# unum<sup>®</sup> | Total Leave

Employee Portal User Guide

Version 5.25





# Table of Contents

Accessing the Total L	eave Employee Portal	
Login		4
Navigation		
Home Page		6-10
<u>Preferences</u>		11
Menu Bar		12
Quick Links		13
Key Features		
Start a Leave or	<u>Claim</u>	15
Check Status of	a Leave or Claim	16-1
<u>Tasks</u>		18-2
Report an Inter	mittent Absence Episode	22
Get Support		
<u>Live Chat</u>		24
Schedule a Call	<u>back</u>	25
Providing Feedl	<u>oack</u>	26



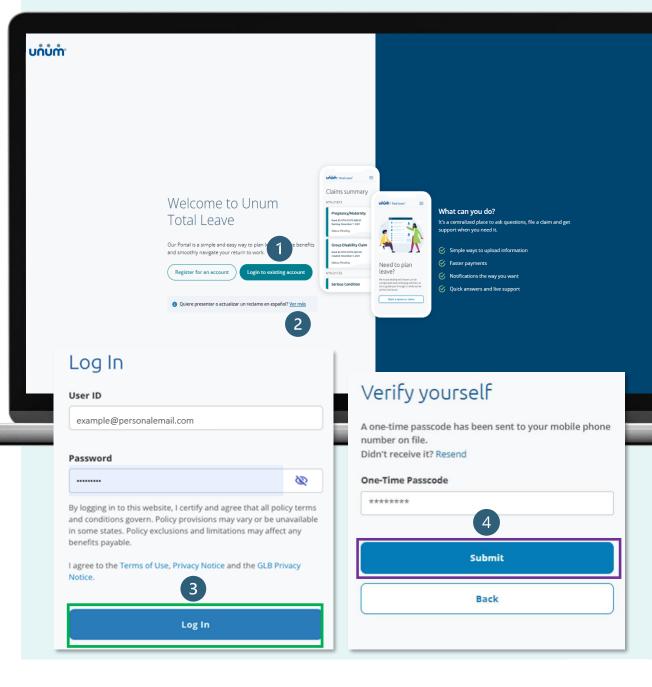
Accessing the Total Leave Employee Portal

#### ACCESSING THE TOTAL LEAVE EMPLOYEE PORTAL

# Login

Go to <a href="https://portal.unum.com">https://portal.unum.com</a> then complete the following next steps.

- 1 Enter your password and click the 'Log In' button
- 2 For information in Spanish click the 'Ver mas' link
- 3 Enter your password and click the 'Log in' button
- 4 If you signed up for two-way verification, a passcode will be sent to your phone. Enter it into the one-time passcode box and then click the 'submit' button.



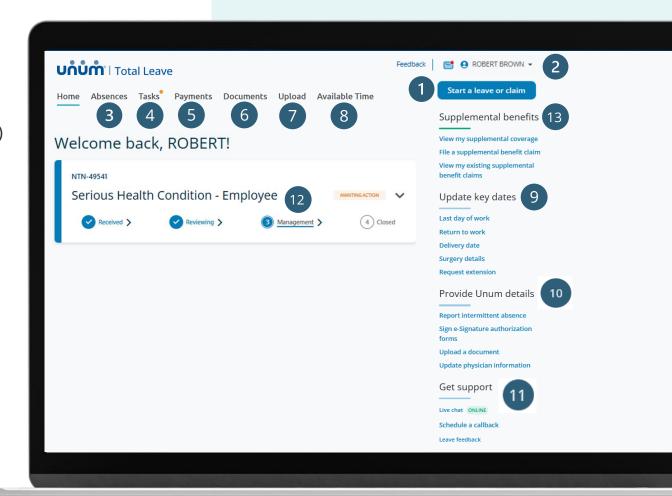


Navigation

# Home Page

When you log in, you'll be on the Summary Page where you can easily:

- Start a leave or claim
- 2 Set up your preferences (personal, communication, and payment)
- 3 View intermittent absence submissions
- 4 View and respond to required and recommended tasks
- 5 View payments information
- 6 Review documents/letters from Unum
- Upload documents to Unum
- 8 View available time
- 9 Update key dates
- 10 Provide Unum details
- 11 Get support
- 12 View where you are in the process on the Progress Bar

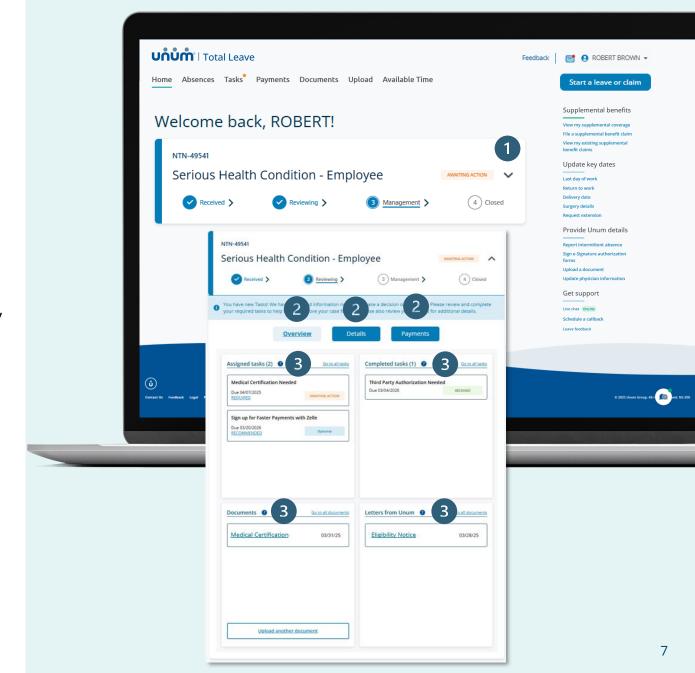


<sup>\*</sup>The 'Supplemental Benefits' section displays if you have a Unum Supplemental Benefit product such as Accident, Critical Illness or Hospital

# Home Page Progress Bar

A Progress Bar is centrally located on the Home page and provides a visual of the claim/leave process. Several helpful features can be accessed via the progress bar.

- 1 To get started click the 'V' on the Progress Bar
- 2 An expanded view provides key details at-a-glance organized by Overview, Details, and Payments (see following slides for a detailed explanation of each tab)
- 3 Enhanced usability features including expanded help and explanation of key terms with examples.

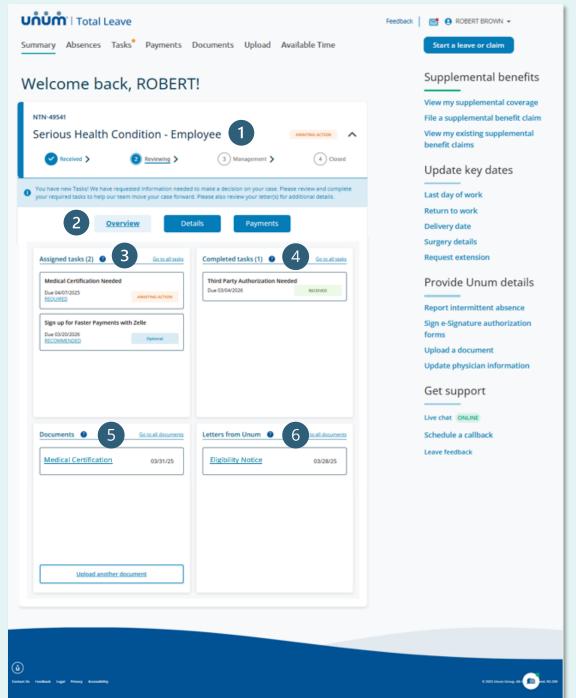


# Home Page

Overview Tab

The Overview tab contains key information ata-glance which is designed to make it easy for you to check on your claim/leave.

- 1 The Progress Bar contains dynamic messaging that explains the current step in the process, what is needed, and what to expect
- Overview Tab with 'cards' that organize key information
- Assigned Tasks required and recommended tasks that the employee needs to address and provide a response
- 4 Completed Tasks lists tasks an employee has responded to
- Documents contains documents that the employee (or someone on their behalf such as an employer) has provided
- 6 Letters from Unum all letters sent by Unum to the employee

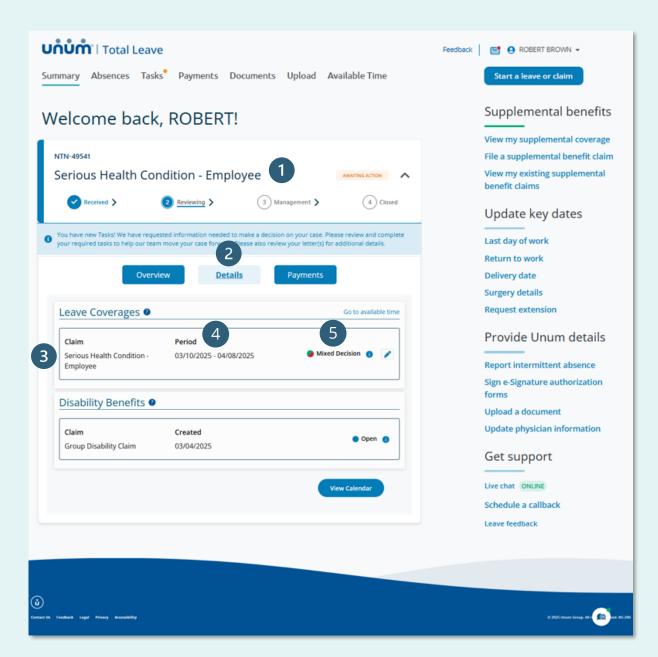


# Home Page

Details Tab

The Details tab contains information on your claim/leave including status.

- 1 The Progress Bar contains dynamic messaging that explains the current step in the process, what is needed, and what to expect
- 2 Overview tab with 'cards' organized into Leave Coverages and/or Disability Benefits that contain key information
- Related claim name
- 4 Dates (period and/or created)
- 5 Status (ex: open, mixed decision, pending, approved)

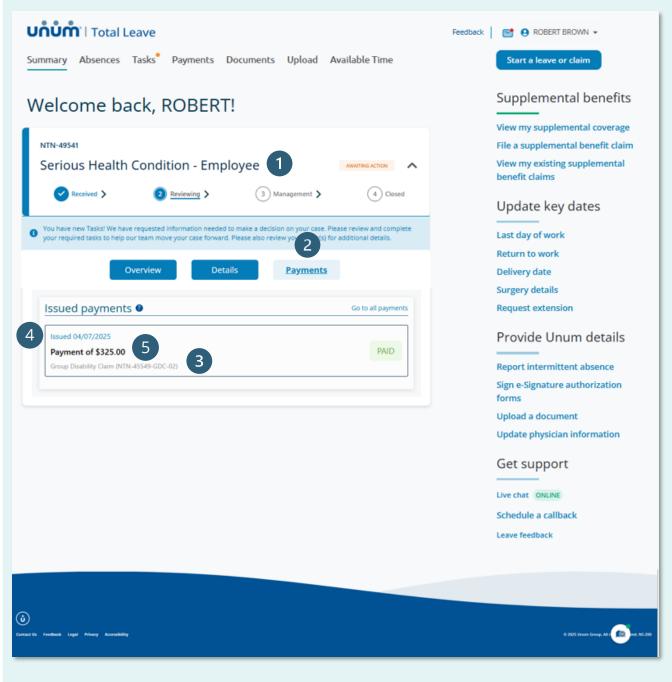


# Home Page

Payments Tab

This tab contains information on payments related to your claim/leave.

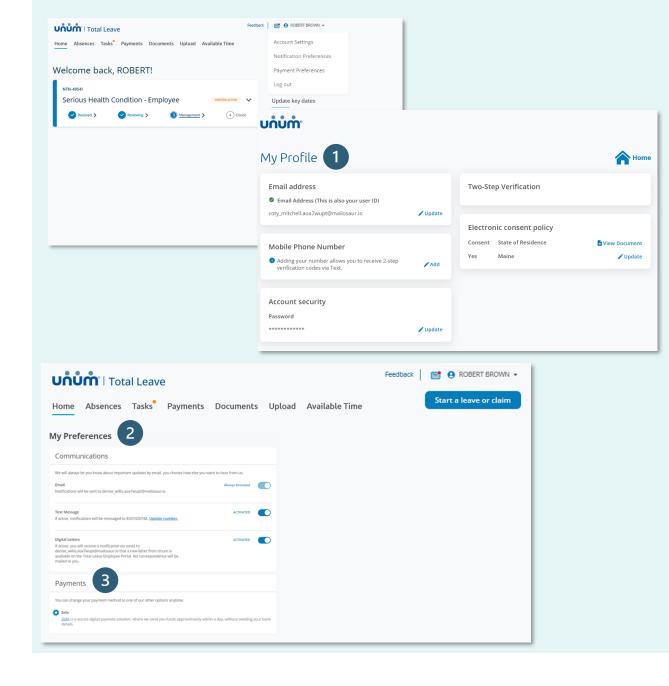
- The Progress Bar contains dynamic messaging that explains the current step in the process, what is needed, and what to expect
- 2 Payments tab with 'cards' organized into Issued and/or Upcoming Payments that contain key information
- 3 Related claim name
- 4 Date issued
- 5 Amount



### Preferences

There are several options to tailor your preferences. In the top right corner next to your name click the arrow. You can access:

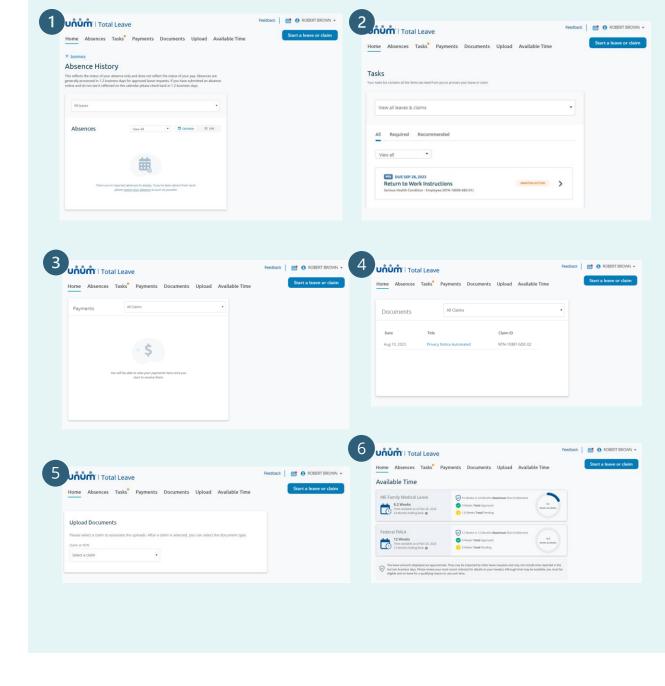
- **Account Settings 'My Profile'** edit your email, phone number, account security, two-step verification, and e-consent
- 2 Notification Preferences 'My Preferences' set your communication preferences related to email, text messages, and digital letters
- Payment Preferences set your preference for payment delivery mode. It is recommended that you choose between Zelle or direct deposit for same day payments. You may also select to receive a mailed paper check which takes approximately 7 days.



## Menu Bar

The menu bar at the top of the page makes it easy to quickly navigate to:

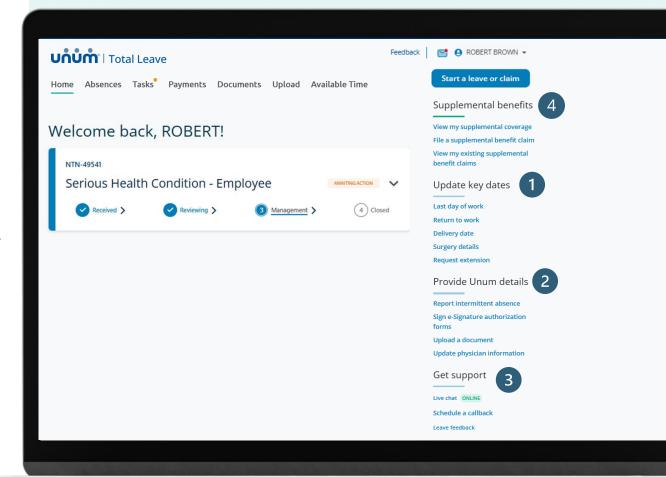
- **1 Absences** view intermittent absence instances
- 2 Tasks view what's needed on your leave/claim and respond
- **3** Payments view information related to dates and amounts
- 4 **Documents** view letters related to your leave/claim
- 5 **Upload** share a document related to your leave/claim
- 6 Available Time view how much time is available to you on a specific benefit. It also communicates the maximum plan entitlement, approved/pending time, as well as other details.

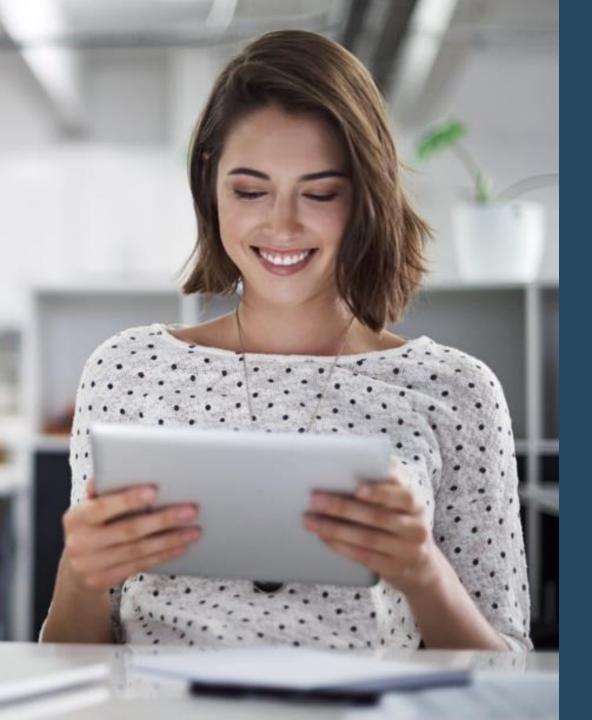


## Quick Links

Quick links provide an easy way to complete key actions such as:

- Update Key Dates such as last day of work, return to work, delivery, surgery, or request an extension for your leave/claim
- Provide Unum Details such as report an intermittent absence, sign e-signature authorization, upload a document, or update physician information
- **Get Support** with live chat, schedule a callback, or leave feedback
- 4 Supplemental Benefits\* view supplemental coverage, file a new supplemental benefit claim or view an existing supplemental benefit claim.



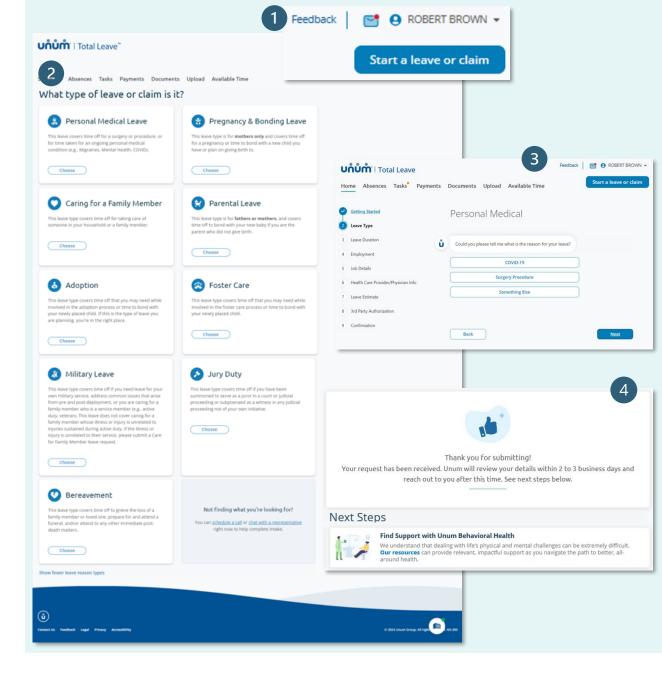


Key Features

### Start a Leave or Claim

There are several options to tailor your preferences. In the top right corner next to your name click the arrow. You can access:

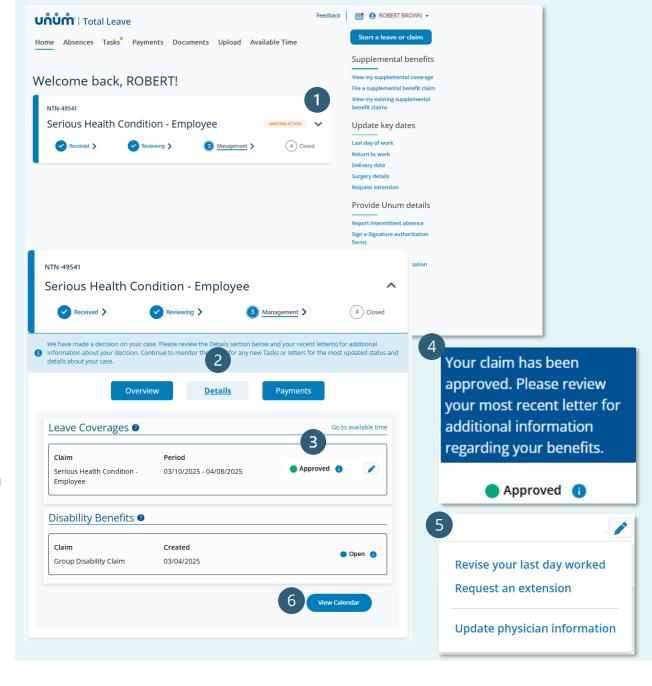
- Start a leave of claim click on the 'start a leave or claim' button located in the upper right-hand section of the portal from any screen or tab.
- What type of leave or claim is it click the 'choose' button for the type of leave/claim that you wish to submit.
- **Provide information** you'll be guided step-by-step through questions related to your leave/claim. There's even a convenient progress bar so that you know exactly where you are in the process to submit.
- 4 Confirmation & Next Steps after you submit your leave/claim you'll be presented with a confirmation and next steps screen.



### Check Status of a Leave or Claim

After you've submitted a claim/leave it will display on the Home Screen. To check on status:

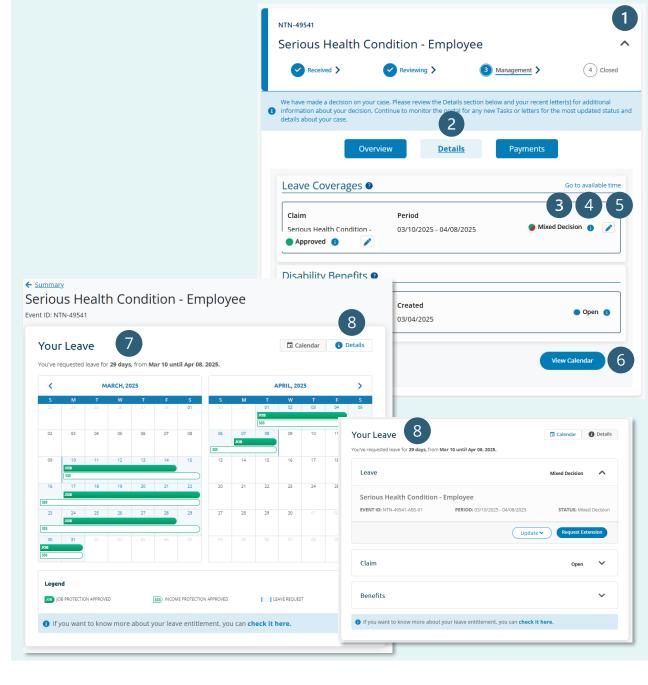
- 1 Click on the "V" down arrow on the leave/claim card progress bar
- 2 Click on the 'Details' tab to view additional information including the dates associated (a.k.a. period)
- 3 The status of the leave/claim is displayed
- 4 Click on the 🕠 for an explanation of the status that is displayed
- Click on the to revise your last day worked, request an extension or update physician information
- 6 Click on view calendar to display a more detailed page with additional information on your leave and/or benefits



### Check Status - View Calendar

After you've submitted a claim/leave it will display on the Summary Screen. To check on status:

- 1 Click on the "V" down arrow on the leave/claim card progress bar
- 2 Click on the 'Details' tab to view additional information including the dates associated (a.k.a. period)
- The status of the leave/claim is displayed
- 4 Click on the i for an explanation of the status that is displayed
- Click on the to revise your last day worked, request an extension or update physician information
- 6 Click on View Calendar to display a more detailed page with additional information on your leave and/or benefits
- 7 The calendar will display the parameters of job and/or income protection as well as the leave request parameters.
- 8 Click on 🕦 Details for an alternate (non-calendar view) of the data

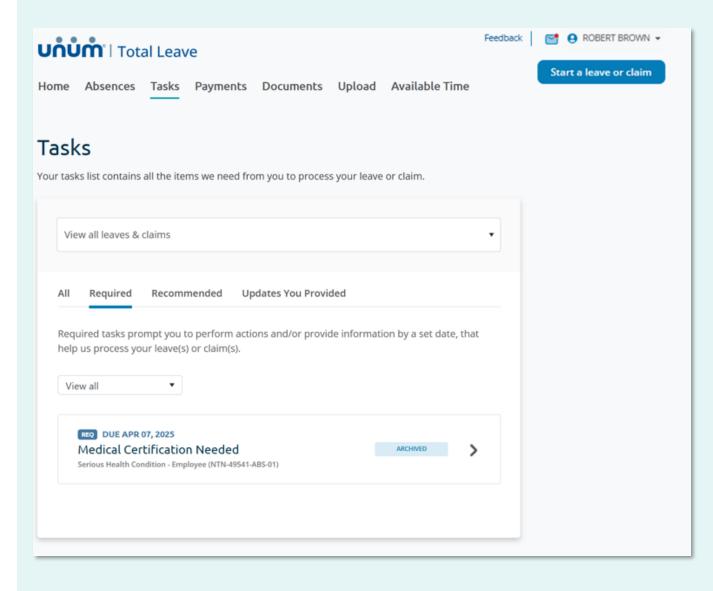


### Tasks

A convenient way to stay informed and communicate with Unum.

Tasks provide a concise explanation of exactly what's outstanding on a leave or claim as well as how to provide it and when it's due. Greater transparency helps keep everyone on the same page. This new feature makes it easy to:

- Receive a notification of a new task that needs attention
- Understand what is needed on a leave/claim in clear, easyto-understand language
- Dig into details such as due date, and status
- Respond by providing information and/or documentation directly through the task on the portal
- Track progress as soon as you respond to a task watch the real-time status update



### Task Tab

The Task Tab has been designed to provide detailed information at-a-glance.

- 1 View/Sort: select what leave or claim you want to view tasks for helpful when you have more than one open leave or claim
- 2 Filter: filter by timeframe or task status
- 3 Due Date: the date the task is due
- 4 Task Type: indicates what kind of information the task will ask for
- 5 **Status Indicator:** indicates the status of the task. There are four status options detailed below:

AWAITING ACTION Task requires attention, a response is needed.

RECEIVED

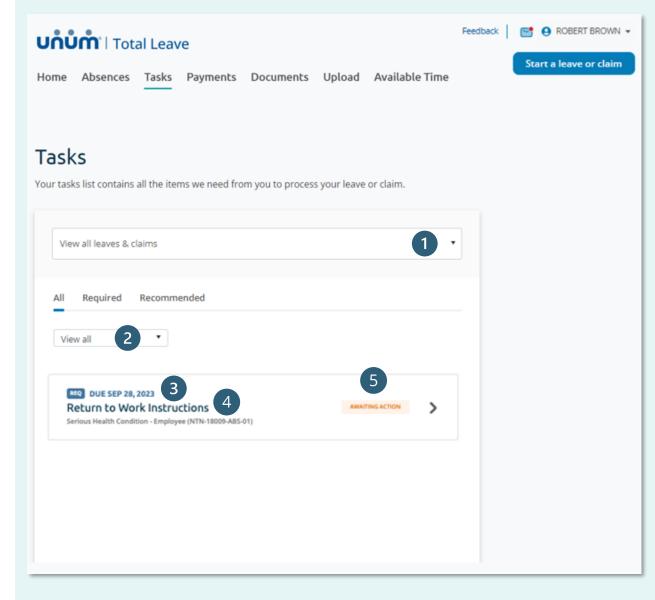
A response has been received by Unum; no further action is currently required.

**RETURNED** 

Task requires attention. A responses was provided but more information is needed.

ARCHIVED

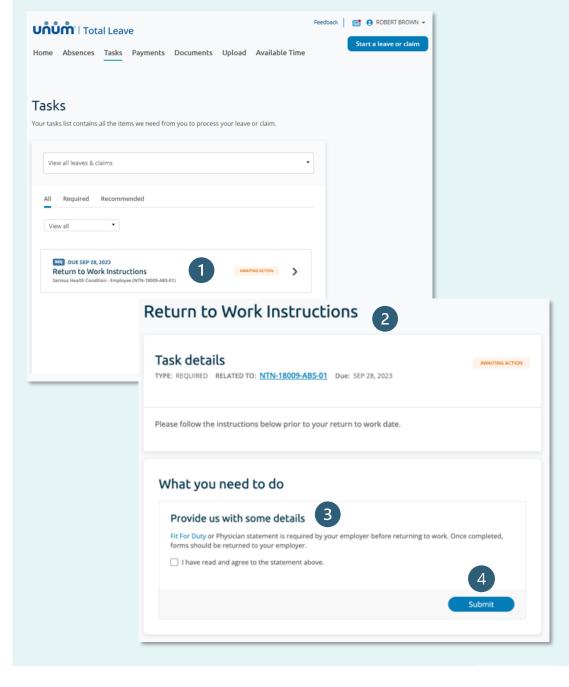
Information was requested, but a response was not received. Note: a response may still be provided on tasks in an archived status. Unum will review and process the information.



# Responding to a Task

It's easy to view and respond to a Task with just a few clicks. To get started:

- Click on the task that you want to view and respond to
- 2 The selected Task will open and provide specific details about what is being asked for/what you need to provide.
- 3 Provide the information requested some will have radio buttons, drop-downs, open text or ask you to upload documentation. In this example there is a linked 'Fit for Duty' form that needs to be filled out. Follow the directions provided on the screen
- 4 Click 'Submit' to provide your information to Unum

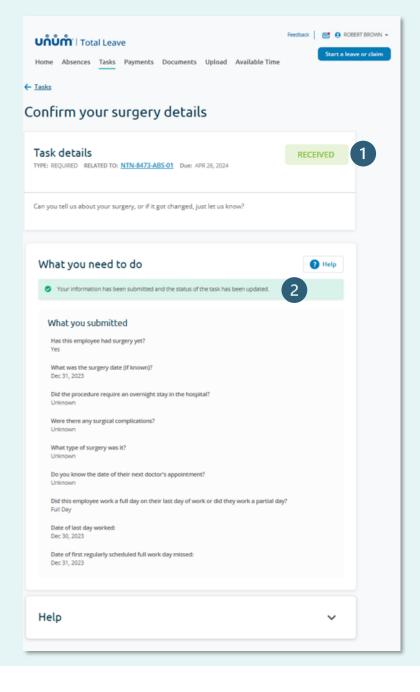


### After a Task is Submitted

### The following happens after a task is submitted:

- **Status Indicator:** the status indicator will change to 'Received' and now be displayed as green
- 2 Success Message: provide a confirmation that the task was successfully submitted

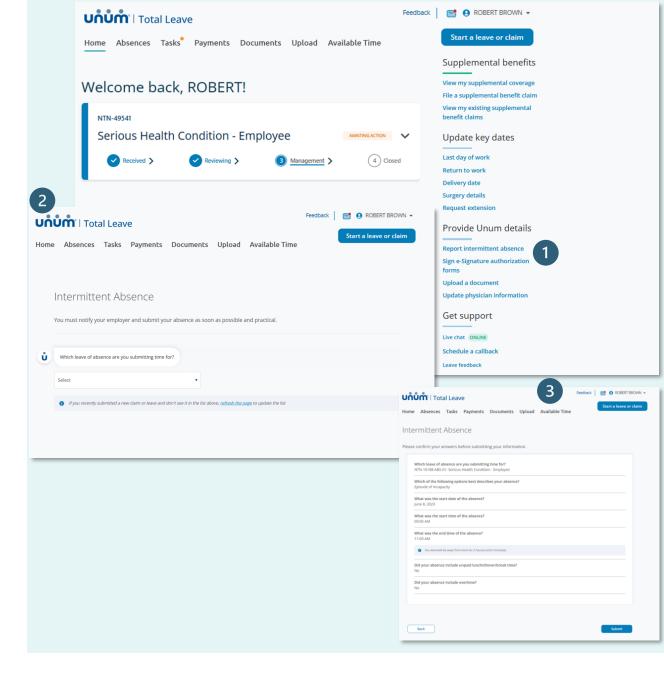
The information provided in the response is sent directly to the specialist working on the claim/leave. They will now proceed with their review.



# Report an Intermittent Absence Episode

Quick links make it easy to submit a new intermittent absence.

- 1 Report Intermittent Absence from the Summary screen click on the 'report intermittent absence' button
- **Provide information** you'll be guided step-by-step through questions related to your intermittent absence.
- 3 Confirm and Submit you'll have an opportunity to review the information that you've provided and then you can click 'submit.'



Get Support



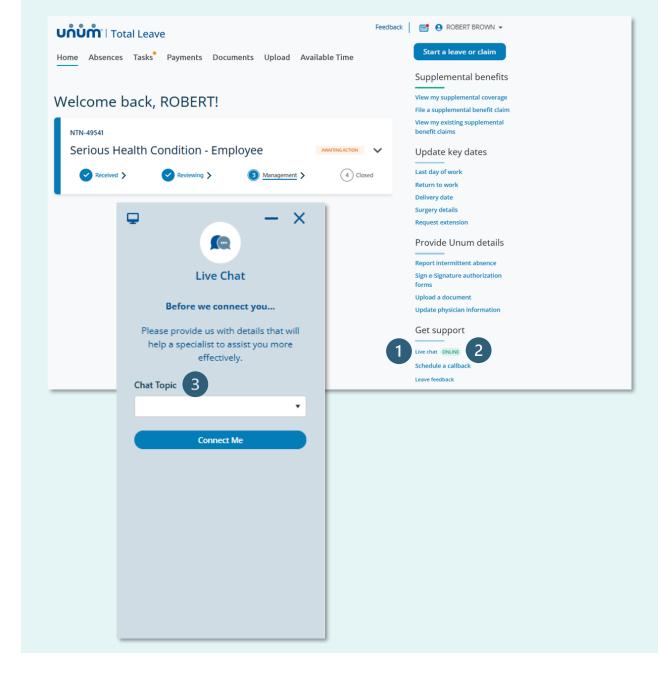
#### **GET SUPPORT**

### Live Chat

Help is built right into the Total Leave Employee Portal. The convenient Live Chat feature provides an easy way to get in touch with Unum. To connect with a leave expert that can provide fast, and easy on-screen guidance follow these simple steps:

- 1 Click the 'Live Chat' link under the 'Get Support' quick links section
- 2 A message box will notify if Live Chat is available (a.k.a. online)
- 3 The Live Chat slide out panel will display select the chat topic from the drop-down mean and click 'Connect Me'

Leave specialists are available 8 a.m. 8 p.m. ET, Monday-Friday.



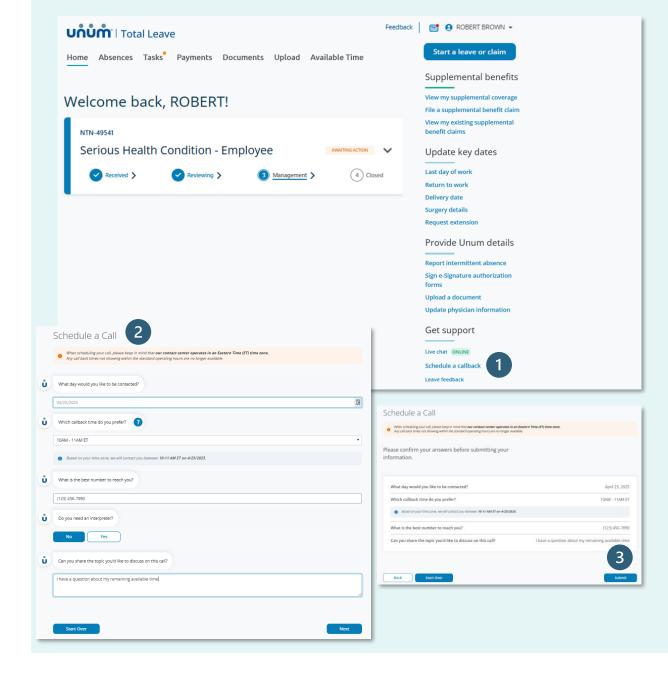
#### **GET SUPPORT**

### Schedule a Callback

Wouldn't it be nice to have support on your schedule? With the ability to select a date/time that works for you, schedule a callback provides convenience. To schedule a callback, follow these simple steps:

- 1 Click the 'Schedule a callback' link under the 'Get Support' quick links section
- 2 The Schedule a Call screen will display select the date and timeslot you prefer and answer a few questions, then click 'Next'
- 3 Confirm the information you provided on the next screen and then click 'Submit'

Leave specialists are available 8 a.m. 8 p.m. ET, Monday-Friday.



#### **GET SUPPORT**

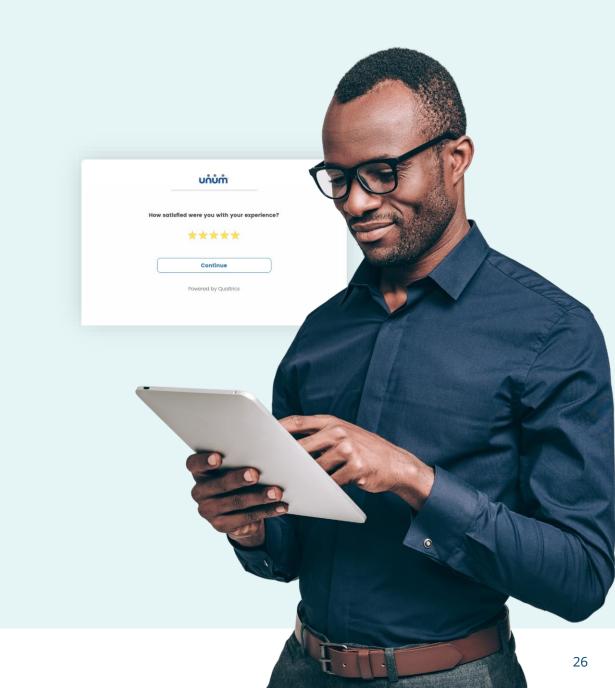
# Providing Feedback

Unum is driven by a commitment to an exceptional employee experience.

In Total Leave, providing feedback becomes an organic process. We ask for feedback at specific experience points along your journey to understand perception, ease of use, and to determine how we can make things even better. We use a familiar five-star rating system.

There are two ways to provide feedback:

- 1 Experience Point Surveys these are short surveys that display via a pop-up panel after specific engagements.
- Peedback Button this is always available to provide Unum with valuable information on your Total Leave Employee Portal experience or ideas on improvements you'd like to see. Click 'Leave Feedback' in the Get Support quick link section



#### Better benefits at work™

The material in this presentation is intended to outline our general product direction concerning Total Leave, and specific functionality may change at Unum's sole discretion in the future. All data displayed is fictitious and product screens are approximate. Also, certain information may contain forward-looking statements, and may include words such as "expects," "anticipates," "intends," "plans," and similar expressions. Such forward-looking statements involve known and unknown risk and uncertainties that may cause our actual future functionality to differ from that projected or contemplated in those forward-looking statements. This material is intended for informational purposes only and is not a contract, nor may it be incorporated into any contract, and any purchasing decisions should be made on features and functions that are currently available.

Insurance products are underwritten by the subsidiaries of Unum Group.

© 2025 Unum Group. All rights reserved. Unum is a registered trademark and marketing brand of Unum Group and its insuring subsidiaries.