

Receipt Requirements

For Discretionary Benefits

Claims may be submitted in respect of any eligible treatment, goods or services received or purchased after the effective date stated on your confirmational letter, which is after 12 months' contributions have been paid toward a Sickness or Tax-Free Savings Plan.

Useful guidance

1. Before booking your treatment or consultation, please make sure it is with a practitioner, who is qualified and registered with the appropriate professional body. You can find a list on our website.
2. At the end of your appointment, ensure you obtain a receipt that confirms your payment.



Please note the receipt should contain the following:

- ✓ The full name and title of the patient / customer
- ✓ The full name, contact details and official stamp of the practitioner
- ✓ Details of the treatment provided (or items purchased) including date
- ✓ Evidence that payment has been made in full



The following are not accepted:

- ✗ No Debit or Credit Card receipts without an official receipt
- ✗ No Invoices or Bank Statements
- ✗ No receipts for part payments or payments made in advance
- ✗ Claims for expenses outside the United Kingdom must be supported by a debit card receipt and an official receipt



Please ensure your receipt complies with our requirements, as failure to do so may cause a delay to the payment of your claim. We may need to contact you and/or the practitioner to confirm details of your appointment. **If we reasonably believe that a claim is false or fraudulent, even if we have not proved that you have acted dishonestly, we will not pay that claim. We may terminate your policy/policies and your membership of the Society, and all your benefits will stop immediately.**