

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 details changes such as a change of address or name. Once completed, please email the form to companydd@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.**

Changes received before 5th of **each month will be included on the current month's invoice.** Any changes received after 5th of the month will be included in the following **month's invoice.**

Employees voluntarily upgrading their cover and/or adding a partner

You employees will have the option to upgrade their cover, or add their partner to their cover directly through Westfield.

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. 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 partners are paid for by their own private Direct Debit.

2. How to pay your premiums - Direct Debit

Direct Debit is an automated facility which debits payments directly from your bank account.

You'll receive an invoice between the 10th and 15th of each month. This will detail your current membership and premiums due, including any outstanding arrears or refunds. To ensure your membership is up to date, any changes you want to make in preparation for this invoice will need to be sent to companydd@westfieldhealth.com by the 5th of each month. Any changes sent after the 5th **will show as arrears or refunds on your next month's invoice.**

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.

All communication will be via email and Direct Debits are collected on/around the 27th of each month, with a delay of 2-3 days in collecting your payments during Bank Holiday periods.

When we **receive your bank details, the Direct Debit will be set up and we'll send you a letter** confirming the date the payment process is due to commence.

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 logging on to 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.

Phone

Customers can call our Customer Care Team on **0114 250 2000*** - our lines are open from 8am to 6pm Monday to Friday (except for Christmas Eve and Public Holidays).

Email

Policyholders can also email enquiries@westfieldhealth.com - **we're only a click away.**

3. Regulatory Compliance

Financial Services Compliance

The company, Westfield Contributory Health Scheme Limited, is authorised by the Prudential Regulatory Authority (PRA) and regulated by both the Financial Conduct Authority (FCA) and the Prudential Regulatory Authority (PRA). 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.

We have reviewed, redrafted and published all privacy notices to meet the compliance standards set out in the Data Protection Act 2018 and General Data Protection Regulation (GDPR). Both our privacy promise & privacy policy are available on our website here: www.westfieldhealth.com/about-us/legal/privacy-policy

For further information about our data protection relationship and about how we process your personal data please see our Group Terms and Conditions.

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