



Steps to Complete Online Enrollment

We are pleased to have you join us in our mission to get America healthy. Before your journey can begin, there are a few necessary steps to complete to active your Health Coach account.

Let's take a few moments today to get you started in your Take Shape For Life business:

Step 1: Once you have purchased your Health Coach pack, you will receive a confirmation email linking you to the online enrollment site. Click on the [Office in Motion](#) link to begin. See the sample enrollment page (attached) for reference.

** If you have not received this link via email, you can access the online enrollment site at www.myofficeinmotion.com.*

Step 2: You will now complete each step in your Activation Checklist (located in the **Steps to activate your Health Coach account** section of your landing page). Each step is a hyperlink that will take you to the particular task within the checklist. As you complete each step, your progress will be indicated by a checkmark.

Steps to activate your Health Coach account:

- You must [submit your tax ID or Social Security Number](#).
- You've passed your [Basic Enrollment Questionnaires](#).
- You must [fill out and submit a W-9 form \(PDF\)](#).
- You must accept the terms & conditions of either the [Health Coach Agreement](#) or the [Health Professional Agreement](#).

Step 3: After you have completed the checklist you will complete the **Profile Update** section. Please enter tax ID in the designated field. **If you do not have an EIN, a SSN can be used.*

Profile Update

Tax ID: (SSN or EIN)

Registered Business Name:

* Your Tax ID number is required in order for you to receive compensation. This information is used for tax purposes only and will not be used or shared for any other purpose.

Click here to update your Profile Information

Step 4: Next, complete the **W-9** section of the pending Health Coach form. Instructions on how to download and complete form are listed at the top of the W-9 section (see image below). Completion of this form is required by the IRS.

**Note that the Tax ID # entered in your W-9 form must match the tax information you provided in the Profile Update section above (Step 3).*

The screenshot shows the 'W-9' section of a form. At the top, it states: '* Completion of this form is required by the IRS. If you do not have Adobe Acrobat, download a free trial version now or call Health Coach Services (1-877-270-5708) for assistance. <Download Trial Now>'. Below this are six numbered instructions: 1. Download the PDF form from the IRS. (Click to download) - circled in red. 2. Type your information into the appropriate areas of the form. * This information must match the tax information you provided above in the Update Profile section. 3. Type your name (as it appears on your Social Security Card) as your electronic signature on the form. 4. Save the completed W-9 form to your desktop. 5. Click "Browse" to locate and select the saved W-9 form from your desktop. - A text input field and a 'Browse...' button are shown, circled in red. 6. Click "Upload" to submit. - An 'Upload' button is shown, circled in red, with a blue callout box pointing to it that says 'Click here to upload'.

Step 5: The last step is to complete the **Health Coach** or **Health Professional Agreement**. Please complete the appropriate agreement based on the pack you purchased from the Shopping Cart.

The screenshot shows the 'Instructions' section of a form. It reads: 'Read through the agreement below that pertains to your pack purchase. Check the "I Agree" box under the agreement and click "Submit." To print the agreement for your records, click "Print Agreement."'. Below this is the 'Health Coach Agreement' section, which is circled in red. It contains a scrollable text area with the following text: 'This Agreement is entered into between Take Shape for Life, Inc. ("TSFL" or "The Company"), a Delaware corporation with principal place of business located at Owings Mills, Maryland, and you, the Health Advisor named in this Agreement and is effective as of the date of the acceptance of the Health Advisor Agreement by TSFL. TSFL reserves the right, in its sole judgment, to decline any Health Advisor Agreement within thirty (30) days of its submission. If TSFL declines the Health Advisor Agreement, the Health Advisor will be immediately terminated, their registration fee refunded in full and any Compensation earned by the Health Advisor during their period as a Health Advisor will be paid according to TSFL Policies. Upon acceptance of the Health Advisor Agreement by TSFL, the Health Advisor will have the right to market and sell TSFL products and services (the "Products and Services") to the Health Advisor's clients.' Below the text area are two buttons: 'Print Agreement' (circled in red) and 'Submit' (circled in red). To the left of the 'Submit' button is an unchecked checkbox labeled 'I agree.'.

Congratulations! You have now successfully completed the online enrollment process and can begin to enjoy the many benefits of activation, including sponsoring Clients. Working together, we can establish America as the healthiest country in the world!

Welcome to Take Shape For Life:

Steps to activate your Health Coach account:

- You must [submit your tax ID or Social Security Number](#).
- You must [finish the Basic Enrollment Questionnaire](#).
- You must [fill out and submit a W-9 form \(PDF\)](#).
- You must accept the terms & conditions of either the [Health Coach Agreement](#) or the [Health Professional Agreement](#).

[Profile Update](#)

Tax ID: (SSN or EIN)

Registered Business Name:

* Your Tax ID number is required in order for you to receive compensation. This information is used for tax purposes only and will not be used or shared for any other purpose.

[W-9](#)

* Completion of this form is required by the IRS.

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1. [Download the PDF form from the IRS. \(Click to download\)](#)
2. Type your information into the appropriate areas of the form.
* This information must match the tax information you provided above in the Update Profile section.
3. Type your name (as it appears on your Social Security Card) as your electronic signature on the form.
4. Save the completed W-9 form to your desktop.
5. Click "Browse" to locate and select the saved W-9 form from your desktop.
6. Click "Upload" to submit.

[Instructions](#)

Read through the agreement below that pertains to your pack purchase. Check the "I Agree" box under the agreement and click "Submit." To print the agreement for your records, click "Print Agreement."

[Health Coach Agreement](#)

This Agreement is entered into between Take Shape for Life, Inc. ("TSFL" or "The Company"), a Delaware corporation with principal place of business located at Owings Mills, Maryland, and you, the Health Advisor named in this Agreement and is effective as of the date of the acceptance of the Health Advisor Agreement by TSFL. TSFL reserves the right, in its sole judgment, to decline any Health Advisor Agreement within thirty (30) days of its submission. If TSFL declines the Health Advisor Agreement, the Health Advisor will be immediately terminated, their registration fee refunded in full and any Compensation earned by the Health Advisor during their period as a Health Advisor will be paid according to TSFL Policies.

Upon acceptance of the Health Advisor Agreement by TSFL, the Health Advisor will have the right to market and sell TSFL products and services (the "Products") to customers ("Customers") pursuant to this Health Advisor Agreement and the TSFL Policies and Procedures as contained in the TSFL [web sites and in written form \(hereinafter referred to collectively as the Agreement\)](#). The

I agree.

[Print Agreement](#)