Join - IWHI

API Only Values

API Schema	Mandatory	Description	Value

`"ProductSelection": {`
`    "hospital": {`
`        "id": "xxx"`
	Yes	The product for the join	Value from Quote
			
			See under "Visitors on the Brands and Products page

`"ProductSelection": {`
`    "hospital": {`
`        "excess":`
	No	nil or $500 excess for basic and budget products (not visitor)	Value from Quote

`"Company": {}`	No	Group payer details - Not required for Salesforce Joins	exclude this part
`"OfferDetails" {}`	No	Promo details - Not required for Salesforce Joins	exclude this part

`"Agreements": {`
` "HasAgreedToFundRules": true,`
` "HasAcceptedDirectDebitServiceAgreement": true`
	Yes	Hardcoded API values	"true"

`"coverStartDate"`	Yes	Cover start date	Value from Quote
`"rate"`	Yes	Premium rate	"i67"

`"visaDetails": {`
 	
`  "expectedVisaEndDate"`
	No	Cover end date	Value from Quote

`"personalDetails": {`
 	
`  "scale"`
	Yes	Single, Couple, Family, Single Parent Family	Value from Quote

`"sourceChannel"`	Yes	Where join has come from	"NibContactCentreIWHI"
`"agentNumber"`	No	Always exclude this from payload	exclude this part
`"financialDetails": { "paymentFrequency"`	Yes	Premium payment frequency	Value from Quote

Screen 1

Field Label	API	Mandatory	Type	Description	Default Value	Picklist Values	Validation	Error Message

Expected Visa Subclass	`"visaDetails": {`
	
	`    "visaSubclass":`
		Yes	Text	Type of visa member will have for this policy	Value from Opportunity	all the numbers in list at:
						
						https://www.austhealth.com/australian-working-visa-list
							n/a	Please select a visa subclass

Previously had health insurance?	`"previousFundDetails": {`
	
	`    "PreviouslyHadHealthInsurance"`
		Yes	Checkbox	Whether member had other health cover before join	false	n/a	none	n/a

Previous Fund	`"previousFundDetails": {` `    "Code"`	Dependent on previous answer**	Picklist	Name of previous fund	none	from Funds API	value must be selected if previous checkbox checked	Please select a fund
Previous Fund Number	`"previousFundDetails": {` `    "PolicyNumber"`	Dependent on previous answer**	Text Field	Policy number of previous fund	none	n/a	value must be entered if previous checkbox checked	Please enter the previous fund's policy number

Screen 2 - `"PolicyHolder": {`

Section	Field Label	API	Mandatory	Type	Description	Default Value	Picklist Values	Validation	Error Message

Person 1	Salutation	`"Title"`	No**	Picklist		Value from Account		Salutations		
	First Name	`"FirstName"`	Yes	Text field		Value from Account			<= 20 chars	First Name must be no more than 20 characters
	Last Name	`"LastName"`	Yes	Text field		Value from Account			<= 20 chars	Last Name must be no more than 20 characters
	Date of Birth	`"DateOfBirth"`	Yes	Date picker		Value from Account				
	Email	`"Email"`	Yes	Text field		Value from Account				
	Sex	`"Gender"`	Yes	Picklist		Value from Account	Male, Female			
	Eligible for Medicare	Not in API, stored in Salesforce only	Yes	Checkbox		unchecked	n/a			
Passport Details	Country of Issue	`"CitizenshipCountry"`	Yes	Picklist	Customer's passport country	Value from Opportunity		Country List for WHICS	n/a	
	Passport Number	`"passportNumber"`	Yes	Text Field	Customer's passport number					

(Optional) Screen 3 - `"Partner": {`

Same as screen 2

(Optional) Screen 4 (up to 8 dependents) - `"Dependants": [ {`

Same as screen 2, except "Email" is excluded

Screen 5

Same as for ISHI

Section	Field Label	API	Mandatory	Type	Description	Default Value	Picklist Values	Validation	Error Message
Residential Address `"ContactDetails": { "Address": {`	Address Line	`"AddressLine"`	No	Text Field	Number, Address Name and Type ***Google lookup field before and after error***	Value from Account		<= 40 chars	Address line must be no more than 40 characters
	Suburb	`"Suburb"`	No	Text Field	Customers suburb in Australia residing**	Value from Account	n/a	none	n/a
	State	`"State"`	No	Picklist	State residing in (must be picklist for MVP)	Value from Account	NSW, ACT, SA, WA, NT, TAS, VIC, QLD	n/a	n/a
	Postcode	`"Postcode"`	No	Text Field	Customers postcode within Australia	Value from Account		= 4 numbers	Postcode must be 4 numbers
Postal Address `"PostalAddress": {`	Address Line	`"AddressLine"`	No	Text Field (**Can we include checkbox 'Same as above' which auto-populates?**)		Value from Account		<= 40 chars	Address line must be no more than 40 characters
	Suburb	`"Suburb"`	No	Text field		Value from Account		none	
	State	`"State"`	No	Picklist		Value from Account	NSW, ACT, SA, WA, NT, TAS, VIC, QLD	none	
	Postcode	`"Postcode"`	No	Text Field	Customers postcode within Australia	Value from Account		= 4 numbers	Postcode must be 4 numbers
Contact Details	Home phone	`"HomePhone"`	1/3 values is mandatory	Text Field		Value from Account			
	Work Phone	`"WorkPhone"`		Text field		Value from Account			

	Mobile	"MobilePhone"		Text field				Value from Account			

Screen 6

Section	Field Label	API	Mandatory	Type	Description	Default Value	Picklist Values	Validation	Error Message
Payment Details	Payment Method	"FinancialDetails": { "PaymentMethod"	Yes	Picklist	Bank account or credit card direct debit	none	"Bank account" "Credit card"	n/a	n/a
	Credit Card Token	"braintreeDetails": { "paymentMethodToken":	Yes (when "paymentMethod"= "Braintree" or product ID =103)	Text	Hidden when "paymentMethod" = "DirectDebit" Payment token generated, copied and pasted from secure IVR	null	n/a	none	n/a
	BSB	"BSB"	Yes (when "paymentMethod"= "DirectDebit")	Text	Hidden when "paymentMethod" = "Braintree"	null	n/a	n/a	n/a
	Account Name	"BankAccountDetails": { "AccountName":	Yes (when "paymentMethod"= "DirectDebit")	Text	Hidden when "paymentMethod" = "Braintree"	null	n/a	n/a	n/a
	Account Number	"AccountNumber":	Yes (when "paymentMethod"= "DirectDebit")	Text	Hidden when "paymentMethod" = "Braintree"	null	n/a	n/a	n/a

Items in Healthline Join, not in Salesforce (or Join API)

Field	Type	Note	Need to Record in SF? Who needs access?
Enrolment types	Picklist	Options excluded in SF: Ex other policy within nib, Ex parents within nib, Rejoin	not available in SF
Permission to Contact Previous Fund	Checkbox	For enrolment type = "Ex other fund"	Join API setting it to Y if they've got previous funds and N if they don't
Youth Discount Certified Age	Picklist	For enrolment type = "Ex other fund" Numbers 19 to 29	no - not used (check with policy admin)
Youth Discount %	Integer	For enrolment type = "Ex other fund"	no - not used (check with policy admin)
Hospital Cover End Date	Date	For enrolment type = "Ex other fund"	no - not used (check with policy admin)
Medicare card type	Picklist	Values: Interim, Not Eligible, Reciprocal "Eligible for Medicare" checkbox included in SF	need these 3 options - for ishi too
Country of Last Residence	Picklist	Passport country is recorded in SF	no - not used
Occupation	Text		no - not used
Sponsor	Lookup	(Only for agents)	no - not used
Sponsor Contact Name	Text		no - not used
Sponsor Phone	Phone		no - not used
Sponsor Email	Email		no - not used
Employer	Lookup	(Only for agents)	no - not used
Employer Contact Name	Text		no - not used
Employer Phone	Phone		no - not used
Employer Email	Email		no - not used
Fax	Phone		no - not used
SMS Opt Out?	Checkbox		no - not used
Preferred Contact Method	Picklist	Email, Home Phone, Mail to Postal Address, Mobile Phone, Work Phone	almost always email - update in HL
Preferred Correspondence	Picklist	Email, Overseas Address, Standard Mail	almost always email - update in HL
All PEC Details	various	recorded in SF only	n/a

Cover Source	Picklist	Always Head Office from SF	n/a
Scale	Picklist	Options not in SF: OSHC Family, Extended Family, IMAN Family, IMAN Couple, IMAN Single	Join API converts to the IMAN values
Initial Pay Method (and associated fields)	Picklist	Only ongoing payment method from SF	n/a
Pay Method	Picklist	Options "Branch" and "Payroll Deduction" excluded from SF	no - not used
Target Group	Picklist	(also not required in HL according to process guide)	no - not used
Pensioner Products	Radio	No/Yes	no - not used
Products	Picklist	Only current products included Excess options ($500/nil) not in SF	yes - excess added to first table above and Quote ~~SFP-780~~ - Specify excess option for iwhi quote BACKLOG
EITC Rate	Number	Not in HL, but in process guide, with instructions: Key '0' if member does not have an ABN. Key '100' if member has an ABN and can claim GST	yes - finance need this?
EITC Effective Date	Date	Not in HL, but in process guide, with instructions: Same as Effective date	yes - finance need this?
Visa Subclass/Type	Picklist	Any number allowed in SF API for this list?	n/a