



UNUM THIRD PARTY APP INTEGRATION

Setup Guide for Unum Third Party App Plans

Step 1: Verify your license level.

Third party app integration requires our Enhanced Plus or above license. Verify your agency has the Enhanced Plus license level or above by going to your agency's Account Info tab > License drop-down. If you don't have Enhanced Plus or above and would like to upgrade, please submit your request into support.

Step 2: Get in touch with Unum.

Reach out to Unum and let them know you'd like to utilize the EN/Unum integration. Unum will create the plane.biz file for the integration – the typical turnaround time is 7-10 days from the date Unum receives the executed new business documents. A Unum case manager will send over the plane.biz integration email, which is used to complete the below steps in EN.

Step 3: Enter the External Account ID.

Go to the company's Benefits tab > External Account IDs (bottom left under Third Party Apps). Click Add an account id. Select Unum from the Third Party drop-down and input the Account ID. **Note:** External Account # = *Unum Case GUID* in plane.biz implementation email. These must match exactly, so include dashes when inputting into EN.

THIRD PARTY APPS ▾

- External Account IDs
- Class Rules
- External Enroller IDs
- Marketplace Resources
- Enrollment Viewer

External Account IDs ⓘ

Add an account id +

Edit An Account ID

Set Account ID

Third Party: UNUM

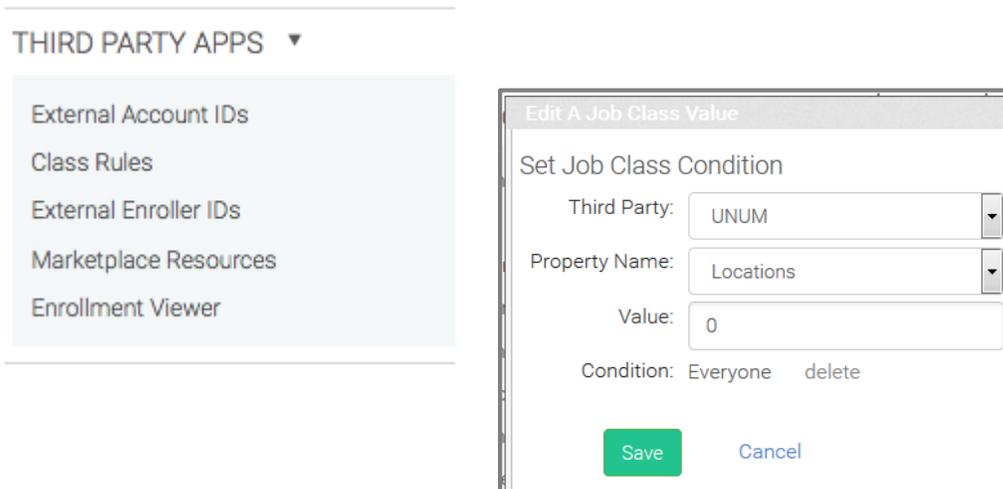
Account ID: 777AAA7A-7777-777A-A777-A777AAA777
(supplied by vendor)

Save Cancel

Step 4: Enter the Class Rules.

The class rules are outlined in the plane.biz implementation email. Rule properties vary by case but can include Bill Segmentation, Bill Subdivisions, Classes, Job Classes and Locations. These properties will be listed under the *Enrollment Dates* section of the plane.biz implementation email under *Rule Information* (substitute Rule for Class, Location, etc.). All rule properties must be added to EN, so if more than one is listed in the plane.biz implementation email, it's required to add all.

Go to the company's Benefits tab > Class Rules. Click Add a class value. Select Unum under Third Party drop-down. Select the corresponding rule property from the Property Name drop-down. Input the Value. Select the corresponding condition from the Condition drop-down. Note: The Value = the *rule property ID* and the Condition = the *rule property name* in the plane.biz implementation email. See below example.



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Dialog: Edit A Job Class Value

Set Job Class Condition

Third Party: UNUM

Property Name: Locations

Value: 0

Condition: Everyone delete

Save Cancel

Step 5: Enroller only or self-enroll?

Confirm whether the group will be setup as enroller only (Unum enrollers must enroll ees in Unum plans) or self-enroll (ees and non-Unum agents can enroll ees in Unum plans). This is indicated in the plane.biz implementation email under *Enrollment Method(s)*. Individual = self-enroll, Enroller = Enroller only. **Note:** You must request self-enroll with Unum.

Note: skip to **step 7** if group is doing (and has been approved for) self-enroll.

Step 6: Add enrollers as HR users.

Enrollers must first be setup as HR users under the company. Go to the company's Settings tab > HR users. Make sure the enroller's first name, last name and email match the enroller's info stored in Unum/plane.biz. Under the user's Permissions tab, check off the box next to *Enroller Only* (this is required in order to bridge over to plane.biz).

Note: You can give enrollers additional access/permissions by checking off the different boxes under the HR account's Access Control tab.

Step 7: Enter External Enroller IDs.

Once the enrollers have been setup as HR users, you'll need to add their enroller IDs. Go to the company's Benefits tab > External Enroller IDs (bottom left under Third Party Apps). Click on the enroller's name and then click Add a new id. Select Unum from the Third Party drop-down and enter the Enroller ID. **Note:** Enrollers are assigned/added by Unum case managers.

The screenshot shows the 'THIRD PARTY APPS' menu on the left with 'External Enroller IDs' selected. The main window is titled 'External Account IDs' for 'Rex Dinosaur' and includes an 'Add a new id +' button. A modal window titled 'Edit An Enroller ID' is open, showing a 'Set Enroller ID' form with the following fields: 'Third Party' (dropdown menu set to 'UNUM'), 'Enroller ID: (supplied by vendor)' (text input field containing 'unumenroller'), and 'Tax ID' (empty text input field). 'Save' and 'Cancel' buttons are at the bottom.

Step 8: Setup the third party app Unum plans.

Go to the company's Benefits tab > Add A Plan > Add a new plan. Scroll to the bottom of the list and select Unum Marketplace under Third Party Apps. Select *Unum* as the carrier, enter the plan name and click *Save*.

The screenshot shows a list of 'Third Party Apps' with the following items: 'Voya Marketplace', 'Colonial Life Marketplace', 'Transamerica Marketplace', and 'Unum Marketplace'. A red arrow points to 'Unum Marketplace', which is highlighted with a dashed border.

Basic > Policy Information tab:

- Select *Unum Plan* from the Plan type drop-down.
- Input the plan's Start and End Dates. The start date can reflect the upcoming (or most recent) policy anniversary date, and the end date should be extended out several years (e.g. 12/31/2050).
- Input the Policy #.

Basic > Eligibility Rules tab:

- Setup plan eligibility rules accordingly. This setup follows the same process as all other plan models in EN.

Enrollment tab:

- *Product group* drop-down: Select the corresponding product from the *Product group* drop-down. The product selected should match the benefit listed under *Benefit Type (s)* in the plane.biz implementation email.
- *Available by enroller only*: Check this box if the group is setup for enrollers only and not self-enroll. If the group has been approved for self-enroll, don't check this box.

Step 9: Confirm required ee demographic data.

In order to bridge from EN to the plane.biz platform, certain ee demographic fields are required to match. You can validate the data by pulling an ad-hoc report to ensure all required fields are completed for ees. The following fields are required:

- SSN
- First Name
- Last Name
- DOB
- DOH
- Gender
- Annual Base Salary
- Pay frequency (indicated by either class or payroll group)
- Job Title
- Address (Address 1, City, State & Zip)
- Home Phone Number
- Dependents (must have at minimum First/Last Name, DOB & Gender)

Step 10: Test ee enrollment.

Before going live with the group, you'll want to test the enrollment process to ensure that everything was setup correctly and the third party app plug-in is working as expected. Unum provides some test ees in the plane.biz implementation email under *Testing*. You can use these Unum supplied test ees or create your own demo ee, but the first 6 digits of any test ee's SSN must reflect 9s. These ees will bridge over to Unum's demo environment, and will let Unum know to wipe out those ees later. Be sure to complete all required demographic fields for test ees. Remember - if the group is setup for enroller only, one of the enrollers will need to complete the testing process.

Note: *You'll get an error and be unsuccessful in bridging to plane.biz if you're trying to test enrollment before the Annual Enrollment date listed under the Enrollment Dates section in the plane.biz implementation email. To open it up, you'll need to contact your Unum case manager and request that this date be temporarily*

pushed back to the current date in the plane.biz platform to allow for testing. Once testing is complete, let your Unum case manager know so the dates can be changed back in plane.biz.