



plane.biz

Case Manager User Guide

Unum

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Intended Users

This document is intended to help Case Managers manage the enrollers assigned to a particular enrollment in plane.biz. It will outline how to add and remove enrollers, reset passwords for existing enrollers and create usernames for enrollers if they do not already exist.

Case Managers are responsible for the total administration of enroller access of plane.biz throughout the enrollment process, including the following:

- Creating logons for new enrollers (pg. 10)
- Assigning existing enrollers to a case (pg. 9)
- Resetting passwords for existing enrollers (pg. 5)
- **Removing enrollers from a case when no longer required or upon an enroller's termination. Doing this in a prompt and timely fashion will help keep sensitive customer information secure by ensuring that no one has access to it that should not have it. (pg. 15)**

The only functionality to which a Case Manager does not have access is enabling an enroller's logon after it has been disabled in the system because of too many login attempts. At this point the enroller can call the Unum Service Desk at 1-866-615-5263 opt. 3 to have his/her logon enabled. The enroller will be asked to verify his/her SSN for security purposes.

Case Manager Functionality

Note: You must be connected to the internet to access case manager functions.

LOGGING ONTO PLANE.BIZ

1. Contact your plane.biz Business Specialist to obtain your username and initial password.

Note: If you are enrolling a Simply Unum case and you do not have a plane.biz username and password, you will be notified of your assigned username and initial password.

2. Open your preferred web browser and navigate to <https://www.plane.biz/Logon.aspx>.
3. Enter your username and password in the Logon Screen and click **Logon**.

Figure 1: Case Manager Logon Screen

The screenshot shows a web form titled "Logon". It contains two text input fields: "User ID:" and "Password:". Below the "Password:" field is an orange button with the text "LOGIN >>". At the bottom of the form, there is a text link: "Did you forget your password? [Click Here](#)".

4. From the Reset Password Screen, enter your initial password in the **Old Password** box, enter a new password of your choice in the **New Password** box, and then retype your new password in the **Verify** box. Click **Confirm**.

A Note on Passwords:

- Must contain at least one numeric character
- Must be at least six characters long
- Expires every 90 days for your protection
- Cannot be reused from the last six changes
- Will be disabled after five unsuccessful logon attempts. Contact the plane.biz team to have your username and password reset.

Figure 2: Case Manager Password Reset Screen

Reset Password

Please enter the new Enroller password and click Reset.

Logon Name: Test, Enroller
Enroller Name: TestLogon
Password:

5. Select the employer case you wish to manage.

Figure 3: Employer Selection Screen

Employer Selection

Your LogonID has been assigned access to multiple cases. Please select the case you need to manage by clicking on the name of the employer below.

You may also perform a Search for the case by entering the employer name. If you are unsure of the employer name, a search on partial parameters can be done by the system. If you are performing a Search by case number, the entire number must be provided.

Currently Enrolling Filter: Display << < > >>

Case #	Employer	Employer Description
35394	Test Case 1	
33704	Test Case 2	
32897	Test Case 3	
38242	Test Case 4	
31963	Test Case 5	
34624	Test Case 6	
35405	Test Case 7	
38118	Test Case 8	
36662	Test Case 9	
32540	Test Case 10	

412 Employer(s) Displayed Page 1 of 42 << < > >>

6. Select the **Case Manager** logon type and click **Continue**.

Figure 4: Case Manager Logon Type Screen

Logon Type Selection

Please select the logon type you will be using for this enrollment.

Logon Type Selection

Enroller
 Case Manager

MANAGING ENROLLER FUNCTIONS

Figure 5 shows the Active Enrollers screen. You may assign, edit, or remove enrollers, as well as reset enroller passwords and view an enroller's licensing and appointment status.

1. Enroller names are links to current L&A information. To view, click on the enroller's name.

Figure 5: Active Enrollers Screen

PROCESSING NOTIFICATION

Active Enrollers

Active enrollers for this case are listed below. These may include enrollers assigned by another Enrollment Firm working on this case.

- To assign a new enroller click on the [Enroller](#) link to the left.
- To view an enroller's Licensing and Appointment status click on the enroller's name.
- To edit an enroller's information click on the [Edit] button. *
- To reset an enroller's password click on the [Reset] button. *
- To remove an enroller(s) from this case check the box preceding the name and click on the [Remove] button. *

*These actions can only be performed for enrollers assigned by your Enrollment Firm.

Active Enrollers						
<input type="checkbox"/> My Enrollment Firm only		Display: 10		<< < > >>		
	Enroller Name	Logon	Enroll Firm	Sig On File	Edit	Passwd
<input type="checkbox"/>		2Pfam1	plane.biz support	No	Edit	Reset
<input type="checkbox"/>	Borgmeier, Todd J	borgmeier	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Breath, Ham	hambreath	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Dixon, Venus	Dixon	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	dravland, james c	gildrav	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Duraisamy, Tharani	tharani	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Durham, Donna	Donna2	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Fulcher, Jeanette K	fulcher	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Gimm, Alan	Agimm	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Heckman, Laura	LHeckman	plane.biz support	Yes	Edit	Reset
REMOVE		32 Enrollers	Page 1 of 4	<< < > >>		

- In this example, the enroller is licensed and appointed for life and health products in CA, IL, MA, MD, MS, NV, and TX.

Figure 6: Licensing and Appointment Information

Approved License and Appointment Information for Case Manager

The information listed below was obtained from the Unum Broker Compensation Services Licensing and Appointment database; this data is updated daily.

If you have any questions about this information, or are not listed as approved in a state you believe should be, please contact Unum Broker Compensation Services at 800-633-7491, Option 2.

State	Product Line	Insuring Company
IL	HEALTH	Provident Life and Accident Insurance Company
IL	LIFE	Provident Life and Accident Insurance Company
IN	HEALTH	Provident Life and Accident Insurance Company
IN	LIFE	Provident Life and Accident Insurance Company
MI	HEALTH	Provident Life and Accident Insurance Company
MI	LIFE	Provident Life and Accident Insurance Company

- Click **Back**, then click **Assign Enroller**.
- Enroller names are links to current L&A information. To view, click on the enroller's name.
- In this example, the enroller does not have any information in the Broker Compensation Services Licensing and Appointment database.

Figure 7: Licensing and Appointment Information

Approved License and Appointment Information for Thompson, Jeff

This enroller has no L&A information at Unum - applications cannot be accepted from this enroller until appropriate L&A is available; contact Broker Compensation Services at Unum to address this issue.

If you have any questions about this information, or are not listed as approved in a state you believe should be, please contact Unum Broker Compensation Services at 800-633-7491, Option 2.

- Check the box next to the enrollers' names, indicate the roles for all enrollers selected, then click **Assign to Case**.

Figure 8: Enrollers Assigned to Enrollment Firm

Enrollment Firm Enrollers

Enrollers associated with the UnumEnroll enrollment firm are listed below. Assign one or more enrollers to this case by checking the box preceding the name, indicate the Role to be provided for all enrollers selected, then click the [Assign To Case] button.

To find an enroller by his/her Social Security Number, click the [Search for Enroller](#) link. If the enroller is not on the system, she/he can be added at this time.

Available Enrollers

Display: 10

	Enroller Name	Logon Name	Signature Filed
<input type="checkbox"/>	Perrin, Julie	jperrin	No
<input type="checkbox"/>	Abrams, Carren	cabrams	No
<input type="checkbox"/>	Aiello, Janice Kay	jaiello	Yes
<input type="checkbox"/>	Ashmore, Johnny	jashmore	No
<input type="checkbox"/>	Bailey, Tracy	tbailey	Yes
<input type="checkbox"/>	Baker, Jonathan	JBaker2	Yes
<input type="checkbox"/>	Bennett, Ashley	Abennett	Yes
<input type="checkbox"/>	Bernsstein, Paul	PBernstein	Yes
<input type="checkbox"/>	Bethi, Sri	bethi	Yes
<input type="checkbox"/>	Black, Terri	blackt	Yes

197 Enrollers
Page 1 of 20

Roles: (note: Roles checked below will apply to all Enrollers checked above)

Call Center - UPC

Enroller

Call Center - Other

Case Manager

- Click **Yes** to assign enrollers to the case.

Figure 9: Assign Enrollers to Case

Assign Enroller

Are you sure that you want to assign this enroller to the case?

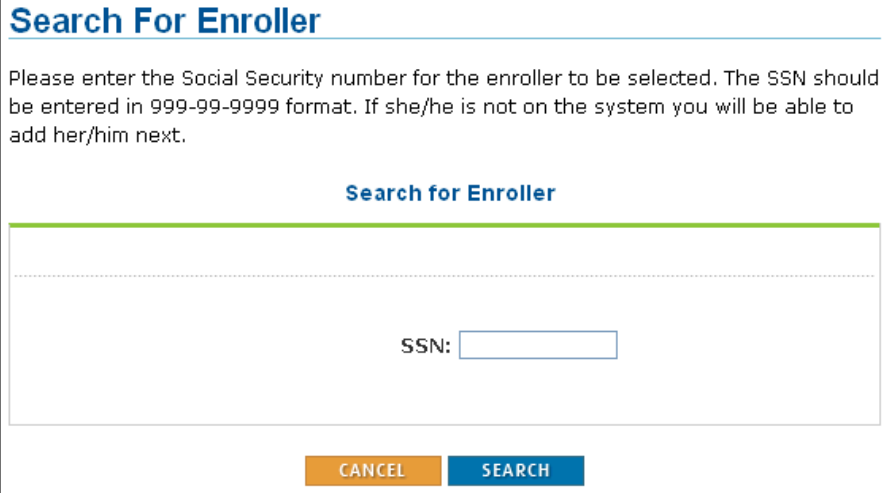
Enroller Name

Test Enroller

SEARCHING FOR AN ENROLLER

1. Click **Search For Enroller** to find an enroller who may already be entered into plane.biz but has not been assigned to the case.
2. Enter the enroller's SSN.

Figure 10: Search for Enroller



Search For Enroller

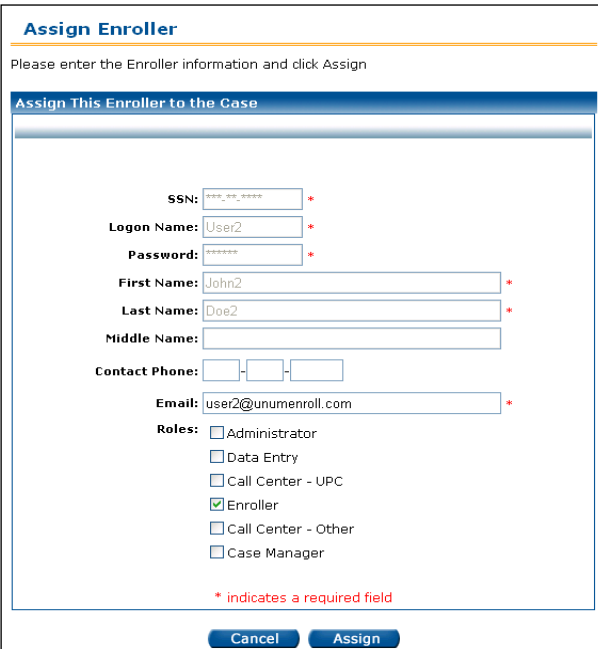
Please enter the Social Security number for the enroller to be selected. The SSN should be entered in 999-99-9999 format. If she/he is not on the system you will be able to add her/him next.

Search for Enroller

SSN:

3. Assign roles for the enrollment, and then click **Assign**.

Figure 11: Assign Enroller



Assign Enroller

Please enter the Enroller information and click Assign

Assign This Enroller to the Case

SSN: *

Logon Name: *

Password: *

First Name: *

Last Name: *

Middle Name:

Contact Phone: - -

Email: *

Roles:

- Administrator
- Data Entry
- Call Center - UPC
- Enroller
- Call Center - Other
- Case Manager

* indicates a required field

ADDING AN ENROLLER

1. If the enroller's name does not appear in the active enrollers list, he/she must be added. A Social Security number (SSN) is required when adding enrollers to plane.biz.

Figure 12: Active Enrollers Screen

PROCESSING NOTIFICATION

Active Enrollers

Active enrollers for this case are listed below. These may include enrollers assigned by another Enrollment Firm working on this case.

- To assign a new enroller click on the [Enroller](#) link to the left.
- To view an enroller's Licensing and Appointment status click on the enroller's name.
- To edit an enroller's information click on the [Edit] button. *
- To reset an enroller's password click on the [Reset] button. *
- To remove an enroller(s) from this case check the box preceding the name and click on the [Remove] button. *

*These actions can only be performed for enrollers assigned by your Enrollment Firm.

<input type="checkbox"/>	Enroller Name	Logon	Enroll Firm	Sig On File	Edit	Passwd
<input type="checkbox"/>		2Pfam1	plane.biz support	No	Edit	Reset
<input type="checkbox"/>	Borgmeier, Todd J	borgmeier	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Breath, Ham	hambreath	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Dixon, Venus	Dixon	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	dravland, james c	gildrav	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Durasamy, Tharani	tharani	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Durham, Donna	Donna2	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Fulcher, Jeanette K	fulcher	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Gimm, Alan	Agimm	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Heckman, Laura	LHeckman	plane.biz support	Yes	Edit	Reset

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2. To add a new enroller, click **Assign Enroller**, enter the enroller's SSN, then click **Search**.

Figure 13: New Enroller SSN Screen

Search For Enroller

Please enter the Social Security number for the enroller to be selected. The SSN should be entered in 999-99-9999 format. If she/he is not on the system you will be able to add her/him next.

Search for Enroller

SSN:

CANCEL **SEARCH**

3. Enter the enroller's information. A red asterisk indicates required fields.

Figure 14: New Enroller Screen

New Enroller

Please enter the Enroller information and click Add
Add Enroller

SSN: 999-99-8642 *

Logon Name: *

Password: *

First Name: *

Last Name: *

Middle Name:

Contact Phone: - -

Email: *

Roles: Enroller
 Call Center - Other
 Case Manager

* indicates a required field

CANCEL ADD

- When you have finished adding information, click **Add**.

Figure 15: Add Enroller Screen

New Enroller

Please enter the Enroller information and click Add
Add Enroller

SSN: 999-99-8642 *

Logon Name: Test *

Password: ***** *

First Name: Test *

Last Name: Enroller *

Middle Name:

Contact Phone: 423 - 294 - 0000

Email: test@email.com *

Roles: Enroller
 Call Center - Other
 Case Manager

* indicates a required field

CANCEL ADD ←

Figure 16: Add and Assign Enroller

Add and Assign Enroller

You may select the Enroller's Name below to see current Licensing and Appointing information. **Note: plane.biz will not allow an enroller to take an application for a product unless he is licensed for that product in the state in which the application is going to be taken.**

Select the Yes button to continue adding this enroller.

[Talib, Agib](#)

Cancel
Yes

5. The added enroller will appear in the active enroller list.

Figure 17: Active Enroller Screen

PROCESSING NOTIFICATION

Active Enrollers

Active enrollers for this case are listed below. These may include enrollers assigned by another Enrollment Firm working on this case.

- To assign a new enroller click on the [Enroller](#) link to the left.
- To view an enroller's Licensing and Appointment status click on the enroller's name.
- To edit an enroller's information click on the [Edit] button. *
- To reset an enroller's password click on the [Reset] button. *
- To remove an enroller(s) from this case check the box preceding the name and click on the [Remove] button. *

*These actions can only be performed for enrollers assigned by your Enrollment Firm.

Active Enrollers My Enrollment Firm only Display: 10 << < > >>

	Enroller Name	Logon	Enroll Firm	Sig On File	Edit	Passwd
<input type="checkbox"/>		2Pfam1	plane.biz support	No	Edit	Reset
<input type="checkbox"/>	Borgmeier, Todd J	borgmeier	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Breath, Ham	hambreath	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Dixon, Venus	Dixon	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	dravland, james c	gildrav	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Duraisamy, Tharani	tharani	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Durham, Donna	Donna2	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Fulcher, Jeanette K	fulcher	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Gimm, Alan	Agimm	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Heckman, Laura	LHeckman	plane.biz support	Yes	Edit	Reset

REMOVE
32 Enrollers
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RESETTING AN ENROLLER PASSWORD

1. If an enroller needs to reset a password, you may do so by clicking **Reset**. A password may need to be reset because the enroller has forgotten their password and/or the enroller's logon has become disabled because they have exceeded the number of allowable password attempts.

Figure 18: Active Enroller Screen

Logon

Invalid Logon. Please make sure your CAPS LOCK and NUMLOCK are OFF.

User ID:

Password:

LOGIN »

Did you forget your password? [Click Here](#)

Resetting the password will re-enable the enroller's logon if it has become disabled.

2. Enter the new password (at least 6 characters - alpha or numeric or any combination of the two) and click **Reset**.

Figure 19: Reset Enroller Password Screen

Reset Password

Please enter the new Enroller password and click Reset.

Logon Name: Test, Enroller

Enroller Name: TestLogon

Password:

EDITING AN ENROLLER LOGON ID

1. If an enroller needs to change their Logon ID, you may do so by clicking Edit.

Figure 20: Edit Enroller Screen

Edit Enroller

Please enter the Enroller information and click Save Changes

Change this Enroller's Email Address and/or Roles

SSN: *

Logon Name: *

Password: *

First Name: *

Last Name: *

Middle Name:

Contact Phone: - -

Email: *

Roles: Call Center - UPC
 Enroller
 Call Center - Other

* indicates a required field

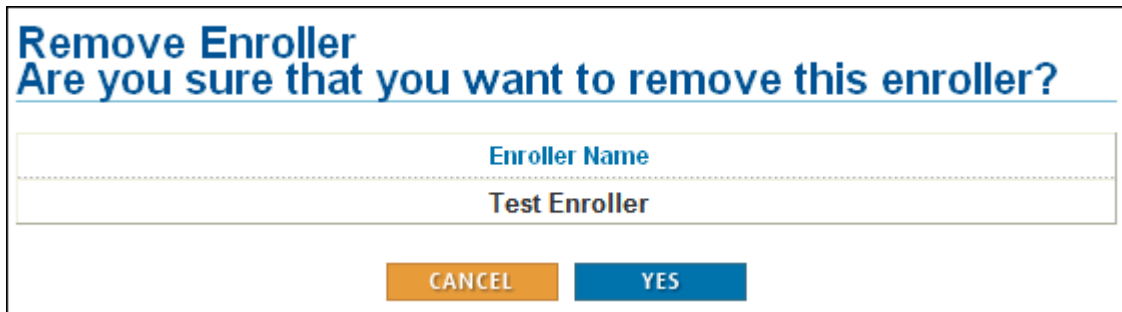
2. Enter the new ID in the logon Name field and click **Save Changes**.

REMOVING ENROLLER ACCESS

It is the responsibility of the Case Manager to remove enroller access to plane.biz when no longer required or upon an enroller's termination. Doing this in a prompt and timely fashion will help keep sensitive customer information secure by ensuring that no one has access to it that should not have it.

1. To remove an enroller from a case, click **Remove**.
2. At the prompt "Are you sure that you want to remove this enroller?" click **Yes**.

Figure 21: Remove Enroller Screen



Remove Enroller
Are you sure that you want to remove this enroller?

Enroller Name
Test Enroller

CANCEL YES

3. The enroller will be removed from the Active Enrollers screen.

Figure 22: Active Enroller Screen

PROCESSING NOTIFICATION

Active Enrollers

Active enrollers for this case are listed below. These may include enrollers assigned by another Enrollment Firm working on this case.

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- To view an enroller's Licensing and Appointment status click on the enroller's name.
- To edit an enroller's information click on the [Edit] button. *
- To reset an enroller's password click on the [Reset] button. *
- To remove an enroller(s) from this case check the box preceding the name and click on the [Remove] button. *

*These actions can only be performed for enrollers assigned by your Enrollment Firm.



Active Enrollers My Enrollment Firm only Display: 10

	Enroller Name	Logon	Enroll Firm	Sig On File	Edit	Passwd
<input type="checkbox"/>		2Pfam1	plane.biz support	No	Edit	Reset
<input type="checkbox"/>	Borgmeier, Todd J	borgmeier	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Breath, Ham	hambreath	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Dixon, Venus	Dixon	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	dravland, james c	gildrav	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Duraisamy, Tharani	tharani	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Durham, Donna	Donna2	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Fulcher, Jeanette K	fulcher	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Gimm, Alan	Agimm	plane.biz support	Yes	Edit	Reset
<input type="checkbox"/>	Heckman, Laura	LHeckman	plane.biz support	Yes	Edit	Reset

REMOVE 32 Enrollers Page 1 of 4