, panic attacks, alcohol or drug dependency, attention deficit disorder, post traumatic stress, schizophrenia, bi-polar disorders, mood swings, attempted suicide, anorexia / bulimia nervosa	YES	NO
13. Renal (kidney) disorders e.g. blood in the urine, urinary tract stones, recurrent infections, kidney failure, bladder problems, dialysis, Addisons disease, nephritis	YES	NO
14. Respiratory disorders e.g. asthma, allergic rhinitis, chronic bronchitis, emphysema or cigarette smoking related disorders, tuberculosis, persistent cough, allergies, chronic obstructive pulmonary disease, pneumoconiosis	YES	NO
15. Skin disorders e.g. eczema, psoriasis, melanoma, skin cancer, burns, acne, scars, keloids, growths, warts, ingrown toe nails	YES	NO
16. State whether you or any of your dependants, have received medical advice or treatment for any infectious and tropical disease e.g. gonorrhoea, genital herpes, syphilis, TB, hepatitis, bilharzia, malaria, cholera	YES	NO
17. Do you or any of your dependants have any birth defects or hereditary disorders?	YES	NO
18. Have you or any of your dependants ever sought counselling or treatment for HIV or AIDS related infections or ever tested positive for HIV or AIDS?	YES	NO
19. Have you or any of your dependants ever been diagnosed and / or treated for an immune system problem?	YES	NO
20. Previous injuries and trauma including sports injuries?	YES	NO
21. Have you or any of your dependants ever been told to improve your adherence to medical treatment?	YES	NO
22. Have you ever required rehabilitation following an event i.e. stroke or motor vehicle accident?	YES	NO

If "yes" answered to any of the questions above, please supply full details below

Question	Applicant	Date	Disorder	Treatment	Consulting Doctor	Current condition

If the space provided is insufficient please complete *addendum A*.

Addendum attached  YES  NO

**SURGERY AND HOSPITAL ADMISSIONS**

1. Please supply details of all surgical procedure(s) and ALL HOSPITAL ADMISSIONS that you or any of your dependants have undergone in the past, and/or details of all planned surgical procedure(s) and ALL HOSPITAL ADMISSIONS that you or any of your dependants expect to undergo in the future.

Applicant	Surgical procedure / Hospital admission	Date	Reason	Doctor	Current condition

**CHRONIC MEDICATION**

1. Please supply details of any chronic medication (prescribed medicines used continuously for more than 3(three) months) currently prescribed for you or any of your dependants.

2. Do you or any of your dependants expect chronic medication to be prescribed in the next 12 months?  YES  NO

If so please supply details below.

Applicant	Prescribed medication	Medical condition	Date started / to be started

**H. GENERAL HEALTH QUESTIONS**

1.	Do you or any of your dependants expect to receive any treatment in the next 12 months and do you or your dependants expect to be, or are currently, hospitalised?	YES	NO
2.	Has any close blood relative (excluding dependants named in this application form) ever been diagnosed with heart disease, high blood pressure, high cholesterol, diabetes or any other hereditary disease?	YES	NO
3.	Do you or any of your dependants have incomplete dental treatment plans, dental implants, orthodontic treatment, dentures, wisdom teeth problems or do you or currently receive, or expect to receive, dental treatment in the next 12 months?	YES	NO
4.	Are you or any of your dependants currently involved in any third party or WCA claim that may include medical treatment? If so please provide below FULL details of injuries, surgery and investigative procedures for which claims will be, or have been, lodged.	YES	NO
5.	Investigations and / or specialised treatment (in and out of hospital)	YES	NO
6.	In the past 2 years, have you or any of your dependants had any x-rays, electrocardiogram or other examinations, including genetic testing or tumour markers, operations or hospitalisations?	YES	NO
a.	Are you or any of your dependants currently undergoing, or expect to undergo investigations for any medical condition and / or symptoms not yet diagnosed?		
b.	Are you or any of your dependants currently receiving or expect to receive specialised treatment (i.e. chemotherapy, radiotherapy, bone marrow transplant, mechanical ventilation, oxygen therapy, dialysis, psychotherapy or counselling)?	YES	NO
7.	Have you or any of your dependants ever received medical advice, counselling or treatment to reduce alcohol consumption for alcohol abuse or alcoholism?	YES	NO
8.	Do you or any of your dependants use stimulants, any illegal drug substances or have ever been treated for illegal drug substance abuse or addiction?	YES	NO
9.	Investigations and / or specialised treatment (in and out of hospital)	YES	NO
a.	Are you or any of your dependants currently undergoing, or expect to undergo investigations for any medical condition and / or symptoms not yet diagnosed?		
b.	Are you or any of your dependants currently receiving or expect to receive specialised treatment (i.e. chemotherapy, radiotherapy, bone marrow transplant, mechanical ventilation, oxygen therapy, dialysis, psychotherapy or counselling)?	YES	NO
10.	In the past 2 years, have you or any of your dependants had any x-rays, electrocardiogram or other examinations, including genetic testing or tumour markers, operations or hospitalisations?	YES	NO

If yes answered to any of the questions above, please supply full details below.

Question	Applicant	Full details (including details of disorder, date diagnosed, nature and duration of treatment and consulting doctor's details)

If the space provided is insufficient, please complete *addendum A*.

**HEIGHT AND WEIGHT**

<b>Applicant</b>	Initials <input type="text"/>	Height <input type="text"/> cm	Weight <input type="text"/> kg
<b>Spouse / Partner / Dependant 1</b>	Initials <input type="text"/>	Height <input type="text"/> cm	Weight <input type="text"/> kg
<b>Dependant 2</b>	Initials <input type="text"/>	Height <input type="text"/> cm	Weight <input type="text"/> kg
<b>Dependant 3</b>	Initials <input type="text"/>	Height <input type="text"/> cm	Weight <input type="text"/> kg
<b>Dependant 4</b>	Initials <input type="text"/>	Height <input type="text"/> cm	Weight <input type="text"/> kg

**N. B.** Any misrepresentation or non-disclosure of medical material or factual information will render all benefits granted by the Scheme null and void. In addition, any payment made due to such actions will be recovered from the member by the Scheme.

**I. PAYMENT METHOD**

Payment Method  Debit order  PERSAL  Via employer  EFT

Billing Method  Advance  Arrears

**J. CONTRIBUTION COLLECTION DETAILS**

Claim refunds can only be paid by direct credit to your bank account. All claims will be reimbursed at Scheme rate, unless otherwise indicated.

Name of bank

Account type  Cheque  Transmission  Savings

Name of account holder

Account number

Branch

Branch code

Monthly debit order  1st  5th

**K. CLAIM REIMBURSEMENT DETAILS**

Cheque  Transmission  Savings

**HEALTH SQUARED** ("the Scheme") is hereby authorised to draw against the above bank account the amount due in terms of this contract, wherever it may be conducted, and similarly I authorise my bank to debit my account with amounts drawn against it by the Scheme.

I understand that the withdrawals hereby authorised will be processed by computer through a system known as ABSA / Debit Order / Multidata and I also understand that the details of each withdrawal will be printed on my bank statement or on an accompanying voucher.

I agree to pay any bank charges relating to this, ABSA / Debit Order / Multidata, instruction.

The authority may be cancelled by myself giving the Scheme / Agility Health (Pty) Ltd one calendar month notice in writing by the principal member, but I understand that I shall not be entitled to any refund of amounts which the Scheme has withdrawn while this authority was in force if such amounts were legally owing to the Scheme. Receipt of this instruction by the Scheme / Agility Health (Pty) Ltd shall be regarded as receipt thereof by my bank.

I further agree to advise the Scheme / Agility Health (Pty) Ltd in writing of any changes which may occur.

Signature of Account Holder

SIGNATURE

## L. MEMBER ACKNOWLEDGEMENT AND DECLARATION

### General

1. *I, the undersigned applicant:*

- 1.1 Hereby apply for myself and my dependants to be registered on the **HEALTH SQUARED** ("the Scheme") and agree to abide by and undertake to familiarise myself with the Rules of the Scheme;
- 1.2 Warrant that the contents of this application and any other documents which may be required in support thereof are true, correct and complete, whether recorded in writing by me or by any intermediary on my behalf and, should there be any change in the state of health or change in personal status by myself or any of my dependants from the date of signing this application form and the date of inception of the membership, notification of such change will be provided to the Scheme immediately upon occurrence of the change, in writing with full details of such condition / ailment as soon as I become aware of the circumstances. Such notification is to include all available medical reports relating to any health conditions in order to enable the Scheme to investigate the circumstances causing and/or contributing to such change;
- 1.3 Understand that the statement and answers provided form the basis of the contracts and any breach of my warranty or non disclosure of any information material to the assessment of this application shall render any contracts to which this application relates null and void and all contributions paid shall be forfeited;
- 1.4 Understand and accept that no benefit will be payable by the Scheme unless they are satisfied as to the validity of a claim and have received all requirements which they may deem necessary, including the result of such medical examinations and tests that they may require me or my dependants to undertake;
- 1.5 Consent to the Scheme addressing any requests for information, tests or examinations directly to any dependants of mine over the age of 18, with the same legal consequences as if the request had been addressed to me in my capacity as a member;
- 1.6 Acknowledge that it is my responsibility as a member to ensure that claims are submitted within the 4 month submission period (Rule 15.2).
- 1.7 Acknowledge that it is my responsibility as a member to ensure that the monthly contribution is received by the Scheme in terms of the rules of the Scheme;
- 1.8 Acknowledge and accept that the Scheme reserves the right to cancel membership of the Scheme if any contribution is not paid on the due date; and
- 1.9 Undertake to inform the Scheme within One (1) calendar month should the situation regarding the dependency of any of my dependants change (Rule 7.2.1).
- 1.10 Am familiar with and have full knowledge of the irrefutable conditions and benefits of the option elected, notwithstanding misrepresentation by any other party;
- 1.11 That neither myself nor my dependants are dependants of another medical scheme;
- 1.12 Hereby consent to all conversations between myself, the Scheme or any party being recorded;
- 1.13 Understand, acknowledge and accept that I may be contacted by the Scheme's panel of attorneys in order to verify the possibility of claims being recovered from third parties. I understand that I will not be liable for any costs herein and that any costs are deductible from the successful proceeds of any action.
- 1.14 Understand that by recovering from third parties I will contribute to the overall financial sustainability of the Scheme.

### Authority

2. Accepting that I am curtailing my and my dependants right to privacy, but in order to facilitate the assessment of the risk and the consideration of any claim, I irrevocably authorise:
  - 2.1 The Scheme / Panel of attorneys, whom I hereby so authorise and direct to give, any information which the Scheme deems necessary.
  - 2.2 I further authorise and instruct the Scheme and any hospital concerned to give any information relating to myself and my dependants to the Medical Case Managers and/or Managed Care Organisation and their personnel appointed by the Scheme, for the purposes of ensuring that the members of the Scheme receive appropriate and necessary medical services while reducing inappropriate care and wastage of medical resources. I also consent to the processing of the information herein for purposes of marketing of value added or similar products and services.
  - 2.3 I understand and accept that the above authorisation constitutes a partial waiver of my and my dependants right to privacy.
3. *declare that:*
  - 3.1 I am liable for his/her family care.
  - 3.2 Dependant children or other members of immediate family in respect of whom the member is liable for care and support.
  - 3.3 My dependant(s) is/are not in receipt of remuneration.
  - 3.4 My dependant(s) is/are not a member(s) or dependant(s) of another medical scheme.
4. By their signature hereto any of my dependants who have reached or are over the age of 18 declare themselves bound to the above terms

### Termination

4. On termination of my membership of the Scheme:
  - 4.1 One (1) calendar month written notice (Rule 12.2.1)

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ /

SIGNATURE

Signature of Applicant





# HEALTH SQUARED

## HOUSEHOLD INCOME VERIFICATION - FOUNDATION MEMBERS

Name & Surname

ID Number  Telephone / Cell No:

**Important: We cannot process your application form if you have not attached the correct documentation for us to verify you household income**  
(Please indicate with an "X" where applicable)

**1. Working full-time:** Number of persons in household

1.1 Certified personal Bank statements for the last 3 months (mandatory); <b>and</b>	
1.2. Salary advice for the last 3 months; or	
1.3. Letter from Employer, on a company letterhead or stamped with a company stamp, stating gross monthly income; or	
1.4. Letter of appointment (when start date is not older than 30 days)	

**2. Studying full-time:** Number of persons in household

2.1 Certified personal Bank statements for the last 3 months (mandatory); <b>and</b>	
2.2. Official proof of enrolment or registration (no student cards, statements, invoices or acceptance letters)	

**3. Self-employed:** Number of persons in household

3.1 Certified personal Bank statements for the last 3 months (mandatory); <b>and</b>	
3.2. Audited financial statements (not older than 12 months); or	
3.3. Latest income tax return; or	
3.4. Letter from accountant or auditor confirming the member's gross monthly income	

**4. Unemployed:** Number of persons in household

4.1 Certified personal Bank statements for the last 3 months (mandatory); <b>and</b>	
4.2. Latest proof of unemployment, retrenchment	
4.3. Latest income tax return (if the member is not registered, a letter from SARS is required)	

**5. Disabled:** Number of persons in household

5.1 Certified personal Bank statements for the last 3 months (mandatory); <b>and</b>	
5.2. A certificate from the Physician to prove disability must be attached; or	
5.3. Proof of disability grant; or	
5.4. Affidavit as per the prescribe form; or	
5.5 Official proof from SARS in the form of the ITR-DD form	

**6. Pensioners:** Number of persons in household

6.1. Grinrod Bank Statement of the last 3 months; or	
6.2. Pension Fund Statement of the last 3 months; <b>and</b>	
6.3 Latest income tax return (if the member is not registered, a letter from SARS is required); <b>and</b>	
6.4 Certified Bank statements for the last 3 months ( <b>mandatory</b> )	

### REFERENCE & CREDIT BUREAU CONSENT

I / We hereby consent to you or your administrator/s making enquiries to my/our credit records and references with any credit reference agency or any third party to confirm the details provided. I confirm that this consent shall apply in every respect to every director, shareholder, member and/or associate of the applicant. I / We irrevocable authorise Health Squared or their administrator to obtain from any person any information that Health Squared requires to assess the information contained in this application

Signed at \_\_\_\_\_ on this \_\_\_\_\_ day of \_\_\_\_\_ /

**SIGNATURE**

Signature of Applicant

# Addendum A

### G. SPECIFIC HEALTH QUESTIONS

Question	Applicant	Date	Disorder	Treatment	Consulting Doctor	Current Condition

### G. GENERAL HEALTH QUESTIONS

Question	Applicant	Date	Disorder	Treatment	Consulting Doctor	Current Condition