# Your application/ amendment form

## **Select Healthcare Plan**

Underwritten To be completed by the member



Please use this form to tell us about your medical history, and the medical history for anyone else you want to add to your cover (a dependant).

We need this information to confirm your cover, process your claims and pay for any treatment you need that's covered by your policy.

- This form is for new members to complete by providing us accurate information and your medical history.
- If your group scheme has provided you with cover for any dependants (partner/children) please provide accurate information and their medical history.
- If you are an existing member and are adding new dependants to your policy (with the authority of your scheme administrator) please provide accurate information and their medical history.
- Give as much detail as you can and check all answers are correct to the best of your knowledge.
- If the answers are about a dependant (your partner and any child you or your partner are responsible for and who is covered on your policy and named on your membership certificate), check with them to make sure the information you're providing is correct.
- Read the privacy notice on page 13 to see how we use your information. Please give a copy of this to any dependants covered on your policy.

If you have any questions, please call us on **0345 600 1167** between 8am and 5pm Monday to Friday and we'll be happy to help.

We may record or monitor our calls.

Hearing or speech difficulties? Please use the Relay UK service on your smartphone or textphone. Visit www.relayuk.bt.com for more information.

Sight difficulties? We offer documents in Braille, large print or audio. Please let us know if you'd like us to send you any.

#### Need to know

This policy is fully medically underwritten. This means that any symptoms or conditions you, or your dependant(s), had before the policy started may not be covered.

We may ask you, or your dependant(s), for more medical information when you, or they, claim for up to five years after your policy start date. This is to make sure that a claim doesn't relate to something which isn't covered by your policy.

If there's reasonable evidence that you or a dependant didn't take reasonable care answering our questions, your policy may be cancelled, treated as if it never existed, or your claims may not be paid.

#### Application type

New application

Addition of new dependants

## Scheme details - please speak to your Group Secretary for these details

Company name
Bupa group number
Please tell us which products should be selected for this application.
Preferred cover start date
<b>Need to know:</b> we'll try to start the cover (for the new application or change, whichever applies) on the above date. We'll confirm your start date on your membership certificate.

## 1. Your personal details

Title (please tick or list title if other)   Mr   Mrs	Miss Ms Other
First name(s)	Surname
Address	
	Postcode
Home telephone number	Mobile telephone number
Email address	
Date of birth	Sex at birth Male Female
If you're already a Bupa policyholder or beneficiary under a Trust or have been in the past, please give us your membership or registration number	

If your group has provided you cover for any dependants (partner, children) please complete section 2.

## 2. Details of anyone else to be covered

## Need to know

If your group hasn't provided you cover for any dependants (partner, children), please go to section 3. If you would like to add dependants please discuss this with your group administrator. Remember to check with each dependant that you have their correct details and make sure that they're shown our privacy notice on page 13 before sending us their details. You must have their express agreement to send us this form on their behalf, or be their legal representative. Need to know: adding people to your policy may impact the price you pay for your cover.

	Person 2	Person 3	Person 4	Person 5
Title				
First name(s)				
Surname				
Relationship to you				
Date of birth				
Sex at birth	Male Female	Male Female	Male Female	Male Female
Nood to od	d mara naanla?			

### Need to add more people?

Please tick this box and use the notes on page 15. You'll also need to answer sections 3 and 4 for them.

## 3. About you and anyone else to be covered

#### Need to know

Please answer each question for yourself and for each person named in section 2. If you're an existing policyholder and are only adding dependants, you don't need to complete sections 3 and 4 about yourself, just about your dependants.

Please tick 'Yes' or 'No' to every question as it applies to you and each dependant named in section 2. Remember to check with them that you have their correct details and make sure they're shown our privacy notice on page 13 before sending us their details.

	Main policyholder	Person 2	Person 3	Person 4	Person 5
		(Plea	ase tick the relevant	box)	
Are you a UK resident? You are if you live in the UK (including Isle of Man and Channel Islands) for 183 days or more each year	Yes No	Yes No	Yes No	Yes No	Yes No
Have you been registered with a UK GP for at least six months?	Yes No	Yes No	Yes No	Yes No	Yes No
If not, do you have access to your medical records in English?	Yes No	Yes No	Yes No	Yes No	Yes No
<b>Need to know:</b> You'll need to be registered with a GP in the UK – if not, we may be unable to offer you health insurance cover					
Are you a professional or semi-professional sportsperson?	Yes No	Yes No	Yes No	Yes No	Yes No
By this we mean: are you paid or sponsored to take part in any sport?					
If ' <b>Yes</b> ', which sport(s)? Please include the name of the team, if applicable?					
<b>Need to know:</b> When we receive your application, if we're unable to offer you health insurance cover, we'll let you know as soon as we can					

## 4. Medical history - part one

#### Need to know

This section asks for your previous and current health and medical details, and for each dependant named in section 2. If you're an existing member and are only adding your dependants, you don't need to fill out the medical history relating to your own health, only for your dependants. Please tick 'Yes' or' No' to every question for each person. Remember to check with them that you have their correct details and make sure they're shown our privacy notice on page 13 before sending us their details.

<ul> <li>Please answer questions 1 to 5 to indicate if you or anyone to be covered on your policy has:</li> <li>seen a GP or other healthcare professional within the last two years for any of the conditions or symptoms listed</li> <li>OR</li> <li>been admitted to hospital, had an operation or any investigations (for example scan, X-ray, blood test, biopsy) within the last seven years for any of the</li> </ul>	Main policyholder	Person 2	Person 3	Person 4	Person 5
conditions or symptoms listed		(Please t	ick the relevar	nt box)	
Question 1 - Musculoskeletal conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you had frequent or recurring pain, an operation in the back, neck, joints or muscles, a bone or nerve condition or any other condition that impacts normal movement?					
(For example: arthritis, cartilage/ligament problems, sprains, joint replacement, gout, sciatica etc)					
Question 2 - Cardiac conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you experienced shortness of breath, palpitations, swollen ankles, angina, heart attack, stroke, mini-stroke/ TIA or any other related symptoms?					
(For example: high blood pressure, high cholesterol, atrial fibrillation, heart failure, heart disease, chest pains, coronary artery disease etc)					
Question 3 - Pelvic conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you had any problems with your bladder, bowels, kidneys or prostate or do you have heavy or irregular menstruation or have had a caesarean section?					
(For example: urinary infections, irritable bowel, incontinence, endometriosis, fibroids, pregnancy and/or childbirth problems etc)					
Question 4 - Sensory organ conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you had any problems with your vision, hearing, balance or had an impacted tooth, wisdom tooth or retained root?					
(For example: cataracts, glaucoma, infections, abscess etc)					
Question 5 - Mental health conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you talked with a GP, therapist, counsellor or any other health professional about your mental health?					
(For example: stress, depression, fatigue, anxiety, anorexia, bulimia, compulsive disorders, schizophrenia etc)					

Please also answer the following questions:	Main policyholder	Person 2	Person 3	Person 4	Person 5
		(Please t	ick the relevar	nt box)	
Question 6 - Cancer conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Have you ever been diagnosed with or received treatment for cancer, or had a test that indicates you may have cancer?					
(For example: tumours, abnormal smears, raised PSA levels etc)					
Question 7 - Any other ongoing conditions	Yes No	Yes No	Yes No	Yes No	Yes No
Do you have any other health condition or symptoms for which you need ongoing prescription medication, regular medical tests, examinations or consultations?					
Question 8 - Any planned treatment	Yes No	Yes No	Yes No	Yes No	Yes No
Do you have any other health condition or symptoms for which you intend to seek investigation or treatment in the future or are currently receiving investigation or treatment for?					
If you've answered 'Yes' to any of the conditions here 'Medical history – part two'. If you've answered 'No' to all of the above conditions,	please go to s	ection 5.			
If you'd like to add any additional information.	olease tick thi	s box and u	use the Note	es on page <sup>-</sup>	15.

## 4. Medical history – part two

## Need to know

To help us fully understand your health and medical history, and the health and medical history of your dependants (if applicable), please give more details on pages 8 to 11 about any of the conditions you answered 'Yes' to in part one. Please give as much detail as possible. Without this information, your application for cover may be delayed. Below are some examples to help you.

## Definitions

Controlled: Condition or symptom ongoing but controlled by treatment or medication.

Recurrent: Occurring more than once, often or occasionally.

Likely to recur: Symptom free for a period of time, but likely to come back or happen again.

Fully recovered: Condition fully resolved or cured, with no symptoms and no medication.

#### Example one JOHN SMITH Name: Question number from part one 2 Please describe the illness or medical problem HIGH CHOLESTEROL Include which area of the body is affected, if relevant (for example left, right, upper, lower) When did symptoms start and end? Started 2 Ũ 2 2 0 1 0 If symptoms are ongoing please leave the end Ended date blank Current state of the condition or symptom Ongoing Controlled Recurrent $\checkmark$ Likely to recur Fully recovered Treatment prescribed or otherwise OVER COUNTER MEDICATION / DIET / PRESCRIBED MEDICATION How many times has this person seen a healthcare 2 professional about this symptom or condition in the last two years? If you'd like to declare another symptom or condition for this question, please tick this box. Example two JOHN SMITH Name: Question number from part one 1 Please describe the illness or medical problem LEFT KNEE PAIN Include which area of the body is affected, if relevant (for example left, right, upper, lower) When did symptoms start and end? Started 2 C 2 1 If symptoms are ongoing please leave the end Ended 2 2 2 0 8 0 2 0 date blank Current state of the condition or symptom Ongoing Controlled Recurrent Likely to recur Fully recovered 🗸 Treatment prescribed or otherwise PHYSIOTHERAPY

How many times has this person seen a healthcare	5	
professional about this symptom or condition in		
the last two years?		

If you'd like to declare another symptom or	
condition for this question please tick this box	

Name:	
Question number from part one	
Please describe the illness or medical problem	
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Treatment prescribed or otherwise	
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## 5. Medical reports - when we need more information from your doctor

We may need to ask your doctor for information about your consultation, tests, or treatment to see if your policy covers these. We'll need your permission to do this, and you have certain rights when it comes to your personal and medical information:

- you can give your doctor permission to send us a medical report without you seeing it first or ask to see it before they send it to us
- you can ask your doctor to show you the medical report before they send it to us so long as you do this within 21 days
  from the date we ask them for it
- if you don't contact your doctor within 21 days, we'll ask them to send the report straight to us
- you can ask your doctor to change the report if you think it's inaccurate or misleading if they refuse, you can add your own comments to it before they send it to us
- once you've seen the report, your doctor can't send it to us unless you give them permission to do so
- you can ask your doctor not to send us the medical report if this happens, we may be unable to tell you whether your consultation, test or treatment is covered, and we may be unable to pay your claim
- you can ask your doctor to let you see a copy of your medical report within 6 months of it being sent to us
- your doctor can withhold some or all the information in the report if they believe the information:
  - might cause you or someone else physical or mental harm, or
  - would reveal someone else's identity without their permission (unless the person is a healthcare professional, and the information they provide is about your care)
- your doctor may charge you for a medical report we'll let you know if we'll cover some of this cost if not, you'll need to
  pay for it yourself.

There's more detail about your rights in The Access to Medical Reports Act 1988 and The Access to Personal Files and Medical Reports (NI) Order 1991.

## 6. Your legal declaration

Important: please read this declaration carefully before signing and dating the completed form.

- 1. To the best of my knowledge and belief the information given in this form is true, accurate and complete. I understand that Bupa can end a person's policy or refuse to pay a claim in full or part if there is reasonable evidence that I or a dependent did not take reasonable care when providing any information requested in this form.
- 2. Where I have provided information on behalf of any other person to be covered on the policy, I confirm that I have checked with them that the information is correct before completing this form and I have their express agreement to submit this form on their behalf, or I am their legal representative.
- **3.** I understand that my personal information and that of any other person to be covered on this policy will be processed by Bupa for the purposes set out in Bupa's privacy notice. I confirm that I have brought Bupa's privacy notice to the attention of the persons covered.
- 4. I agree to be bound by the terms of this policy (including in respect of those terms that apply to any other person to be covered on this policy). I agree that English law will apply to the policy.

It is essential that you take reasonable care to provide us with full, complete and accurate information when you complete this form. Please be sure to check the entire form.

If you do not provide complete information about yourself or any other person covered under the policy, we may have the right to end your policy, or to refuse to pay all or part of a claim.

We recommend that you keep a record of all the information you supply to us in connection with this form, including letters.

If you would like a copy of this form, please ask us.

#### Obtaining medical reports from your doctor

- I understand that Bupa may need me to provide a medical report from my doctor to support my application, before treatment is authorised or a claim paid.
- I understand that Bupa will gain verbal or written permission from me prior to any medical report being requested in this way.
- I have shown this declaration to the proposed dependants on the policy. I confirm that they understand that Bupa will gain verbal or written permission from them prior to any medical report being requested in this way.
- I acknowledge the rights I have in relation to such reports as explained in section 5.

## Signature

Date	
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## Privacy notice - in brief

We are committed to protecting your privacy when dealing with your personal information. This privacy notice provides an overview of the information we collect about you, how we use it and how we protect it. It also provides information about your rights. The information we process about you, and our reasons for processing it, depends on the products and services you use. You can find more details in our full privacy notice available at **bupa.co.uk/privacy**. If you do not have access to the internet and would like a paper copy, please write to **Bupa Data Protection**, **Willow House, 4 Pine Trees, Chertsey Lane, Staines-upon-Thames, Middlesex TW18 3DZ**. If you have any questions about how we handle your information, please contact us at **dataprotection@bupa.com** 

#### Information about us

In this privacy notice, references to 'we', 'us' or 'our' are to Bupa. Bupa is registered with the Information Commissioner's Office, registration number Z6831692. Bupa is made up of a number of trading companies, many of which also have their own data-protection registrations. For company contact details, visit **bupa.co.uk/legal-notices** 

#### 1. Scope of our privacy notice

This privacy notice applies to anyone who interacts with us about our products and services ('you', 'your'), in any way (for example, email, website, phone, app and so on).

#### 2. How we collect personal information

We collect personal information from you and from certain other organisations (those acting on your behalf, for example, brokers, health-care providers and so on). If you give us information about other people, you must make sure that they have seen a copy of this privacy notice and are comfortable with you giving us their information.

#### 3. Categories of personal information

We process the following categories of personal information about you and, if it applies, your dependants. This is standard personal information (for example, information we use to contact you, identify you or manage our relationship with you), special categories of information (for example, health information, information about race, ethnic origin and religion that allows us to tailor your care), and information about any criminal convictions and offences (we may get this information when carrying out anti-fraud or anti-money-laundering checks, or other background screening activity).

## 4. Purposes and legal grounds for processing personal information

We process your personal information for the purposes set out in our full privacy notice, including to deal with our relationship with you (including for claims and handling complaints), for research and analysis, to monitor our expectations of performance (including of health providers relevant to you) and to protect our rights, property, or safety, or that of our customers, or others. The legal reason we process personal information depends on what category of personal information we process. We normally process standard personal information on the basis that it is necessary so we can perform a contract, for our or others' legitimate interests or it is needed or allowed by law. We process special categories of information because it is necessary for an insurance purpose, because we have your permission or as described in our full privacy notice. We may process information about your criminal convictions and offences (if any) if this is necessary to prevent or detect a crime.

### 5. Marketing and preferences

We may use your personal information to send you marketing by post, phone, social media, email and text. We only use your personal information to send you marketing if we have either your permission or a legitimate interest. If you don't want to receive personalised marketing about similar products and services that we think are relevant to you, please contact us at **optmeout@bupa.com** or write to **Bupa Data Protection, Willow House, 4 Pine Trees, Chertsey Lane, Staines-upon-Thames, Middlesex TW18 3DZ** 

#### 6. Processing for profiling and automated decision-making

Like many businesses, we sometimes use automation to provide you with a quicker, better, more consistent and fair service, as well as with marketing information we think will interest you (including discounts on our products and services). This may involve evaluating information about you and, in limited cases, using technology to provide you with automatic responses or decisions. You can read more about this in our full privacy notice. You have the right to object to direct marketing and profiling relating to direct marketing. You may also have rights to object to other types of profiling and automated decision-making.

### 7. Sharing your information

We share your information within the Bupa group of companies, with relevant policyholders (including your employer if you are covered under a group scheme), with funders who arrange services on your behalf, those acting on your behalf (for example, brokers and other intermediaries) and with others who help us provide services to you (for example, health-care providers) or who we need information from to handle or check claims or entitlements (for example, professional associations). We also share your information in line with the law. You can read more about what information may be shared in what circumstances in our full privacy notice.

#### 8. International transfers

We work with companies that we partner with, or that provide services to us (such as health-care providers, other Bupa companies and IT providers) that are located in, or run their services from, countries across the world. As a result, we transfer your personal information to different countries including transfers from within the UK to outside the UK, and from within the EEA (the EU member states plus Norway, Liechtenstein and Iceland) to outside the EEA, for the purposes set out in this privacy notice. We take steps to make sure that when we transfer your personal information to another country, appropriate protection is in place, in line with global data-protection laws.

### 9. How long we keep your personal information

We keep your personal information in line with periods we work out using the criteria shown in the full privacy notice available on our website.

#### 10. Your rights

You have rights to have access to your information and to ask us to correct, erase and restrict use of your information. You also have rights to object to your information being used; to ask us to transfer information you have made available to us; to withdraw your permission for us to use your information; and to ask us not to make automated decisions which produce legal effects concerning you or significantly affect you. Please contact us if you would like to exercise any of your rights.

#### 11. Data-protection contacts

If you have any questions, comments, complaints or suggestions about this notice, or any other concerns about the way in which we process information about you, please contact us at **dataprotection@bupa.com**. You can also use this address to contact our Data Protection Officer.

You also have a right to make a complaint to your local privacy supervisory authority. Our main office is in the UK, where the local supervisory authority is the Information Commissioner, who can be contacted at: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF, United Kingdom.

Phone: 0303 123 1113 (local rate).

## Notes

Bupa health insurance is provided by:

Bupa Insurance Limited. Registered in England and Wales with registration number 3956433.

Bupa Insurance Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Arranged and administered by:

Bupa Insurance Services Limited, which is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales with registration number 3829851.

Registered office: 1 Angel Court, London EC2R 7HJ

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