

PAIA MANUAL

Prepared in terms of Section 51 of the Promotion of Access to Information Act, 2 of 2000 (PAIA)

Entity: Hastie & Piper Health Consulting CC (trading as HealthGroup)

Registration Number: CK2006/123456/23

FSP Number: 33932

CMS Accreditation Number: ORG 3055

Date of Compilation: 3 September 2025

1. CONTACT DETAILS

Information Officer	Dale Piper
Postal Address	PO Box 101, Kloof, 3640
Physical Address	12 Village Road, Kloof, Durban
Telephone	031 764 7298
Email	dale@healthgroup.org.za
Website	www.healthgroup.org.za

2. INTRODUCTION

This manual is published in accordance with Section 51 of PAIA and outlines the procedures for requesting access to records held by HealthGroup. It also reflects our commitment to the lawful processing of personal information under the Protection of Personal Information Act (POPIA).

3. APPLICABLE LEGISLATION

HealthGroup complies with the following legislation, among others:

- Promotion of Access to Information Act, 2 of 2000
 - Protection of Personal Information Act, 4 of 2013
 - Medical Schemes Act, 131 of 1998
 - Financial Advisory and Intermediary Services Act, 37 of 2002
 - Companies Act, 71 of 2008
 - Income Tax Act, 58 of 1962
 - Basic Conditions of Employment Act, 75 of 1997
 - Labour Relations Act, 66 of 1995
 - Electronic Communications and Transactions Act, 25 of 2002
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4. DESCRIPTION OF BUSINESS

HealthGroup is an accredited healthcare brokerage offering advisory and intermediary services related to medical schemes. We serve individuals, families, and employer groups, providing comparative advice, onboarding support, claims assistance, and benefit reviews. Our CMS accreditation number is **ORG 3055**, confirming our status as a registered broker organisation.

5. RECORDS AVAILABLE WITHOUT REQUEST

The following records are available without formal PAIA request:

- Company profile and accreditation certificates
- Marketing brochures and service descriptions
- CMS and FSCA registration details
- POPIA Privacy Policy
- Broker Charter
- Public newsletters and wellness articles

These can be accessed via our website or requested via email.

6. RECORDS AVAILABLE ON REQUEST

Subject to applicable grounds for refusal, the following categories of records may be requested:

6.1 Client Records

- Application forms and onboarding documentation
- Advice records and needs analyses
- Claims assistance logs
- Correspondence with schemes and clients

6.2 Personnel Records

- Employment contracts
- Leave and payroll records
- Performance reviews
- Training and supervision logs

6.3 Financial Records

- Annual financial statements
- Broker fee schedules
- Tax returns and VAT records
- Monthly dashboards and reporting packs

6.4 Compliance Records

- FSCA and CMS correspondence
- Complaints register
- POPIA compliance documentation
- Supervision and representative registers

6.5 Operational Records

- Internal policies and procedures
- Sales process documentation
- Client onboarding trackers
- Document templates and speechwriting archives

7. REQUEST PROCEDURE

To request access to a record:

1. Complete **Form C** (available from www.sahrc.org.za or www.justice.gov.za)
2. Submit the form to the Information Officer via email or post
3. Include:
 - Sufficient detail to identify the record
 - Proof of identity
 - Grounds for request (if applicable)

Fees:

- A request fee may be charged (R140.00 standard)
 - Additional access fees may apply for reproduction or search time
 - Fee exemptions may apply for personal records
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8. GROUNDS FOR REFUSAL

Access may be refused if:

- Disclosure would violate third-party privacy
 - The record contains confidential commercial information
 - The record is legally privileged
 - Disclosure would endanger the safety of individuals
 - The request is manifestly frivolous or vexatious
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9. POPIA COMPLIANCE

HealthGroup is committed to protecting personal information in accordance with POPIA:

- Information is collected for lawful, specific purposes
 - Data subjects are informed of the purpose and use
 - Records are safeguarded against loss, unauthorised access, and misuse
 - Data subjects may request access, correction, or deletion of their information
 - A full POPIA policy is available on our website
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10. MANUAL AVAILABILITY

This manual is available:

- In hard copy at our offices
 - Electronically via our website
 - On request via email
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11. SAHRC CONTACT DETAILS

Postal Address Private Bag X2700, Houghton, 2041

Telephone 011 877 3600

Email PAIA@sahrc.org.za

Website www.sahrc.org.za