

# unum® | Health Plan 360®

Getting a quote



**New quote**

1 Quote details — 2 Benefit selection — 3 Quote summary

**Quote details**

Quote name (for your future reference)  
Enter Quote Name Here

Policy start date: 01/08/2025

Agency number: [dropdown]

**Company details**

Companies House search (narrow your search with Companies House number)  
Enter Company Name or Companies House Number Here [Search]

**Your quote so far**

Quote name	Enter Quote Name Here
Policy start date	01/08/2025
Agency number	-

Return to home Previous Continue

# Step 1



- Enter quote name
- Select agency number
- Select policy start date
- Enter Company Name / Companies House Number

For any quotes over £100k or 750 lives you will need to contact us on 0345 850 9447.

# Step 2




Select your commission, this can either be nil, our default 10% or you can apply a custom commission percentage up to 20%.

### Commission

Your quote summary can include up to three options for commission. Two of these options are fixed. The third option allows you to choose your own commission up to 20%.

**Nil**  
**0%**

**Product default**  
**10%**

**Custom**  
**1%**  


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### Insurance history

Is client currently insured or new to market?

☒ New to Market
 ☐ Insured

### Insurance history

Is client currently insured or new to market?

☐ New to Market
 ☒ Insured

Lorem ipsum  
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### Prior carrier details

Previous Insurer Optional

Other

### Claims history

Cover start Optional

DD/MM/YYYY

Cover end Optional

DD/MM/YYYY

Number of claims Optional

Placeholder

Number of lives Optional

Placeholder

Paid claims amount Optional

£ Placeholder

Commission percentage Optional

Placeholder %

Premium (including IPT) Optional

£ Placeholder

## Step 3



- Insurance History – please click either new to market or insured. If you clicked insured, the below insurance history box will become available
- Please add the previous insurer and claims history information which is requested but not compulsory
- Please click continue

**Commission**

Your quote summary can include up to three options for commission. Two of these options are fixed. The third option allows you to choose your own commission up to 20%.

**Nil**  
0%

**Product default**  
10%

**Custom**  
1%

**Insurance history**

Is your client currently insured or new to market? If they're currently insured, entering policy details will offer a more accurate quote.

☒ New to market
☐ Insured

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**Funding type**

**Company paid**

**Company paid:** Your client pays premiums for all eligible employees

Does your client want employees to be able to upgrade their cover level?  
Your client pays for a core level and selects additional level or levels the employees can upgrade themselves to. Your client recoups the cost of the upgrade from the employee.

☐ No/Yes

**Include partners?**  
Do you want to add employees' eligible partners to the policy? If so, partners will be on the same level as the insured member.

☒ No/Yes

**Partners funded by employee?**  
When adding partners to the policy, choosing 'Yes' here means the employer recoups the cost of adding partners from the employee. Choosing 'No' means the employer does not recoup the cost of adding partners to the policy, covering the cost themselves.

☒ No/Yes

# Step 4

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- Please select your clients funding type, whether they will allow employees to upgrade their coverage and if partners are eligible to be added to the policy
- Here you can also confirm the partners funding type

# Step 5



Available cover levels

Insured treatment benefits	Level 1 <input checked="" type="checkbox"/>	Level 2 <input type="checkbox"/>	Level 3 <input type="checkbox"/>
Routine dental treatment	£70	£125	£200
Worldwide accident and emergency dental treatment	£250	£400	£600
Optical and hearing cover	£70	£125	£200
Chiropractic and podiatry	£50	£75	£100
Specialist consultations and diagnostics	£200	£350	£500
UK hospital stays (including parental stays)	£15	£15	£15
NHS and private prescriptions, vaccinations and GP referral letters	£20	£30	£40
Number of eligible employees	<input type="text" value="75"/>	<input type="text"/>	<input type="text"/>

## Choose your cover levels

- On the cover selection screen, tick the level(s) of cover you want to offer. If you're offering more than one level, enter the number of eligible employees for each. You must tick all relevant cover levels, not just the one you're funding (e.g. If you fund level 2 with upgrades you must tick levels 2 and 3).

## If you enabled upgrades in the previous step

- You must tick all available cover levels, not just the one you're funding
- This includes the level you want to fund (highlighted in green).
- Ticking all levels ensures employees can choose to upgrade to any of the selected options

## System behaviour

- The system will automatically treat the lowest selected level as the one you are funding. Higher levels will be available for employees to upgrade to, based on your selections

*This requirement is due to a current system limitation. Our portal development team is aware of the issue and a fix is in progress.*

# Step 6



- You can customise your benefits by clicking customise
- Please note eligibility applies to customisation of the benefits:
  - 50-149: Amend benefit allowances
  - 150+: Add or remove benefits and amend benefit allowances

Insured treatment benefits	Level 1 <input checked="" type="checkbox"/>	Level 2 <input type="checkbox"/>	Level 3 <input type="checkbox"/>
Routine dental treatment	£70	£125	£200
Worldwide accident and emergency dental treatment	£250	£400	£600
Optical and hearing cover	£70	£125	£200
Chiropody and podiatry	£50	£75	£100
Specialist consultations and diagnostics	£200	£350	£500
UK hospital stays (including parental stays)	£15	£15	£15
NHS and private prescriptions, vaccinations and GP referral letters	£20	£30	£40
Number of eligible employees	<input type="text" value="500"/>	<input type="text"/>	<input type="text"/>
Customise benefit amounts	<input type="button" value="Customise"/>		

## Customise benefits



### Insured treatment benefits

### Proactive health and wellbeing services

#### Adjust insured benefit values

As the client you're quoting for is insuring at least 150 employees, you can customise their Health Plan 360 policy. Use the sliders below for each of the insured treatment benefits to increase or decrease the reimbursements available for each benefit on each selected level. You can also turn selected benefits on or off.

Cost per employee



£4.95  
10%

Level 1



Routine dental treatment



#### Customise your routine dental treatment benefit



Worldwide accident and emergency dental treatment



#### Add/remove benefit from cover

Removing routine dental treatment from the policy will also remove worldwide accident and emergency dental treatment.



Optical and hearing cover



Chiropody and podiatry



Specialist consultations and diagnostics



UK hospital stays (including parental stays)



£50

£90

Routine dental treatment

£ 70

Cancel

Continue



## Customise benefits

Insured treatment benefits

Proactive health and wellbeing services

### Add or remove proactive health and wellbeing services

As the client you're quoting for is insuring at least 150 employees, you have additional options to customise their Health Plan 360 policy. You can choose to add or remove the preventive health and wellbeing services listed below.

#### Adding or removing services

Please note, if you add or remove a proactive health and wellbeing services, these services are removed across every level of cover.



Unlimited remote GP



Customise your unlimited remote GP benefit



Retail discounts and savings  
(including gym discounts)



☐ Add/remove service from cover



24/7 helpline and wellbeing  
resources, including Unum's  
Wellbeing Calendar



Personalised mental health  
support



Cancel

Continue

# Step 7

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Customise Benefits –  
Value Added Services.

## Proactive health and wellbeing services

These proactive health and wellbeing services are also available via Health Plan 360 at no additional cost. They're designed to maintain employees' health to help reduce the risk of them falling ill and needing to pay for treatment. The limits apply to each insured adult on the policy.

Cancer screening assessment	Included
Healthcare navigator and second medical opinion	2 per year
Physiotherapy and complementary therapies	6 per year
Health assessment/MOT	1 per year
Nutritionist consultations	3 per year
Personalised mental health support	6 per year
Unlimited remote GP	Included
Retail savings and discounts (including gym discounts)	Included
24/7 helpline and wellbeing resources, including Unum's Wellbeing Calendar	Included

Please note, if you would prefer to make physiotherapy and complementary therapies a traditional benefit pot where claims are reimbursed call 0345 850 9447.

# Step 8

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## Physiotherapy and complementary therapies & PMI Excess

– If you would like to add the traditional benefit pot where claims are reimbursed or PMI excess, please call our broker support team on: 0345 850 9447

# Step 9



- Add or remove optional benefits & click continue
- You will then be directed to your quote summary page which gives you your quote ID(s) and provides you with a copy of the key documents to download

**Add or remove optional benefits**

You can choose to add or remove each of the optional benefits below. Click the icon next to each benefit to discover more about it and how it could help your client's employees.

Critical illness cover

☐ No/Yes ?

New child cover

☐ No/Yes ?

Personal training

☐ No/Yes ?

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Quote details ☒ Benefit selection ☒ **Quote summary** ☒

**Quote summary**

Quote ID: HPQ2001028 ✓  
Commission: 10%

Rate guarantee period: 1 Year ?

Commission

**Product default** ✓

**10%**

Annual premium	Monthly premium
£4,725.00	£393.75

The above estimated premium is based on the information you have provided in the Quote for the employees to be insured only.

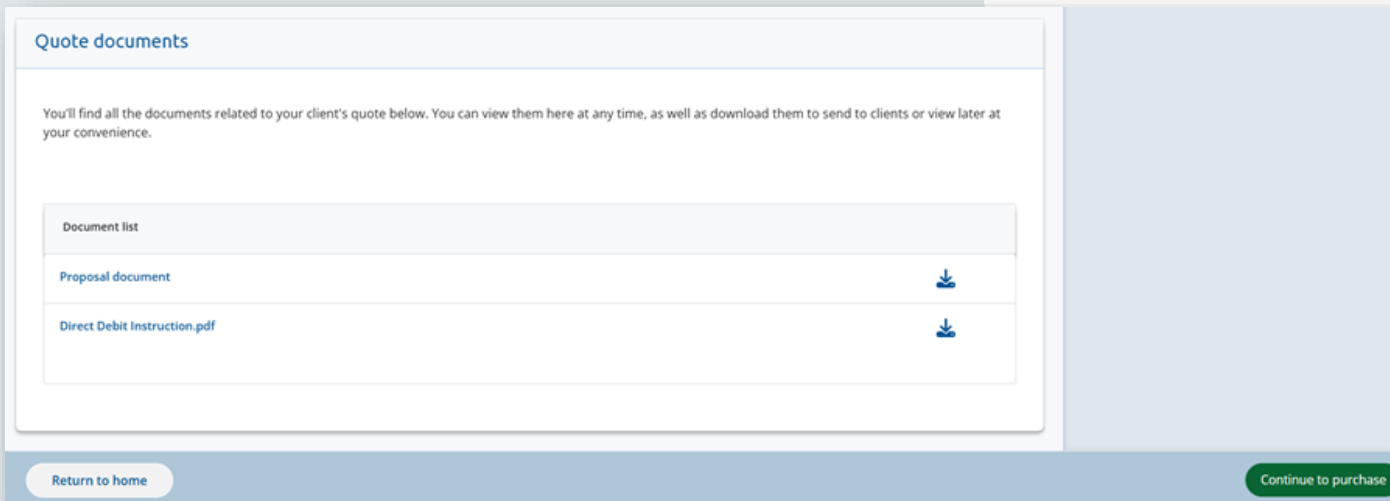
[Return to home](#) [Continue to purchase](#)

**Your quote**

Quote details	✓
Benefit selection	✓
Quote ID	HPQ2001028
Commission	10%
Level 1	
Cost per employee	£5.25
Cost per partner	£7.70
Total annual price	£4,725.00

[Duplicate quote](#)

# Step 10



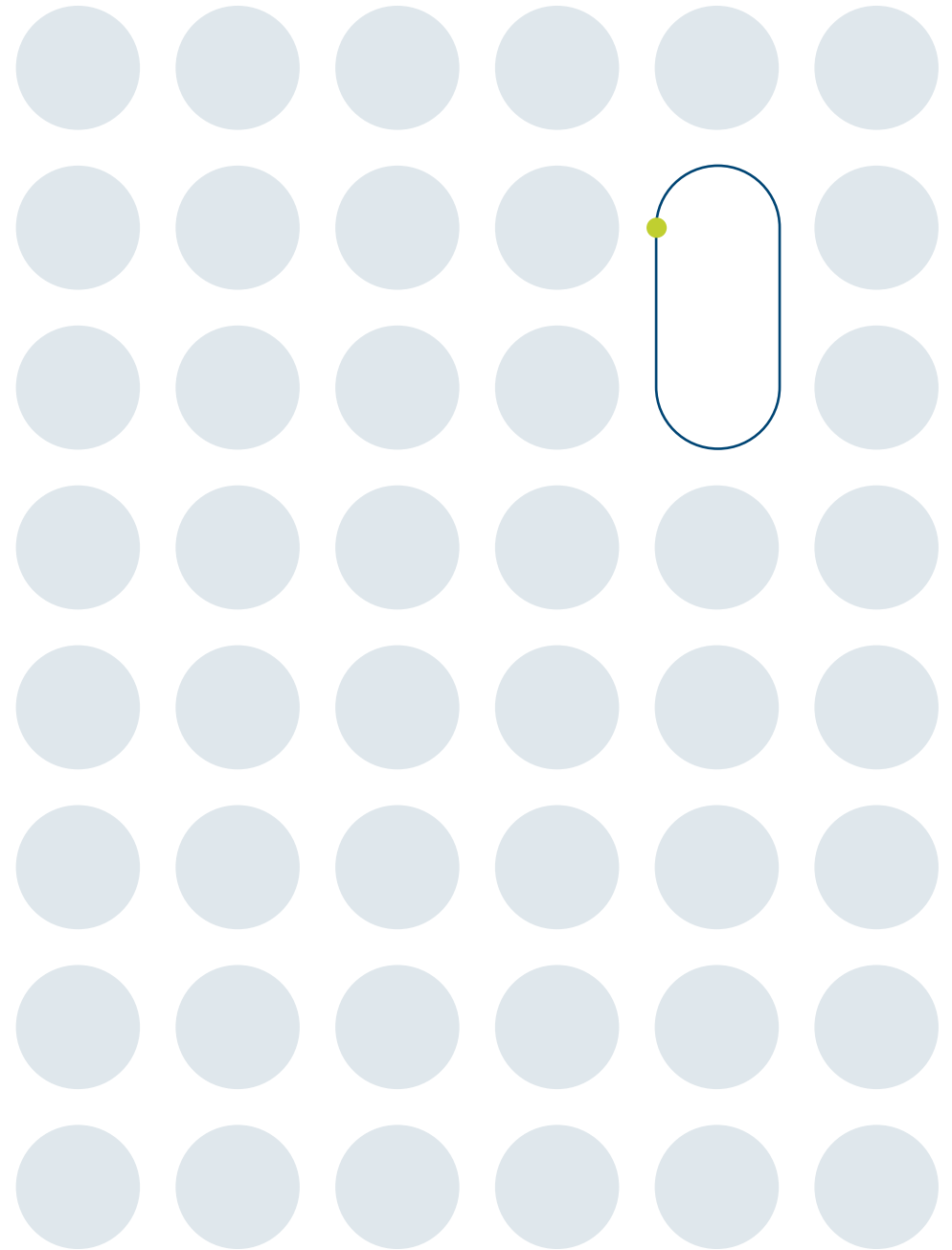
- Your quote will be emailed but you also have the option to download your client's proposal (see screenshot)
- Once you have reviewed our proposal and the client is happy to proceed, please click continue to purchase

If you need any further help, fill out our [quick enquiry form](#) or give us a call on **0345 850 9447**.



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