

Employee Benefits Application Form

Discover your Employee Benefits





- + Use this form if you wish to set up salary packaging for benefits under your capped limit including mortgage/loan repayments, rent, credit card repayments and/or education-related expenses.
- + If you wish to apply for a Westpac payment card, please complete this form and the Westpac application form at the back of this document.
- + Please refer to your employer's policy for a full menu of benefits

- I am a new customer (please complete section A)
- I am an existing customer (please complete section B)

Get in Touch

We'd love to hear from you

If you have a question about this form, or any of your Salary Packaging Employee Benefits:

-  1300 40 25 23
-  nswhealth@salarypackagingplus.com.au
-  www.salarypackagingplus.com.au
-  PO Box 7066, Melbourne VIC 3004

Section A - Your Details

Please complete all applicable fields. Please ensure to provide a home contact in case your circumstances change.

Title	<input type="text"/>	Legal Name	<input type="text"/>		
Gender	<input type="text"/>	Date of Birth	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Payroll ID	<input type="text"/>		Preferred Name	<input type="text"/>	
Employer	<input type="text"/>				
Facility/Hospital	<input type="text"/>		Pay Cycle Name (if known)	<input type="text"/>	
Employment Status	<input type="checkbox"/> Full/Part Time	<input type="checkbox"/> Casual	<input type="checkbox"/> Fixed Term Contract and End Date	<input type="text"/>	
Home Address	<input type="text"/>				
	<input type="text"/>		<input type="text"/>	<input type="text"/>	
Postal Address (if different to above)	<input type="text"/>				
	<input type="text"/>		<input type="text"/>	<input type="text"/>	
Primary Email	<input type="text"/>		Secondary Email	<input type="text"/>	
Home Phone	<input type="text"/>		Mobile	<input type="text"/>	
Work Phone	<input type="text"/>				
Are you a Staff Specialist?	<input type="checkbox"/> Yes	Have you salary packaged at any other NSW Health agency since April 1?	<input type="checkbox"/> Yes. Specify where	<input type="text"/>	
	<input type="checkbox"/> No		<input type="checkbox"/> No		

I have read and agree to the Privacy Policy which can be found at <http://www.salarypackagingplus.com.au/privacy>

Section B - Existing Customers

Name

Date of Birth

Payroll ID

Checklist

For SalaryPackagingPLUS to set up your new package, we need:

- + Completed Form**
- + Recent Payslip (or 5 payslips if you are casual)**
- + Westpac Application Form**
(if applying for a card)

Salary Packaging

You can salary package living expenses and meal entertainment either using a salary packaging payment card, or by reimbursement. When using a card, your packaged funds will be deposited for regular spending on to the Visa debit card. If you choose to package by reimbursement, we will deposit your payment directly to your nominated bank account on presentation of sufficient substantiation.

Living Expenses

How would you like to package?

I would like to apply for a Westpac Everyday Purchases card

Please fill out the Westpac Application Form at the back of this document.

OR

By Reimbursement

Please list items you would like to package and attach substantiation (evidence) before submitting your application.

SUBSTANTIATION EXAMPLES

Mortgage: Loan statement showing your name, minimum repayment amount and frequency

Rent: rental agreement or letter from real estate/landlord stating the amount and frequency

Credit Card: credit card statement(s) showing the repayments you have made

Other: tax invoices/bill with proof of payment

Item	Amount	Evidence Provided
<i>Eg: Mortgage Statement</i>	\$70.85	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Financial Institution

BSB Number

Account Number

Account Name

How Much?

Please package the maximum amount for me

I'd like to package specific amounts per pay cycle.

Please deduct the amount below

\$.

per

Meal Entertainment

How would you like to package?

I would like to apply for a Meal Entertainment card.

Please fill out the Westpac Application Form at the back of this document.

OR

By Reimbursement

Once you have accumulated \$500 worth of receipts, please complete and submit the separate meal entertainment claim form available on our website.

Financial Institution

BSB Number

Account Number

Account Name

How Much?

Please package the maximum amount for me

I'd like to package specific amounts per pay cycle.

Please deduct the amount below

\$.

per

Complete Your Application

Please tick those which apply to you:

I have a HECS-HELP Debt

I do NOT claim the Tax-Free Threshold with this employer

Declaration

I declare the following:

- The Meal Entertainment Card will only be used for meal entertainment expenses in accordance with NSW Health policy (if ticked yes for Meal Entertainment card)
- I am eligible to participate in my employer's salary packaging program.
- I have read and agree to the terms and conditions of salary packaging as set by [NSW Health](#) and [SalaryPackagingPLUS](#).
- I authorise payroll deductions to enable payment of my chosen salary packaging benefit(s) and administration fee.
- I understand that benefit payments can only be made following deduction from my salary, and that non payment of salary will result in non payment of the benefit if there is insufficient balance in my salary packaging account.
- I acknowledge that it is my responsibility to confirm what effect, if any, this salary packaging will have on any government payments I receive or are required to make.
- I acknowledge the information provided by SalaryPackagingPLUS does not constitute financial or taxation advice.
- I acknowledge that any incorrect information provided to SalaryPackagingPLUS that results in a Fringe Benefits Tax liability will be my responsibility
- The information provided in this form is true and correct to the best of my knowledge.

Signed

Date



Westpac Payment Card Application

As a NSW Health employee, we work together with Westpac to bring you this convenient payment solution.

All you need to do is complete sections 1,3,4 and 5 of the attached form and email it back to nswhealth@salarypackagingplus.com.au

Please Note:

The NSW Health salary packaging policy does NOT allow additional card holders. This means you can skip section 2 of the attached application form.

Frequently Asked Questions

What is an 'Everyday Purchases' card?

This card can be used to pay for your general living expenses such as groceries and bills. It uses money from your annual Living Expenses Cap.

What is a Meal Entertainment card?

It is a prepaid card which you can use to cover the costs of dining out with friends and family. It has been designed to enable you to easily manage your annual Meal Entertainment Cap.

Where can I get an application form?

It is attached to this document. Otherwise, it can be found on our website at www.salarypackagingplus.com.au/employees/nswhealth

Do I need to complete an ID check as part of my application?

No, your employer will confirm your ID with us so you do not need to complete an ID check.

Where do I send my completed application?

Send your application form through to us at nswhealth@salarypackagingplus.com.au so that we can verify your details. Do not send it to Westpac as written on the form.

Can I use my card overseas?

Yes, you can use your card overseas. Transaction and currency conversion fees may apply.

How will I receive my card?

You will receive a letter when your card is ready. You can pick up your card from the branch you nominated in your application at a time that suits you. You have 6 weeks to collect your card(s).

How many cards can I have?

NSW Health Salary Packaging Policy does not allow additional cardholders for this benefit so you are only allowed to hold ONE of each type of card. This means you are not required to fill out section 2 of the attached form.

Why do I need to provide my bank details for direct debit?

Westpac require these details for rare instances where your card has been overdrawn and there is no money against your card. Your application cannot be processed without providing these details.

Are there merchant blocks on the Meal Entertainment Card?

Yes. From 1 August 2017 a number of merchant blocks have been implemented to reduce the risk of inappropriate spending. Merchants that are now blocked include supermarkets and liquor stores. Your card should only be used for meal entertainment expenses outlined in your employer's policy.

Can I set up direct debit payments on my card?

No, and the card cannot be used to withdraw cash.

How do I find out my card balance(s)?

If you currently bank with Westpac you will be able to see your card balance in your Westpac Live Online Banking account. You can also download the Westpac App or phone Westpac to check your balance using the number on the back of your card.

How do I view my transactions?

You will receive a statement each month from Westpac to the address provided on the application form. If you do not receive it, you can contact Westpac to ensure they have the correct details on file.

What happens if I change my name?

Supply your marriage certificate (or other official documentation) to us and we can arrange to have your packaging details, including your cards, updated.

What happens when my card expires?

Like any other bank card, Westpac will send a replacement card when your payment card is due to expire. We recommend contacting Westpac directly if you are nearing expiry and have not received a new card.

What should I do in case of a lost or stolen card?

Contact Westpac on 1300 650 107. The bank will block your card and send you a replacement. The change won't affect the payments we make onto your card. Please notify us of your new card number when your replacement card arrives.

Can't find the answer to your question?

Give our Customer Support team a call on 1300 40 25 23 or email nswhealth@salarypackagingplus.com.au and we'll be happy to help.





Employee Benefit Card – Cardholder Request

- Before you complete this form please read the 'Acknowledgements and Consents' on page 2 of this form
- Please send the completed application to email nbcommercialcards@westpac.com.au or fax (02) 9374 7916

Everyday Purchase Meal

Section 1 – Primary Cardholder Details

Title Given Name(s) in full

Surname Date of Birth / /

Are you known by any other name? If yes, please provide other name

Occupation

Male Female Employee ID (Mandatory, this is required for FBT reporting)

Residential Address (no PO Boxes)

Mailing Address (if different to above)

Email Address Mobile

If an existing Westpac Customer please provide your 8 digit customer number

Section 2 – Additional Cardholder Details

Title Given Name(s) in full

Surname Date of Birth / /

Are you known by any other name? If yes, please provide other name

Occupation Male Female

Residential Address (no PO Boxes)

Mailing Address (if different to above)

Email Address Mobile

If an existing Westpac Customer please provide your 8 digit customer number

Section 3 – Card Delivery Instructions

For security reasons the Employee Benefit Card must be collected from a Westpac Branch. Please indicate a convenient branch from which card(s) can be collected.

Branch Name & Address

Section 4 – Cardholder's Consent

By signing below, the Primary Cardholder/Additional Cardholder:

- Agrees to the Acknowledgements and Consents on page 2 of this form; and
- requests the issue of a new card under the nominated Facility as detailed above, to be used by the Primary Cardholder/Additional Cardholder in accordance with Employee Benefits Card Terms and Conditions.

Primary Cardholder Signature Date / /

Additional Cardholder Signature Date / /

Note: It is an offence under the Anti-Money Laundering and Counter-Terrorism Finances Act 2006 to knowingly provide false or misleading information.

Section 5 – Direct Debit Request (DDR) To be completed by the Cardholder to provide for debit balances on the Everyday Purchase Card to be paid from another account

I/We authorise and request Westpac Banking Corporation (User ID 249802) to debit my/our account nominated below through the Bulk Electronic Clearing System in accordance with the attached Direct Debit Request Service Agreement.

Account Name

Name and Branch of Financial Institution

BSB No. Account Number

Immediately upon issuance of an Employee Benefit Card please draw all debit balances of my Employee Benefit Card at the end of the statement period (monthly) from the above account. This Direct Debit authority will remain in place until the Bank receives instructions to revoke the authority or the Bank cancels the authority in accordance with the Direct Debit Request Service Agreement. If debiting from a joint account, all account holders are required to sign

Account Holder's Signature Date / /

Additional Account Holder's Signature Date / /

Section 6 – Employer Details (to be completed by Employer or third party administrator appointed by the Employer)

Company Name Facility Number

Reporting Level

Authorised Signatory 1 (Print Name)

Authorised Signatory 1 Date / /

Authorised Signatory 2 (Print Name)

Authorised Signatory 2 Date / /

Verifying Officer (Print Name)

Verifying Officer Signature Date / /

Acknowledgement and Consents

Privacy Statement

Personal information

We collect personal information from you to process your application, provide you with our product or service, and manage your product or service. We may also use your information to comply with legislative or regulatory requirements in any jurisdiction, prevent fraud, crime or other activity that may cause harm in relation to our products or services and help us run our business. We may also use your information to tell you about products or services we think may interest you.

If you do not provide all the information we request, we may need to reject your application or we may no longer be able to provide a product or service to you.

We may disclose your personal information to other members of the Westpac Group, anyone we engage to do something on our behalf, rewards program administrators and other organisations that assist us with our business.

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in our privacy policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products or services, you consent to these disclosures.

We are required or authorised to collect personal information from you by certain laws. Details of these laws are in our privacy policy.

Our privacy policy is available at westpac.com.au or by calling 132 032. It covers:

- how you can access the personal information we hold about you and ask for it to be corrected;
- how you may complain about a breach of the Australian Privacy Principles or a registered privacy code and how we will deal with your complaint;
- how we collect, hold, use and disclose your personal information in more detail.

We will update our privacy policy from time to time.

Other acknowledgments and consents

- We may confirm the details of the information provided in this application.
- Where you have provided information about another individual, you must make them aware of that fact and the contents of the Privacy Statement.
- This application is not an offer or acceptance of credit.

We will use your personal information to contact you or send you information about other products and services offered by the Westpac Group or its preferred suppliers. Please call us on 132 032 or visit any of our branches if you do not wish to receive marketing communications from us.

Our reporting obligations

We are required to identify certain US persons in order to meet account information reporting requirements under local and international laws.

If you or (where you are applying on behalf of an entity) the entity and/or any office bearer* of the entity and/or any individual who holds an interest in the entity of more than 25% (a Controlling Person) are a US citizen or US tax resident, you must telephone 1300 658 194 at the time of completing this application. When you contact us you will be asked to provide additional information about your US tax status and/or the US tax status of the entity and/or any Controlling Person which will constitute certification of US tax status for the purposes of this application.

Unless you notify us that you or (where you are applying on behalf of an entity) the entity and/or any Controlling Person are a US citizen or US tax resident as specified above, by completing this application you certify that you or (where you are applying on behalf of an entity) the entity and/or any Controlling Person are not a US citizen or US tax resident.

If at any time after account opening, information in our possession suggests that you, the entity and/or any Controlling Person may be a US citizen or US tax resident, you may be contacted to provide further information on your US tax status and/or the US tax status of the entity and/or any Controlling Person. Failure to respond may lead to certain reporting requirements applying to the account.

*Director of a company, partner in a partnership, trustee of a trust, chairman, secretary or treasurer of an association or co-operative.

Definitions

"We", "our", "us", "Westpac" means Westpac Banking Corporation ABN 33 007 457 141. "Westpac Group" means Westpac Banking Corporation and its related bodies corporate.

Other Acknowledgements and Consents

- I consent to the issue by Westpac Banking Corporation ABN 33 007 457 141 (Westpac) of the card type selected in section 6.
- In addition to the consents provided in relation to the handling of my Personal information, I authorise Westpac and my Employer (or any other third party named in section 6 of this form) to request and obtain from one another, or disclose to one another, information relating to my use of the Card (including any information relating to transactions I carry out or attempt to carry out with my Card) for the purpose of administering my Card and general salary sacrifice administration.
- If my Employer has appointed a salary packaging provider ("spp") to administer the Card on my behalf, than I authorise Westpac and the SPP to request and obtain from one another or disclose to one another, information relating to my use of the card (including any information relating to transactions I carry out or attempt to carry out with my card) for the purpose of administering my Card and general salary sacrifice administration.
- I acknowledge that if I have any questions about my Card or with Westpac, I may discuss these with my Employer directly or with Westpac by calling 1300 650 107.

Direct Debit Request Service Agreement

This document outlines our service commitment to you, in respect of the Direct Debit Request (DDR) arrangements made between Westpac Banking Corporation, USER ID 249802 and you. It sets out your rights, our commitment to you and your responsibilities to us together with where you should go for assistance.

Terms of the arrangement

In terms of the Direct Debit Request arrangements made between us and signed by you, we undertake to debit your nominated account for any debit balance outstanding on your Employee Benefits Card at the end of the Statement period for that card.

If any debit falls due on a non-business day, it will be debited to your account on the next business day.

We will give you at least 14 days notice in writing via your Employer when changes to the terms of the arrangement are made.

If you wish to discuss any changes to the terms, you should contact your Employer. Additional information may also be obtained from the Westpac Commercial Cards Service line 1300 650 107.

Your Rights

Changes to the arrangement

If you want to cancel this agreement you should notify the financial institution where your nominated account is held at least five working days prior to the next scheduled drawing date.

You should also notify your Employer immediately, in writing, that you wish to cancel both the drawing arrangement and the Employee Benefits Card(s).

Disputes

- If you believe that a drawing has been initiated incorrectly, we encourage you to take the matter up directly with us by contacting the Commercial Cards Service unit on 1300 650 107
- You will receive a refund of the drawing amount if we cannot substantiate the reason for the drawing.

Your Commitment to us

It is your responsibility to:

- Ensure your nominated account can accept direct debits as direct debiting may not be available on all accounts (your financial institution can confirm this); and
- Ensure that on the drawing date there are sufficient cleared funds in the nominated account; and
- Advise us if the nominated account is transferred or closed.
- Check your nominated account details against a recent statement from your financial institution.

If your drawing is returned or dishonoured by your financial institution then value will be processed to your Employer's account.

Your Information

We will keep all information relating to your nominated account confidential except where required for the purpose of conducting direct debits with your financial institution.