

## Work Wellness. Client Facing Policy

### Payment & Cancellations

**Policy:**

Purpose:	To define the payment and cancellation terms applicable to clients when they engage Work Wellness services.
Scope:	All chargeable Work Wellness services.
Accountable:	Work Wellness Commercial Director.
Responsible:	Officers of Work Wellness. Where compliance depends upon others, such as sub-contractors, the Work Wellness officer will ensure that the sub-contractor is compliant with this policy.

## 1 Payment terms.

### 1.1.1 No contract in place.

- First instance of service delivery to a new client.
  - Work Wellness will send an invoice upon appointment confirmation.
  - Payment is due in full upon receipt of the invoice and no later than 2 working days prior to the appointment.
- Subsequent instances of service delivery to an existing client.
  - Work Wellness will send an invoice upon or after appointment confirmation.
  - Payment is due in full within 14 calendar days of receipt of the invoice unless the client has a history of late payment in which case Work Wellness reserve the right to require payment in full upon receipt of the invoice and no later than 2 working days prior to the appointment.

If the client's internal finance operations / BACS based payment process is unable to achieve these timescales then Work Wellness accept on-line card payments via Square, subject to an additional processing fee of 3%.

### 1.1.2 Contract in place.

- Payment terms subject to contract.

### 1.1.3 Timely cancellation by client or employee.

- If payment already received Work Wellness will issue a refund for the payment amount minus any committed "out of pocket" expenses.
- If payment not yet received, the invoice is waived and Work Wellness will re-invoice for any committed "out of pocket" expenses.

### 1.1.4 Late cancellation by the client or employee or cancellation by Work Wellness because of failure to perform by the client or employee.

- If payment already received there will be no refund.
- If payment not yet received Work Wellness will expect payment of the invoiced amount in full.
- Work Wellness will also invoice for any committed "out of pocket" expenses not already invoiced.
- If a re-scheduled appointment is agreed within a calendar month, the rescheduled appointment will be charged at 50% of the normal price.

### 1.1.5 Out of pocket expenses.

Out of pocket expenses for occupational health assessments can be incurred by:

- Commissioning a report from the employee's GP or treating specialist.
- Booking an independent off-site venue for the appointment.
- Purchasing consumables which are perishable or which cannot be re-allocated.
- Travelling to the assessment location.

Out of pocket expenses for training courses can be incurred by:

- Purchasing course manuals, booklets and other course materials.
- Booking an independent off-site venue for the training course.
- Booking local accommodation for the night prior to the training course.

Out of pocket expenses also carry a 15% administration charge.

### 1.1.6 Cancellation by Work Wellness.

Where Work Wellness need to cancel an appointment because of clinician / instructor sickness or a force majeure event then an alternative appointment can be arranged.

## 2 Definition of terms.

### 2.1.1 Ad hoc assessment.

- One or more assessments which have been booked separately.
- Assessments can include:
  - Fitness for Work Assessments.
  - DSE-Workstation Assessments.
  - Individual Stress Risk Assessments.
  - New & Expectant Mother Health Risk Assessments.

### 2.1.2 Clinic day.

- A group of assessments or health checks booked together and intended to occupy a complete clinic day.
- Assessments can include:
  - Fitness for Work Assessments.
  - DSE-Workstation Assessments.
  - Individual Stress Risk Assessments.
  - New & Expectant Mother Health Risk Assessments.
- Health checks can include:
  - Vital Signs Physical Health Checks.
  - Mind Matters Mental Health Checks.
  - Menopause Matters Health Checks.

### 2.1.3 Appointment confirmation.

- A calendar date and time confirmed in writing by the client (e.g., by email) and / or by their employee (e.g., by accepting a Google calendar invite).
  - This definition also applies in the following scenarios where the client has asked Work Wellness to arrange the appointment with their employee:
    - A calendar date and time has been confirmed in writing by the client but Work Wellness have yet to receive the employee consent form from the client (which means Work Wellness are awaiting consent to make contact with the employee) or
    - Work Wellness have agreed a calendar date and time with the employee and have issued a meeting invite to them (e.g., a Google calendar invite) but they have not accepted the invite (Work Wellness will usually try, but cannot always commit, to chasing the employee to accept the invite and / or escalate non-acceptance to the client for them to resolve with the employee).

### 2.1.4 Cancellation of ad hoc assessment by the client or employee.

	Timely cancellation
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<ul style="list-style-type: none"> <li>• Written confirmation from the client that the appointment is no longer required.</li> <li>• Calendar invite declined by the employee (Work Wellness will usually try, but cannot always commit, to timely notification to the client for them to resolve with the employee).</li> </ul>	<p>Earlier than 2 working days (i.e., earlier than 48 hours counted over 2 working days) prior to the appointment.</p>
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2.1.5 Cancellation of ad hoc assessment by Work Wellness because of failure to perform by the client or employee.

	Cancellation triggered at:
<ul style="list-style-type: none"> <li>• The invoice specifies payment is due in full upon receipt of the invoice and no later than 2 working days prior to the appointment but payment has not been received within these timescales.</li> </ul>	<p>2 working days (i.e., 48 hours counted over 2 working days) prior to the appointment.</p>
<ul style="list-style-type: none"> <li>• Non-receipt of the referral / consent forms to allow Work Wellness sufficient time to:                             <ul style="list-style-type: none"> <li>• Arrange the appointment with the employee (agreeing a convenient date and time, issuing the calendar invite and receiving an invite acceptance).</li> <li>• Request relevant documents from the employee and receive these documents back from the employee.</li> <li>• Prepare for the appointment, including;                                     <ul style="list-style-type: none"> <li>• Read through the referral form and relevant documents provided by the employee.</li> <li>• Research unfamiliar terms, health conditions and treatments described in the referral form or relevant documentation.</li> <li>• Prepare a starting set of questions ready explore with the employee in order to elicit the information required to answer the questions you have asked of us.</li> </ul> </li> </ul> </li> </ul>	<p>5 working days (i.e., 120 hours counted over 5 working days) prior to the appointment.</p>
<ul style="list-style-type: none"> <li>• Non-attendance by the employee. If the employee is not in attendance:                             <ul style="list-style-type: none"> <li>• 5 minutes after the appointment start time Work Wellness will usually try, but cannot always commit, to emailing them in an attempt to bring them into the assessment.</li> <li>• 15 minutes after the appointment start time, the Work Wellness practitioner cannot recover lost time and will leave the appointment (e.g., close down the video conference call).</li> </ul> </li> </ul> <p>It is the employer’s responsibility to ensure that the employee is committed to the occupational assessment process, which includes attending appointments on time.</p>	<p>15 minutes after the appointment start time.</p>

2.1.6 Cancellation of a clinic or training course by the client.

	Timely cancellation
<ul style="list-style-type: none"> <li>• Written confirmation from the client that the appointment is no longer required.</li> </ul>	<p>Earlier than 14 working days (i.e., earlier than 336 hours counted over 14 working days) prior to the appointment.</p>

Acceptance of alternative attendees on training courses is at the discretion of Work Wellness subject to notification to Work Wellness at least 2 working days prior to the appointment date.

## Appendix A. Document Summary.

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Next Review Date:	Annually, considering any changes to advice publicised by respected authorities, e.g., <ul style="list-style-type: none"> <li>• <a href="#">Small Business Commissioner</a></li> <li>• <a href="#">Department for Business, Innovation and Skills</a></li> <li>• <a href="#">Federation of Small Businesses</a></li> </ul>
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