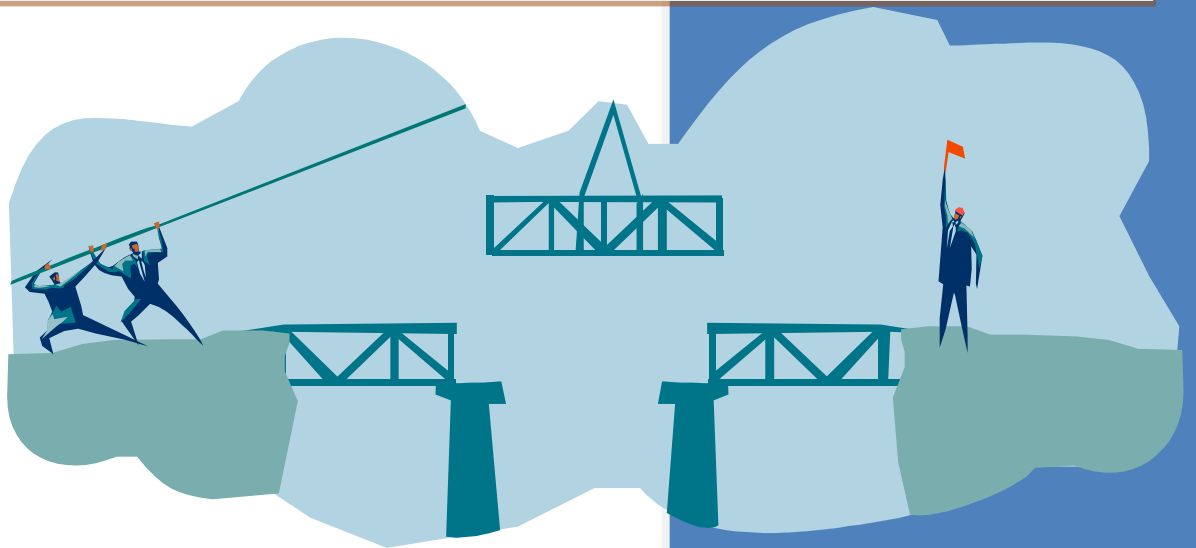


UNUM EOI Bridge Setup



selerix ✓

Bridge Documentation

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unumsm

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Overview

Unum is a Chattanooga, Tennessee-based insurance company previously named UnumProvident, which was formed from the merger of two competing insurance companies, Unum of Portland, Maine, and Provident Life and Accident Insurance Company of Chattanooga. Unum's predecessor, Union Mutual Life Insurance Company, was founded in 1848, making it one of the oldest continuously operating insurance companies in the United States.

This document provides instructions on how to set up a bridge for Unum products where the coverage requested exceeds the guaranteed issue limit for those products. In this instance, these products require an Evidence of Insurability (EOI) form to be completed, which is what setting up this bridge facilitates.

The bridge must be set up properly to display the window so that the employee can complete the EOI form.

UNUM Products

The EOI bridge supports the following products:

- Voluntary Life
- Short Term Disability
- Long Term Disability

UNUM Contacts

Please contact the following for cases with more than 2000 lives:

Jan Hunter
Manager, NCG Operations
Unum
Phone: 207-575-3847
Email: jehunter@unum.com

Please contact the following for cases with fewer than 2000 lives:

Lisanne Hodges
Service Consultant
Launch Unum
Direct: 423-294-1471
Email: lhodges@unum.com

For case setup support:
Selerix Technical Support
Phone: 214-856-4290
Email: Support@Selerix.com

Pre-Requisites

This document does not provide information on setting up the payer, product(s) and any benefit plans in a case; it assumes these are already set up and configured correctly (i.e. the guaranteed issue limits are properly set per the carrier's instructions) in the case for which the EOI bridge will be used.

The following are the required items:

- **Bridge parameters** – This is preset for all cases (ID and key do not change); this will be pre-populated in the plugin, but listed here for reference.
 - **Partner ID same for all cases:** 506a571b-34f8-46f8-886b-f2cf1c06ebd1
 - **API Key - Production (same for all cases):**
iszX89AYnPFNF1b31UCkNO+Gk/4xRaMXd4ytIJJFzFQ=
 - **API Key - UA/TEST (same for all cases):**
OPy1zrVCKSnUjAPAIZeO0GGeeU0SiBW+qVkykEbF6ls=
- **EDI parameters** – UNUM provides the following group information, which is used to set up the EDI parameters.
 - **Policy:** An 8-digit code. Example: 00136424.
Map to Master Group Number.
 - **Reporting Division (if needed for the case):** A 4-digit code. Example: 0001
(default to Billing Division unless otherwise noted.)
Map to Plan SubCode.
 - **Billing Division:** A 4-digit code. Example: 0001
Map to Plan Code.
 - **Eligibility Class Code:** A 3-digit code. Example: 105
Map to Network ID.
 - **Sub Eligibility Class Code:** A 3-digit code. Example: 105
Map to Subnetwork ID.

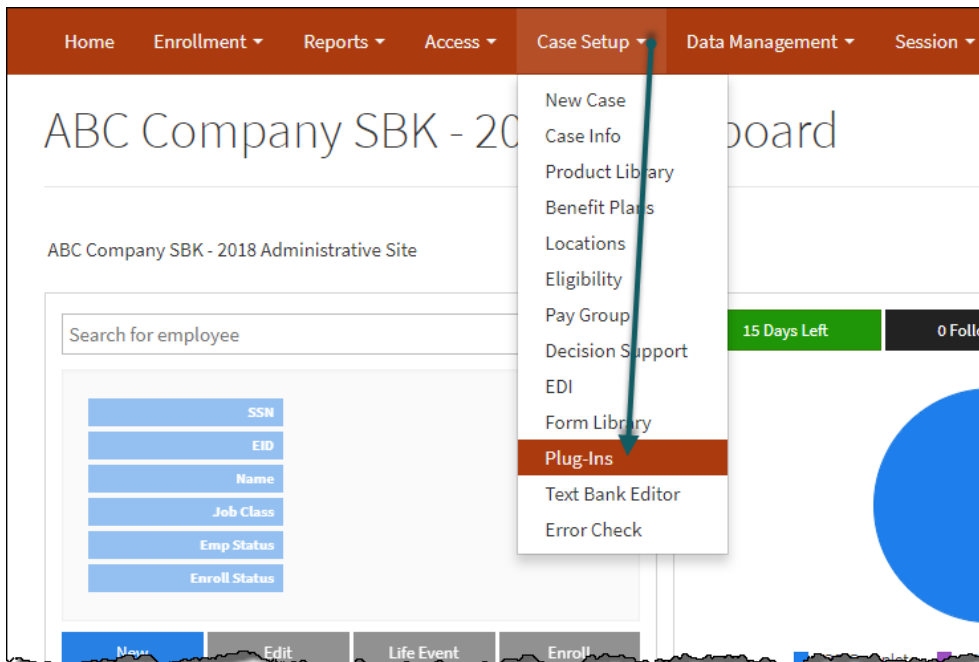
NOTE: If you have difficulty obtaining information from UNUM, then contact the appropriate person from the UNUM Contacts section.

Step 1: Add the Bridge Plug-in to the Case

You must first add the bridge plug-in to the case, then configure it with the settings provided in this document.

To add the Unum EOI bridge plug-in:

1. Login to the **Admin site** that is being used for the enrollment and go to your case.
2. Select **Plug-ins** from the **Case Setup** menu.

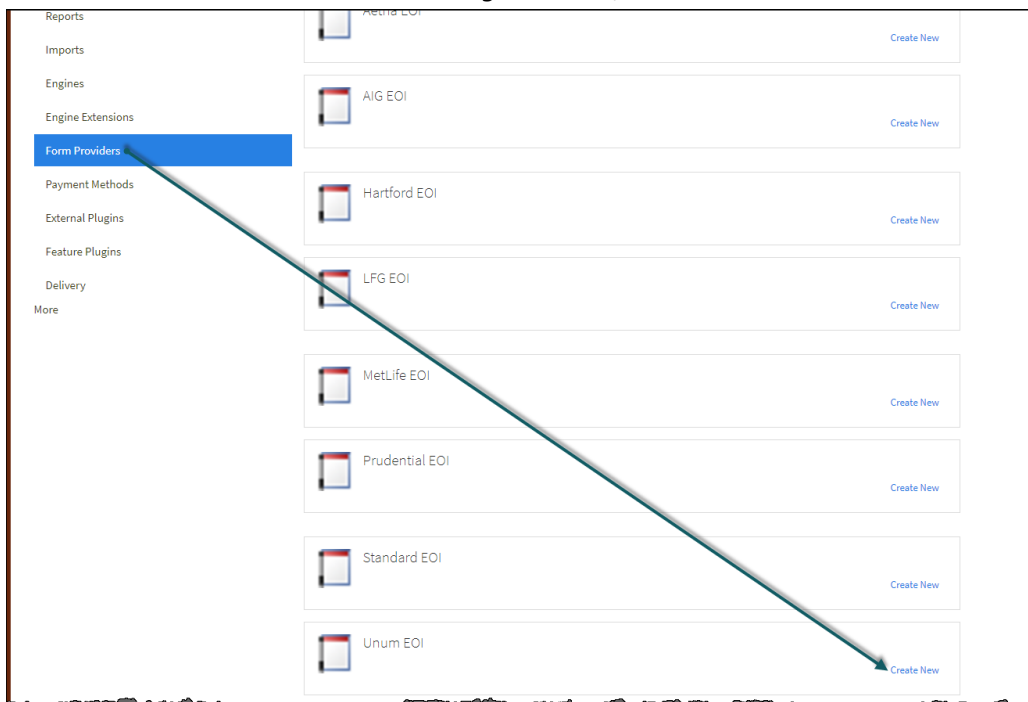


3. Click the **New** button.

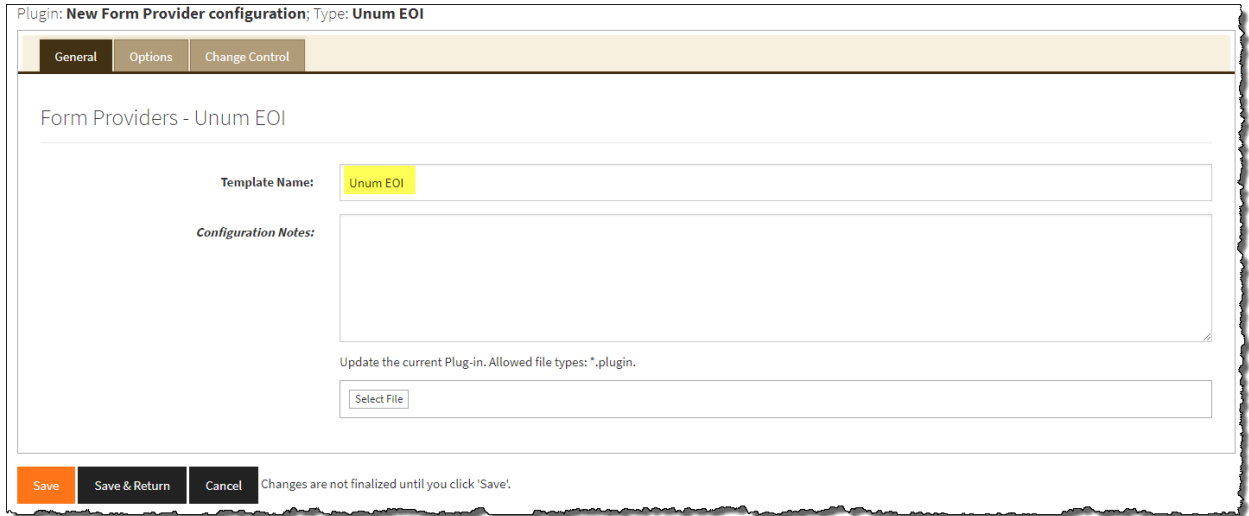
[+ New](#)

The *Add a New Plug-in* screen displays options for you to create a new plug-in.

4. In the **left Nav bar** of the *Add a New Plug-in* screen, select **Form Providers**.



5. Click **Create New** under the name of the Unum EOI plug-in.
The Plug-In Configuration screen displays setup options.
6. In the **Template Name** field, type a name for the Unum EOI bridge, such as Unum EOI.



Plugin: **New Form Provider configuration**; Type: **Unum EOI**

General Options Change Control


Form Providers - Unum EOI

Template Name:

Configuration Notes:

Update the current Plug-in. Allowed file types: *.plugin.

Changes are not finalized until you click 'Save'.

7. Click the **Save** button. 
8. Click the *Options* tab.
9. For the **Description section**, complete fields as necessary:
 - a. Environment – which environment are you trying to access? Select: Testing or Production.
 - b. Selerix certificate – Select when the Selerix certificate expires.
 - c. Allow employee skip EOI process? – Select Do not allow the employee to skip SSO enrollment or Allow the employee to skip SSO enrollment.
 - d. Partner ID – Enter the Partner ID: 506a571b-34f8-46f8-886b-f2cf1c06ebd1. This is the same for all cases.
10. Api Key – Enter the API key, which only changes for the environment:
 - a. Production - **iszX89AYnPFNF1b31UCkNO+Gk/4xRaMXd4ytIJJFzFQ=**
 - b. UA/Test environment **OPy1zrVckSnUjAPAIZeO0GGeeU0SiBW+qVkykEbF6ls=**

11. Complete setup for each of the products that are on the case, selecting the plan that applies to the Unum product.

General Options Change Control	
Description	Value
Environment	Production
Selerix certificate	Selerix Production (expires 11/15/2019)
Allow employee skip EOI process?	Do not allow the employee to skip SSO enrollment.
Partner ID	506a571b-34f8-46f8-886b-f2cf1c06ebd1
Api Key	iszX89AYnPFNF1b31UCkNO+Gk/4xRaMXd4ytIJJFzFQ=
LTD Plan	Empty
STD Plan	Short Term Disability
Employee Life Plan	Employee Voluntary Life
Spouse Life Plan	Empty
Child Life Plan	Empty

All None

12. Click the **Save** button.

Save

Step 2: Add the Form to the Benefit Plan

A Unum Confirmation form must be added to each plan that needs underwriting.

To add the form to the benefit plan:

1. Select **Benefit Plans** from the **Case Setup** menu.
2. Select the Unum plan to which you want to add the EOI form.
3. Click the **Rate Group** tab.
4. Deselect **Inherit forms from Product Library**. This allows you to set up a new form.

Plan: Short Term Disability Rate group: Salary Rule

General Payer products Service Area Deduction processing

Rate Group Enrollment rules Eligibility Rates Questions Life events Presentation Forms Dependence Rules Alias JScript Properties

Rate Group Name: Salary Rule

Stylesheet: Default

Custom Field: <No Custom Field>

Custom Field Value:


☒ Inherit presentations from Product Library
☐ Inherit forms from Product Library
☒ Inherit event scripts from Product Library
☐ Location name as employer

Core Life/AD&D - Hourly Rule Copy From

Save Cancel New Delete

5. Click the **Save** button.
6. Click the **Forms** tab.
7. Click the **New** button to create a new form.
The Info tab displays blank fields for setting up the form.
8. Complete the fields as follows:
 - a. Description: Add a name, such as **Unum EOI**.
 - b. Document Provider: Choose **Unum EOI**.
 - c. Document type: Choose **Other**.
 - d. XML Tag Name: Type in **Unum_EOI**.
 - e. File Name: add the URL "ProductLib/Unum/Forms/Unum_SOH_Confirmation.pdf" without quotes.
 - f. Product: Choose the **payer product** that is selected for this benefit plan.
 - g. Form Type: Choose **Application**.
 - h. Deselect the **Do not merge** option under Number of children per form.

i. Employee Signature Required: Choose **No signature required**.

Info	States	Special Instructions	Alternative Text	JScript
<p>Description: <input type="text" value="Unum EOI"/></p>				
<p>Document Provider: <input type="text" value="Unum EOI"/></p>				
<p>Document type: <input type="text" value="Unknown"/></p>				
<p>XML Tag Name: <input type="text" value="Unum_EOI"/></p>				
<p>File Name: <input type="text" value="ProductLib/Unum/Forms/Unum_SOH_Confirmation.pdf"/> </p>				
<p>Product: <input type="text" value="All Products"/></p>				
<p>Form type: <input type="text" value="Application"/></p>				
<p>Signature mode:</p> <p><input checked="" type="checkbox"/> Digitized (Topaz)</p> <p><input checked="" type="checkbox"/> PIN</p> <p><input type="checkbox"/> Click to Accept</p> <p><input type="checkbox"/> Voiceprint</p> <p><input type="checkbox"/> Allow one-step signature</p>				
<p>Order number: <input type="text" value="1"/></p>				
<p>Number of pages: <input type="text" value="1"/></p>				
<p>Number of children per form: <input type="text" value="0"/></p>				
<p><input type="checkbox"/> Do not merge</p> <p><input type="text" value="100"/> applications per form</p> <p><input type="checkbox"/> Do not merge plans</p>				
<p>Employee signature required: <input type="text" value="No signature required"/></p>				
<p>Spouse signature required: <input type="text" value="No signature required"/></p>				
<p><input type="checkbox"/> Enroller signature required</p> <p><input type="checkbox"/> External Document</p> <p><input type="checkbox"/> For every insured</p>				
<p>Languages:</p> <p><input checked="" type="radio"/> Any</p> <p><input type="radio"/> Only the following language(s)</p> <p><input type="checkbox"/> English</p> <p><input type="checkbox"/> Spanish</p> <p><input type="checkbox"/> English (Canadian)</p> <p><input type="checkbox"/> French (Canadian)</p>				
<p>Save Cancel</p>				

9. Click the **Save** button.

Save

10. On the **States** tab, select the states to which the form applies.

Plan: Employee Voluntary Life ▼

General	Payer products	Service Area	Deduction processing								
Rate Group	Enrollment rules	Eligibility	Rates	Questions	Life events	Presentation	Forms	Dependence Rules	Alias	JScript	Properties

	Form	For Product	In States
✓	Unum EOI	Any	AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA
<			
<			

New Copy Edit Delete Delete All View Clean

Plan: Child Voluntary Life ▼ [Copy From](#)

11. Click the **Save** button.

- Click the **JScript** tab to add scripting that ensures that the underwriting questions are asked when the benefit will pend for underwriting.

13. Click the JScript icon next to the Visible event.

Add the following script to the scripting window:

```
Event.Value =
```

```
Selerix.ETIExtension.FormProvider.UnumEOIFormProvider.IsConfigured(Event
.Case)
```

```
&& Event.Application.IncreaseBenefitAmount > 0;
```

14. Click the **Save** button in the scripting window.

Info	States	Special Instructions	Alternative Text	JScript
Event Type		Script		
Visible		Event.Value = Selerix.ETIExtension.FormProvider.UnumEOIFormProvider.IsConfigured(Event.Case) && Event.Application.IncreaseBenefitAmount > 0;		
Save				
Field mapping				
View All				

Save	Cancel
------	--------

15. Click the **Save** button.

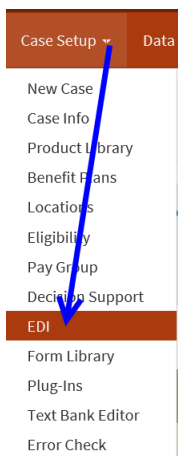
Save

Step 3: Setting up EDI Parameters

The last steps before testing the bridged form includes setting up EDI control and group numbers.

To set up EDI:

1. Select **EDI** from the **Case Setup** menu.



The **EDI** screen displays tabs for setting EDI options.

2. Click the **Save** button.
3. Click the **Group Numbers** tab.
4. Click the **Add** button (green plus sign at the end of the table). A new line entry is added to any existing EDI group numbers.
5. Select the product from the **Product** drop-down list.
6. Select the **Unum** payer. **This must be the Unum payer, and not an associated payer.**
7. Type a **Description** for the payer.
8. For the Master Group Number, enter the Policy Number.
9. For the Plan Code, enter the Billing Division.
10. For the Plan Subcode, add the Reporting Division.
11. For the Network ID, enter the Product Eligibility Group.
12. For the Subnetwork ID, enter the Sub Eligibility Class.

 A screenshot of the 'Group Numbers' tab in the EDI setup screen. It features a table for 'Associated Payers' and a table for 'Group numbers for - Unum Child Life - DB1'.

Location: All Location

Associated Payers

Product	Payer	Description	
Unum Child Life - DB1 (Unum)	Unum		+
Unum LTD (Unum)	Unum		x
Unum STD (Unum)	Unum		x
Unum Vol Life - DB1 (Unum)	Unum		x
Unum Vol Spouse Life - DB1 (Unum)	Unum		x

Group numbers for - Unum Child Life - DB1

JobClass	Ded Freq	Master Group Number	Master Group Number Label	Plan Code	Network ID	Subgroup Number	Plan Subcode	Subnetwork ID
		00216988		0001	001		0002	000
FT (FT)	12							
PT (PT)	Any							

All Location [Delete All Group Numbers](#)

☐ Same for all locations [Save](#) [Cancel](#) [Import](#) [Export](#) [Template](#)

13. Click the **Save** button.

Step 4: Testing/Sample Enrollment

After you have attached the EOI form to each benefit plan that is using the EOI bridge, you should test to ensure that the bridge is invoked correctly.

Use a test employee, and walk through the enrollment. To test the EOI bridge, ensure you select over Guaranteed Issue (GI) for the appropriate benefit plan.

Note: Ensure you use an SSN that starts with 999 for the test employee. This indicates to Unum that this is a test enrollment, and data will not be sent to the Production environment.

At the end of the enrollment process, you will see the Sign & Submit page:

Home You & Your Family ▾ My Benefits ▾ Sign & Submit Logout
Next

Sign and Submit

Here is a recap of your enrollment elections. The summary below shows your election for each benefit and includes your pre-tax and post-tax contributions **per pay period** for each plan.

- Are You Satisfied With Your Elections?** If you are satisfied with your choices, click on the "NEXT" button at the bottom of this screen to sign your Enrollment Verification Form electronically using your PIN.
- Need to Make Some Changes?** If you wish to make any changes to your elections, click on the benefit plan name in the menu at the left.

Plan	Description	Employee Pretax Cost	Employee Posttax Cost
Employee Voluntary Life	\$50,000	\$0.00	\$76.00
Spouse Voluntary Life	\$25,000	\$0.00	\$47.25
Child Voluntary Life	\$5,000	\$0.00	\$6.15
Short Term Disability	\$400; EO	\$0.00	\$7.92
Long Term Disability	Unum LTD; \$100	\$0.00	\$2.50
Total		\$0.00	\$139.82

To complete your enrollment, you must sign the following forms. Press Next to begin signing forms.

Form Name	Status	Date Signed/Reviewed
Unum EOI	Not Reviewed	
Benefit Confirmation	Unsigned	

Next

Underwriting questions display in the Enrollment site window:

[Home](#)
[You & Your Family](#)
[My Benefits](#)
[Sign & Submit](#)
[Logout](#)
[Next](#)

List your current Height

Employee ft in

Spouse ft in

List your current Weight

Employee lbs

Spouse lbs

Within the past 2 years, have you used any controlled substances with the exception of those prescribed by a physician, received medical advice or sought treatment for drug or alcohol abuse, or pled guilty, pled no contest to or been convicted of a felony, misdemeanor, or a charge of operating a motor vehicle under the influence of drugs and/or alcohol?

Employee ☐ Yes ☐ No

Spouse ☐ Yes ☐ No

Within the past 2 years, have you been prescribed three or more medications to be taken concurrently for high blood pressure?

Employee ☐ Yes ☐ No

Spouse ☐ Yes ☐ No

Within the past 5 years, have you received medical advice or sought treatment for psychosis, internal cancer including melanoma, leukemia or Hodgkin's disease, ALS, muscular dystrophy, angina, or had heart surgery, heart attack or transient ischemic attack (TIA)?

Employee ☐ Yes ☐ No

Spouse ☐ Yes ☐ No

Within the past 10 years, have you received medical advice or sought treatment for stroke, congestive heart failure, chronic lung disease including emphysema, diabetes treated with insulin or oral medications, hepatitis (other than type A), cirrhosis of the liver, chronic renal disease including hypertension or failure, systemic lupus or any connective tissue disease?

Employee ☐ Yes ☐ No

Spouse ☐ Yes ☐ No

Are you confined to a wheelchair for reasons other than paraplegia?

Employee ☐ Yes ☐ No

Spouse ☐ Yes ☐ No

Please know that if you have questions during this time, we are here to help. You can contact us at 1-800-421-0344 between the hours of 8 a.m. and 8 p.m. Eastern Time.

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[Next](#)

Answer the questions and click **Next**.

Here is a sample EOI form in PDF format:

Statement of Health Confirmation

Employee ID	Name	Title
00001	NewHire Test	test

Job Class	Location	Department
FT	All Location	F

Plan	Product	Tier	Ded Cycle	Effective Date	Requested		Approved	
					Benefit	Cost	Benefit	Cost
Employee Voluntary Life	Unum Vol Life - DB1	EO	12	04/01/2017	200,000	304.00	50,000	76.00
Spouse Voluntary Life	Unum Vol Spouse Life - DB1	SO	12	04/01/2017	100,000	189.00	25,000	
Child Voluntary Life	Unum Child Life - DB1	CO	12	04/01/2017	10,000	12.30	5,000	6.15
Short Term Disability	Unum STD	EO	12	04/01/2017	1,038	20.56	400	7.92
Long Term Disability	Unum LTD	EO	12	04/01/2017	5,250	2.50	100	2.50
Total:						0.00		0.00

Date submitted: _____

Page 1 of 1

The UNUM EOI Bridge accepts/Rejects or Pends in real time. The following are some reasons an appropriately answered EOI process may still PEND:

- anything over 200k requiring UW pends regardless of EOI answers (UW decision for large amounts)
- anything over 500k **total coverage** per EE will pend
- LTD - anything **over 50k salary** will always result in pend

Appendix A: Handling Multiple Division or Eligibility Classes

If your case has multiple divisions and/or sub eligibility classes, you will need to set up multiple job classes to accommodate the sub eligibilities, and then ensure that the divisions and sub eligibilities are set appropriately in the EDI parameters.

Here's a sample setup for a case with multiple divisions and sub eligibility classes, using the following **FICTIONAL** example:

Policy 00999999 – Life benefit only

Division

0100 – Atlanta

0102 – Baltimore

0104 – Chattanooga

0105 – Portland

Reporting Division

0100 – Atlanta

0102 – Baltimore

0104 – Chattanooga

0105 – Portland

PEG (Eligibility Class) –

001 – All Eligible Employees

Sub Eligibility Class

001 – 0 Days Waiting Period

002 – 09 Days Waiting Period

003 – 6 Months Waiting Period

004 – 30 Days Waiting Period

On the Eligibility screen (Case Setup >> Eligibility), an eligibility class is created for each waiting period.

Eligibility

At a given location, eligibility for benefit enrollment is generally determined by the employee's job class. Job classes are unique to each location. For each location, you must specify the name (and an optional description) for each job class. Place a check mark next to each product available to members of the job class. [Use the All and None buttons to change check or uncheck all products.]

- To add a job class click Add.
- To change a job class, select the class and click Save after making changes.
- To delete a class, select the class and press Delete.

Location: <All Locations>

FT 30 Days (30 day waiting period)
 FT Zero Days (0 Days Waiting Period)
 PT 6mth (6mth wait period)
PT 9 Days (9 day waiting period)

Job Class Name: PT 9 Days

Description: 9 day waiting period

Note:

Benefit type: Payroll

Eligibility:

Employee Voluntary Life: default
☒ Unum Vol Life - DB1

Spouse Voluntary Life: default
☒ Unum Vol Spouse Life - DB1

Child Voluntary Life: default
☒ Unum Child Life - DB1

Short Term Disability: default

For each location, set up the EDI parameters, which include the Plan Code and Subnetwork ID.

Atlanta Location and Division:

Control (Account) Num: Group Numbers Deduction Codes Agent IDs

Location: Atlanta

Associated Payers

Product	Payer	Description
Unum Vol Life - DB1 (Unum)		

Group numbers for - Unum Vol Life - DB1

JobClass	Ded Freq	Master Group Number	Mas Num	Plan Code	Network ID	Subgroup Number	Plan Sub	network ID
FT 30 Days (30 day waiting period)	Any	00965978		0100	001		0100	004
FT Zero Days (0 Days Waiting Period)	Any	00965978		0100	001		0100	001
PT 6mth (6mth wait period)	Any	00965978		0100	001		0100	003
PT 9 Days (9 day waiting period)	Any	00965978		0100	001		0100	002

Chattanooga Delete All Group Numbers

Baltimore Location and Division:

Control (Account) Nu: Group Numbers Deduction Codes Agent IDs

Location: **Baltimore**

Associated Payers Filter

Product	Payer	Description	+
Unum Vol Life - DB1 (Unum)	Unum		✕

Group numbers for - Unum Vol Life - DB1

JobClass	Ded Freq	Master Group Number	Master Group Number Label	Plan Code	Network ID	Subgroup Number	Sub eligibility	Subnetwork ID
FT 30 Days (30 day waiting period)	Any	00965978		0102	001		0102	004
FT Zero Days (0 Days Waiting Period)	Any	00965978		0102	001		0102	001
PT 6mth (6mth wait period)	Any	00965978		0102	001		0102	003
PT 9 Days (9 day waiting period)	Any	00965978		0102	001		0102	002

Chattanooga

Chattanooga Location and Division:

Control (Account) Nu: Group Numbers Deduction Codes Agent IDs

Location: **Chattanooga**

Associated Payers Filter

Product	Payer	Description	+
Unum Vol Life - DB1 (Unum)	Unum		✕

Group numbers for - Unum Vol Life - DB1

JobClass	Ded Freq	Master Group Number	Master Group Number Label	Plan Code	Network ID	Subgroup Number	Sub Eligibility	Subnetwork ID
FT 30 Days (30 day waiting period)	Any	00965978		0104	001		0104	004
FT Zero Days (0 Days Waiting Period)	Any	00965978		0104	001		0104	001
PT 6mth (6mth wait period)	Any	00965978		0104	001		0104	003
PT 9 Days (9 day waiting period)	Any	00965978		0104	001		0104	002

All Location

Portland Location and Division:

Control (Account) Num	Group Numbers	Deduction Codes	Agent IDs
-----------------------	---------------	-----------------	-----------

Location: Portland

Associated Payers Filter

	Product	Payer	Description	
✓	Unum Vol Life - DB1 (Unum)	Unum		✕

Group numbers for - Unum Vol Life - DB1

JobClass	Ded Freq	Master Group Number	Master Group Number Label	Plan Code	Portland Division	Subgroup Number	Subnetwork ID
FT 30 Days (30 day waiting period)	Any	00965978		0105	001		0105
FT Zero Days (0 Days Waiting Period)	Any	00965978		0105	001		0105
PT 6mth (6mth wait period)	Any	00965978		0105	001		0105
PT 9 Days (9 day waiting period)	Any	00965978		0105	001		0105

All Location Delete All Group Numbers

Sub-eligibility classes

Portland Division

