

## HOW TO CHANGE A MAIN MEMBER

- When the main member passes on, the dependant can choose to continue with the policy.
- In this case we then need to do a main member swap.
- Once we receive the update form and required supporting documents, the request is indexed against the member's policy and actioned in Putty in the MIU menu option.

```

TRA-TEST - PuTTY
MIP HEALTHCARE * V201508
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All rights reserved <nombulelom on tratstmp, 0> *NO SCHEME*

M A I N M E N U
Total Risk Administrators 2020/03/17
Scheme Option Information
001 = ABSOLUTE 024 = SUPER+ COTT 070 = CUREM BAS30
003 = ABSOLUT+ 026 = SUPER+ TRU 071 = CUREM VITAL
006 = ABSOLUT+ TR 027 = SUPER+ 072 = CUREM SUPER
007 = ABSOLUT TRU 028 = 4D SUPER+ 073 = CUREM ABSOL
008 = 4D ABSOLUT+ 030 = VITAL+ 080 = A&G ESSE
009 = BAS 300 TRU 031 = VITAL+* 081 = A&G COMPREH
011 = BASIC 300 032 = VITAL+ TRU 082 = A&G ABSOLUT
012 = 4D BAS 300 033 = 4D VITAL+ 090 = UNIVERSAL
017 = SAA PILOTS 036 = MALCOR GAP 095 = ANI: ABSOLU
018 = SAA PILOTS 037 = MALCOR TRA 096 = ANI: BASIC
019 = SECURITAS 039 = BAS TRA ASS 097 = ANI: SUPER+
020 = SUPER 067 = TRUGAP COMP 098 = ANI: VITAL+

Menu Information
A = ADMINISTRATION
B = BATCH RUNS
C = COMPANIES
D = DOCTORS
I = INFO INTERCHANGE
M = MEMBERS & CLAIMS
O = OTHER
P = PAYMENTS
R = REPORTING
S = STATISTICS
U = USER PROGRAMS
Q = QUIT

Scheme option: 003 Menu option: mi System printer: DEFAULT
Enter the scheme option
option, CR for previous menu, or F4 for main menu.
    
```

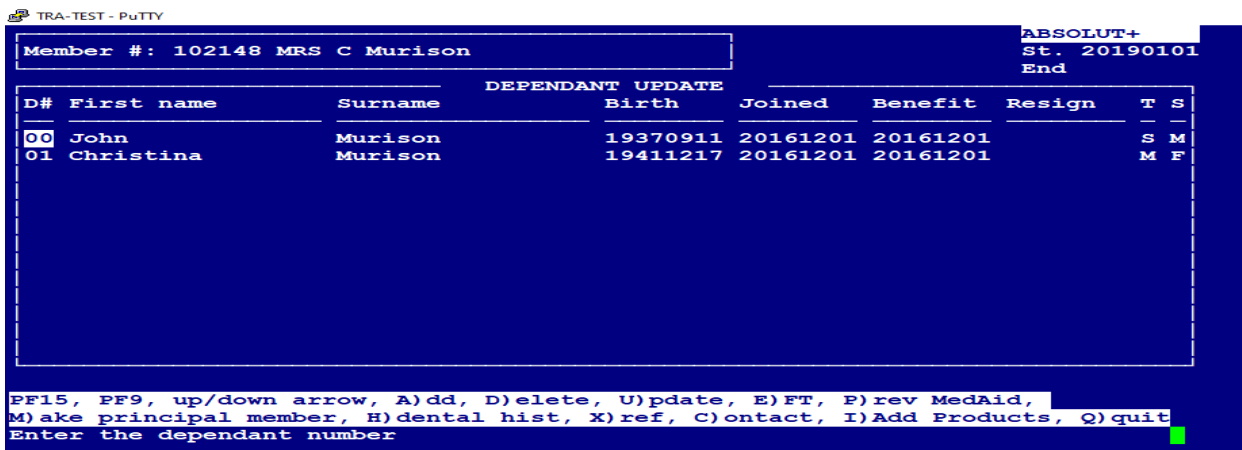
- After you are logged in and you are on the Main Screen, select MIU.
- Enter the Policy Number to access the information of the Policyholder.

```

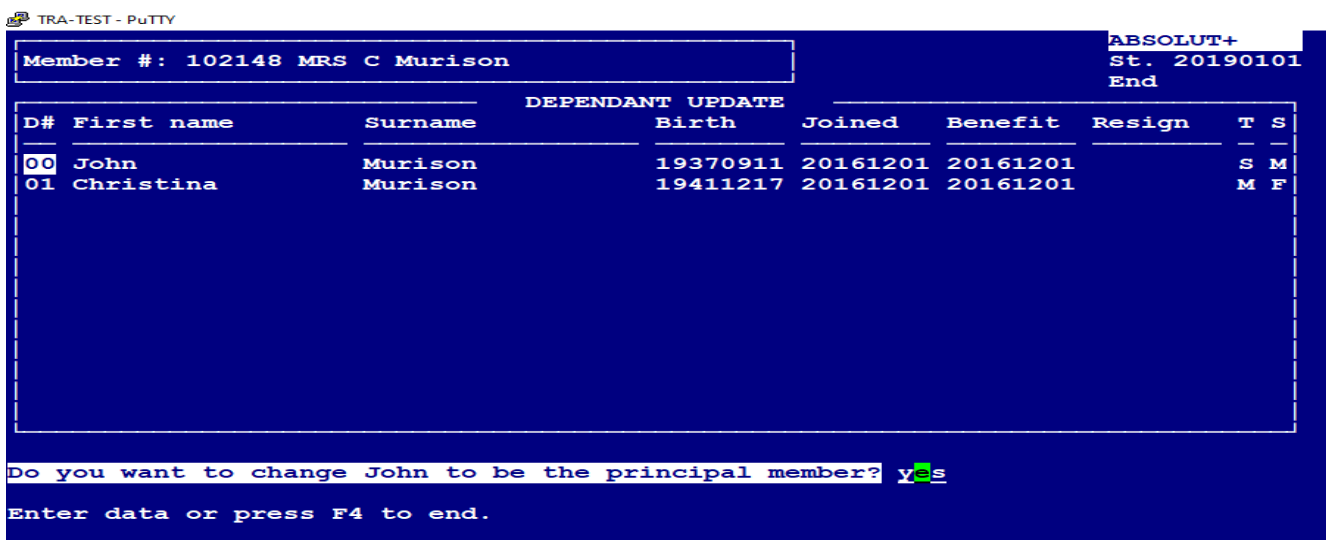
TRA-TEST - PuTTY
Member #: 102148 Mr J Murison ABSOLUT+
St. 20190101
End

A) Address B) Basic
D) Dependants E) Exclusions
F) Fund/Xfer G) GP/PCP
H) Hospital I) Inactivity
J) Perk history K) Communication
L) Limits M) Mult/Treat
N) Notes O) Other
P) Persal R) Record
T) Transfer U) UserFlags
V) VPA Lump Sum W) WordProc
X) XReference Z) Beneficiaries
C) Contribution Q) Quit
    
```

- Select D to access the Dependant Screen.



- Stand on the Dependant you need to change.
- Change their status to Main Member by selecting M to make the Dependant the main Policyholder.



- The system will ask you to confirm that the Dependant must be changed to the Principal Member.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison

ABSOLUT+  
St. 20190101  
End

DEPENDANT UPDATE							
D#	First name	Surname	Birth	Joined	Benefit	Resign	T S
00	John	Murison	19370911	20161201	20161201		S M
01	Christina	Murison	19411217	20161201	20161201		M F

Enter the effective date for Main Membership 2020/04/01

Enter data or press F4 to end.

- Enter the date as from when the Dependant will become the Principal Member.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison

ABSOLUT+  
St. 20190101

DEPENDANT UPDATE			
D#	First name:	John	Initials: J
	Surname:	Murison	Title: MR
	ID No:	3709115033089	Birth date: 1937/09/11
00	Joined date:	2016/12/01	Benefit date: 2016/12/01
01	Resigned date:		Resign code:
	Termination date:		Graduation Date: / /
	Dependant type:	M	Relationship: 0
	Student number:		Penalty%: 0.00%
	Race:	W	Sex: M
	Wait.Period Cat.:	A	Underwriting Cat.:
	Income:	0.00	Proof of income date:

Member, Child, Adult, Spouse, Extender

- Go into the new Principal Member to update all the details.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison

ABSOLUT+  
St. 20190101  
End

DEPENDANT UPDATE							
D#	First name	Surname	Birth	Joined	Benefit	Resign	T S
00	John	Murison	19370911	20161201	20161201		M M
01	Christina	Murison	19411217	20161201	20161201		S F

PF15, PF9, up/down arrow, A)dd, D)delete, U)pdate, E)FT, P)rev MedAid,  
M)ake principal member, H)denal hist, X)ref, C)ontact, I)Add Products, Q)quit

Enter the dependant number

- Access the previous Principal Member that passed away.

```

TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
DEPENDANT UPDATE
D# First name: Christina Initials: C
Surname: Murison Title: MRS T S
ID No: 4112170043086 Birth date: 1941/12/17 --
00 Joined date: 2016/12/01 Benefit date: 2016/12/01 M M
01 Resigned date: 2020/03/31 Resign code: S F
Termination date: Graduation Date:
Dependant type: S Relationship: 0
Student number: Penalty%: 0.00%
Race: W Sex: F
Wait.Period Cat.: A Underwriting Cat.: A
Income: 0.00 Proof of income date:

Enter the resignation reason code
    
```

- Enter the reason code as to why the Principal member is changing.

```

TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
DEPENDANT UPDATE
D# First name: Christina Initials: C
Surname: Murison Title: MRS T S
ID No: 4112170043086 Birth date: 1941/12/17 --
00 Jo 6/12/01 M M
01 Resi 0% S F
Termina
Depen
Stude
Wait.Pe
DATA LIST HELP
List code Description
1 Dismissed
10 Backdated Resignation
11 Not Interested
12 Overage Dependant
>13 Deceased
2 Retrenched
2E Take on Data
3 Resign from Medical scheme onl
4 GEMS
5 120 Days

Enter data or press F4 to end.
    
```

- Enter the reason code for deceased.

```

TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
DEPENDANT UPDATE
D# First name: Christina Initials: C
Surname: Murison Title: MRS T S
ID No: 4112170043086 Birth date: 1941/12/17 --
00 Joined date: 2016/12/01 Benefit date: 2016/12/01 M M
01 Resigned date: 2020/03/31 Resign code: 13 S F
Termination date: Graduation Date:
Dependant type: S Relationship: 0
Student number: Penalty%: 0.00%
Race: W Sex: F
Wait.Period Cat.: A Underwriting Cat.: A
Income: 0.00 Proof of income date:

Enter the actual termination date
    
```

- As soon as the reason code is deceased, the system will take you to the resignation date.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison ABSOLUT+ St. 20190101

DEPENDANT UPDATE

D#	First name: Christina	Initials: C	T	S
	Surname: Murison	Title: MRS	-	-
	ID No: 4112170043086	Birth date: 1941/12/17	M	M
00	Joined date: 2016/12/01	Benefit date: 2016/12/01	S	F
01	Resigned date: 2020/03/31	Resign code: 13		
	Termination date: 2020/03/18	Graduation Date:		
	Dependant type: S	Relationship: 6		
	Student number:	Penalty%: 0.00%		
	Race: W	Sex: F		
	Wait.Period Cat.: A	Underwriting Cat.: A		
	Income: 0.00	Proof of income date: / /		

Enter the proof of income date

- The resignation date will always be the date that the Principal member passed away.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison ABSOLUT+ St. 20190101 End

DEPENDANT UPDATE

D#	First name	Surname	Birth	Joined	Benefit	Resign	T	S
00	John	Murison	19370911	20161201	20161201		M	M
01	Christina	Murison	19411217	20161201	20161201	20200331	S	F

PF15, PF9, up/down arrow, A)dd, D)delete, U)pdate, E)FT, P)rev MedAid, M)ake principal member, H)dental hist, X)ref, C)ontact, I)Add Products, Q)quit  
Enter the dependant number

- After completing the process, press Q to Quit.

TRA-TEST - PuTTY

Member #: 102148 MRS C Murison ABSOLUT+ St. 20190101 End

Dependant 00: Type S to M

Dependant Type Change Date: 2020/04/01

Enter data or press F4 to end.

- The system will request the effective date.

```

TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
End

SUBSCRIPTION TYPE SELECTION
T D# Description Sub Date Subs.levy Agrd.Pmnt
E 00 FEMME COVER SUBSCRIPTIONS
E 01 FEMME COVER SUBSCRIPTIONS
F 00 FUNERAL COVER SUBSCRIPTIONS
F 01 FUNERAL COVER SUBSCRIPTIONS
I 00 INTERMEDIARY AMOUNT
S 00 GAP PREMIUM SO 2020/04/01
S 01 GAP PREMIUM SP 2020/04/01
T 00 TRULOGIC SERVICE AMOUNT

Dependant code 00, S subscription code should be SP - Please confirm
PF15, PF9, up/down arrows, ENTER(update), Q(quit)
Enter the subscription type
    
```

- The system will direct to a screen where you need to confirm the subscriptions for the member that was updated.

```

TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
End

SUBSCRIPTION TYPE SELECTION
T D# Description Sub Date Subs.levy Agrd.Pmnt
E 00 FEMME COVER SUBSCRIPTIONS
E 01 FEMME COVER SUBSCRIPTIONS
F 00 FUNERAL COVER SUBSCRIPTIONS
F 01 FUNERAL COVER SUBSCRIPTIONS
I 00 INTERMEDIARY AMOUNT
S 00 GAP PREMIUM SP 2020/04/01
S 01 GAP PREMIUM SP 2020/04/01
T 00 TRULOGIC SERVICE AMOUNT

Dependant code 01, S subscription code should be S0 - Please confirm
PF15, PF9, up/down arrows, ENTER(update), Q(quit)
Enter the subscription type
    
```

- Once the date is confirmed, the system will automatically fill the subscription code for you.
- Enter

```
TRA-TEST - PuTTY
Member #: 102148 MRS C Murison
ABSOLUT+
St. 20190101
End

Pull / Reverse claims dated after resignation for Christina? yes
Enter data or press F4 to end.
```

- The system will request if the claims for the resigned member should be reversed if claimed after the resigned date.
- Yes
- Process is now complete.
- Quit
- Back to the Main Screen

The process has been completed.

## HOW TO UPGRADE OR DOWNGRADE A POLICY (PUTTY):

- Go into the Putty Program.
- The system will request your Username and Password.
- Once you have completed the login process, you are now in the Main Menu.

```
MEMBERS & CLAIMS MENU - Total Risk Administrators
ABSOLUTE
2021/03/15
MAC Member name & address change      MDL Member overage dependant letter
MAU Member account date update         MEF Member Debit Order EFT Create
MBA Member billing adjustment          MFC Funeral claim update
MBE Member Bulk Email                  MFL Member file logging
MBR Member booklet label requests      MFT Force member termination
MBU Missing menu option                MHT Holding tank menu
MBV Member batch view                  MIU Member information update
MCA Member credit authorisation        MJB Member batch journal update
MCB Member claims capture              MJN Member journals
MCD Member claim log deletion          MLR Member label requests
MCL Member claims logging              MNC Member number change
MCN Call centre member note entry      MOB Member subs opening bal adj
MCR Member card requests               MPR Member portion receipting
MCU Member claims update               MQC Member query by code
MDC Hosp.notifications-outstanding     MRA Suspense Member Account TRF
PAGE 1
Scheme option: 001  Menu option: █
System printer: DEFAULT
Enter option. CR for previous menu. or F4 for main menu.
```

- From this screen you can select what you need to action.
- Different functions are accessed from this screen.
- You will access the member's profile under "MIU".



Member #: 106710

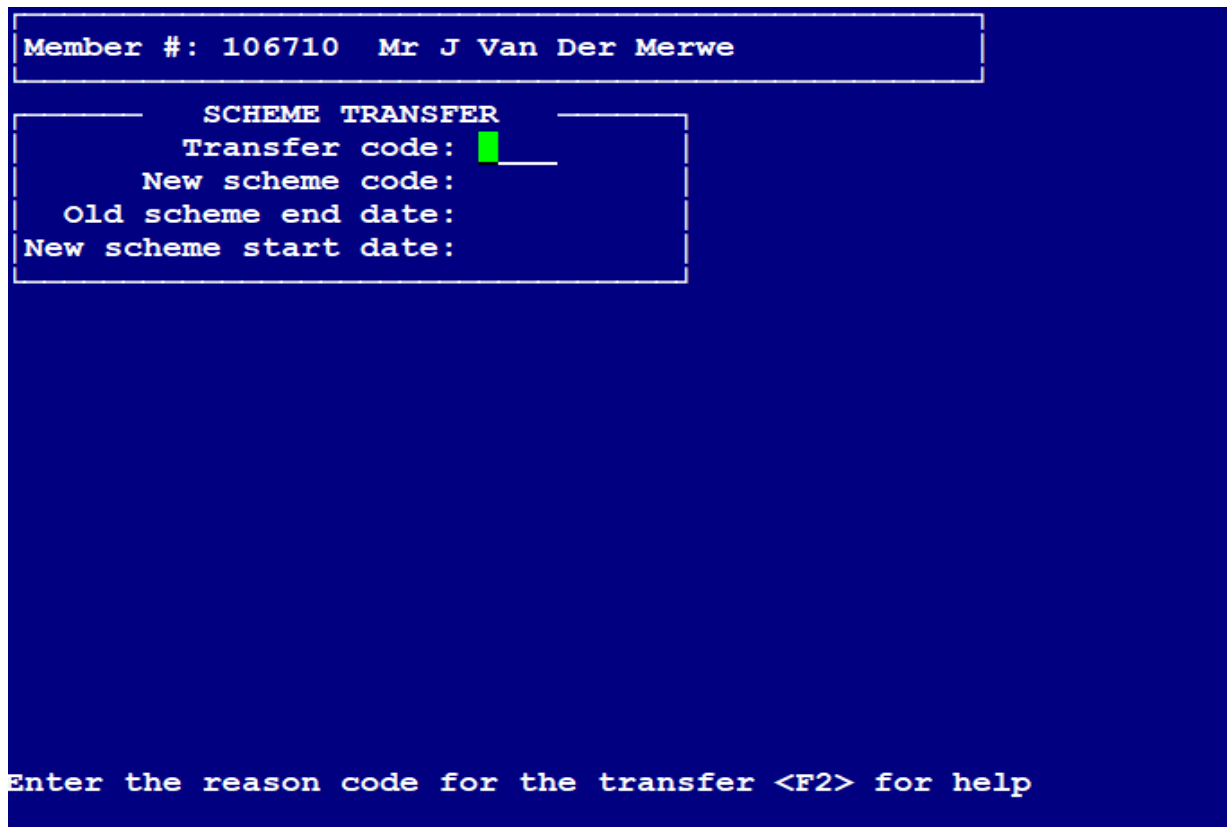
SCHEME SELECTION			
	Scheme	Start dt	End date
1	027	2019/07/01	
2	072	2019/01/01	2019/06/30
3	027	2018/01/01	2018/12/31
4	099	2017/01/01	2017/12/31

Press PF15, PF9, line number to select, Q to quit

- You will access the member's profile under "MIU". Select number 1 as this is the Policy the Policholder is currently active on.



- As soon as you have entered the Policyholder's active record, the screen with the different options that can be updated will open.
- Select T for Transfer and press Enter.



- Enter F2 on the screen to select the transfer code.

```
Member #: 106710 Mr J Van Der Merwe
-----
SCHEME TRANSFER
Transfer code:
New scheme code:
Old sche
New scheme
-----
DATA LIST HELP
-----
List code      Description
-----
>down         Member is downgrading
indi         Group cover to individual
upgr         Member is upgrading
-----
Enter data or press F4 to end.
```

- Select the option that is relevant and Enter.

```
Member #: 106710 Mr J Van Der Merwe
-----
SCHEME TRANSFER
Transfer code: upgr
New scheme code: 00
Old scheme end date:
New scheme start date:
-----
Enter the new scheme code
```

- Enter the Scheme Code of the Option that the Policyholder is upgrading to.

- The old Option will end at the end of the current/selected month and the new Option starts on the 1<sup>st</sup> of the next month.

```
Member #: 106710  Mr J Van Der Merwe

-----
          SCHEME TRANSFER
          Transfer code: upgr
          New scheme code: 003
          Old scheme end date: 2019/06/30
          New scheme start date: 2019/07/01
-----

          NEW SCHEME INFORMATION
          Letter: N
          Company code: 2
          Sub-cmpy code: 0000
          Employee #:
          Pay mode: D/O
          Agent #: BTRA0116
          Waiting period: no
          Persal member: no
          Income: 0.00

Would you like a transfer letter to be printed
```

- As soon as the details are completed, the above screen will appear.
- Select "Y" on the letter so that a new Policy Document can be created.
- Check the update form to ensure that the Broker has not changed.
- If the Broker is changing as well, change the Agent code to the new Broker.
- If all details remain the same, press Enter until you are asked to press the space bar.
- This then completes the upgrade process.

END