

unum® | Health Plan 360®

Getting started guide



Get ahead with renewals

- over 90% of policies renewable online
- up to one month in advance
- including policies not bought online



unum | Online

Get started from here...

If you have forgotten your password, or not set it yet, click **Set password**.

 Sign in with Unipass

or

Email Address

Next

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Step 1



**Open UnumOnline in
your browser**

<https://unumonline.co.uk>



Broker information request

Agency Postcode *

RH43LZ

Directly Authorised FCA number / Appointed Representative FCA number (if applicable) *

110408

Network Principle FCA number if applicable

NP FCA Number

Clear agency

Unum Ltd

Unum Ltd (dummy)

Unum Limited

Continue

Step 2



Log in to UnumOnline using your email address and password. If you haven't logged in before, you can create an account by entering your email address and clicking next. You will be sent a one-time passcode to enter.

Once you have submitted your one-time passcode, you will need to enter your firm's postcode and FCA number to finish the registration process. Please note you may have different agencies linked to different post codes for your firm, so please use the relevant post code. We can also change the agency you are linked to at a later date if needed. If you require support locating your firm's agency code, please contact: Agencyonline@unum.co.uk

unum | Online

JD John Day

Welcome, John

Help centre

Group Risk products

Quote, buy and renew your client's Life Assurance, Income Protection and Critical Illness policies - up to 250 lives.

Health Cash Plan

Quote and buy your client's Health Plan 360 product - up to 750 lives. And, manage your client's policies.

Dental

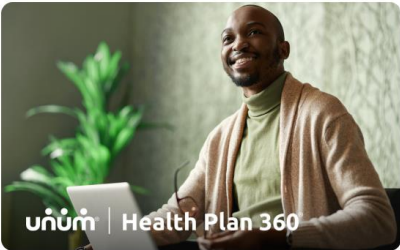
Request a quote for your client's Dental Insurance needs

Commission statements

View details of your Group Risk and Health Cash Plan commission statements.

Manage your team's access

Choose the areas of UnumOnline your team members can access.



unum | Health Plan 360

Learn about the latest updates and releases to UnumOnline here: [Find out more](#)

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Step 3



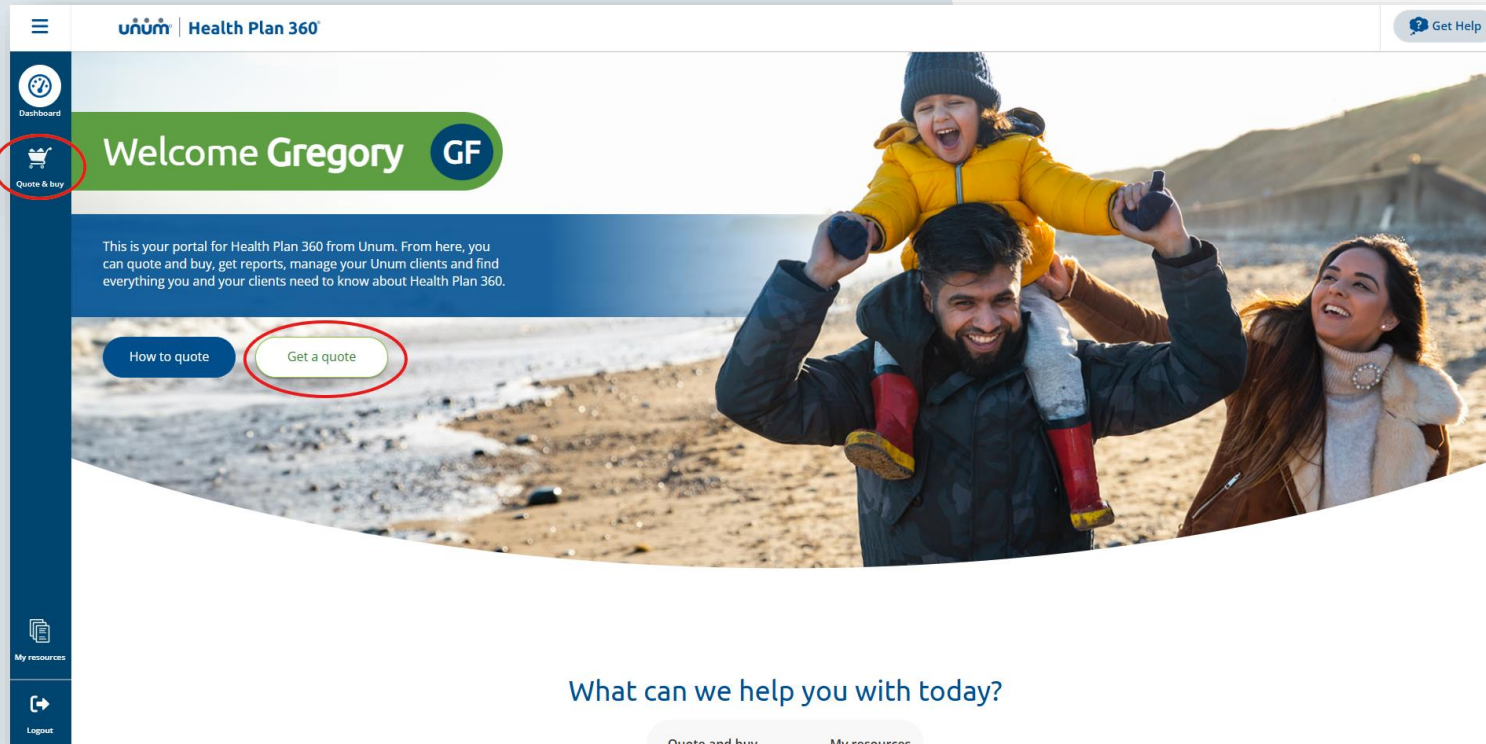
Now you are logged in click on the Health Cash Plan tile to quote and buy on Health Plan 360.

Step 4

04

Now you are logged in you can start to build your first quote.

Check out our [online demos](#) to see more on how to do this. There are also handy in-portal prompts to guide you through.



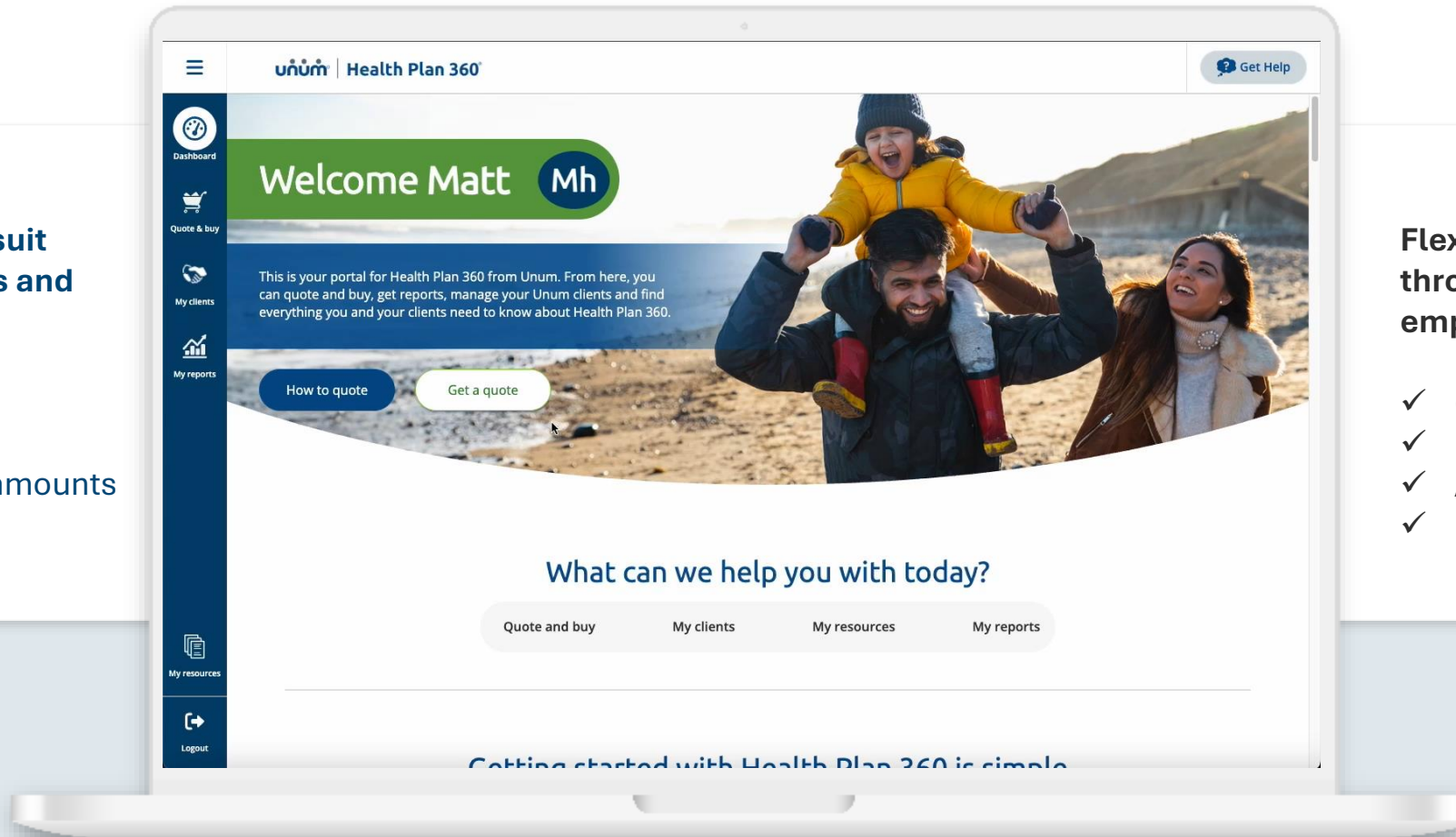
Get an online quote in minutes

Tailor your quote to suit clients' health needs and budgets, through:

- Commission
- Funding type
- Benefits & cover amounts
- Optional benefits

Flexible self-service through Unum's employer portal:

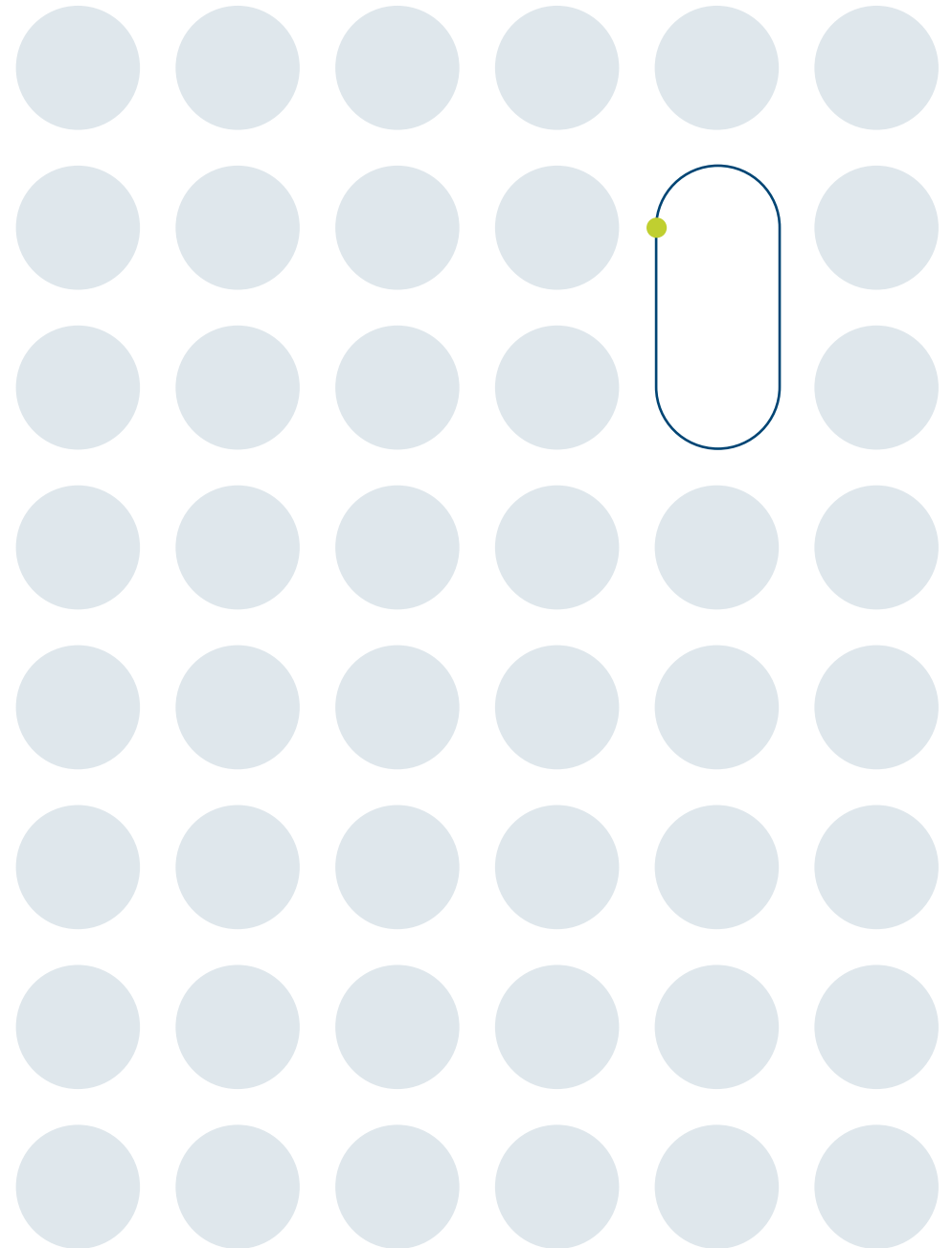
- ✓ Quote & buy instantly
- ✓ Renew with ease
- ✓ Anytime resources
- ✓ Run reports on-demand





unum.co.uk

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