About this guide

The aim of the questionnaire is to obtain a detailed medical history from your client. You can help speed up the application process and ensure that completion of the medical questionnaire goes smoothly by making sure both you and your client are prepared.

Preparing for online apply

You:

- Familiarise yourself with the questions before you start.
- Ensure you are familiar with the pronunciation of medical terms so that your client understands what you are asking. If you are unsure how to pronounce any medical terms, please look on the Internet for help or give us a call. You might find http://www.medilexicon.com/medicaldictionary.php helpful or http://www.nlm.nih.gov/medlineplus/mplusdictionary.html.

Your client:

- Arrange for your client to be somewhere comfortable, where he or she can privately discuss their medical details and give you their full attention. Avoid trying to complete the medical questionnaire whilst your client is driving or is similarly distracted.
- Ask your client to allow plenty of time to complete the medical questionnaire. The questionnaire will take approximately 30 minutes but can vary in length depending on your client's medical history. It is important that your client takes the time to complete the medical questionnaire with full disclosure.
- Ask your client to have the following details to hand:
  - The name and dosage of any medication;
  - Their current height, weight, waist measurement or dress size;
  - Name, address and phone number of their doctor;
  - Details of their parents and siblings health history;
  - If your client suffers from high blood pressure or raised cholesterol, details of their last reading(s).

Completing online apply

- Ensure that you read the Context and Disclaimer statements to your client at the beginning of the medical questionnaire so that they understand the importance of full disclosure.
- To avoid delays in the application process, it is important that your client is able to answer all the questions as completely as possible. Please remember that the more information we have, the less likely it is that we will have to go back to the client for further details or request a medical report from their doctor. To achieve this:
  - Do not rush the medical questionnaire; read the question fully, pause and give your client time to think about their answers;
  - Do not try to summarise or answer the questions for your client;
  - Provide full details regarding each condition as disclosed by your client; if your client feels something is relevant, please disclose it to us.
- As part of the online medical questionnaire, you will need to ask your client a series of questions regarding their medical history which may include additional information such as the date of diagnosis, details regarding treatment and/or investigations and the current status of the condition. Please remember we need to know which limb or part of the body is involved, for example left knee or lower back.

On completion of online apply

Please advise your client that they will be sent a transcript of their medical questionnaire. Please ask them to check it carefully and to call us directly or 01234 358344 or email us at enquiries@britishfriendly.com if they need to make any changes.

British Friendly Society Limited
Registered Office:
45 Bromham Road, Bedford MK40 2AA

Telephone:
01234 358344

Fax:
01234 327879

Email:
support@britishfriendly.com

Web:
advisers.britishfriendly.com

LinkedIn:
linkedin.com/company/british-friendly-society

Twitter:
twitter.com/BritishFriendly

BRITISH FRIENDLY

It feels good to be covered