



5 'need-to-know' online services

We don't need to tell you how busy life is and never more so than at this time of year.

With so much going on you may have missed some updates to key features on UnumOnline that may save you time and help you provide a better service to your clients. Check out our list below and see how UnumOnline can make your life easier today.

Register
here

"All round, the Unum
portal is very good.
I find it clear and intuitive"

Corporate Benefits Account Manager, SME-sized broker



1. Save time quoting

1. Use the 'duplicate quote' button to copy quotes – the portal stores your selections and member data for quick comparative quotes for an alternative benefit basis or for a different product
2. Request **3 different commission rates** on each quote, to guide your commercial decisions.

2. Download documents at the touch of a button

1. **Scheme histories** (without medical underwriting) including, 5 years claims, 5 years premiums and current benefit basis
2. Latest **invoices** and **policy documents**

3. **Commission statements** from past months.

3. Immediate policy servicing

1. Request simple changes to schemes with under 750 members and self-serve basic policy information e.g. unit rate and non-medical limits — **even if a policy wasn't purchased on UnumOnline**
2. **Upload a member data file** when you renew policies — you don't even have to edit columns that aren't required. Plus the portal validates the data, ensuring all required fields have been completed.

4. Intuitive user experience

1. We use multi-factor authentication to protect your account but if you don't need this additional security, **make sure cookies are enabled** on your browser to avoid having to enter a one-time passcode each time you login
2. Our direct feed to **Companies House** bypasses the need to manually input company details.

5. Your best price

1. Policies quoted via UnumOnline attract an automatic **5% discount**, giving instant access to your best price with Unum
2. Quotes automatically include any **bespoke or enhanced partner terms** you may have with us.

There's never been a better time to enjoy more online services, faster turnaround and great pricing with UnumOnline, designed to make doing business with Unum easier and more effective. So take a look at the UnumOnline [handbook](#) or our [adviser web page](#) and get started today.

[Register for UnumOnline >](#)