



User guide

Consumer Intermediary Portal



Key changes

New design

Expect a new look and feel. We are moving with the digital times by investing in our systems to stay current and competitive.



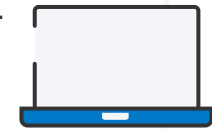
Better functionality

Increased excess options, more detailed summaries and cost breakdowns now include any discounts and **IPT**.



Easy access

The new home page includes the five most recent quotes, an area to effortlessly monitor outstanding actions, and a place where all important documents can be found.

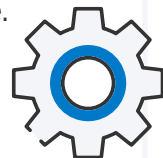


Simple processes

You'll have more flexibility around quote variations. Clients wanting different cover options? No problem - this can now be selected at life level.

Quotes can be created on behalf of another person, member details can be duplicated for new quotes in one click and add-ons can be included at quote stage.

These are just some of the many changes we have made.



You'll find a new change when you spot this icon.





Benefits of the Portal

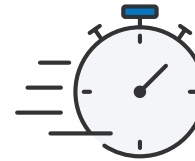
Stronger relationships

We want you to be able to build stronger relationships with clients; the new portal will mean you have everything at your fingertips to offer a more informed and transparent journey.



Speed

Any updates made to quotes via the portal are copied in real time to our internal system.



Security

These changes will help us to ensure we're keeping our members' details safe.



Fewer calls

As much as we love to speak with you, we know having to call us can take up your time - that's why we have given you the tools to be as self-sufficient as possible.



Fewer clicks

We've removed many manual processes to keep things simple and easy.





User guide

Consumer Intermediary Portal

This is an interactive document to guide you through using the new Consumer Intermediary Portal.

Throughout the guide, there are links and buttons to help you get to where you need to go.



These icons take you to the next page in the guide.



These icons will take you to the contents page.



Buttons like this, will take you directly to the section you choose.





User guide

Consumer Intermediary Portal

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Core navigation

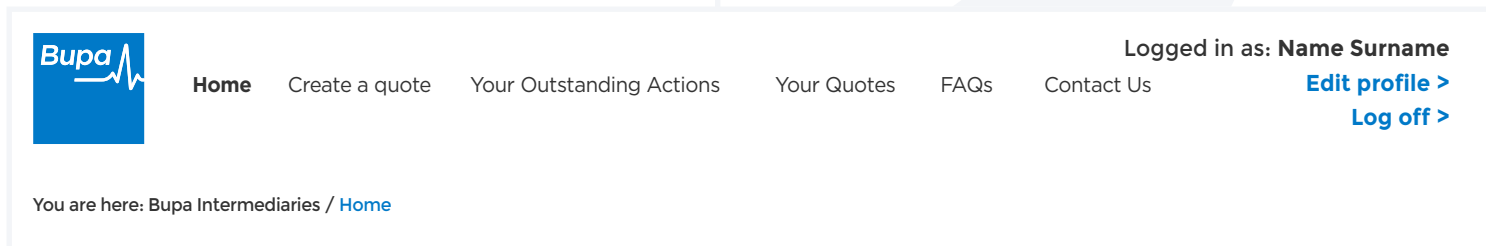
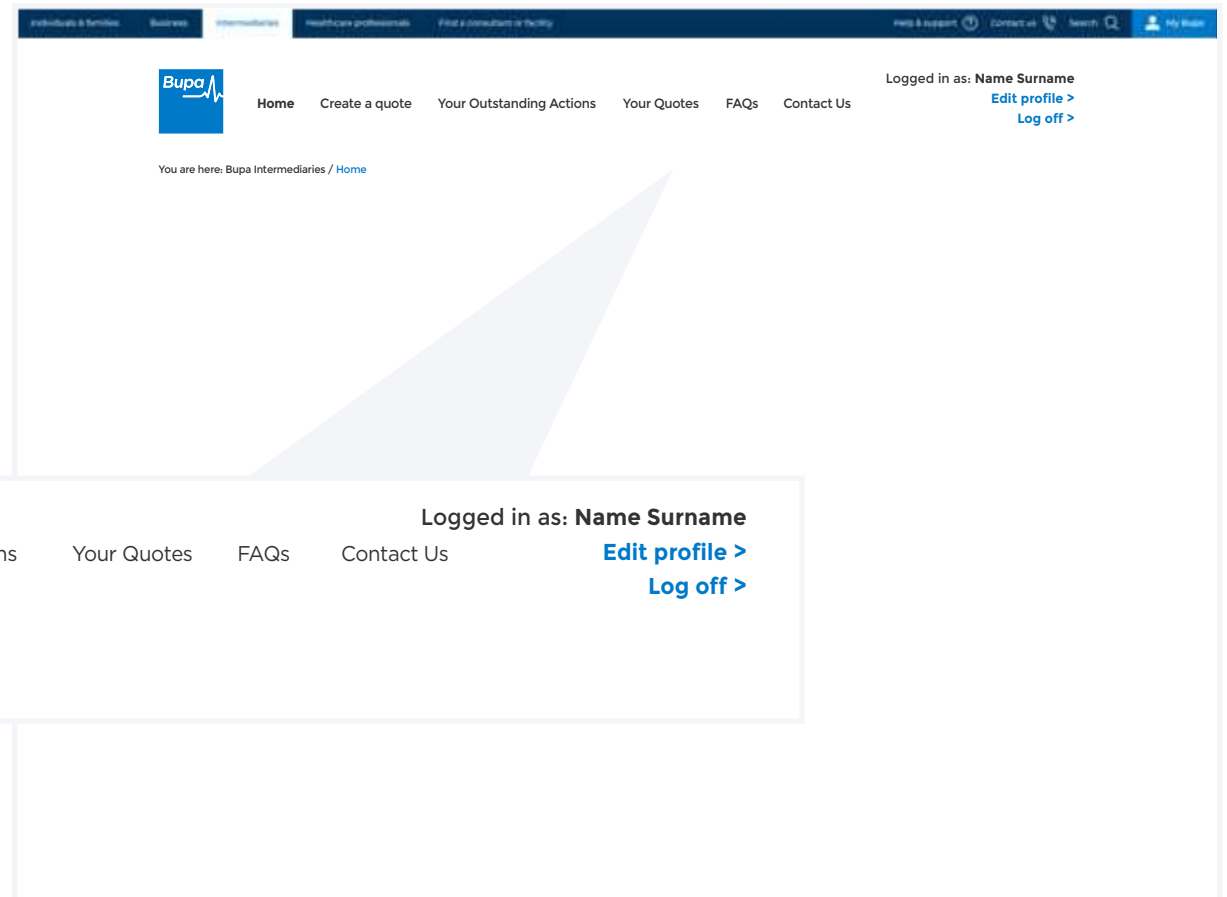
01





Core navigation

At the top of the page, you can navigate to create a new quote, view your outstanding actions and all previous quotes. You can also view FAQs and Bupa contact details.

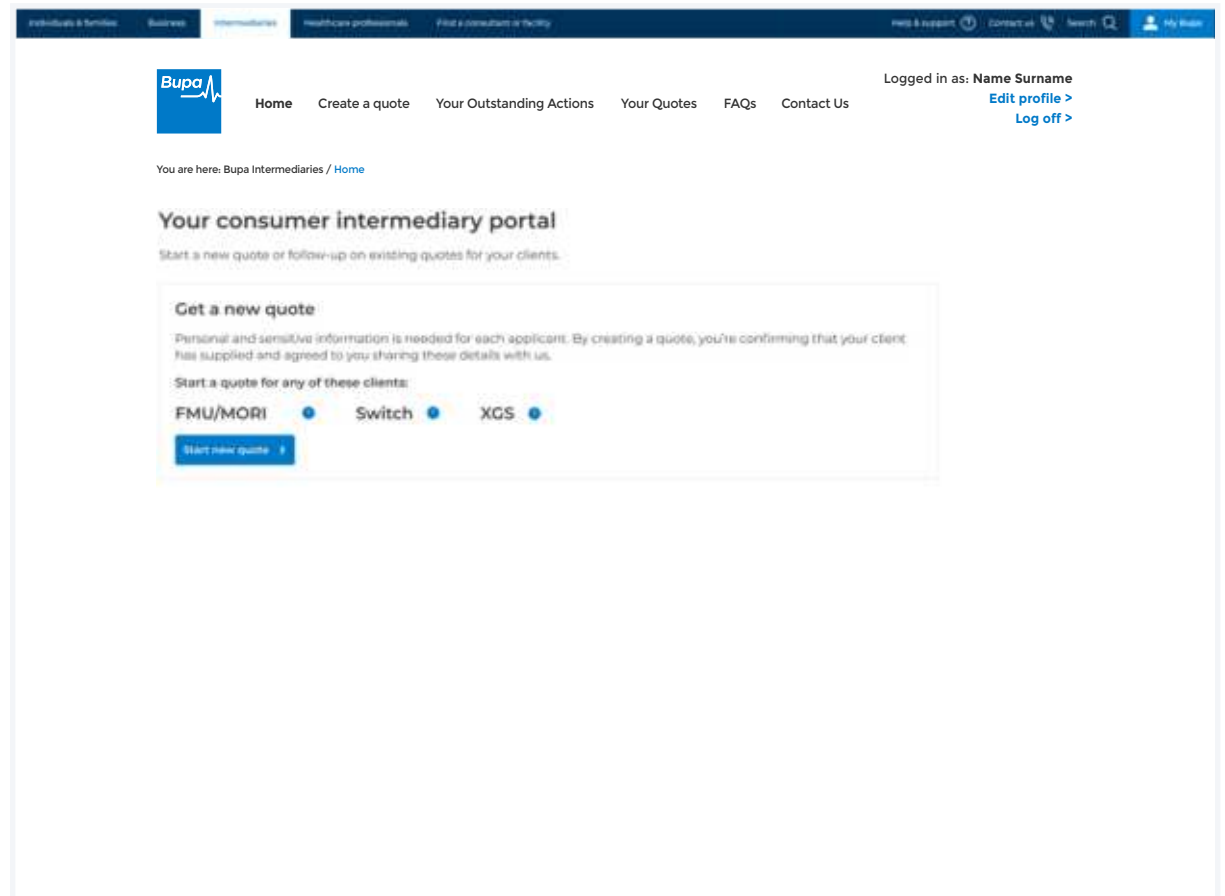




Core navigation

Here, you can start creating a new quote and see more details about what's included with FMU/MORI, Switch and XGS by clicking the small blue icons to their right.


When you're ready to start a new quote, simply press on the **Start new quote** button.





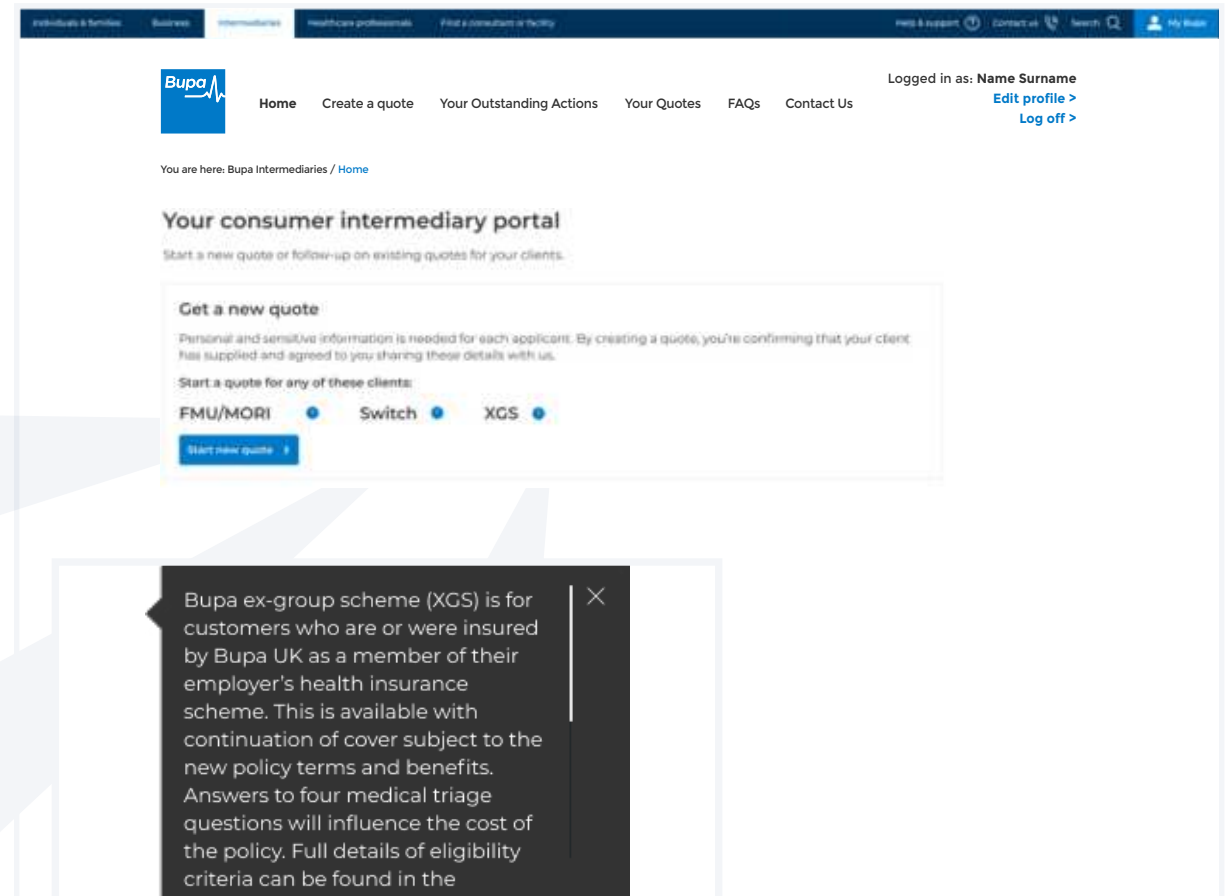
Core navigation

Below are examples of the kind of tool tips you'll see throughout your new Consumer Intermediary Portal.

 Wherever you see this icon you can click it to see more detail about the section.

For full medical underwriting (FMU), we'll consider your client's medical history at enrolment. We'll then review their medical history and decide if we need to place any medical exclusions on their plan. For moratorium underwriting (MOR), your clients don't need to provide their full medical history. In this case, pre-existing conditions won't be covered unless they meet the rolling moratorium criteria when they come to claim.

If your client wants to switch to Bupa from an existing UK health insurance policy, all the individuals to be covered must have held their policy continuously for 12 months, and their personal medical underwriting must stay the same. Note: babies under 12 months can be included if they have been covered from birth on the previous policy.



The screenshot shows the Bupa Consumer Intermediary Portal interface. At the top, there is a navigation bar with links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. On the right, it says 'Help & support', 'Contact us', 'Search', and 'My Bupa'. Below the navigation bar is the Bupa logo and a menu with 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Your consumer intermediary portal' and includes a sub-header 'Start a new quote or follow-up on existing quotes for your clients.' A 'Get a new quote' section contains a disclaimer: 'Personal and sensitive information is needed for each applicant. By creating a quote, you're confirming that your client has supplied and agreed to you sharing these details with us.' Below this, it says 'Start a quote for any of these clients:' and lists 'FMU/MORI', 'Switch', and 'XGS' with radio buttons. A 'Start new quote' button is at the bottom of this section. Three tool tips are overlaid on the page: one on the 'FMU/MORI' radio button, one on the 'Switch' radio button, and one on the 'XGS' radio button. At the bottom right of the screenshot, there are left and right arrow navigation buttons.

Bupa ex-group scheme (XGS) is for customers who are or were insured by Bupa UK as a member of their employer's health insurance scheme. This is available with continuation of cover subject to the new policy terms and benefits. Answers to four medical triage questions will influence the cost of the policy. Full details of eligibility criteria can be found in the intermediary training document or by continuing through to the new quote section.



Core navigation

On the **Home** page, you can also see your five oldest outstanding actions.

Using the buttons on the right of each line you can also quickly do the following:



download the quote into a PDF document to send to your client



open the quote to see what actions are outstanding

An Outstanding Action is an order/sale that we are not able to set up due to missing documentation, incorrect customer data, some form of underwriting query.

The screenshot shows the Bupa Intermediaries Home page. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Your outstanding actions' and includes a table with the following data:

Name	Product type	Ref ID	Order Date	Days Outstanding	Action
Test age	BBV	BBV000271BP	24/06/2023	74	[Download] [View]
Test Test	BBV	BBV000271BP	24/06/2023	74	[Download] [View]
Michael Smith	BBV	BBV000271BP	23/06/2023	74	[Download] [View]
Test age Season	BBV	BBV000275FP	23/06/2023	75	[Download] [View]
Test age season	BBV	BBV000275FP	23/06/2023	75	[Download] [View]

Below the table, it says 'Show 1-5 of 1063 records' and 'View All Actions >'. A note above the table states: 'Actions highlighted in red have exceeded a 30-day resolution.'





Core navigation

Further down the page you can also see you five most recent quotes. This includes the client's name, the product they have been quoted for, the unique quote reference and the status of the quote so you can see where you're up to.

Just like your outstanding quotes, there are four buttons within the Action column, to help you with some quick actions:



download the quote to provide to the client, if the quote has progressed that far



cancel or delete the quote



copy the quote, for example if you'd like to create a variation but keep the original



open the quote, to pick up where you left off

Your current quotes

You'll find your most recent quotes shown first. All quotes remain valid for 14 days after you create them.

Name	Product type	Ref ID	No. of quotes	Frequency	Price	Date quoted	Status	Action
Uni Days	BBF	BBY000602BP	1	Monthly	£66.91	11/07/2023	Quoted	
Teledentistry	BBF	BBY0005830P	1	Monthly	£66.91	05/07/2023	Indication	
X-CL	BBF	BBY0005800P	1	Monthly	£66.92	05/07/2023	Quoted	
Test Test							In Progress	
A-Pp	BBF	BBY0005810P	1	Monthly	£62.41	05/07/2023	Quoted	

Show 1-5 of 8 records [View all quotes >](#)





Core navigation

Lastly, at the bottom of the page, you'll find lots of important and useful documents for you and for your client.

You can download these for yourself or to distribute to the client as needed.

Simply press the blue download icon to the right of the required document.

The screenshot shows the Bupa Intermediaries portal. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. On the right of the navigation bar, there are links for 'Help & support', 'Contact us', 'Search', and 'My Bank'. Below the navigation bar, the Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile >' and 'Log off >'. The main content area shows the breadcrumb 'You are here: Bupa Intermediaries / Home' and a section titled 'Important documents'. This section contains a table with three columns: 'Bupa By You', 'Other', and 'IPIDs'. Each document in the table has a blue download icon to its right.

Bupa By You	Other	IPIDs
Bupa Direct Debit Mandate ↓	BBY Switch Broker Complete (Guided Care) ↓	Guided Care Customer Leaflet ↓
Bupa Intermediary Training Pack ↓	Dentist Discount ↓	BBY XGS Application Form ↓
Doctors Discount ↓	BBY Brochure ↓	No Claims Discount Leaflet ↓
Third Party Payer ↓	Bupa Company Bank Details ↓	Guided Care Intermediary Brochure ↓





Starting a quote

02





Starting a quote

Click **Start a new quote**.

Choose from New Business, Switch or XGS and confirm eligibility with applicant depending on the customer's needs.

The screen will outline the eligibility requirements for each joining scenario.

Simply click **Accept and continue** to start the journey.

The screenshot shows the Bupa website interface for intermediaries. The main heading is "Get a new price indication". Below this, there are three columns representing different joining scenarios:

- FMU/MOR**: Full Medical Underwriting (FMU) or Moratorium (MOR) Business. Eligibility requirements include:
 - Be aged 18 or over
 - Be registered with a UK GP for at least 6 months before applying and be able to provide their GP details
 - Not receive payments for taking part in sports
 - Not have been diagnosed with a condition that may affect the underwriting
- Switch**: Customers switching from another UK PMI scheme. Eligibility requirements include:
 - Be aged 18 or over
 - Be employed with a UK GP for at least 2 months or have been self-employed for at least 12 months before applying
 - Not receive payments for taking part in sports
 - Not have been diagnosed with a condition that may affect the underwriting
 - Not have been diagnosed with a condition that may affect the underwriting
- Bupa ex-group scheme (XGS)**: Customers transferring from a Bupa Group Scheme. Eligibility requirements include:
 - Be aged 18 or over
 - Be registered with a UK GP for at least 6 months before applying and be able to provide their GP details
 - Not have payments for taking part in sports
 - Not have been diagnosed with a condition that may affect the underwriting
 - Not have been diagnosed with a condition that may affect the underwriting

New Business

This is for New Full Medical Underwriting (FMU) or Moratorium (MOR) Business.

Switch

This is for customers switching from another UK PMI scheme.

Bupa Ex Group Scheme (XGS)

This is for customers transferring from a Bupa Group Scheme.





Starting a quote

On this page, you'll need to enter the following details for the main applicant:

Here you can change between joining scenarios by clicking Change Indication Type and selecting 'FMU or MOR'

Once you've provided these details click **Save**.

You can also add additional members, by pressing the **Add Family Member** button underneath.

The screenshot shows the Bupa website interface for creating a new FMU/MOR price indication. The page title is "Create a new FMU/MOR price indication". A dropdown menu labeled "Change indication type" is highlighted with a red box, showing "FMU-MOR" selected. Below this is the "Main applicant details" section with the following fields:

- Cover start date*: 21 / 04 / 2023
- Home postcode*: [empty]
- Whether a smoker*: No
- First name*: [empty]
- Occupation*: Not declared
- Date of birth (if known): DD / MM / YYYY
- Or age at start date*: [empty]

Below the form is a navigation bar with buttons for "Cover start date", "Name", "Postcode", "Occupation", "DOB or Age", and "Smoker Status".





Starting a quote

When adding additional members to the quote on this page, you'll only need to enter these details:

- relationship
- DOB or age
- smoker status

You can add multiple additional family members in the same way. If you add in an additional family member and would like to remove them, you can do this by selecting the remove icon.

Relationship*	Date of birth*	Age*	Smoker*	Remove
2 Husband	23 11 1988	34	No	

[Add Family Member +](#)

Relationship to main member

DOB or Age

Smoker status





Starting a quote

You now need to select the product options:



Excess amounts



Cancer cover



Hospital access

Additionally, you can define the out-patient limit and add-ons for the respective product.

Then click calculate price.

Individuals & families Business Intermediaries Healthcare professionals Find a consultant in facility Help & support Contact us Search My Bank

Bupa Home Create a quote Your Outstanding Actions Your Quotes FAQs Contact Us

Logged in as: Name Surname
[Edit profile >](#)
[Log off >](#)

You are here: Bupa Intermediaries / Home

Product options

Choose from a pre-defined list for each product option.

Excess* £100 Cancer cover* Full Cancer Cover Recognised Facility* Extended Choice
[More options and details](#)

Bupa By You Comprehensive	Bupa By You Treatment and Care
Outpatient No limit	No Further Options
Add On(s) None	Add On(s) None





Starting a quote

Once you've included any add-ons and calculated the prices, you'll see the quote prices laid out both monthly and annually, along with any discounts.

If the member is happy to proceed based on these indications, click **Progress to quote** in the relevant products box.

If you decide not to progress at this stage the quote will not be saved.

The screenshot shows the Bupa website interface for creating a quote. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with options to 'Edit profile' and 'Log off'. The main content area displays two product boxes:

- Bupa My You Comprehensive:** Co-patient: Full refund; Add On(s): None; £159.02 per month + £108.00 per annum; Includes: 5% couple discount; NCD adjustment applies; Progress to quote button.
- Bupa My You Treatment and Care:** No further options; Add On(s): None; £136.02 per month + £108.00 per annum; Includes: 5% couple discount; NCD adjustment applies; Progress to quote button.

Below the product boxes, there are sections for 'No claims discount (NCD)' and 'Couples discount'.





New business quoting

03





New business quoting

Once a quote has been progressed, you'll be provided with a summary of the quote, including the Quote ID and a reminder of the eligibility criteria.

You'll now have the opportunity to choose the underwriting terms, choosing between Full Medical Underwriting or Moratorium.



The screenshot displays the Bupa By You Comprehensive Quote details page. The page includes a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as Name Surname, with links for Edit profile and Log off. The page title is "Bupa By You Comprehensive - Quote details". The main applicant is Gemima Laing, the quote ID is BBY00115716P, and the business type is New Business. A summary of the quote is provided, along with buttons for Download, Print, and Save quote. The page is divided into two columns: Cover Summary and Eligibility criteria. The Cover Summary section includes fields for Cover start date (17 Jan 2022), Home post code (MSO 3SP), Main applicant occupation (Account Executive), and Underwriting Terms (FMU, MOR, None). The Eligibility criteria section lists requirements for health insurance eligibility, such as being a UK resident, registered with a UK GP, and not receiving payment for taking part in sports.





New business quoting

At this point, you'll need to capture the remaining applicant's details if any are missing such as the name of any of the additional members added earlier.

This also gives you the opportunity to amend any of the main applicant's details here if required.

You can also vary the level of cover or add-ons at this stage, and even add additional members by clicking the **Add Family member** button.

The screenshot displays the Bupa business quoting interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The 'Business' tab is active. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile >' and 'Log off >'. The main content area shows 'Main Applicant - Age 39' with an 'Underwriting Term' of 'MOR'. The 'Member Detail' section includes fields for 'First name*' (Camma), 'Last name*' (Laing), 'Smoker*' (No), 'Date of birth*' (07/09/1982), and 'Age*' (39). The 'Cover Detail' section has dropdowns for 'Recognised Facility' (Extended Ch), 'Outpatient' (Out-patient t), 'Excess' (£100), and 'Cancer Cover' (Full Cancer C). On the right, a summary table shows 'Cover' options: 'Monthly*' at £92.43 and 'Annual*' at £1109.16. A 'Total cost' section also shows these values. A note at the bottom right states: '* Annual amount payable by monthly instalments. Quota Valid Until - 31 Jan 2022'.





New business quoting

You'll need to start entering the details for the additional members at this stage.

The detail required are:

- name
- smoker status
- relationship to main applicant
- date of birth

By selecting exclude here you can create an indication that doesn't include this member. However their details will be restored if there are additional quotes you'd like to include them on.



Unlike the old portal, you now also have the ability to vary the level of cover for each individual in the quote, and can do so using the drop down menus under **Cover Detail**.

The screenshot shows the Bupa quoting interface for a new business quote. The user is logged in as 'Name Surname'. The page displays details for 'Member 2 - Husband - Age 34'. The 'Member Detail' section includes fields for First name (G), Last name (Y), Smoker status (No), Relationship (Husband), Date of birth (23/11/1988), and Age (34). The 'Cover Detail' section includes dropdown menus for Outpatient (No Limit), Excess (£100), Recognised Facility (Extended Ch), and Cancer cover (Full Cancer C). The 'Underwriting Term' is set to 'MOR'. The 'Exclude?' option is visible. A summary table on the right shows the 'Cover' options: Monthly and Annual, with 'Core product' costs of £78.29 and £939.48 respectively, and 'Total cost' of £78.29 and £939.48. A note indicates 'Annual amount payable by monthly installments' and 'Quote Valid Until - 25 Jul 2023'.





New business quoting

Underneath, you'll find some important information about the chosen underwriting method, as well as a total breakdown of the cost of cover.

All members must have the same underwriting type to be on the same policy.

The screenshot shows the Bupa website interface for a new business quote. The top navigation bar includes links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The user is logged in as 'Name Surname' and can click on 'Edit profile' or 'Log off'. The main content area is titled 'Important Information' and includes a section for 'Moratorium (Mor)' with a 'show more' link. Below this is a 'Total pricing breakdown for 2 people' section with a table of costs.

Cover	Monthly*	Annual*
Core product	£187.04	£2244.48
Total cost	£187.04	£2244.48
IPT	£20.04	£240.48





New business quoting

The documents you'll need to distribute to your client will be located just underneath along with a check box for you to confirm that you have provided this information.

Please note that there may be a slight delay from when you save the quote and the document becoming available.

The screenshot shows the Bupa Intermediary portal interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile >' and 'Log off >'. Below the navigation, there is a breadcrumb trail: 'You are here: Bupa Intermediaries / Home'. A dark blue banner with a close icon (X) contains a message: 'Changing member details affects the price of the policy. It will also update the details on all associated quotes. Please confirm the new details and we'll recalculate to get an updated price.' with a 'Confirm member details >' button. The main content area is titled 'Useful documents' and displays a grid of document icons with labels: 'BBY Policy Benefits & Terms', 'Hospital List', 'Training Guide', 'DD Mandate', 'Intermediary Data Consent', 'IPT Exemption', 'Third Party Payer', 'BBY MOR Application (Applicant)', 'BBY Brochure', 'Company pay confirmation form', 'BBY MOR Application (Broker)', and 'BBY Comprehensive IPD'. At the bottom of the grid are buttons for '< Back', 'Create new', 'Download', 'Print', 'Purchase >', and 'Edit'. A footer contains regulatory information: 'Bupa health insurance is provided by Bupa Insurance Limited, Registered in England and Wales No. 359421. 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 No. 352975. Registered office: 1 Angel Court, London EC2R 7ND.'



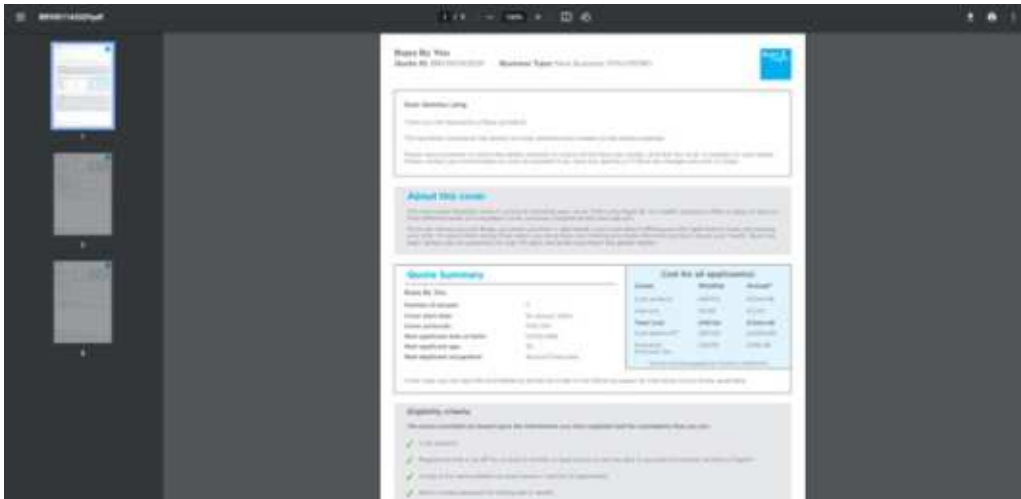


New business quoting

You can get a PDF copy of the quote to provide to your client by clicking the **Download** button just under the document section.

Or, if you're ready to create the purchase, click the purchase button.

Purchase



This new quote document has much more detail around product and pricing than the old version.





Switch

04





Switch quoting

Our new portal now allows you to quote clients wanting to Switch. To do so follow these steps.

Click **Get a new indication**

Choose Switch and confirm eligibility with the applicant.

Simply click **Accept and continue** to start the journey.

The screenshot shows the Bupa portal interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as 'Name Surname' with links to 'Edit profile' and 'Log off'. The main heading is 'Get a new price indication'. Below this, there are three columns representing different underwriting options:

- New Business:** This is for New Full Medical Underwriting (FMU) or Moratorium (MOR) Business. Eligibility criteria include being a UK resident, registered with a UK GP for at least 6 months, having access to and being able to provide your full medical records in English, not receiving payment for taking part in sports, and having a pre-family policy if this must be. A privacy notice confirmation is required.
- Switch:** This is for people switching from another UK PMI scheme. Eligibility criteria include being a UK resident, registered with a UK GP for at least 6 months, having access to and being able to provide your full medical records in English, not receiving payment for taking part in sports, and continuing on the same underwriting method as the existing policy (unless current underwriting is M4D or). A privacy notice confirmation is required.
- Bupa Ex Group Scheme (XGS):** This is for people transferring from a Bupa Group Scheme. Eligibility criteria include being a UK resident, registered with a UK GP for at least 6 months, having access to and being able to provide your full medical records in English, not receiving payment for taking part in sports, and continuing on the same underwriting method as the existing policy (unless current underwriting is M4D or). A privacy notice confirmation is required.

New Business
This is for New Full Medical Underwriting (FMU) or Moratorium (MOR) Business.

Switch
This is for people switching from another UK PMI scheme

Bupa Ex Group Scheme (XGS)
This is for people transferring from a Bupa Group Scheme





Switch quoting

On this page, you'll need to enter the details you can see on the right.

Once you've provided these details click **Save**.

You can also add additional members, by pressing the **Add Family Member** button underneath.

The screenshot shows the Bupa website interface for creating a new Switch price indication. The page title is "Create a new Switch price indication". The user is logged in as "Name Surname". The form includes the following fields:

- Cover Start Date*: 18 01 2022
- Home Postcode*: MS0 3SP
- First name*: Andreas
- Last name*: Pietrou
- Occupation*: Not Declared
- Date of birth (if known)*: 25 07 1991
- Or age at start date*: 30
- Are they a smoker?*: No

There is a "Save" button at the bottom right of the form. A "Create new" button is also visible in the top right corner of the form area.





Switch quoting

When adding additional members to the quote on this page, you'll only need to enter these details you can see on the right.

You can add multiple additional family members in the same way.

The screenshot shows the Bupa website interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. Below the navigation bar, the breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. The main content area is titled 'Family Members' and contains a form with the following fields:

Relationship*	Date of birth*	Age*	Smoker*	Remove
Z: Husband	23 11 1988	34	No	

Below the form is a blue button labeled 'Add Family Member'.

Relationship to main member

DOB or Age

Smoker Status





Switch quoting

Once you've entered the details for the main member and any additional members, you're required to provide some basic information in the form of four yes or no questions.

These are the triage questions which will shape the quotes that are produced.

Ask the applicant the questions, and simply click the **Yes** or **No** box on the right, depending on their response.

If you've more than one applicant, they'll be consecutively listed along the right hand side.

The screenshot shows the Bupa website interface. At the top, there is a navigation bar with links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' and can click 'Edit profile' or 'Log off'. Below the navigation, the page title is 'Medical history'. The main content area contains a questionnaire with four questions, each with 'Yes' and 'No' response options. The questions are:

- Does the person to be covered have a self-reported condition that is normally excluded from the relevant scheme?
- Does the person to be covered have a heart condition and if so, do they have a regularly scheduled medical check-up? For example coronary artery disease, angina, heart attack, stroke, abnormal heart rhythm, blood clots or deep vein thrombosis, or a valve of aorta or aortic aortic dissection.
- Does the person to be covered have any orthopaedic conditions (neck, back, hips and knees) and if so, do they have a regularly scheduled medical check-up that is not already excluded from the relevant scheme?
- Does the person to be covered have any other medical conditions (including pre-existing, surgery or medical equipment) that are not already excluded from the relevant scheme?

The 'Main Applicant' is listed as 'Age 37'.





Switch quoting

At this point, you can set the basic product options like excess and hospital network. This will be applied to all applicants but you'll have the ability to customise this for each member later in the process.

Under that, you're presented with the indicative quotes, detailing the per month or per annum prices.

You've the option to edit the details at this point by clicking **Edit** in the bottom right, which will reopen the fields above where you can amend the applicant's details.

You can also include any add-ons, like dental cover, at this stage, by pressing the **Add ons** button within the product boxes. This will open a pop-out window.



Treatment and Care is now available on Switch policies

The screenshot displays the Bupa quoting interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as Name Surname, with links to Edit profile and Log off. Below the navigation bar, the page title is "Product options". The main content area features three dropdown menus for "Excess*", "Cancer Cover*", and "Recognised Facility*", with values of £100, Full Cancer Cover, and Extended Choice respectively. A link "Show hospitals and clinics" is visible below the Recognised Facility dropdown. Below these are two product boxes: "Bupa By You Comprehensive" and "Bupa By You Treatment and Care". The Comprehensive box has dropdowns for "Outpatient" (No limit) and "Add On(s)" (None). The Treatment and Care box has "No Further Options" and an "Add On(s)" dropdown (None). At the bottom, there are buttons for "< Back" and "Calculate price >".





Switch quoting

If your client wants to add Dental 20 to their policy, you can select this option from the drop down menu when generating a quote. You can add this at individual level once indicative quotes have been generated.

If you decide not to progress at this stage the quote will not be saved.

The screenshot shows the Bupa quoting interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as Name Surname, with links for Edit profile and Log off. Below the navigation bar, the breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. The main content area is divided into two columns. The left column is titled 'Bupa By You Comprehensive' and contains two dropdown menus: 'Outpatient' with 'No limit' selected, and 'Add On(s)' with 'None' selected. The right column is titled 'Bupa By You Treatment and Care' and contains 'No Further Options' and 'Add On(s)' with 'None' selected. At the bottom right of the screenshot, there are two navigation arrows: a left arrow and a right arrow.





Switch quoting

Once you've included any add-ons and calculated the prices, you're then presented with the indicative quotes, detailing the per month or per annum prices.

You've the option to edit the details at this point by clicking **Edit** in the bottom right

If the member is happy to proceed based on these indications, click **Progress to Quote** in the relevant product's box.

If you decide not to progress at this stage the quote will not be saved.

The screenshot displays the Bupa website interface for quote management. At the top, there is a navigation bar with links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. Below the navigation, the main content area shows two quote cards. The first card, 'Bupa By You Comprehensive', has an 'Outpatient' field with 'No. visits' and an 'Add On(s)' field with 'None'. It displays a price of £70.86 per month (including £66.32 per month) and includes NCD Adjustment. The second card, 'Bupa By You Treatment and Care', has 'No Further Options' and an 'Add On(s)' field with 'None'. It displays a price of £40.91 per month (including £36.32 per month) and includes NCD Adjustment. Both cards have a 'Progress to quote' button. Navigation arrows are visible at the bottom of the quote cards.





Switch quoting

Once a quote has been progressed, you'll be provided with a summary of the quote, including the Quote ID and a reminder of the eligibility criteria.

The screenshot shows the Bupa website interface for quote details. The top navigation bar includes links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The user is logged in as 'Name Surname' with options to 'Edit profile' and 'Log off'. The main content area is titled 'Bupa By You Comprehensive - Quote details' and shows the main applicant as 'Andreas Petrou', quote ID 'BBY0014249P', and business type 'Switch'. A summary of the quote is provided, along with buttons for 'Download', 'Print', and 'Save quote'. Below this, there are two columns: 'Cover Summary' and 'Eligibility criteria'. The 'Cover Summary' lists 'Cover start date' as 18 Jan 2022, 'Home post code' as M50 3SP, and 'Main applicant occupation' as Not Declared. The 'Eligibility criteria' section lists several conditions for eligibility, all marked with a checkmark.

Cover Summary

- Cover start date**
18 Jan 2022
- Home post code**
M50 3SP
- Main applicant occupation**
Not Declared

Eligibility criteria:

To be eligible for our health insurance your client must:

- ✓ be a UK resident;
- ✓ be registered with a UK GP for at least 6 months or have access to and be able to provide your full medical records in English;
- ✓ not receive payment for taking part in sports;
- ✓ continue on the same underwriting method as the existing policy (unless current underwriting is MHD or Faxed Moratorium);

and

- ✓ to have a joint/family policy all lives must be registered at the same address;
- ✓ if moving from a group scheme it must be a non-Bupa group scheme/policy and they must no longer be eligible to remain in that scheme;
- ✓ all lives to be covered must be currently included on the switching policy;
- ✓ cover start date must be the day after the lapse date of the existing cover;
- ✓ the existing policy must have been in place for at least 1 year.





Switch quoting

At this point, you'll need to capture the remaining applicant's details if any are missing, such as the names of any of the additional members added earlier.

There's also the opportunity to amend any of the main applicant's details here if required.

You can also begin to amend the cover levels and add-ons like excess amounts and out-patient limits here.

The screenshot displays the Bupa website interface for a 'Main Applicant - Age 30'. The page is divided into several sections:

- Member Detail:** Includes input fields for 'First name*' (Andreas), 'Last name*' (Pletiou), and a 'Smoker*' dropdown menu set to 'No'. Below these are 'Date of birth*' (25-07-1991) and 'Age*' (30) fields.
- Cover Detail:** Includes dropdown menus for 'Recognised Facility' (Extended Ch), 'Outpatient' (Out-patient t), 'Excess' (£100), and 'Cancer Cover' (Full Cancer C).
- Summary Table:** A table on the right side of the form showing cover options and costs.

Cover	Monthly*	Annual*
Core product	£74.85	£897.96
Total cost	£74.85	£897.96

* Annual amount payable by monthly instalments.
Quote Valid Until - 01 Feb 2022





Switch quoting

You'll need to start entering the details for the additional members at this stage.

The details required are:

- name
- smoker status
- relationship to main applicant
- date of birth
- age

The screenshot shows the Bupa quoting interface for a member. The page title is "Member 2 - Husband - Age 34". The "Underwriting Term" is set to "MOR". The "Exclude?" checkbox is checked. The "Member Detail" section includes fields for "First name*" (C), "Last name*" (Y), "Smoker*" (No), "Relationship*" (Husband), "Date of birth*" (25/11/1988), and "Age*" (34). The "Cover Detail" section includes fields for "Outpatient" (No Limit), "Excess" (£100), "Recognized Facility" (Extended Ch), and "Cancer cover" (Full Cancer C). The "Cover" section shows "Monthly" and "Annual*" options with prices of £78.29 and £939.48 respectively. The "Total cost" is also shown as £78.29 and £939.48. A note at the bottom right states: "Annual amount payable by monthly installments. Quota valid until - 26 Jul 2023".





Switch quoting

For Switch, you'll need to ask the client to answer 4 questions about each applicant, to help determine price and eligibility.

These questions remain unchanged, but you'll have more sight of them throughout the process once they've been completed in this stage.

The screenshot shows the Bupa website interface for intermediaries. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with options to 'Edit profile' and 'Log off'. The main content area is titled 'Medical history' and contains a table of mandatory questions.

Mandatory questions	Main applicant Age 37
In the last 5 years has the person to be covered had any form of cancer that is not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 5 years has the person to be covered had a heart or circulatory condition that is not already excluded on their existing scheme? For example coronary artery disease, angina, heart attacks, stroke, a normal heart rhythm, blood clots, aneurysms, heart valve disorders, uncontrolled high blood pressure/cholesterol, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 2 years has the person to be covered had any arthritic conditions and/or back, neck and spinal conditions (including surgical) or joint replacements that are not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the person to be covered have any planned or pending investigations, treatment, surgery or follow-ups for any condition or symptom that's not already excluded on their existing scheme (this applies whether the treatment is planned privately or under the NHS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No





Switch quoting

Below the triage questions is some important information about the chosen underwriting method, as well as a total breakdown of the cost of cover.

This breakdown now includes the monthly and annual breakdown, as well as the IPT amounts.

The screenshot shows the Bupa website interface for a quote. The top navigation bar includes links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The user is logged in as 'Name Surname' with links to 'Edit profile >' and 'Log off >'. The main content area features a 'Bupa' logo and navigation links: 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. A breadcrumb trail indicates 'You are here: Bupa Intermediaries / Home'. The primary content is divided into two sections: 'Important information' with a 'Switch Underwriting' link, and 'Total pricing breakdown for 2 people'. The pricing section includes a disclaimer: 'This quote is valid for 14 days. The price and terms offered may be subject to change if not accepted by 01-Feb-2022.' and a note: '*Annual amount payable by monthly installments'. A table on the right provides a detailed breakdown of costs.

Cover	Monthly*	Annual*
Core product	£152.59	£1831.08
Total cost	£152.59	£1831.08
IPT	£16.35	£196.20





Switch quoting

Any changes you make on this page will need validating as they may affect the price of the quote. You can do this by clicking **Confirm Member Details** in the blue banner that appears at the bottom of the screen.

If you click the **X** on the left, it will disregard any changes made.

Once changes are validated, the price breakdown at the bottom of the page will also update. Now click **Save Quote** at the bottom right of the page and download the relevant documents you'll need to distribute to your clients located just underneath, along with a check box for you to confirm that you've provided this information.

The screenshot shows the Bupa Intermediaries website interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The main header includes the Bupa logo, navigation links (Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, Contact Us), and user information (Logged in as: Name Surname, Edit profile >, Log off >). Below the header, a breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. A prominent blue banner with a close button (X) on the left contains the message: 'Changing member details affects the price of the policy. It will also update the details on all associated quotes. Please confirm the new details and wait for us to get an updated price.' Below this banner is a section titled 'Useful documents' with a grid of document links: 'BBY Policy Benefits & Terms', 'Hospital List', 'Training Guide', 'DD Mandate', 'Intermediary Data Consent', 'IPT Exemption', 'Third Party Payer', 'BBY MOR Application (Applicant)', 'BBY Brochure', 'Company pay confirmation form', 'BBY MOR Application (Broker)', and 'BBY Comprehensive IPID'. At the bottom of the page, there are buttons for '< Back', 'Create new', 'Download', 'Print', 'Purchase >', and 'Edit'. A footer contains regulatory information: 'Bupa health insurance is provided by Bupa Insurance Limited. Registered in England and Wales No. 3956435. 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 No. 5829650. Registered office: 1 Angel Court, London, EC2R 7HD.'



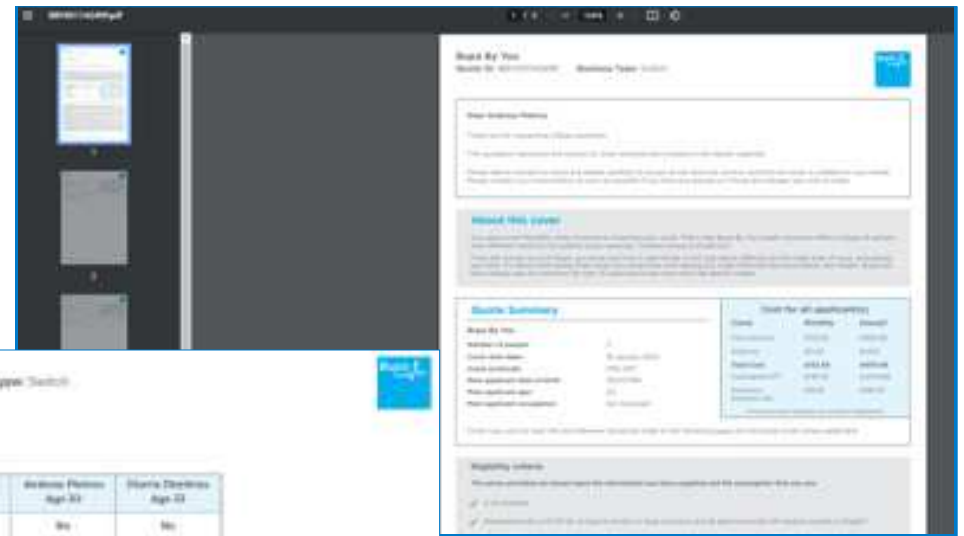


Switch quoting

You can get a PDF copy of the quote to provide to your client by clicking the **Download** button just under the document section.

Or, if you're ready to create the purchase, click the **Purchase** button.

Purchase



Quote By You
Quote ID: 000101143490 Business Type: Switch

Medical history questions

Questions	Active Period Age 21	Historic Diseases Age 21
In the last 12 months has the person been treated for any form of cancer (not including skin cancer)?	No	No
In the last 12 months has the person been treated for a heart or circulatory condition (not including coronary artery disease, angina, bradycardia, atrial fibrillation, heart failure, stroke, deep vein thrombosis, pulmonary embolism, aortic aneurysm, aortic dissection, or other)?	No	No
In the last 12 months has the person been treated for any chronic condition, such as diabetes, asthma, or other? (Please specify the condition in your response.)	No	No
Does the person have a current, past, or planned pregnancy, or are they pregnant or planning to become pregnant?	No	No
Has the person ever been treated for any form of drug or alcohol abuse?	↓	↓



This new quote document has much more detail around product and pricing than the old version, as well as showing you and the customers the answers provided to any triage questions they may have answered.





XGS

05





XGS quoting

Click **Get a new indication**

Choose XGS and confirm eligibility with the applicant.

Simply click **Accept and continue** to start the journey.

The screenshot shows the Bupa website interface for getting a new price indication. The page is titled 'Get a new price indication' and includes a Bupa logo, navigation links, and a user login status. The main content area features three columns of options, each with a list of eligibility criteria and a 'Accept and continue' button. The options are: 'New Business', 'Switch', and 'Bupa Ex Group Scheme (XGS)'. Each option has a blue callout box pointing to it from the left side of the page.

New Business

This is for New Full Medical Underwriting (FMU) or Moratorium (MOR) Business.

Switch

This is for people switching from another UK PMI scheme.

Bupa Ex Group Scheme (XGS)

This is for people transferring from a Bupa Group Scheme.





XGS quoting

On this page, you'll need to enter the following details for the main applicant:

On this page, you'll need to enter the details you can see on the right.

Once you've provided these details click **Save**.

You can also add additional members, by pressing the **Add Family Member** button underneath.

The screenshot shows the Bupa website interface for creating an XGS price indication. The main heading is "Create an XGS price indication" with a "Change Indication Type" dropdown set to "XGS". Below this is the "Main applicant details" section, which includes a "Create new" button and a note: "Please complete the details below. *These fields are mandatory." The form fields are:

- Cover start date*: 21 / 04 / 2023
- First name*
- Last name*
- Home postcode*
- Occupation*: Not declared
- Date of birth (if known)*: DD / MM / YYYY
- Or age at start date*
- Are they a smoker?*: No

A "Save" button is located at the bottom right of the form.





XGS quoting

When adding additional members to the quote on this page, you'll only need to enter the details you can see here.

You can add multiple additional family members in the same way.

The screenshot shows the Bupa XGS quoting interface. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Family Members' and contains a table with the following data:

Relationship*	Date of birth*	Age*	Smoker*	Remove
2 Husband	23 11 1988	34	No	

Below the table is a blue button labeled 'Add Family Member +'. The form is highlighted with a yellow border.

Relationship to main member

DOB or Age

Smoker Status





XGS quoting

Once you've entered the details for the main member and any additional members, you are required to provide some basic information in the form of five yes or no questions.

These are the triage questions which will shape the quotes that are produced.

Ask the applicant the questions, and correctly click the **Yes** or **No** box on the right, depending on their response.

If you've more than one applicant, they'll be consecutively listed along the right hand side.

The screenshot shows the Bupa XGS quoting interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The 'Intermediaries' tab is selected. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile >' and 'Log off >'. The main content area is titled 'Medical history' and includes instructions: 'Please complete these questions for each member. If the answer is 'Yes' to any of these questions, you'll need to submit a medical declaration form for your client, found in 'Useful documents' on the next page.' Below this, there is a table of mandatory questions for a main applicant aged 37.

Mandatory questions	Main applicant Age 37
In the last 5 years has the person to be covered had any form of cancer that is not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 5 years has the person to be covered had a heart or circulatory condition that is not already excluded on their existing scheme? For example coronary artery disease, angina, heart attacks, stroke, abnormal heart rhythms, blood clots, aneurysms, heart valve disorders, uncontrolled high blood pressure/cholesterol, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 2 years has the person to be covered had any arthritic conditions and/or back, neck and spinal conditions (including sciatica) or joint replacements that are not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the person to be covered have any planned or pending investigations, treatment, surgery or follow-ups for any condition or symptom that's not already excluded on their existing scheme (this applies whether the treatment is planned privately or under the NHS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If the applicant has answered 'Yes' to the planned and pending question, and this is NOT related to any other question above, would you like to have this condition excluded from future cover? (This can be left unanswered if	<input type="checkbox"/> <input type="checkbox"/>





XGS quoting

At this point, you can set the basic product options like excess and hospital network. This will be applied to all applicants but you'll have the ability to customise this for each member later in the process.

Under that, you're presented with the indicative quotes, detailing the per month or per annum prices.

You've the option to edit the details at this point by clicking **Edit** in the bottom right, which will reopen the fields above where you can amend the applicant's details.

You can also include any add-ons, like dental cover, at this stage, by pressing the **Add ons** button within the product boxes. This will open a pop-out window.

The screenshot displays the Bupa XGS quoting interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Product options' and contains three dropdown menus: 'Excess*' set to '£100', 'Cancer cover*' set to 'Full cancer cover', and 'Recognised facility*' set to 'Extended Choice'. Below these is a 'Bupa By You Comprehensive' section with 'Outpatient' set to 'No Limit' and 'Add-ons' set to 'None'. At the bottom, there are 'Back' and 'Calculate price' buttons, and a note: 'To view your price indication click above'.





XGS quoting

If your client wants to add Dental 20 to their policy, you can select this option from the drop down menu when generating a quote. You can add this at individual level once indicative quotes have been generated.

The screenshot displays the Bupa XGS quoting interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The Bupa logo is on the left, and navigation links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us' are in the center. On the right, it shows 'Logged in as: Name Surname' with links for 'Edit profile >' and 'Log off >'. Below the navigation, a breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. The main section is titled 'Product options' and contains three dropdown menus: 'Excess*' (set to £100), 'Cancer cover*' (set to Full cancer cover), and 'Recognised facility*' (set to Extended Choice). A link 'Show hospitals and clinics' is below the 'Recognised facility*' dropdown. Below this, a card for 'Bupa By You Comprehensive' is shown. It includes an 'Outpatient' dropdown set to 'No Limit' and an 'Add On(s)' dropdown set to 'None'. A blue box displays the pricing: '£159.02 per month' and '£1,908.24 per annum', with a note 'NCD adjustment applies'. A 'Progress to quote' button is at the bottom of the pricing box. At the very bottom of the page, there are 'Back' and 'Next' navigation buttons.





XGS quoting

Once you've included any add-ons and calculated the prices, you'll see the quote prices laid out both monthly and annually.

If the member is happy to proceed based on these indications, click **Progress to Quote** in the relevant product's box.

The screenshot shows the Bupa website interface for intermediaries. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links to 'Edit profile' and 'Log off'. The main content area displays a quote for 'Bupa By You Comprehensive' under the 'Outpatient' category. The quote includes 'Out-patient treatment - No limit' and shows a price of '£153.46 per month' and '£1841.52 per annum'. A prominent blue button labeled 'Progress to quote' is visible, along with a link to 'Read our terms and conditions'. Navigation buttons for 'Back' and 'Next' are also present.





XGS quoting

Once a quote has been progressed, you'll be provided with a summary of the quote, including the Quote ID and a reminder of the eligibility criteria.

The screenshot displays the Bupa XGS quoting interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in your city'. The 'Intermediaries' tab is active. On the right side of the navigation bar, there are links for 'Help & support', 'Contact us', 'Search', and 'My Bank'. Below the navigation bar, the Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area shows the breadcrumb 'You are here: Bupa Intermediaries / Home' and the title 'Bupa By You Comprehensive - Quote details'. Below the title, the main applicant is 'Rhiannon Grosvenor', the quote ID is 'BBY001H233P', and the business type is 'XCS'. A summary text states: 'This is a summary of the quote based upon the information you have entered. You can edit the details using the controls in the boxes.' There are three buttons: 'Previous', 'Next', and 'Save quote'. Below this, there are two columns: 'Cover Summary' and 'Eligibility criteria:'. The 'Cover Summary' includes 'Cover start date' (18 Jan 2022), 'Home post code' (MS0 3SP), and 'Main applicant occupation' (IT consultant). The 'Eligibility criteria' section lists requirements for health insurance eligibility, each with a green checkmark icon.

Cover Summary

- Cover start date: 18 Jan 2022
- Home post code: MS0 3SP
- Main applicant occupation: IT consultant

Eligibility criteria:

To be eligible for our health insurance your client must:

- ✓ be a UK resident
- ✓ be registered with a UK GP for at least 6 months or have access to and be able to provide your full medical records in English
- ✓ not receive payment for taking part in sports
- ✓ continue on the same underwriting method as the existing policy (unless current underwriting is MHD or Fixed Maximum)
- ✓ be moving from a Bupa group scheme which they are no longer eligible to remain on and
- ✓ to have a joint/family policy all lives must be registered at the same address
- ✓ all lives to be covered must be currently included on the Group Policy
- ✓ cover start date must be the day after the lapse date of the existing cover





XGS quoting

At this point, you'll need to capture the remaining applicant's details if any are missing such as the name of any of the additional members added earlier.

This is also the opportunity to amend any of the main applicant's details here if required.

You can also vary the level of cover or add-ons at this stage, and even add additional members by clicking the **Add Family member** button.

The screenshot displays the Bupa XGS quoting interface. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with options to 'Edit profile' and 'Log off'. The main content area is titled 'Main Applicant - Age 31' and is divided into two sections: 'Member Detail' and 'Cover Detail'. The 'Member Detail' section contains input fields for 'First name' (Rhiannon), 'Last name' (Crosvenor), 'Smoker' (No), 'Date of birth' (25 08 1990), and 'Age' (31). The 'Cover Detail' section includes dropdown menus for 'Recognised Facility' (Extended Ch), 'Outpatient' (Out-patient t), 'Excess' (£100), and 'Cancer Cover' (Full Cancer C). On the right side, a summary table shows the 'Cover' type, 'Core product', and 'Total cost' for both 'Monthly' and 'Annual' payment options. The 'Annual' cost is £908.40, and the 'Monthly' cost is £75.70. A note at the bottom right states: '* Annual amount payable by monthly instalments. Quote Valid Until - 01 Feb 2022'.

Cover	Monthly*	Annual*
Core product	£75.70	£908.40
Total cost	£75.70	£908.40

* Annual amount payable by monthly instalments.
Quote Valid Until - 01 Feb 2022





XGS quoting

You'll need to start entering the details for the additional members at this stage.

The detail required are:

- name
- smoker status
- relationship to main applicant
- date of birth
- age



Unlike the old portal, you now also have the ability to vary the level of cover for each individual in the quote, and can do so using the drop down menus under **Cover Detail**.

The screenshot displays the Bupa XGS quoting interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as 'Name Surname' with links for Edit profile and Log off. Below the navigation bar, the breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. The main content area is titled 'Member 2 - Husband - Age 34'. On the right side, there is a table showing cover options:

Cover	Monthly	Annual
Core product	£78.29	£939.48
Total cost	£78.29	£939.48

Below the table, there is a note: 'Annual amount payable by monthly installments. Quote valid until - 28 Jul 2023'. The 'Member Detail' section includes fields for First name (G), Last name (Y), Smoker (No), Relationship (Husband), Date of birth (25 11 1988), and Age (34). The 'Cover Detail' section includes dropdown menus for Outpatient (No Limit), Excess (£100), Recognised Facility (Extended Ch), and Cancer cover (Full Cancer C).





XGS quoting

For XGS, you'll need to ask the client to answer five questions about each applicant, to help determine price and eligibility.

These questions remain unchanged, but you'll have more sight of them throughout the process once they have been completed in this stage.



Our new portal now allows you to playback the answers to the triage questions.

The screenshot shows the Bupa XGS quoting portal interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in family'. The 'Intermediaries' tab is selected. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links to 'Edit profile >' and 'Log off >'. Below the navigation, the page title is 'Medical history'. The main content area contains instructions: 'Please complete these questions for each member. If the answer is 'Yes' to any of these questions, you'll need to submit a medical declaration form to your client, found in 'Useful documents' on the next page.' and 'For advice on whether this will result in exclusions, please contact our medical risk team on 0349 6000 850, lines are open 9am to 5pm, Monday to Friday.' Below this is a table of mandatory questions.

Mandatory questions	Main applicant Age 37
In the last 5 years has the person to be covered had any form of cancer that is not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 5 years has the person to be covered had a heart or circulatory condition that is not already excluded on their existing scheme? For example coronary artery disease, angina, heart attacks, stroke, a normal heart rhythms, blood clots, aneurysms, heart valve disorders, uncontrolled high blood pressure/cholesterol, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
In the last 2 years has the person to be covered had any arthritic conditions and/or back, neck and spinal conditions (including sciatica) or joint replacements that are not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the person to be covered have any planned or pending investigations, treatment, surgery or follow-ups for any condition or symptom that's not already excluded on their existing scheme (this applies whether the treatment is planned privately or under the NHS)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If the applicant has answered 'Yes' to the planned and pending question, and this is NOT related to any other...	<input type="checkbox"/> <input type="checkbox"/>





XGS quoting

Below the triage questions is some important information about the chosen underwriting method, as well as a total breakdown of the cost of cover.

This breakdown now includes the monthly and annual breakdown, as well as the IPT amounts.

The screenshot shows the Bupa website interface for XGS Underwriting. The top navigation bar includes links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Important Information' and 'Ex-Bupa Group Scheme (XGS) Underwriting'. Below this is a 'Total pricing breakdown for 2 people' section with a table showing monthly and annual costs for cover, core product, total cost, and IPT.

Cover	Monthly*	Annual*
Core product	£153.46	£1841.52
Total cost	£153.46	£1841.52
IPT	£16.44	£197.28





XGS quoting

Any changes you make on this page will need validating as they may affect the price of the quote. You can do this by clicking **Confirm Member Details** in the blue banner that appears at the bottom of the screen

If you click the **X** on the left, it will disregard any changes made.

Once changes are validated, the price breakdown at the bottom of the page will also update. Now click **Save Quote** at the bottom right of the page and the relevant documents you'll need to distribute to your clients will be located just underneath, along with a check box for you to confirm that you have provided this information.



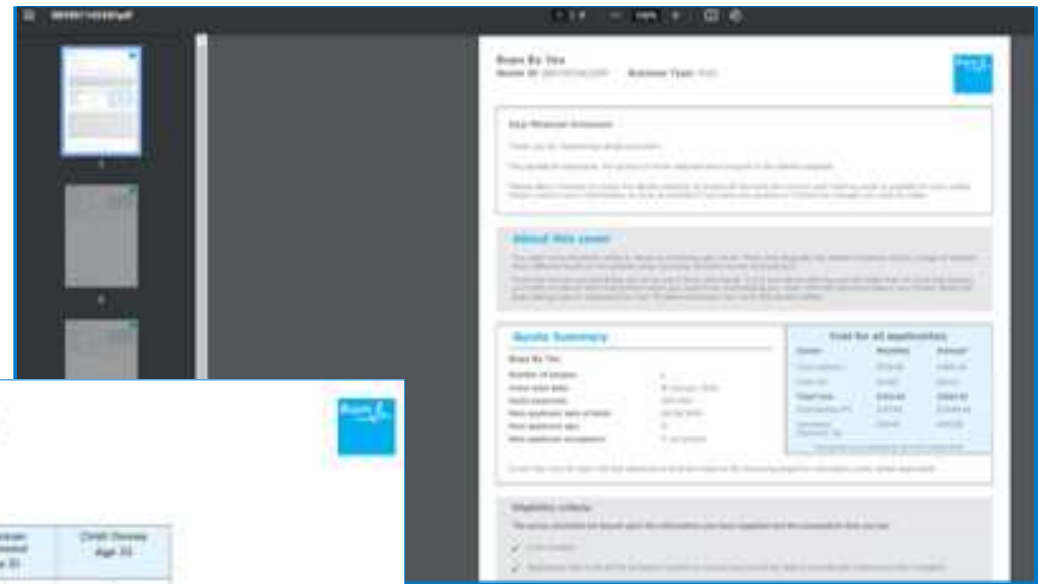


XGS quoting

You can get a PDF copy of the quote to provide to your client by clicking the **Download** button just under the document section.

Or, if you're ready to create the purchase, click the **Purchase** button.

Purchase



Quote By Year
Quote ID: 00100000227 Business Type: 100

Medical history questions

Question	Answer Chosen Age 21	Chosen Age 22
In the last two years, has the person to be covered had any form of cancer (not already included in their existing contract)?	No	No
In the last two years, has the person to be covered had any form of cancer (not already included in their existing contract)? For example: primary breast disease (cancer & non-cancer), prostate, abdominal cavity (stomach, pancreas, liver, colon, etc.), uterine cancer, thyroid cancer, melanoma, skin cancer, leukemia, lymphoma, multiple myeloma, etc.	No	No
In the last two years, has the person to be covered had any form of cancer (not already included in their existing contract)? For example: primary breast disease (cancer & non-cancer), prostate, abdominal cavity (stomach, pancreas, liver, colon, etc.), uterine cancer, thyroid cancer, melanoma, skin cancer, leukemia, lymphoma, multiple myeloma, etc.	No	No
Has the person to be covered had any form of cancer (not already included in their existing contract)? For example: primary breast disease (cancer & non-cancer), prostate, abdominal cavity (stomach, pancreas, liver, colon, etc.), uterine cancer, thyroid cancer, melanoma, skin cancer, leukemia, lymphoma, multiple myeloma, etc.	No	No





Updating your clients details

06

Making changes to the quote that will affect the price, such as a postcode, date of birth or smoking status change.





Updating your clients details

Once you've clicked **Save Quote** during the steps outlined in this guide, if you need to change any of the information given, you can do so by clicking **Edit** at the bottom right of the screen, or at the top of the screen above **Cover Summary**.

Please note that if you've already proceeded to the Purchase screens, you'll be unable to edit any details that may affect the price, and will need to create a new purchase.

Clicking **Edit**, will reopen the form sections above, allowing you to change any details, including the answers to any triage questions you may have provided.

The screenshot displays the Bupa By You Comprehensive Quote details page. The top navigation bar includes the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as Name Surname, with links for Edit profile and Log off. The page title is "Bupa By You Comprehensive - Quote details". The main applicant is Andreas Petrou, the quote ID is BBY00194249P, and the business type is Switch. A note states that the quote is valid for 14 days and may be subject to change if not accepted by 01 Feb 2022. Below this, there are buttons for Download, Print, Purchase, and Edit. The page is divided into two main sections: Cover Summary and Eligibility criteria. The Cover Summary section includes fields for Cover start date (18 Jan 2022), Home post code (M50 2SP), and Main applicant occupation (Not Declared). The Eligibility criteria section lists requirements such as being a UK resident, registered with a GP, and having medical records in English. At the bottom, there are buttons for Back, Create new, Download, Print, Purchase, and Edit. A list of documents is shown, including BBY Policy Benefits & Terms, BBY Policy Summary, Hospital List, Training, OCM, Intermediary Data Consent, BBY XCS Application (Broker), BBY Switch Application (Applicant), Company Bank Consent, and BBY Comprehensive IPD.





Updating your clients details

Changing any of the following fields, for any of the applicants, will result in a change to the quote already provided:

- date of birth
- smoking status
- postcode
- relationship status
- triage answers

The screenshot displays the Bupa Intermediaries portal interface. At the top, there is a navigation bar with the Bupa logo and various menu items like 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The user is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The main content area is titled 'Main Applicant - Age 30' and contains two main sections: 'Member Detail' and 'Cover Detail'. The 'Member Detail' section includes input fields for 'First name' (Andreas), 'Last name' (Pietrou), 'Smoker' (No), 'Date of birth' (25/07/1991), and 'Age' (30). The 'Cover Detail' section includes dropdown menus for 'Recognised Facility' (Extended Ch), 'Outpatient' (Out-patient t), 'Excess' (£100), and 'Cancer Cover' (Full Cancer C). To the right of these sections is a summary table showing 'Cover' options: 'Monthly' at £74.83 and 'Annual' at £897.96. The 'Total cost' is also listed as £74.83 / £897.96. A note at the bottom right states '*Annual amount payable by monthly installments' and 'Quote Valid Until - 01 Feb 2022'.





Updating your clients details

These changes can impact the price of the quotes, so any changes made will need to be validated and the quotes will then update.

You're able to change the details for any of the applicant members, as long as the purchase has not been created.

The screenshot displays the Bupa Intermediaries interface for updating a client's details. The page title is "Member 2 - Husband - Age 34". The form includes the following fields:

- Member Detail:**
 - First name*: C
 - Last name*: Y
 - Smoker*: No
 - Relationship*: Husband
 - Date of birth*: 23. 11. 1988
 - Age*: 34
- Cover Detail:**
 - Outpatient: No Limit
 - Excess: £100
 - Recognised Facility: Extended Ch
 - Cancer cover: Full Cancer C

Summary table on the right:

Cover	Monthly	Annual*
Core product	£78.29	£939.48
Total cost	£78.29	£939.48

* Annual amount payable by monthly installments. Quota Valid Until: 28 Jul 2023





Updating your clients details

You can even amend the answers given to the triage questions.

Please be aware that if you make an alteration to any of the answers provided, this will be applied to all associated quotes to ensure that they are accurate.

If you want to change back, just update again.

The screenshot shows the Bupa Intermediaries portal interface. At the top, there is a navigation bar with tabs for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. On the right, it says 'Logged in as: Name Surname' with links for 'Edit profile >' and 'Log off >'. Below the navigation bar, there is a Bupa logo and a menu with 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. The main content area is titled 'Medical history questions' and includes a note: 'Please answer all the following questions below. If the answer is yes to any of these questions then you will need to submit a medical declaration form for your client. To get advice on whether these will result in exclusions please contact our Medical Risk team on xxx.' Below this is a table with four rows of questions and two columns for 'Main applicant - Age 31' and 'Member 2 - Age 33'. Each cell in the table contains a 'Yes' and 'No' option with a checkbox. In all cases, the 'No' checkbox is checked.

Question	Main applicant - Age 31	Member 2 - Age 33
In the last five years, has the person to be covered had ANY form of cancer that is not already excluded on their existing scheme?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
In the last five years, has the person to be covered had a heart or circulatory condition that is not already excluded on their existing scheme? For example coronary artery disease (angina & heart attack), stroke, abnormal heart rhythm, blood clot, aneurysm, heart valve disorders, uncontrolled high blood pressure/cholesterol, etc.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
In the last five years has the person to be covered had any arm/leg conditions, and / or back and neck conditions and / or spinal conditions (including scoliosis, or joint replacements)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the person to be covered have ANY planned or pending investigations, treatment, surgery, for any condition or symptom? (This applies whether the treatment is planned privately or under the NHS)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No





Updating your clients details

Any changes you make on this page will need validating as they may affect the price of the quote. You can do this by clicking **Confirm Member Details** in the blue banner that appears at the bottom of the screen

If you click the **X** on the left, it will disregard any changes made.

Once changes are validated, the price breakdown at the bottom of the page will also update. Now click **Save Quote** at the bottom right of the page and the documents you'll need to distribute to your client will be located just underneath, along with a check box for you to confirm that you have provided this information.

The screenshot displays the Bupa Intermediaries portal interface. At the top, there is a navigation bar with tabs for 'Individuals & Families', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The main header includes the Bupa logo, navigation links (Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, Contact Us), and user information (Logged in as: Name Surname, Edit profile >, Log off >). Below the header, a breadcrumb trail reads 'You are here: Bupa Intermediaries / Home'. A prominent blue banner with a close button (X) on the left contains the text: 'Changing member details affects the price of the policy. It will also update the details on all associated quotes. Please confirm the new details and we'll recalculate to get an updated price.' Below this banner is a confirmation checkbox: 'I confirm that I have/will provide this information to my client'. The 'Useful documents' section lists several documents with download icons: 'BBY Policy Benefits & Terms', 'Hospital List', 'Training Guide', 'DD Mandate', 'Intermediary Data Consent', 'IPT Exemption', 'BBY XCS Application (Applicant)', and 'BBY Comprehensive IPID'. At the bottom of the page, there are buttons for '< Back', 'Create new', 'Download', 'Print', 'Purchase >', and 'Edit'.





Purchase

07





Purchase

Once you've clicked **Purchase**, a new screen will load and at the top, you'll see a summary of the quote details like on previous pages.

Further down, you'll be able to check and amend some of the member's details, but you'll also need to confirm additional details for the member, such as their title, birth gender, address, phone number and email.

Individuals & families Business Intermediaries Healthcare professionals Find a consultant in therapy Help & support Contact us Search My Bank

Bupa Home Create a quote Your Outstanding Actions Your Quotes FAQs Contact Us

Logged in as: Name Surname
[Edit profile >](#)
[Log off >](#)

You are here: Bupa Intermediaries / Home

Client Contact details

Please check the following details below and ensure you enter your clients email address and not your own.
***These fields are mandatory**

Main Applicant	Member 2
Andreas Pietrou	Diarra Dimitriou
Title* Select...	Title* Select...
First name* Andreas	First name* Diarra
Middle initial [Empty]	Middle initial [Empty]
Last name* Pietrou	Last name* Dimitriou
Gender at Birth* Select...	Gender at Birth* Select...
Date of Birth 25/11/99	Date of Birth 15/11/99
Age 30	Age 25





Purchase

When entering the address, you'll already have entered the postcode earlier in the process, as such, all you need to do is click **Look up Address** and choose from the list that appears on the right.

Please ensure to include a contact telephone number and email address for the applicant in this section.

Once all is complete, click out of this window and click Continue to Payment at the bottom right of the screen. You can click **Continue to Payment** at the bottom right of the screen. Please note that if this is greyed out, there is a section of the form that needs to be completed before you can proceed.

The screenshot shows the Bupa website's address entry form. The top navigation bar includes links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in therapy'. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links to 'Edit profile' and 'Log off'. The main content area is titled 'You are here: Bupa Intermediaries / Home'. The form is divided into two columns: 'Address details' and 'Suggested address list'. The 'Address details' section includes fields for 'Postcode*' (M50 3SP), 'Address Line1*' (102 The Quays), 'Address Line2', 'City/Town*' (SALFORD), 'Customer Mobile Number*' (01234567890), and 'Customers email address*' (test@bupa.com). A 'Look up address' link is positioned between the postcode and the address line fields. The 'Suggested address list' on the right shows several address options, with the first one selected: 'W 5 P Second Floor The Quays SALFORD M50 3SP United Kingdom'. At the bottom of the form, there are two buttons: '< Back' and 'Continue to payment >'. The 'Continue to payment' button is highlighted in blue, indicating it is the next step.





Purchase

Once you have clicked **Continue to Payment**, a new page will load. At the top, you'll see the usual summary of the quote details.

Further down, you'll need to enter the applicants Direct Debit details.

This can either be the individuals details or their company details. XGS customers can also use company bank details so long as this is not linked to company they have left from.

After all details have been filled out, click **Submit** in the bottom right.

The screenshot shows the Bupa website's 'Payment Details' page. The page is titled 'Payment Details' and includes a sub-heading 'Pay by Direct Debit'. The Bupa logo is visible in the top left corner. The page is logged in as 'Name Surname' with links for 'Edit profile' and 'Log off'. The breadcrumb trail indicates the user is on the 'Bupa Intermediaries / Home' page. The 'Payee Type' section has two radio buttons: 'Individual' (selected) and 'Company'. The 'Payer Type' dropdown menu is set to 'Main Member'. There are three input fields for 'Account holders name', 'Branch Sort Code', and 'Account number'. A disclaimer at the bottom states: 'Please ensure the payment details are captured directly from the payer and the direct debit guarantee needs to be read in full to the payer.'





Purchase

After the payment details are entered, the application will process and load the subsequent screen.

You'll once again be shown a summary of the order, but this page is also where you may need to provide additional documents such as Existing Policy documents or any necessary forms etc, which will be highlighted in red as part of the summary.

The screenshot shows the Bupa website interface. At the top, there is a navigation bar with links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The user is logged in as 'Name Surname' and can click on 'Edit profile >' or 'Log off >'. The main content area displays the quote details for 'Bupa By You Comprehensive - Accepted Quote details'. The status is 'Accepted'. The main applicant is 'Andreas Pietrou' with quote ID 'BBY001A246P' and business type 'Switch'. A warning message states: 'This quote has been accepted by you & submitted to Bupa in order to process. Please make sure you've uploaded all necessary documentation. This quote will not be enrolled unless all necessary documentation are provided'. Below this, there is a section for 'Main applicant address and contact details' with the address '102 The Quays, SALFORD, Postcode M50 3SP' and contact information '0121-567890' and 'bsi@bupa.com'. At the bottom, there is a 'Total pricing breakdown for 2 people' section with a table showing costs for 'Cover', 'Core product', 'Total cost', and 'IPT'.

Total pricing breakdown for 2 people	
The cover start date is 18-Jan-2022	
* Annual amount payable by monthly instalments	

Cost for all applicant(s) including IPT		
Cover	Monthly*	Annual*
Core product	£152.59	£1831.08
Total cost	£152.59	£1831.08
IPT	£16.35	£196.20





Purchase

The system will prompt you for any documentation required, such as medical forms, previous policy documents or company billing forms.

To provide any of the documents being requested, just click **Upload** on the relevant line, and choose the document from the files on your computer from the pop out window that opens.

Please note the “Supporting Information via Intermediary Portal” is optional.

The screenshot shows the Bupa Intermediaries portal interface. At the top, there is a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as 'Name Surname' with links for Edit profile and Log off. Below the navigation, a breadcrumb trail indicates 'You are here: Bupa Intermediaries / Home'. The main content area is titled 'Documents required from the client' and includes a brief instruction: 'This is a sentence about how we need the following documents from the client. If you haven't provided it to the client previously you can also download the document from the table below'. A table with three columns: 'Document', 'Download Template', and 'Upload' is displayed. The table contains three rows: 'Document Uploaded via Intermediary Portal' with a download icon and an 'Upload' button; 'Supporting information via Intermediary Portal' with a text input field, a download icon, and a disabled 'Upload' button; and 'Existing Policy Document' with a download icon and an 'Upload' button. A blue box highlights the 'Supporting information via Intermediary Portal' row.

Document	Download Template	Upload
Document Uploaded via Intermediary Portal		Upload
Supporting information via Intermediary Portal <input type="text"/>		Upload
Existing Policy Document		Upload





Purchase

You'll also be shown a recap of the triage questions you may have answered during the process.

You cannot change these answers at this point, if you need to amend any of these answers, you'll need to contact Bupa to make any changes.



Unlike the old portal you can now view the answers to the triage questions at this stage.

Individuals & families Business Intermediaries Healthcare professionals Find a consultant in facility Help & support Contact us Search My Bupa

Bupa Home Create a quote Your Outstanding Actions Your Quotes FAQs Contact Us

Logged in as: Name Surname [Edit profile >](#) [Log off >](#)

You are here: Bupa Intermediaries / Home

	Main applicant Age 37	Member 2 Aged 37	Member 3 Aged 10
In the last 5 years has the person to be covered had any form of cancer that is not already excluded on their existing scheme?	No	No	No
In the last 5 years has the person to be covered had a heart or circulatory condition that is not already excluded on their existing scheme? For example coronary artery disease, angina, heart attacks, stroke, abnormal heart rhythms, blood clots, aneurysms, heart valve disorders, uncontrolled high blood pressure/cholesterol, etc.	No	No	No
In the last 2 years has the person to be covered had any arthritic conditions and/or back, neck and spinal conditions (including sciatica) or joint replacements that are not already excluded on their existing scheme?	No	No	No
Does the person to be covered have any planned or pending investigations, treatment, surgery or follow-ups for any condition or symptom that's not already excluded on their existing scheme (this applies whether the treatment is planned privately or under the NHS)?	No	No	No





Purchase

Finally, you have another opportunity to download the relevant documents that the client will need. The documents shown will be specific to the policy chosen, to simplify the process.

You can choose one or multiple by selecting the check box to the left of each and then clicking download.

Once everything is confirmed, and correct, click **Finish**.

Doing so will close the purchase and return you back to the home screen.

The screenshot displays the Bupa Intermediaries user interface. At the top, there is a navigation bar with tabs for 'Individuals & Family', 'Business', 'Intermediaries', and 'Healthcare professionals'. The 'Intermediaries' tab is active. The user is logged in as 'Name Surname' and has options to 'Edit profile' and 'Log off'. The main content area is titled 'Download Documents' and includes instructions on how to download individual documents or multiple documents. A list of documents is shown, each with a checkbox and a 'Download' button. The 'BBY Policy Benefits & Terms' document is selected. At the bottom of the page, there are two buttons: 'Download' and 'Finish'.





Finding quotes and purchases

08

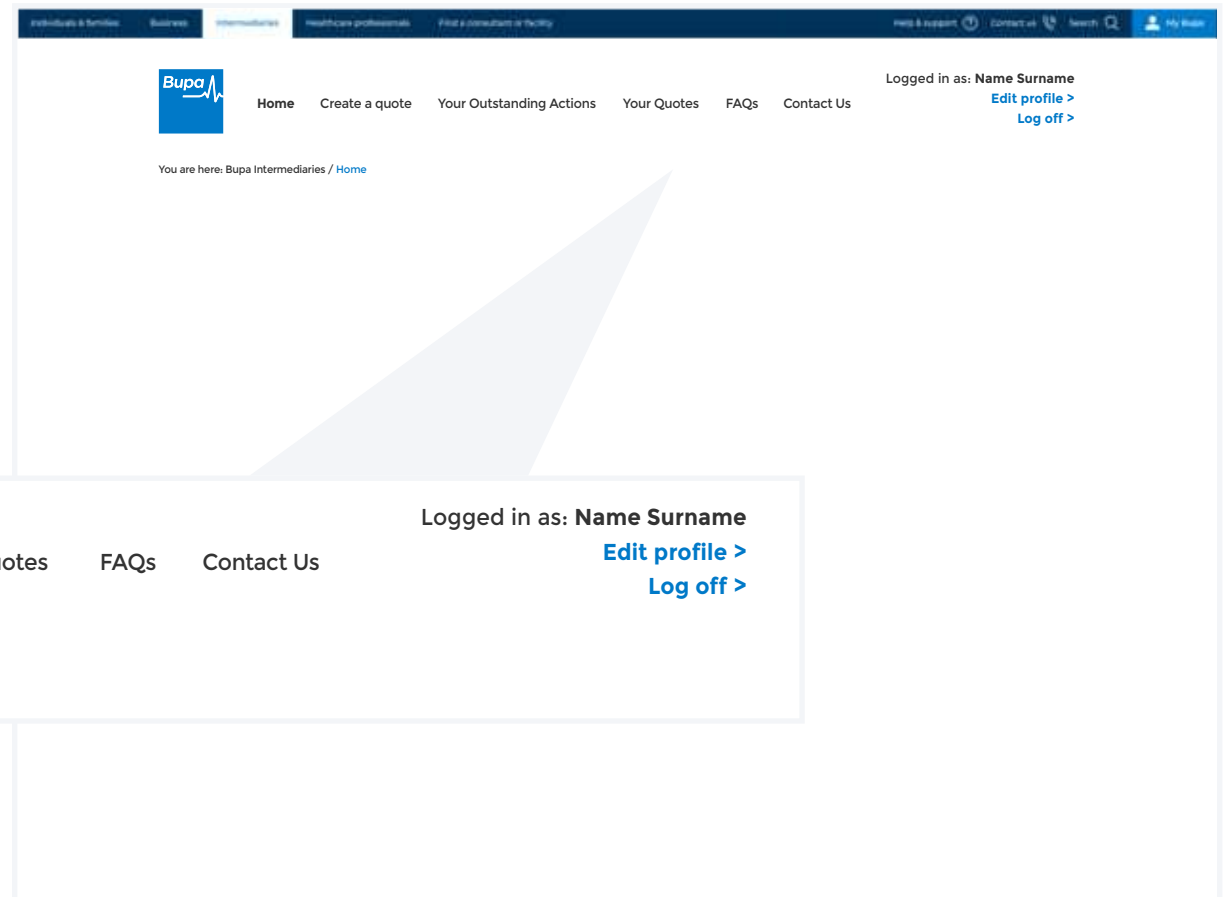




Finding quotes and purchases

At the top of the page, you can navigate to create a new quote, view your outstanding actions and all previous quotes. You can also view FAQs and Bupa contact details.

To find an existing quote or purchase, click **All Quotes**.









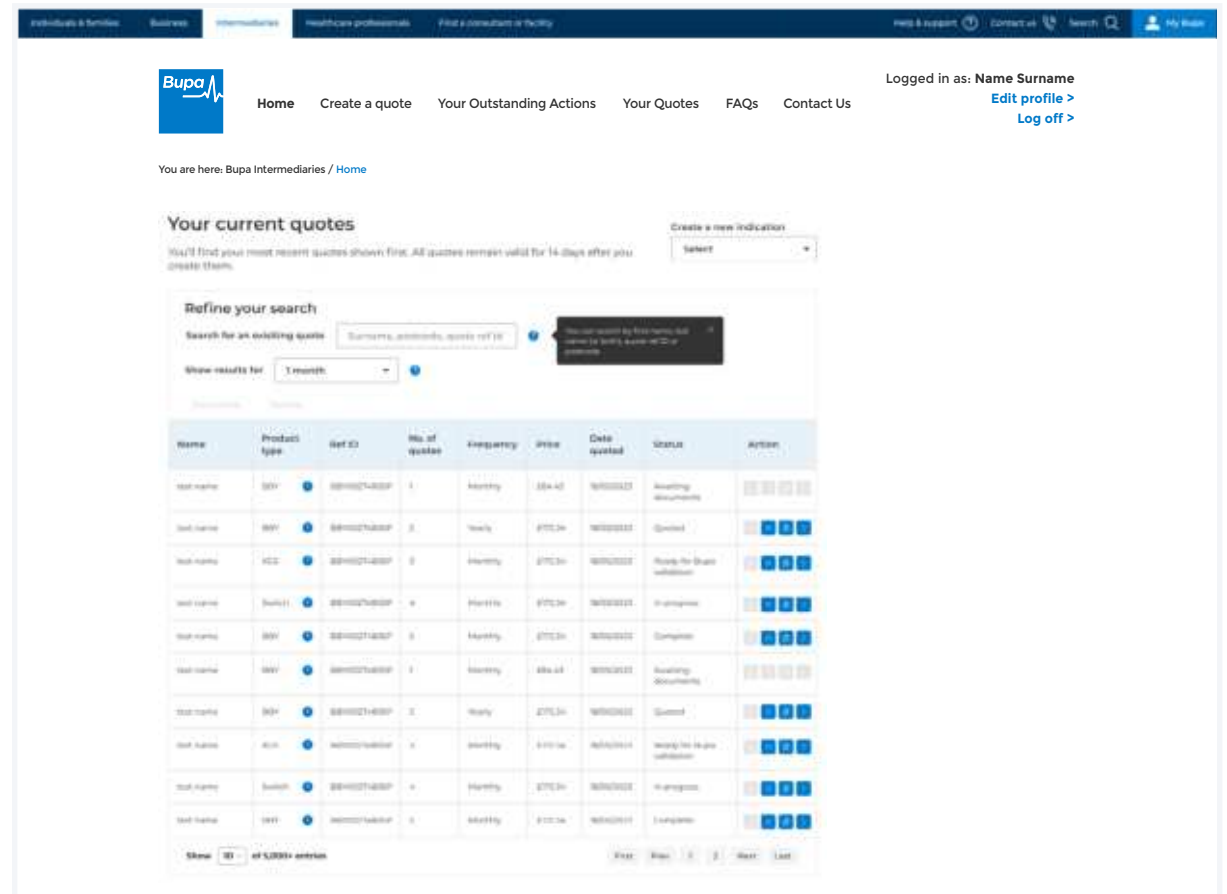
Finding quotes and purchases

Here, you'll be able to see a list of all quotes and refine them by the timeframe in which they were created.

You can also search for a quote using the client's details, or the quote reference.

Once again, you're provided with buttons to help you do the following:

-  download the quote to provide to the client, if the quote has progress that far
-  cancel or delete the quote
-  copy the quote, for example if you'd like to create a variation but keep the original
-  open the quote, to pick up where you left off




The screenshot displays the Bupa Intermediaries dashboard. At the top, there's a navigation bar with the Bupa logo and links for Home, Create a quote, Your Outstanding Actions, Your Quotes, FAQs, and Contact Us. The user is logged in as 'Name Surname' with links to 'Edit profile' and 'Log off'. Below the navigation, there's a section titled 'Your current quotes' with a 'Create a new indication' button. A search bar allows users to search for existing quotes, with a dropdown menu for 'Show results for' set to '1 month'. Below the search bar is a table of quotes with the following columns: Name, Product type, Ref ID, No. of quotes, Frequency, Price, Date quoted, Status, and Action. The table contains 10 rows of data. At the bottom of the table, there's a 'Show' dropdown set to '10' and a note 'of 5,000+ entries'. There are also 'First', 'Last', and 'Next' buttons.



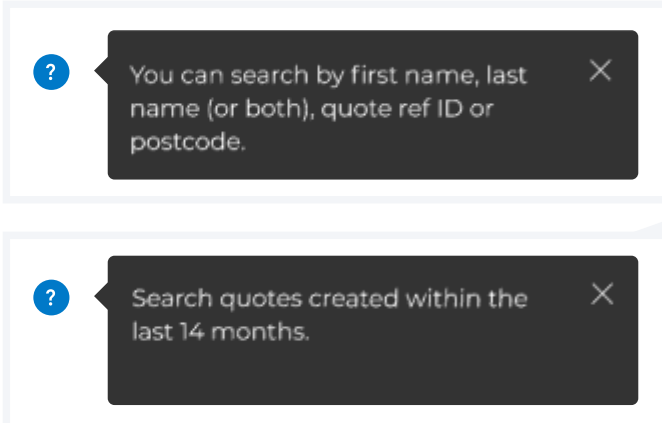



Finding quotes and purchases


As with other sections of the portal, there are tips and information located around the pages to help you.

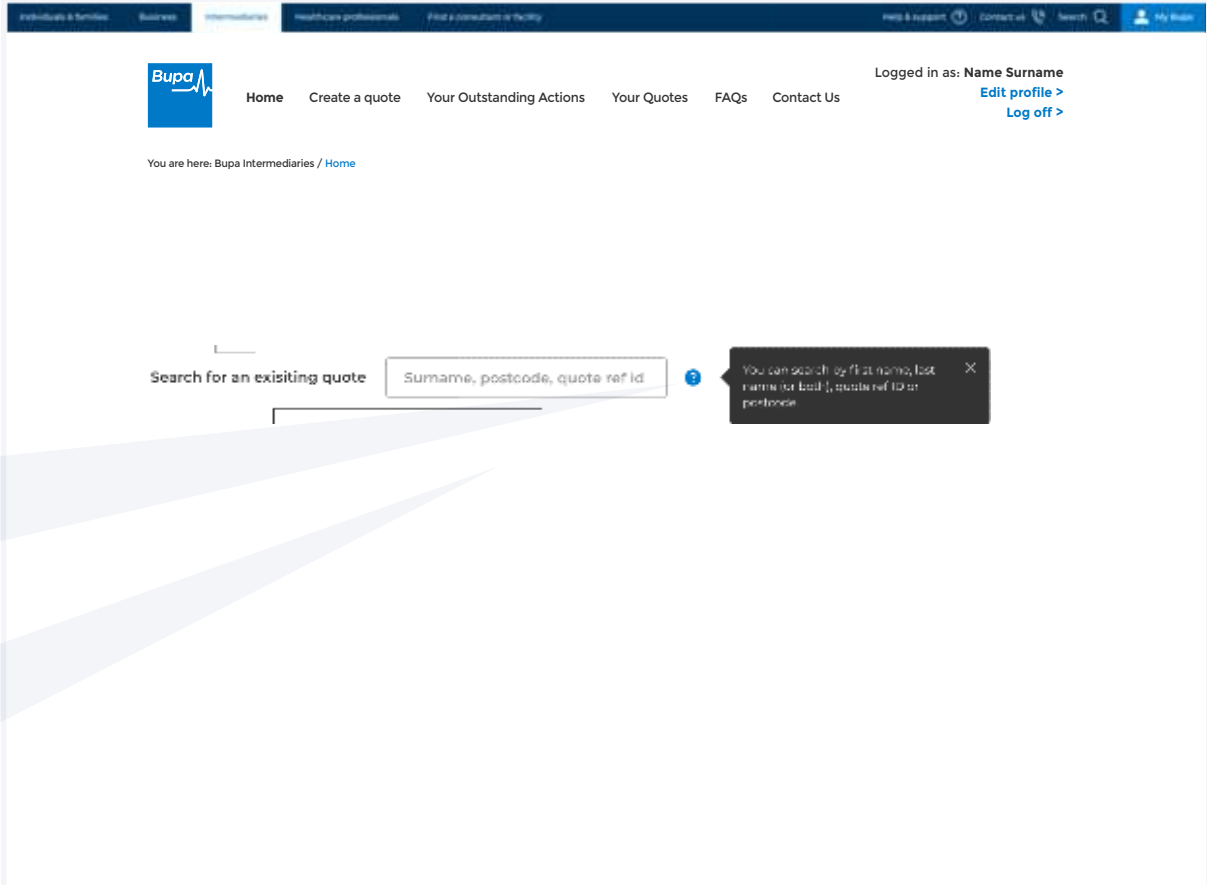
 Wherever you see this icon you can click it to see more detail about the section.

Below are the tool tips from the quote search screen.



 You can search by first name, last name (or both), quote ref ID or postcode.

 Search quotes created within the last 14 months.



The screenshot shows the Bupa portal interface. At the top, there is a navigation bar with links for 'Individuals & families', 'Business', 'Intermediaries', 'Healthcare professionals', and 'Find a consultant in facility'. The Bupa logo is on the left, and the user is logged in as 'Name Surname' with links for 'Edit profile >' and 'Log off >'. Below the navigation bar, there are links for 'Home', 'Create a quote', 'Your Outstanding Actions', 'Your Quotes', 'FAQs', and 'Contact Us'. A breadcrumb trail indicates 'You are here: Bupa Intermediaries / Home'. The main content area features a search bar with the placeholder text 'Search for an existing quote' and a text input field containing 'Surname, postcode, quote ref id'. A tooltip with a question mark icon is positioned over the search bar, containing the text: 'You can search by first name, last name (or both), quote ref ID or postcode.'



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