

Transfer Certificate Information – Automated Solution

Policy Number Required Urgent Certificate Request Partial Family Member Retention Retained in Error

Existing Fund Details

Fund Name:

New Fund Details

Fund Name:

Date Joined New Fund:

Policy Number (optional):

Type of policy to be transferred: General Treatment Hospital Ambulance

Request Details

Person Details	Full Name	Date of Birth	Authorisation Received (Y/N)	Retained (Y/N)	Policy Number (to be supplied by the existing Fund)
Person #1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person #2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person #3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person #4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person #5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments:

Template Notes:

- This template is to be used by health funds using the automated solution for exceptions and urgent requests only. For example, if a newly joined person was being admitted to hospital and they had not yet supplied their OLD health fund member number to the NEW health fund then a request can be sent through to obtain the OLD Health Fund member number.
- The following is a summary of each option and when they should be used:
 - **Policy number required** – This option is used by the NEW health fund to request the fund membership number from the OLD health fund in an exceptional or emergency circumstance. This will then enable the NEW health fund to submit a Transfer Certificate Request (TCR).
 - **Urgent Certificate Request** – This option is used by the NEW or OLD health fund to indicate when one of the other request types is urgent.
 - **Partial Family Member Retention** – This option is used by the OLD health fund to alert the NEW health fund when they have partially retained some, but not all, of the people on the membership. One example scenario is where the OLD health fund has not yet sent a TCD and is advising the NEW health fund that one of the persons on the membership will be retained. This will prompt the NEW health fund to cancel the existing transfer certificate request and send a new Transfer Certificate Request (TCR) that excludes the person being retained by the OLD health fund.
 - **Retained in Error** – This option is used by the OLD health fund to alert the NEW health fund when the OLD Health Fund has sent through a retained response to the NEW health fund in error. This will prompt the NEW health fund to send through a new Transfer Certificate Request (TCR).