Help@hand Admin Portal guide

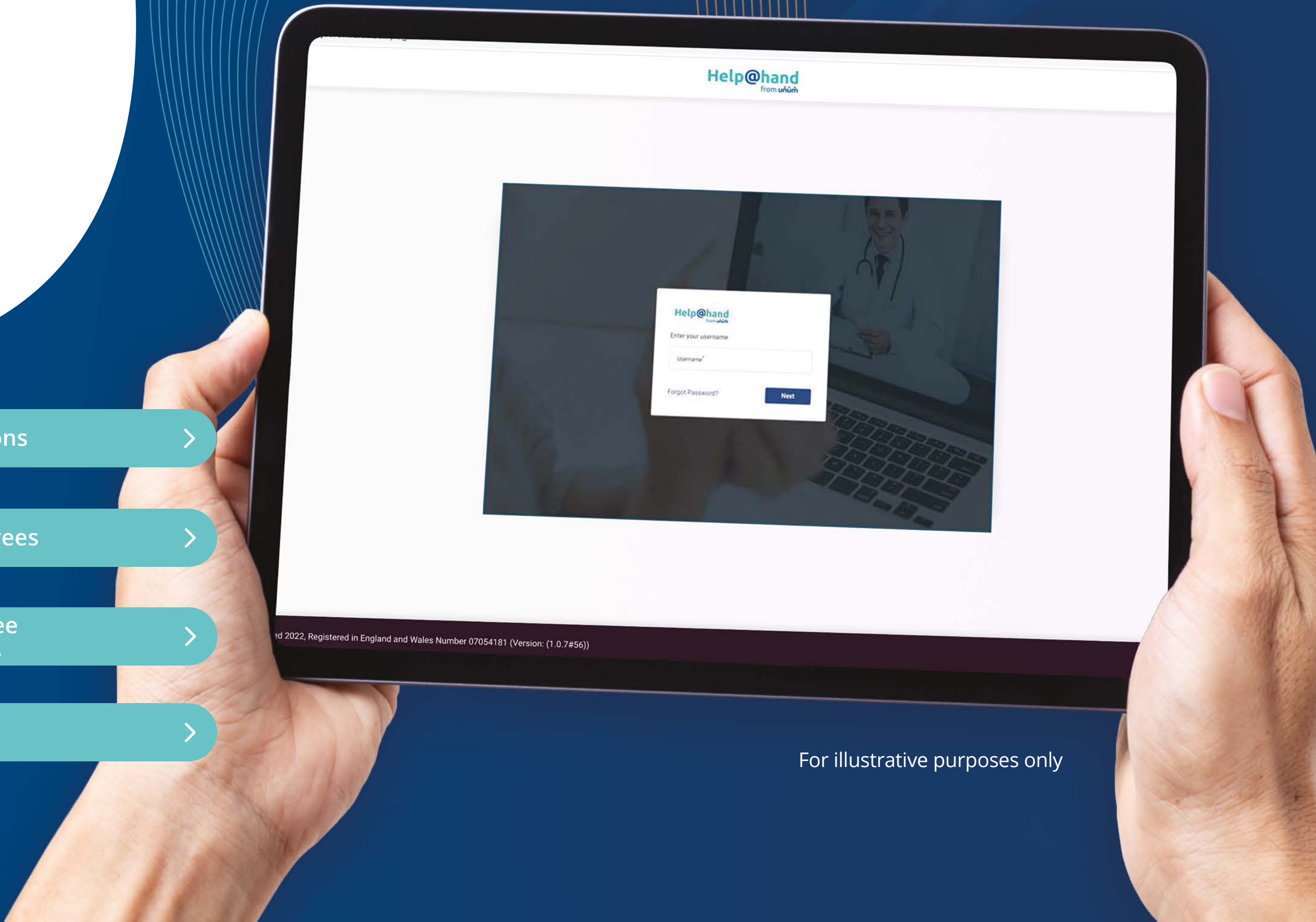
Help@hand from unum

Thank you for registering for Help@hand. This quick guide will show you how to set up your account, upload employee details and keep your account updated.

If you have any further questions, please check our handy Frequently Asked Questions page.

You can also sign up for a Help@hand Ready session for a walkthrough plus interactive Q&A here.

Please note: the Help@hand Admin Portal works best using the Chrome browser.



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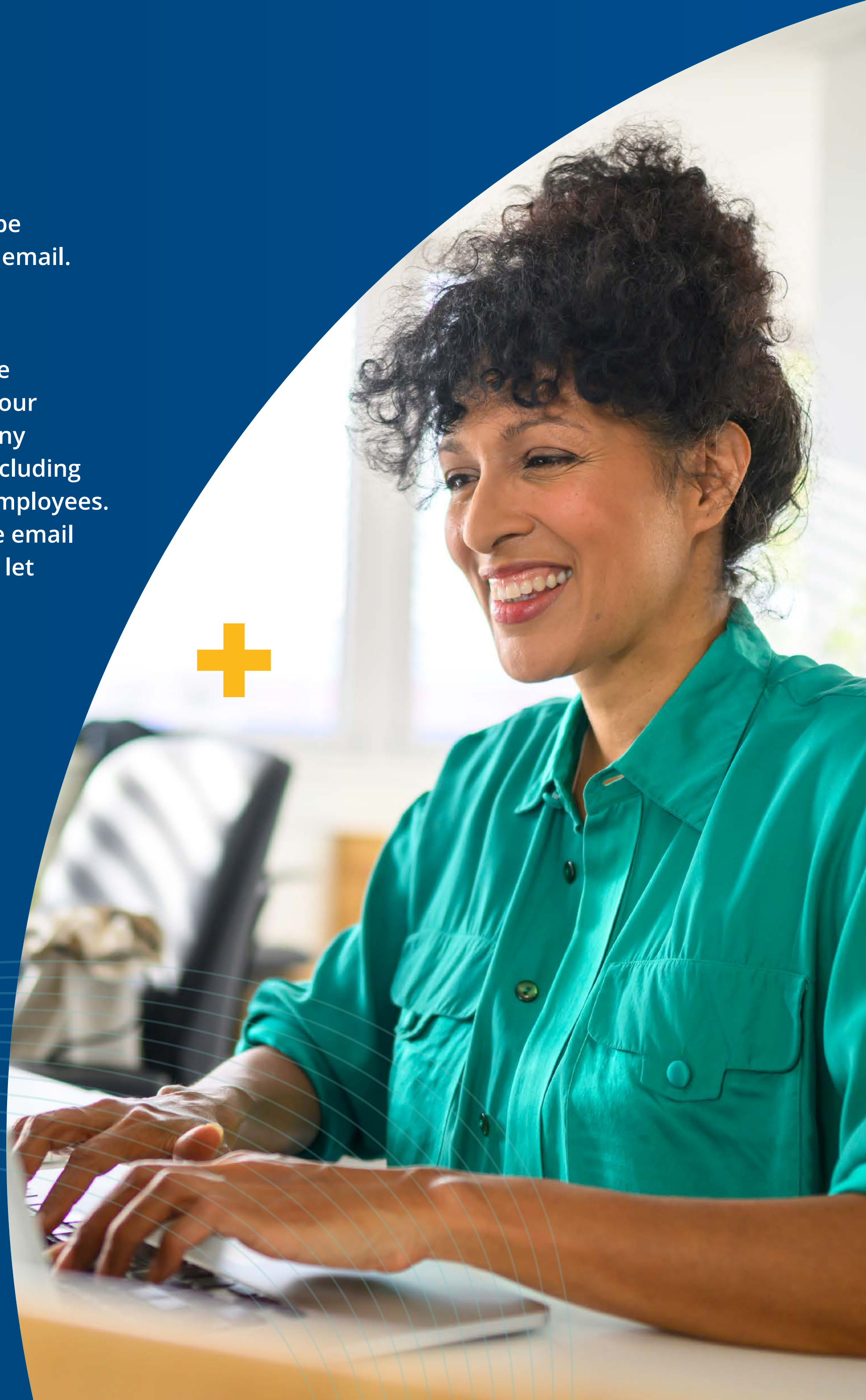
Registration

1. Once you've registered you will receive an email with your temporary login details. This password is valid for 24 hours – after this time you will need to request a new temporary password to register. You can do this by clicking 'Forgot Your Password?

2. Once logged in, you will be asked to reset your password, and login again. You will also need to add a mobile number, for MFA (multi-factor authentication). Following initial registration, you will have the option to authenticate via email or mobile number when you log in.

3. The change of password will be confirmed on screen, and via email.

4. Please then move through the registration steps, checking your personal information, company details, and policy details – including adding the total number of employees. If a change is required, please email help-at-hand@unum.co.uk to let us know.



Top tip: When employee email addresses have been uploaded, they will receive an email within 24 hours of completion inviting them to the service. So, if you're not quite ready to launch, simply skip this step and wait to upload your data.

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Add another administrator

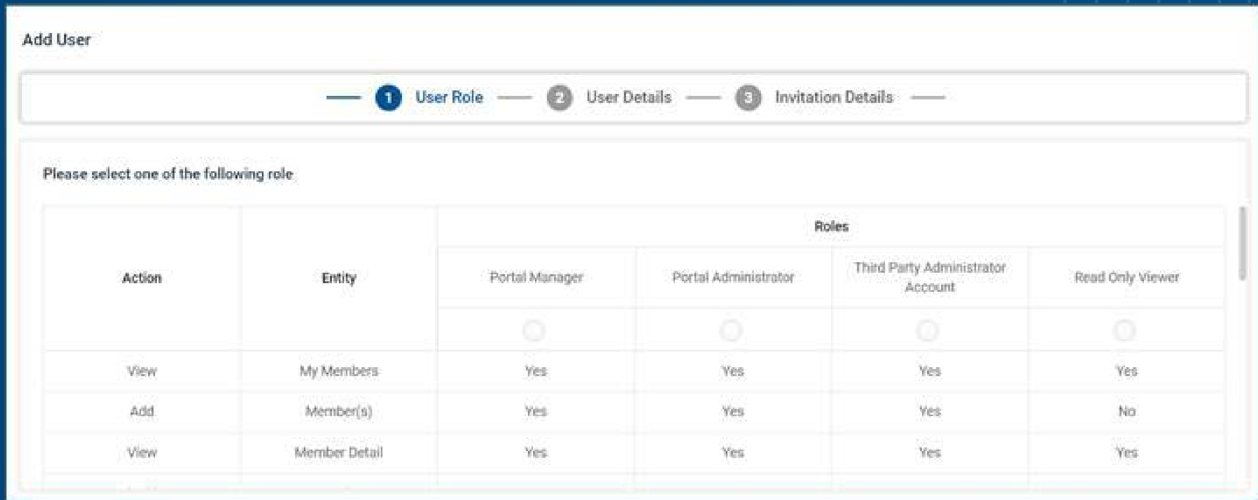
1. First, go to the 'Account Information' section.

2. Go to the 'System Users' tab, and from here you can add another administrator.

Top tip: We recommend you have at least two admins to make sure that your business can maintain access to your account. It might be helpful to add a generic HR inbox as an administrator, making it easier to gain access if an individual is unavailable.

Administrator glossary

- Portal managers have the highest level of access.
- Third-party administrators can access more than one account where this is required.
- Portal administrators are not able to add or disable additional administrators.
- Read-only administrators can only view details in the account.



Add User

1 User Role — 2 User Details — 3 Invitation Details

Please select one of the following role

Action	Entity	Roles			
		Portal Manager	Portal Administrator	Third Party Administrator Account	Read Only Viewer
View	My Members	Yes	Yes	Yes	Yes
Add	Member(s)	Yes	Yes	Yes	No
View	Member Detail	Yes	Yes	Yes	Yes

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Account information and product details

Navigate to the ‘Account information’ section.

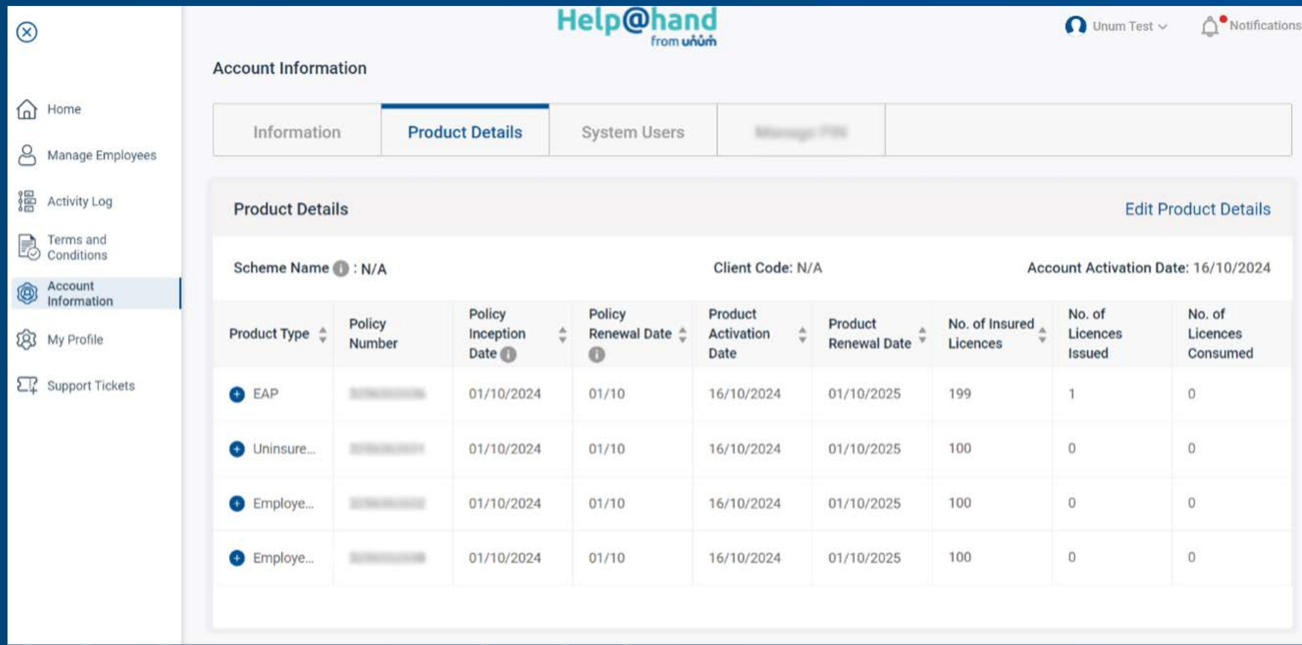
1 Company details

Under the Information tab, you can see your company details.

2 Products

Go to ‘Product Details’. Here you can see the number of employees eligible for licences for Help@hand, and if you have multiple policies these will be detailed here.

Please note: You may see different product options on your portal. This is based on the policy or policies you hold with Unum.



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Add employees

1. Navigate to 'Manage employees' section.

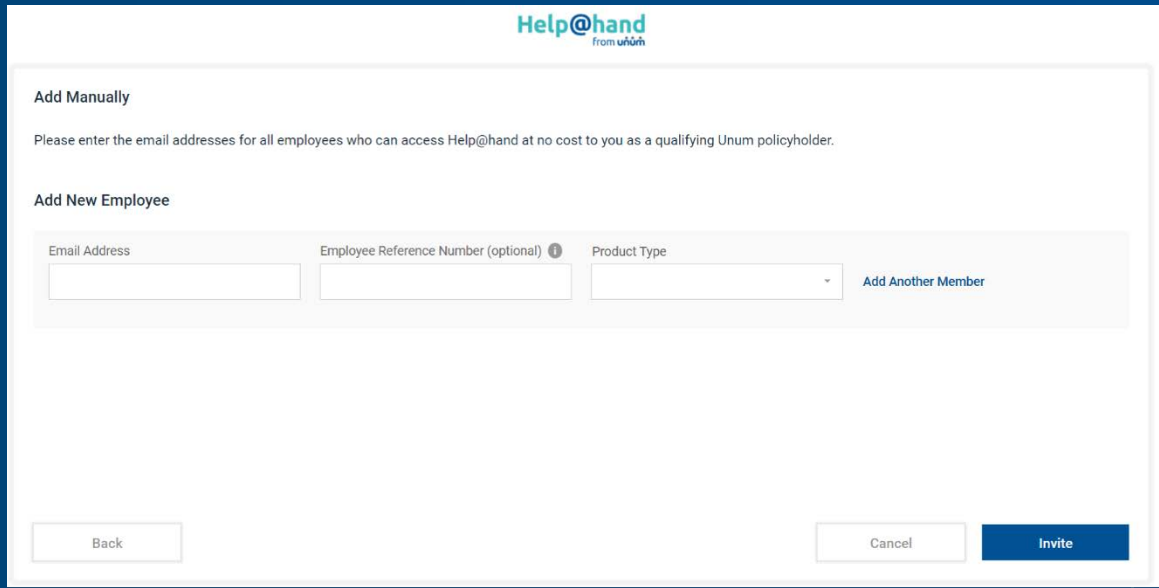
2. Click the 'Manage employees' drop down, and select 'Add employees'.

3. You can then choose to add employees in bulk. To use the csv file, please download the sample and ensure your csv file has both headers. The 'employee reference number' is optional and you can leave this column blank if preferred.

   Or

   You can add employees manually, if you have a small number to add to the portal.

Please note: the 'Paid' option refers to adding uninsured employees who are otherwise not eligible, so they can access the full suite of Help@hand services. This provision is invoiced directly from Square Health.



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User status glossary

Registered: Downloaded the app

Unregistered: Welcome email sent but not downloaded the app

Active: Used at least one service

De-Registered: You have removed their details

Suspended/Dormant: Not in use

Please note: a new csv upload does not overwrite a previous upload or remove access to employees who have already been uploaded into the portal.

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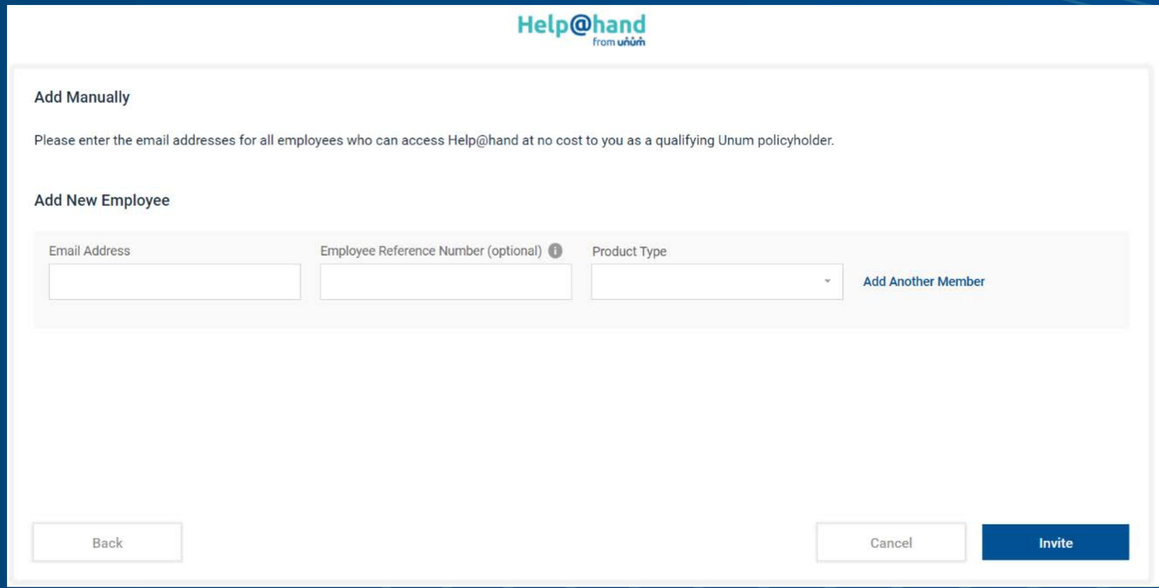
Move employees between product type

When employees are added into the Admin Portal, they are added under a 'Product type' (i.e. Group Income Protection). Employees can be added under multiple products and can also be removed from one or all products.

1. Navigate to 'Manage employees' section and using the drop down menu, select add employees.
2. Upload employees under the 'Product type' you'd like to move them to. This can be done manually or in bulk – check the 'Add employees' page for more information. **Please note invitations will not be sent if they have previously been uploaded.**
3. Then locate the employee(s) in your records. Under 'Action', click on the 3 dots and choose de-register from the product you want to remove. This can also be actioned in bulk, using the 'Bulk de-register' option and choosing the product type you wish to remove them from.



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Please note: the 'Paid' option refers to adding uninsured employees who are otherwise not eligible, so they can access the full suite of Help@hand services. This provision is invoiced directly from Square Health.

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Resend invitations

Once Help@hand is launched, you can check if employees have registered and resend the email invite to those who are 'Unregistered' to remind them to download the app at any time.

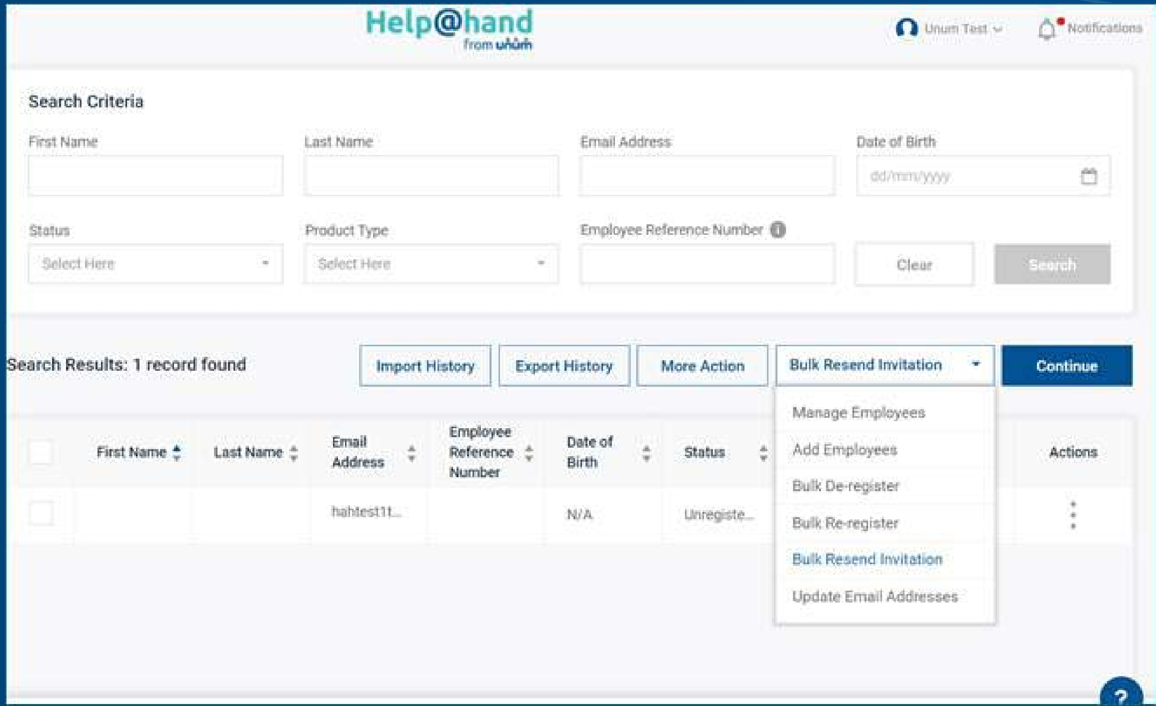
1. Navigate to 'Manage employees' section.

2. Click the 'Manage employees' drop down and select 'Bulk resend invitation'. This will automatically send to all employees who are 'Unregistered'.

   Please note the resend option will only appear for users that are unregistered and that have not yet verified their email. Users that are unregistered but already verified their email and then not competed registration will not receive the app invitation again. They can log in using the 'Forgotten password' button in the app at any time.

   Or

   You can resend an individual invite by searching for the employee, clicking the three dots under 'Actions' and selecting 'Resend invitation'.



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Remove employees

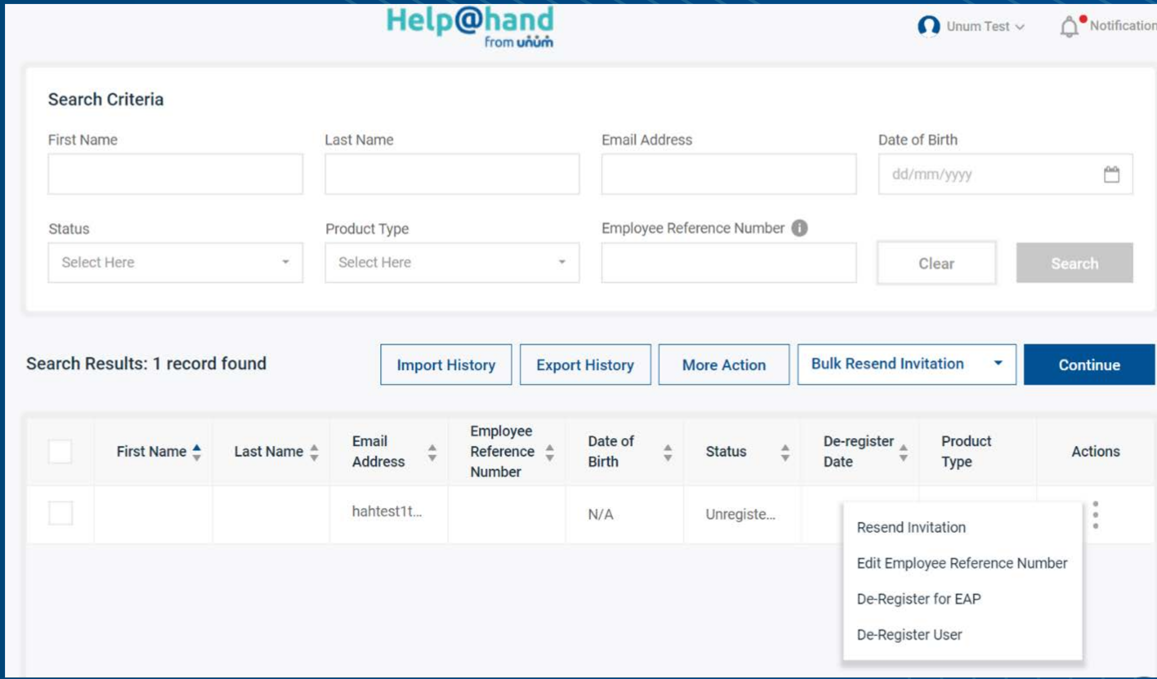
If an employee leaves the business, they should be removed from the Help@hand admin portal.

1. Navigate to 'Manage employees' section.

2. Click the 'Manage employees' drop down and select 'Bulk de-register'. This can be done for several employees at the same time, using the sample csv file with their details.

   Or

   You can de-register an individual by searching for the employee, clicking the three dots under 'Actions' and selecting 'De-register user'.



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Update employee email addresses

You may need to update employee email addresses, if an employee changes their name or the company email domain changes.

1. Navigate to 'Manage employees' section.
2. Click the 'Manage employees' drop down and select 'Update email address'.
3. This update has to be done via csv file. Please download the sample csv, and use this to input the current and new email address – please do not alter the spreadsheet column headers.

A	B
Current Email Address	New Email Address
donald.william1@somedomain.com	donald.william01@somedomain.com
victor.mold1@somedomain.com	victor.mold01@somedomain.com
donald.william2@somedomain.com	donald.william02@somedomain.com
victor.mold2@somedomain.com	victor.mold02@somedomain.com
donald.william3@somedomain.com	donald.william03@somedomain.com
victor.mold3@somedomain.com	victor.mold03@somedomain.com

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4. Save the file and upload it to the portal. This will prompt an email to the employee(s) impacted to verify their email. Once verified this will update the email on the portal.

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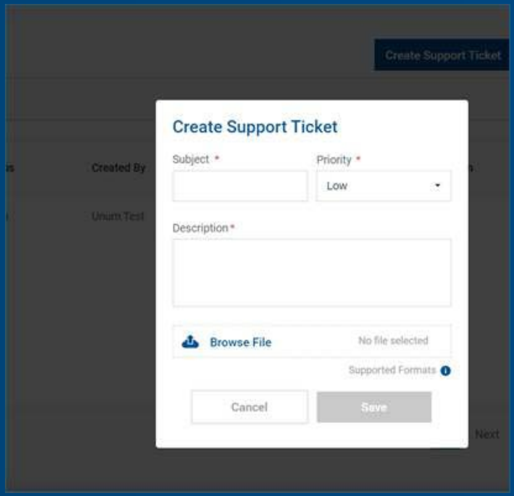
Support tickets

You can create a support ticket for the Square Health team, if you have any issue or query regarding the Help@hand Admin Portal.

1. Navigate to the 'Support tickets' section..

2. Click the 'Create support ticket' button and input the details of the situation where you need some additional support.



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Please note: you can also go to 'Support tickets' to see your open and closed tickets at any time.

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Got a question?

Join us for a **Help@hand Ready** session – there to support you from launch to everyday administration of Help@hand. This 20-30 minute session includes time for a Q&A, so you can get some top tips, ask questions, and feel confident when using the Help@hand Admin Portal.

Sign up today:

unum.co.uk/employer/help-at-hand/launch-communication

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The Help@hand app is provided directly to customers by Square Health Limited.

unum.co.uk/employer/help-at-hand