



Making the most of your plan

www.simplyhealth.co.uk

Your **step-by-step** guide to
managing your plan online,
including **how to set up**
your online account.

We're proud to be recognised as a B Corp certified company and so we're committed to caring for you and the environment. As part of this commitment, we're reducing our paper consumption and moving online.

We understand our customers may require some support going online, so we have created this step-by-step guide to walk you through setting up an online account, updating your personal information and how to make a claim.

Here's what you'll find in your online account:



How to make a claim



Managing your plan



My documents



How to access a GP or counsellor 24/7



Personal details



Access to discounts and rewards

How to register

You can either set up an online account at www.simplyhealth.co.uk/register or you can **download our SimplyPlan app from the Apple app store or Google Play.**

How do I register?

1. Start by going to www.simplyhealth.co.uk and then to **'My account'**.
2. **Click 'Sign up'** or if you're using the app, **click 'Register'**. Confirm your personal details and an active personal email address.
3. Follow the steps to create your password before **clicking 'Submit'**.
4. Wait for an email called **'You've got mail'** and click the link in the email to verify your email address. **Remember to check your junk or spam folders.**
5. You're nearly ready to go. Just **click 'Login'** and use the email and password you've just confirmed. Add your personal details to complete your registration and access your online account.

How to manage and update your account details

Manage and update your personal information in minutes, without hassle, wherever you are.

All you need to do is:

1. Log in to your account via the app or by **clicking 'My account'** in the main menu of our website.
2. **Click your 'Profile'** on the top right of the screen.

From here, you can choose to change:

- Your login details (Security)
- Bank details
- Home address
- Email address
- Phone numbers
- Marketing preferences
- Add bank details for fast claim payments



Remember to click **'Save all settings'** if you change any details.

How to make a claim

Whether you are using the Simplyhealth website or the SimplyPlan app, follow our simple instructions on how to submit a claim.

To get started, you'll need:

- ✓ Patient name
- ✓ Practitioner name
- ✓ Treatment date
- ✓ Treatment type
- ✓ Amount paid for treatment
- ✓ Itemised receipt (either a physical copy or photo downloaded on your chosen device)
- ✓ Which plan the claim is being made on

1

Choose **'Make a claim'** in your list of options.

2

You'll be asked to read a declaration. If you're happy to continue, **tap 'Agree'**. You will then be asked if you are ready to make a claim. If you have everything to hand **click 'Continue'**.

3

Upload your receipt or supporting documents:

- If you have a paper copy of your receipt and are using the SimplyPlan app you can **select 'Take a photo'**. Make sure to capture the whole receipt without any blur.
- If you have a digital copy - e.g. a photo or a PDF - select the **'Upload file'** option and select the necessary document.

4

Fill in your treatment details.

5

Press **'Submit'**.



All done. Claims can take a few days to be reviewed, so please don't worry if you don't receive approval and payment immediately.

You can check the progress of your claims on the **SimplyPlan app** or your online account.

Managing your plan on the go

You can use your plan anywhere, anytime.

Use our SimplyPlan app to manage your plan and make claims directly from your mobile or tablet. It uses the same login details as your online account.

How do I download the app?

1. Locate your designated app store on your phone.
2. Search for 'SimplyPlan'.
3. Click on the app titled 'SimplyPlan by Simplyhealth'. (The icon will be our logo).
4. Click 'Install' or 'Download'.
5. Go to your home screen or apps screen and you'll find the **SimplyPlan icon** available for you to use. Tap the icon to open the app.

Download the SimplyPlan app now



SimplyPlan
by Simplyhealth



How to scan a QR code

Use your phone camera to scan the QR code from your chosen app store above to take you directly to the app download screen.

Improving the UK's access to healthcare

At Simplyhealth, we believe in making your healthcare easy.

SimplyConsult app

We have your health covered, 24/7, 365 days a year.



Year round access to a GP of your choice through video consultation. From diagnosing symptoms, prescriptions and referral letters.



Your own direct line to counsellors and psychologists, providing immediate, round the clock support.



Telephone advice and support on a range of issues, including financial debt, gambling, bereavement and employment concerns or any other issue you may be facing.

Some of these services are provided by a third party provider.

Rewards & Discounts

We partner with a number of organisations to bring you **discounts, offers and rewards** to support your health and happiness.



Register your online account or log in and click **'SimplyRewards'**.



Your information is safe with us

We use secure technology to protect your details, holding data on protected systems, and regularly monitoring our online and app based services.



Need some more information or support?

Visit www.simplyhealth.co.uk/contact-us or call us on **0300 100 1024** Monday to Friday 8am - 6pm