**APPLICATION FOR VOLUNTARY FUNERAL ASSURANCE WITH EXTENDED FAMILY BENEFITS**

**KHANYISA AGENT INFORMATION Add**

Select from Drop down list

* Thandeka Tshabalala
* Khosi Manaka
* George Nduma
* Tebogo Legodi
* Siyasanga Mzamo
* Pitso Maake
* Zinhle Sibisi

**SHOP STEWARD INFORMATION Add**

NAME Select from dropdown list or search as you type option - see attached list of active shop stewards

(Shop Steward List must contain in the background: Contact Number, Email address, Province, Region, Station, Information Sheet Received – Y/N and Training attended - Y/N)

Must have the ability to add new shop stewards to the list

**Select Application Type:**

* New Application
* Amendment Remove amendment from here. This will only be used on applications that were already captured
* Transfer

**Select Scheme Option:**

Correct

**POLICY HOLDER DETAILS: - change to “PRINCIPAL MEMBER DETAILS”**

**Region:**

Drop Down List – to be provided

**Station:**

Text field

**Department:**

Please remove this field

**Surname:**

Mandatory

**Name:**

Mandatory

**ID Number:**

Mandatory Must be validated as a valid number

**Age:**

Auto calculated from ID number

**Cell Number:**

Mandatory

**Work Number**

Correct

**Email address:**

Correct

**SAPU Number**

Correct

**Physical Address**

Correct - Mandatory

**Postal Address**

Correct

**Umngcwabo:**

Tick Box Please move to the end of this section

**Premium**

Auto calculated as per rating sheet. Must include Umngcwabo premium if ticked

Please move to the end of this section

Option to generate a policy number at this stage using “KIP & 5 digits” to remain the same as the format we are currently using, but must be flagged so that the rest of the information must still be captured

**PERSONAL DETAILS OF SPOUSE:**

**Surname:**

Correct

**Name:**

Correct

**ID Number:**

Correct Must be validated as a valid number

**Umngcwabo:**

Tick Box Please move to the end of this section

**Umngcwabo Premium:**

Auto calculated as per rating sheet

NB: If Umngcwabo is ticked for both the main member and spouse a reduced premium is applicable – see rate sheet

**PRINCIPLE MEMBER’S OWN CHILDREN**

**Name & Surname:**

Correct

**ID Number:**

Correct Does not have to be validated

**Umngcwabo:**

Tick Box

**Umngcwabo Premium:**

Auto calculated as per rating sheet

**WIDER CHILDREN**

**Name & Surname**

Correct

**ID Number**

Correct Does not have to be validated

**Premium:**

Auto calculated as per rating sheet

**Total Wider Children Premium**

Auto calculated

**EXTENDED FAMILY DETAILS**

**Name & Surname**

Correct

**ID Number:**

Correct Does not have to be validated

**Age:**

Auto calculated from ID number or Date of birth

**Repatriation:**

Tick Box

**Repatriation Premium:**

Auto completed as per rate sheet

**Umngcwabo:**

Tick Box

**Umngcwabo Cover Amount:**

Drop down – see cover amount options on rate sheet

**Umngcwabo Premium:**

Auto calculated as per rating sheet

**Benefit Cover Amount:**

Drop down – see cover amount options on rate sheet

**Benefit Premium:**

Auto calculated as per rate sheet

**Total Member Premium:**

Auto calculated Total premium per Extended Member = Repatriation Premium + Umngcwabo Premium + benefit cover premium

**Total Extended Family Premium**

Auto calculated Total of all Extended member premiums

**INCOME CONTINUATION BENEFIT:**

Correct

**OPTIONAL BENEFITS:**

Correct

**TOTAL PREMIUM CALCULATION**

Correct Must be auto picked up from above premium fields = Total Immediate family premium + Total Wider Children Premium + Total Extended family premium + Income continuation premium + Airtime premium + Car Hire premium

**BENEFICIARY NOMINATION**

1. Name & Surname ID Number Relationship
2. Name & Surname ID Number Relationship

**PREMIUM PAYMENT**

**PERSAL DEDUCTION AUTHORISATION**

Correct

Amount:

Must be auto completed based on total premium

**DEBIT ORDER AUTHORITY:**

Correct

Amount:

Must be auto completed based on total premium

Must be able to search on:

Principal member name

ID number

Policy number

Persal Number