

## Administration Guide

We've put together this handy guide to help you successfully set up and administer your Westfield Health plan.

Your plan is simple to operate, and this guide provides all the information you need to know. However, if you do need any help or guidance on setting up your plan or have any questions once the plan is in operation, please call us on **0114 250 2000** and our **Customer Care Team** will be happy to help.

### 1. Making changes to the employees on your plan.

We've attached a Membership Changes Form which you'll need to use to let us know about all company paid starters and leavers, and also of any personal detail's changes such as a change of address or name. Once completed, please email the form to [membership@westfieldhealth.com](mailto:membership@westfieldhealth.com)

To ensure all your changes are made as quickly as possible, please only notify us by using this form and making sure that all mandatory data is completed. If the form isn't completed correctly and/or mandatory data is missing, we'll need to return it to you for correction/completion, which will cause a delay.

Invoices are created and issued on or around the 1<sup>st</sup> of each month. Changes received before the 22<sup>nd</sup> of the month will be included on the following month's invoice and changes received after the 22<sup>nd</sup> will be included on the month after. So for example, changes received on 21<sup>st</sup> January would be included on February's invoice, whereas changes received on 23<sup>rd</sup> January would be included on March's.

#### **Employees voluntarily upgrading their cover and/or adding an additional adult**

Your employees will have the option to upgrade their cover or add an additional adult to their cover directly through Westfield, within the month of your company anniversary date.

When an employee is added onto your corporate cover, we issue them with a Welcome Letter approx. 7-10 working days after we've added them onto our system.

The Welcome Letter directs your employees to **My Westfield**, where they can personally manage their account online from their policy start date. Within My Westfield, employees will find their plan guide and an application form. They will need to complete the application form and send directly to Westfield for us to process. Please note any upgrades or additional adults are paid for by their own private Direct Debit. We cannot accept any applications for upgrades/additional adult cover outside of your company anniversary date.

Phone: 0114 250 2000 Email: [membership@westfieldhealth.com](mailto:membership@westfieldhealth.com)

## 2. How to pay your premiums - BACS

We issue one invoice per month, which will arrive on or around the 1<sup>st</sup> of each month. Your invoice will show your current membership and any premiums due.

If you have any changes you want to make in preparation for your invoice, please email us before the 22<sup>nd</sup> of each month for the following month's changes. These changes should be emailed to [membership@westfieldhealth.com](mailto:membership@westfieldhealth.com) using the Membership Changes Form mentioned previously.

Don't worry if you have changes to make *after* receiving your invoice, these will simply show as arrears or refunds on your next invoice. Payment by BACS should be made to our bank on a monthly basis. You should quote your company number and always pay the invoiced amounts. Our bank details are below:

**Bank:** HSBC

**Sort code:** 400530

**Account no:** 64567838

**Account name:** Westfield Contributory Health Scheme Limited General Account

**Quoting reference:** This reference number will be your Westfield Health company reference number

Please keep a copy of your invoices for your own records. Any invoices not paid will fall into our credit control procedure. We don't provide P11D information, so it's essential you have a copy of changes you have made on your plan.

## 3. A personal service for your employees

Our friendly **Customer Care Team** is on hand to help whether your employees have an enquiry about their policy or need advice with a claim.

### Online

An easy and convenient way for policyholders to access their account details around the clock. It's as easy as simply registering and logging on to [www.westfieldhealth.com](http://www.westfieldhealth.com) and going to the **My Westfield** area. Here policyholders will be able to download more claim forms, check their benefit balance and update their address details. Policyholders can register their plan online from their policy start date.

### Phone

Customers can call our Customer Care Team on **0114 250 2000** our lines are open from 8:30am to 5:30pm Monday to Friday (except for Christmas Eve and Public Holidays).

### Email

Policyholders can also email [enquiries@westfieldhealth.com](mailto:enquiries@westfieldhealth.com) - we're only a click away.

### 3. Important Information

Westfield Contributory Health Scheme Limited is authorised by the Prudential Regulatory Authority and regulated by both the Financial Conduct Authority and the Prudential Regulatory Authority. Our financial services registration number is 202609.

#### Data Protection

Westfield take the privacy of all customers and those that communicate with us very seriously. We believe in being open and up front with users and customers and have developed our Privacy Promise, a quick and simple summary explaining how we manage, share and look after your information.

- **You're always in control:** Your privacy will be respected at all times, and we will put you in control of your privacy with easy-to-use tools and clear choices.
- **We work transparently:** We will be transparent about the data we collect and how we use that data so that you can make fully informed choices and decisions.
- **We operate securely:** We will protect the data that you entrust to us via appropriate security measures and controls and have achieved ISO27001 certification. We'll also ensure through the contracts we have in place, that other businesses we work with are just as careful with your data.
- **For your benefit:** When we do process your data, we will use it to benefit you, to make your experience better and to improve our products and services.

For further information about our data protection relationship and about how we process personal data please see our Group Terms and Conditions and Privacy Notice available on our website: [www.westfieldhealth.com/about-us/legal/privacy-policy](http://www.westfieldhealth.com/about-us/legal/privacy-policy).

Alternatively, if you have any questions about how we process personal data, please contact our Data Protection Officer: [dpo@westfieldhealth.com](mailto:dpo@westfieldhealth.com)