

Enrollment Form



Policy # _____
(Internal Use)

A Company Information

Legal Name of Company: _____ Phone: (____) _____
Address: _____ City: _____
Province: _____ Postal Code: _____
Company Plan Administrator: _____ Email: _____
Broker Name: _____ Broker Email: _____

B Health Spending Account - Plan Details

- i** 1. Choose job classification(s) for the employees of your company. It is required that each employee within a classification be extended the same annual limits.
2. Please make sure the descriptions are accurate. Example text is shown below.
3. Enter the annual limit amounts. The grey amounts are default - any amount can be entered.

	JOB TITLE	JOB DESCRIPTION	ANNUAL LIMIT SINGLE	ANNUAL LIMIT FAMILY
A	Executive	Has the authority to enter into contracts on behalf of the company and is responsible for the overall direction and vision.	\$5,000	\$10,000
B	Manager	Is responsible for all hiring and supervision of employees within their areas of responsibility.	\$1,000	\$2,000
C	Full Time Employee	Performs daily operational duties and work for at least 30 hours a week.	\$750	\$1,500
D	Other			
E	Other			

Credit Carry Forward: Use Credit Carry Forward Unused claim amounts / credits can be carried into the next benefit year for a maximum of 2 years
 DO NOT Use Credit Carry Forward

Benefit Year: January to December The 12 month cycle that claims are made against
 Other: _____

Effective Start Date: _____
(YYYY / MM / DD)

The Health Spending Account can be made (optionally) effective up to one year before the Plan Effective Start date. This alternate date will accommodate old health care receipts to be claimed only during the first year.

Alternate HSA Effective Date: _____
(YYYY / MM / DD)

Enrollment Form



C Enter Your Employee & Dependent Information

EMPLOYEE INFORMATION			
Full Name: _____		Email: _____ <small>(This will be used as the website username)</small>	
Job Title: <small>(From Section B)</small>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E	Date of Birth: _____ <small>(YYYY / MM / DD)</small>	
Date of Hire: _____ <small>(YYYY / MM / DD)</small>			
Dependents			
Name	Relationship	Date of Birth (YYYY / MM / DD)	Student
_____	Spouse	_____	
_____	Child	_____	Y / N
_____	Child	_____	Y / N
_____	Child	_____	Y / N

EMPLOYEE INFORMATION			
Full Name: _____		Email: _____ <small>(This will be used as the website username)</small>	
Job Title: <small>(From Section B)</small>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E	Date of Birth: _____ <small>(YYYY / MM / DD)</small>	
Date of Hire: _____ <small>(YYYY / MM / DD)</small>			
Dependents			
Name	Relationship	Date of Birth (YYYY / MM / DD)	Student
_____	Spouse	_____	
_____	Child	_____	Y / N
_____	Child	_____	Y / N
_____	Child	_____	Y / N

EMPLOYEE INFORMATION			
Full Name: _____		Email: _____ <small>(This will be used as the website username)</small>	
Job Title: <small>(From Section B)</small>	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E	Date of Birth: _____ <small>(YYYY / MM / DD)</small>	
Date of Hire: _____ <small>(YYYY / MM / DD)</small>			
Dependents			
Name	Relationship	Date of Birth (YYYY / MM / DD)	Student
_____	Spouse	_____	
_____	Child	_____	Y / N
_____	Child	_____	Y / N
_____	Child	_____	Y / N

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D Authorization and Indemnity Contract

By signing this enrollment form, the company agrees to provide a healthcare spending account for its employees and will pay for all account funding and administration fees as required.

This signature will also apply to the indemnity contract.

Signature of Authorized
Company Officer: _____

Date: _____

(YYYY / MM / DD)

Print Name: _____

Please Fax or Mail To: National Health Claim Corporation
335 58th Ave S.E.
Calgary Alberta T2H 0P3
Fax: (403) 228-1580

Additional Contact Information:
Toll Free (866) 342-5908

www.HSA.WesternLife.com

E Additional Information

Other Plan Options

The Western Life HSA program can accommodate other advanced plan features such as: Pro-rating and Waiting Period for new hires. Still have some questions about options? Contact National HealthClaim to discuss.

HSA Funding

A company can choose to provide funding for their HSA by either "Pay-as-you-go" (generate a cheque for each expense claim submitted) or by "Pre-funding". To utilize the "Pre-funding" method, a company is required to send in a sum of money that will be held in an account and drawn from as HSA claims come in. By "Pre-funding" an account, claims will be processed immediately. All HSA accounts will operate in either mode, automatically. NHC does not pay interest on monies held.

Privacy Statement

Protecting the insured person's personal information at National HealthClaim Corp (NHC) is very important. We recognize and respect the company and individual's privacy. When a company enrolls for an HSA, we establish a confidential file that contains their account and employee information. This file is kept in the offices of NHC. We collect and use the personal information to process this enrollment and provide and administer the financial product(s) enrolled for, investigate and process claims, and create and maintain records concerning our relationship.

What Happens Next?

- 1** The signed enrollment form is sent to National HealthClaim (NHC) for review and entry into their secure web application system. NHC may contact the company Plan Administrator to discuss the enrollment if there are questions.
- 2** An email will be sent to the company "Plan Administrator" with instructions for logging onto the Western Life Health Spending Account web site. Changes to the Plan / Employees can be done directly by the Plan Administrator through the web site. Ensure the Plan Administrator's email address is included on page 1.
- 3** An email will be sent to each employee with instructions for logging onto the Western Life Health Spending Account web site. Health Spending Account claims are made directly on the web site. The employee username for the login is the email address submitted on the enrollment form.