

# Application form Individual transfer









## 5 How you'd like to manage your policy

We are working hard to reduce our impact on the environment, and we encourage our customers to help us by managing their plan online.

Please let us know how you would like to receive your and your dependants' (over 16 years old) policy documents.

	Main applicant	Dependant 1	Dependant 2	Dependant 3
To view and manage your policy online, register at <a href="https://membersworld.bupaglobal.com">https://membersworld.bupaglobal.com</a> . We will email you when new documents are available to view	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To receive your documents by post	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

At Bupa, we understand that our members might sometimes need support and we want to make things as easy as possible when they deal with us. To help us do this, please let us know if you or anyone on your policy would like to tell us about a hearing problem, a sight problem, a speech difficulty, a physical disability, or any other communication concerns.

Select this box if you want us to contact you about it

## 6 Medical questions

These questions relate to you and the dependants in section 5, who are also covered under their existing / expired policy.

If you do not provide us with full details we may terminate your cover or it may stop us from paying your claims.

Please tick yes or no to every question for every person. If you tick 'Yes' to a question, please give full details below, in section 7.

	Main applicant	Dependant 1	Dependant 2	Dependant 3
<b>1. Has any applicant suffered from any form of:</b>				
<input type="radio"/> cancer, including benign brain tumours	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<input type="radio"/> heart condition	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<input type="radio"/> stroke	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<input type="radio"/> psychiatric condition	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<b>2. Has any applicant had a joint replacement or spinal surgery?</b>	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<b>3. Has any applicant seen a doctor or other healthcare professional, undergone any investigations, or had treatment in the last 12 months?</b>	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<b>4. Does any applicant have any long-term conditions which require regular treatment and reviews with a doctor?</b>	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N
<b>5. Does any applicant have any ongoing or planned treatment, investigations or tests?</b>	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N

Further details (for over 16s only):

How tall are you?	<input type="radio"/> feet/inches	<input type="radio"/> metres/centimetres	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
How much do you weigh?	<input type="radio"/> stones/pounds	<input type="radio"/> kilograms	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 7

## Medical history: additional information

This section applies if any applicant has indicated yes to any medical questions in section 6. If you are unsure whether any details are relevant, you must include them.

Please attach medical reports or test results relating to the medical conditions you have declared if these are available.

Is additional medical information included?  Y  N

	The relevant question number from section 6	Please specify as accurately as possible the name of the illness or medical problem. Where applicable, please state the area of the body affected (e.g. right leg, left eye).	When were symptoms first experienced and when was treatment completed (if applicable)?	What treatment did you receive and when (please include dates, names and details of medications)?	What was the outcome of the treatment (e.g. ongoing, complete recovery, recurrent or likely to recur)?
Main applicant					
Dependant 1					
Dependant 2					
Dependant 3					

If there is insufficient space, please use the notes page at the end of this form, and indicate that you have done so by ticking here

## Your payment details

(Contact your Bupa Global representative if payment is to be made by a third party)

Which currency would you like to use to pay for the policy? (please tick one)

GBP £

USD \$

EUR €

How often would you like to make premium payments?

Monthly

Quarterly

Annually

### Payment method

You can pay for your policy by direct debit, credit card, cheque or bankers draft. We're unable to accept cash payments.

**Need to know:** If you have chosen a deductible, co-insurance and/or to pay your premium each month, you must pay by direct debit or credit card. Please make sure that we always have a valid direct debit agreement or card payment authority. If we don't, it may take us longer to pay claims.

Please choose how you'd like to pay for your policy:

By credit card - now complete the **card payment authority section** below

By direct debit through a UK bank (GBP £ payments only) - now complete the **direct debit section** on the next page

By cheque or bankers draft in the currency you have indicated above. Fill in the name of the person paying the premiums in the box provided below. If the named person is not the policy holder they will be subject to Bupa's KYC (Know Your Customer) checks.

Name

### Card payment authority

Visa and Mastercard require Bupa Global to obtain your consent to store your credit card information for future use. This is so that we can take payments from you as agreed in your international private medical insurance contract, such as premiums, deductibles and/or co-insurances. Please refer to your policy documents for details of when payments will be taken and the amounts.

We will also request your consent to store your credit card information if you are using an American Express card.

Your card will remain stored against your policy for transactional purposes until the card expires. For legal and regulatory purposes, we will continue to store records of your transactions in accordance with our Privacy Notice.

If you do not want Bupa Global to store your card details, then we cannot accept payments from your card and you will need to choose a different payment method.

I authorise Bupa Global to charge to my card account when payments become due. I will advise you immediately if the card becomes lost, stolen or if I wish to close my bank account or cancel the card payment authority.

I give my consent to Bupa Global to store my below card details on file and use them to process payments.

Please tick

MasterCard

Visa

American Express

Please note that we do not accept Maestro payments. You will be given 14 days' notice of other unspecified amounts to be collected.

Cardholder's name as it appears on the card

Card number

Valid from date

M

M

/

Y

Y

Expiry/end date

M

M

/

Y

Y

Cardholder's signature

Date of signature

D

D

M

M

Y

Y

Y

Y

Cardholder address (if different from the main applicant's address)

Address

Town/city

County/region

Postal/zip/area code

Country



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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 and how we use and 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: [www.bupaglobal.com/privacypolicy](http://www.bupaglobal.com/privacypolicy). If you do not have access to the internet and would like a paper copy of the full privacy notice, or if you have any questions about how we handle your information, please contact the Bupa Global service team on +44 (0) 1273 323 563. Alternatively, you can email or write to the team via [info@bupaglobal.com](mailto:info@bupaglobal.com) or Bupa Global, Victory House, Trafalgar Place, Brighton BN1 4FY, United Kingdom.

### Information about Bupa Global

In this privacy notice, “we” “us” and “our” means the Bupa companies trading as Bupa Global. For details of these companies visit [www.bupaglobal.com/legal-notices](http://www.bupaglobal.com/legal-notices)

The Bupa companies that process your information will depend on which of our products and services you ask us about, buy or use. For our insurance policies, your information will be processed by the insurer and the lead administrator of your policy who may share it with other Bupa companies as set out in the ‘Sharing your information section’. Please refer to your policy documentation for confirmation of the insurer and lead administrator.

### 1. What this privacy notice covers

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 other organisations (for example those acting on your behalf, like brokers, healthcare 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. What we use personal information for and our legal reasons for doing so

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 complaints handling), 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 would, on occasion, like to keep you informed of our products and services which we consider may be of interest to you.

Please tick if you would like us and other members of the Bupa group to keep you updated about our products and services by post, telephone email and text.

You will be able to opt out of receiving these communications at any time by contacting us.

### 6. 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 healthcare 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 healthcare 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.

### 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 [info@bupaglobal.com](mailto:info@bupaglobal.com). You can also use this address to contact our Data Protection Officer.

You also have the 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’s Office ([www.ico.org.uk](http://www.ico.org.uk)) who can be contacted at, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF, United Kingdom. Tel: 0303 123 1113 (local rate) or 01625 545 745 (national rate).



## Final checklist

**Before you return this form to us, please make sure you have:**

- included a copy of your current membership certificate or provide proof of coverage if MHD terms apply
- included full details of everyone you would like to be covered by the policy
- checked that everyone's details are correct
- shown each dependant the privacy notice
- checked you have everyone's agreement to send us this form on their behalf, or you're their legal representative
- signed and dated the declaration section
- kept a copy for your own records

**What happens next?**

We'll review the information you've provided and if we need more details, we'll be in touch. If we don't need to check anything with you, we'll send you a welcome pack.

# Notes