

The Information Manual

for Bay Union Insurance Brokers (Pty) Ltd



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FSP:	BAY UNION INSURANCE BROKERS FSP 12235		
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Prepared in accordance with Section 51 of the Promotion of Access to Information act 2 of 2000 ("the Act")

Introduction:

Bay Union Insurance Brokers (Pty) Ltd conducts business as a Short Term Insurance Broker. We are an Authorized Service Provider in terms of the Financial Advisory @ Intermediary Service Act. Our FSP license number is FSP 12235

Particulars in Terms of the Section 51 Manual:

Information Officer: Kyle Partington

Contact details [Section 51(1) (a) – The following contact details can be used to obtain Information from Bay Union Insurance Brokers (Pty) Ltd in accordance with the Act and this Manual:

Company Contact Details:

Directors: Mr. AN Dickinson
Mr. DK Pearse
Mr. PM Pearse
Mr. NJ Keary

CEO: Mr. DK Pearse

Physical Address:

Bay Union Insurance Brokers (Pty) Ltd
The Annexe, Lion Match Office Park,
892 Umgeni Road
Durban
KZN
4000

Telephone: +27 (0)87 997 0200

Email (Information Officer): popia@bayunion.co.za

Website: www.bayunion.co.za

Postal Address:

P.O Box 795
Durban
4000

Background to the Promotion of Access to Information Act:

The Promotion of Access to Information act 2 of 2000 ("the Act") was enacted on 3 January 2000. The purpose of the Promotion of Access to Information Act is to give effect to the constitutional right of access to any information held by the State and any information that is held by another person and that is required for the exercise or protection of any rights; and to provide for matters connected therewith.

Requests in terms of the act shall be made in accordance with the prescribed procedures, at the rates provided. The forms and tariffs are dealt with in the below paragraphs.

The Section 10 Guide on how to use the Act [Section 51(1)(b)]:

The Guide is available from the South African Human Rights Commission or click here to view guide (online version). PAIA GUIDE

Please direct any queries to:

The South African Human Rights Commission: PAIA Unit
The Research and Documentation Department

Telephone: +27 (0) 11 484 8300

Website: www.sahrc.org.za

Email: paia@sahrc.org.za

Applicable Legislation:

Number	Reference	Act
1	No 61 of 1973	Companies Act
2	No 98 of 1978	Copyright Act
3	No 55 of 1998	Employment Equity Act
4	No 95 of 1967	Income Tax Act
5	No 66 of 1995	Labour Relations Act
6	No 89 of 1991	Value Added Tax Act
7	No 37 of 2002	Financial Advisory and Intermediary Services Act
8	No 75 of 1997	Basic Conditions of Employment Act
9	No 25 of 2002	Electronic Communications and Transactions Act
10	No 2 of 2000	Promotion of Access of Information
11	No 30 of 1996	Unemployment Insurance Act
12	No 24 of 1956	Pension Fund Act
13	No 9 of 1999	Skill development Levies Act
14	No 24 of 1936	Insolvency Act
15	No 130 of 193	Compensation of Occupation Injuries and Diseases Act

Categories of information [Section 51 (1) (e)]:

The records mentioned below are not automatically available and a request for access to the information, is subject to Section 63 (1) of the Act, providing that a head of a private body must refuse a request for access to a record of the body if its disclosure would involve the unreasonable disclosure of perusal of personal information about a third party, including a deceased individual, therefore, inclusion in this list does not imply that the request for the record will be granted.

Personnel Records:

Includes records relating to temporary employees, fixed term employees, part-time employees, permanent employees, locums, associates, contractors, partners, directors, executive directors, non-executive directors. It includes personal files and similar records, records a third parties have provided to us about their personnel; employment contracts, conditions of employment; workplace policies; disciplinary records; termination records; minutes of staff meetings; performance management records and systems and all employment-related records and correspondence.

Customer-related Records:

Includes client lists; agreements; consents; needs assessments; financial and accounts information;; profiling; and similar information. It must be noted that, in the financial sector, personal information are protected by legislation and ethical rules, and disclosure can only take place, if at all, without those frameworks.

Personal Information Records:

Includes our business's founding and other documents, minutes and policies; annual and other reports; financial records; operational records, policies and procedures; contracts; licences, trademarks and other intellectual property; production, marketing records; other internal policies and procedures; internal correspondence; statutory records; insurance policies and records; etc.

Other Records:

Includes supplier registrations; contracts; confidentiality agreements and non-disclosure agreements, communications; logs; delivery records; commissioned work; and similar information, some of which might be provided to us by such suppliers and providers under service- and other contacts. Technical records, which includes manuals, logs, electronic and cached information, product registrations, product dossiers, health professionals council / statutory body records, approvals, conditions and requirements, trade association information and similar product information.

Form of Request:

- The requester must use the prescribed form (Form 2) to make the request for access to a record. This must be made to the Information Officer of the private body. This request must be made to the address, fax number or electronic mail address of the body concerned [section 53(1)]. A request will be deemed to be received by Bay Union Insurance Brokers when Bay Union Insurance Brokers acknowledges receipt thereof, for the purposes of this clause an auto response shall not be a response by Bay Union Insurance Brokers;
- The requester must provide sufficient detail on the request form to enable the head of the private body to identify the record and the requester. The requester should also indicate which form of access is required. The requester should also indicate if any other manner is to be used to inform the requester and state the necessary particulars to be so informed [section 53(2) (a) and (b) and (c)];
- The requester must identify the right that is sought to be exercised or to be protected and provide an explanation of why the requested record is required for the exercise or protection of that right [section 53(2) (d)];
- If a request is made on behalf of another person, the requester must then submit proof of the capacity in which the requester is making the request to the satisfaction of the head of the private body [section 53(2) (f)].

Fees:

ACTIVITY	FEE
Copy per A4 Page	R1.10
Printing per A4 page	75 cents
Copy on a CD	R70
Transcription of visual images per A4 page	R40
Copy of a visual image	R60
Transcription of an audio recording per A4 page	R20
Copy of an audio recording	R30
Search and preparation of the record for disclosure	R30 per hour or part thereof, excluding the first hour, reasonably required for the search and preparation.

Postage fees must be paid by the requester for the delivery of their records in the case of both public and private bodies.

A requester who seeks access to a record containing personal information about that requester is not required to pay the request fee. Every other requester, who is not a personal requester (request for personal information), must pay the required request fee as stipulated in the Regulations promulgated in terms of the Act (as indicated hereunder).

Payment of the fees must take place prior to making available the requested record/s;

The fee for a copy of the manual as contemplated in regulation 9(2) (c) is R1.10 for every photocopy of an A4-size page or part thereof.

Limitation of Liability:

Bay Union Insurance Brokers is relieved from liability and shall have no duty whatsoever, in relation to:

- The integrity and or accuracy of the information requested;
- Any delay associated with the delivery except to comply with the procedures stipulated herein; and/or
- That the information requested shall conform with the requirements of the requester except that it should correspond with the title and description provided by the requester.

FORM 2

REQUEST FOR ACCESS TO RECORD

[Regulation 7]

NOTE:

1. *Proof of identity must be attached by the requester.*
2. *If requests made on behalf of another person, proof of such authorisation, must be attached to this form.*

TO: The Information Officer

(Address)

E-mail address:

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Fax number:

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Mark with an "X"

☐

Request is made in my own name

☐

Request is made on behalf of another person.

PERSONAL INFORMATION				
Full Names				
Identity Number				
Capacity in which request is made (when made on behalf of another person)				
Postal Address				
Street Address				
E-mail Address				
Contact Numbers	Tel. (B):		Facsimile: <table border="1"><tr><td></td></tr></table>	
Cellular:				
Full names of person on whose behalf request is made (if applicable):				
Identity Number				
Postal Address				

Street Address			
E-mail Address			
Contact Numbers	Tel. (B)		Facsimile
	Cellular		
<p align="center">PARTICULARS OF RECORD REQUESTED</p> <p><i>Provide full particulars of the record to which access is requested, including the reference number if that is known to you, to enable the record to be located. (If the provided space is inadequate, please continue on a separate page and attach it to this form. All additional pages must be signed.)</i></p>			
Description of record or relevant part of the record:			
Reference number, if available			
Any further particulars of record			
<p align="center">TYPE OF RECORD</p> <p align="center"><i>(Mark the applicable box with an "X")</i></p>			
Record is in written or printed form			
Record comprises virtual images <i>(this includes photographs, slides, video recordings, computer-generated images, sketches, etc)</i>			
Record consists of recorded words or information which can be reproduced in sound			
Record is held on a computer or in an electronic, or machine-readable form			

FORM OF ACCESS <i>(Mark the applicable box with an "X")</i>	
Printed copy of record <i>(including copies of any virtual images, transcriptions and information held on computer or in an electronic or machine-readable form)</i>	
Written or printed transcription of virtual images <i>(this includes photographs, slides, video recordings, computer-generated images, sketches, etc)</i>	
Transcription of soundtrack <i>(written or printed document)</i>	
Copy of record on flash drive <i>(including virtual images and soundtracks)</i>	
Copy of record on compact disc drive <i>(including virtual images and soundtracks)</i>	
Copy of record saved on cloud storage server	

MANNER OF ACCESS <i>(Mark the applicable box with an "X")</i>	
Personal inspection of record at registered address of public/private body <i>(including listening to recorded words, information which can be reproduced in sound, or information held on computer or in an electronic or machine-readable form)</i>	
Postal services to postal address	
Postal services to street address	
Courier service to street address	
Facsimile of information in written or printed format <i>(including transcriptions)</i>	
E-mail of information <i>(including soundtracks if possible)</i>	
Cloud share/file transfer	
Preferred language <i>(Note that if the record is not available in the language you prefer, access may be granted in the language in which the record is available)</i>	

PARTICULARS OF RIGHT TO BE EXERCISED OR PROTECTED <i>If the provided space is inadequate, please continue on a separate page and attach it to this Form. The requester must sign all the additional pages.</i>	
Indicate which right is to be exercised or protected	

Explain why the record requested is required for the exercise or protection of the aforementioned right:	

FEES	
a)	<i>A request fee must be paid before the request will be considered.</i>
b)	<i>You will be notified of the amount of the access fee to be paid.</i>
c)	<i>The fee payable for access to a record depends on the form in which access is required and the reasonable time required to search for and prepare a record.</i>
d)	<i>If you qualify for exemption of the payment of any fee, please state the reason for exemption</i>
Reason	

You will be notified in writing whether your request has been approved or denied and if approved the costs relating to your request, if any. Please indicate your preferred manner of correspondence:

Postal address	Facsimile	Electronic communication (Please specify)

Signed at _____ this _____ day of _____ 20 _____

Signature of Requester / person on whose behalf request is made

FOR OFFICIAL USE

Reference number:	
Request received by: (State Rank, Name And Surname of Information Officer)	
Date received:	
Access fees:	
Deposit (if any):	

Signature of Information Officer