Making sure your clients are onboarded smoothly

We understand that you want your business clients to be up and running as soon as possible. To be able to do this, we'd like to remind you of the information we need you to send us.

When contacting your Bupa Account Manager, please use the below checklist so that we will have everything we need to onboard them as soon as possible.

If you have any questions, please contact your Bupa Account Manager.

Intermediary information

Intermediary name

Intermediary agency reference

Policy information

Quote reference number to be accepted

Policy start date D D M M Y Y Y Y

Number of members

Company information

Company name

Company trading address

Postcode

Business type *(Ltd/partnership etc.)*

Company verification *(what have you used to verify? – eg, Companies House/VAT number etc.)*

Verification number *(as per Companies House/VAT number etc. where applicable)*

Contributing members Yes ☐ No ☐

Please also supply the following:

- a full membership list *(must include full names, date of birth and full addresses including postcode)*
- if paying direct debit, a direct debit mandate
- medical declaration *(for NFU/MORI Switch).*

Group contact and preference information

Group Policy documents

Online ☐ Paper ☐

Group Secretary name

Group Secretary contact number

Group Secretary email address

Invoices Online only

Billing contact email address

Should you or your have any particular accessibility or information needs for example due to disability, illness or current personal circumstances – please contact us via the talk to us icon, by email smeonboarding@bupa.com or phone 0345 600 3764, where one of the team will be happy to discuss your requirements. We may record or monitor calls.

My Bupa digital invite Yes ☐ No ☐

Additional information

Is there anything else the team need to be aware of *(eg, over aged dependants that need adding, the scheme is transferring from corporate etc.)?*

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