plane.biz
Case Manager User Guide

Unum

National Client Group – Technical Solutions

1 Fountain Square – 7N

Chattanooga, TN 37402

1-866-615-5263

plane@unum.com

www.plane.biz

Contents

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

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

5. Select the employer case you wish to manage.

Figure 3: Employer Selection Screen

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

Figure 4: Case Manager Logon Type Screen

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 ☐ My Enrollment Firm only   Display: 10 ▾   « ‹ › »

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

REMOVE   32 Enrollers   Page 1 of 4   « ‹ › »

2. 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

3. Click **Back**, then click **Assign Enroller**.

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

5. 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.

6. 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

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

Figure 9: Assign Enrollers to Case
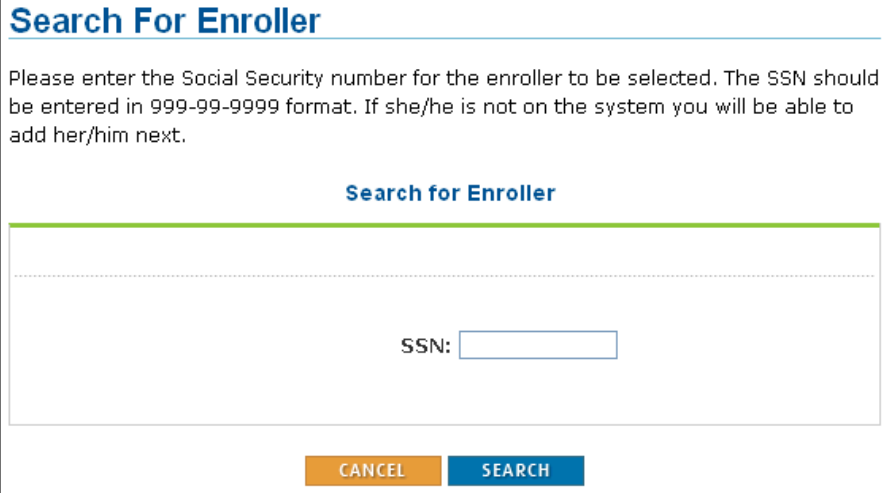
SEARCHING FOR AN ENROLLER

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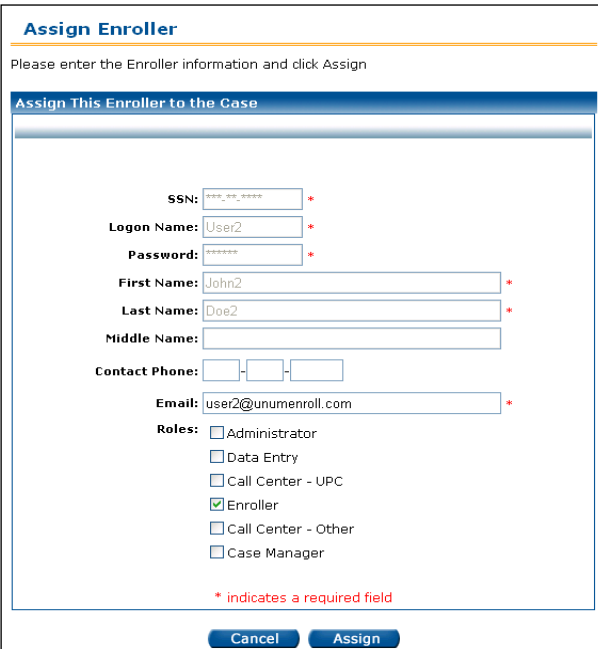
3. Assign roles for the enrollment, and then click **Assign**.

Figure 11: Assign 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

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

Figure 13: New Enroller SSN Screen

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

Figure 14: New Enroller Screen

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

Figure 15: Add Enroller Screen

Figure 16: Add and Assign Enroller

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

Figure 17: Active Enroller Screen

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.

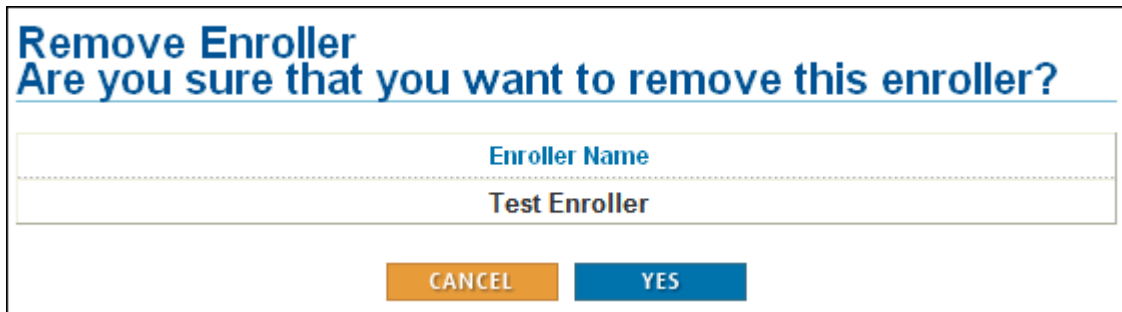*Figure 20: Edit Enroller Screen*

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

REMOVING ENROLLER ACCESS

<mark>**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.**</mark>

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

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

Figure 22: Active Enroller Screen