

# Enrolling MedExtra Members

Enrolling your clients in MedExtra is as simple as 1-2-3-(4).

Complete sections 1 through 4 of the MedExtra enrolment form for each covered person indicating:

1. **Client**  
Member's demographic information
2. **Type of Enrolment**  
Membership level – be sure to include:
  - Type of coverage
  - Single / Family
  - Cancer CM option
3. **Enroller**  
Agent's name and agent number
4. **Group Enrolment**  
Contact information for plan administrator

The image shows a screenshot of the MedExtra enrolment form. At the top left is the MedExtra logo with the tagline 'Facilitating access to healthcare'. The form is divided into five sections:

- 1. Client:** Includes fields for Company, Surname, First Name, Street, City, Province, Postal Code, Telephone, Fax, Email, Date of Birth (mm/dd/yyyy), and Preferred Language for Communication (English/French).
- 2. Type of Enrolment:** A single text input field.
- 3. Enroller:** Fields for Full Name and ID.
- 4. Group Enrolment:** Fields for Administrator Surname and First Name. Below these fields is a note: 'Please provide the details listed in sections 1 & 2 of this form in CSV format to MedExtra. For technical assistance, contact 514-522-8000.'
- 5. Office Use Only:** Fields for Date of enrolment and ID, with a checkbox for 'Payment Processed'.

At the bottom of the form is a stylized logo consisting of a yellow and blue arrow pointing right.

As an alternative to completing the form for each employee, it may be simpler to provide a spreadsheet (template enclosed) for all the employees with columns for each item in section 1 & 2 of the form.

Return the forms to your account manager by email or by fax at 514-526-4521.

Within forty-eight hours, you will receive back a service agreement and invoice. MedExtra's standard terms are 50% upon execution, 25% at 90 & 180 days. Once the service agreement and payment are received by MedExtra, the memberships kits will be promptly forwarded to the sales agent or the plan administrator for distribution.