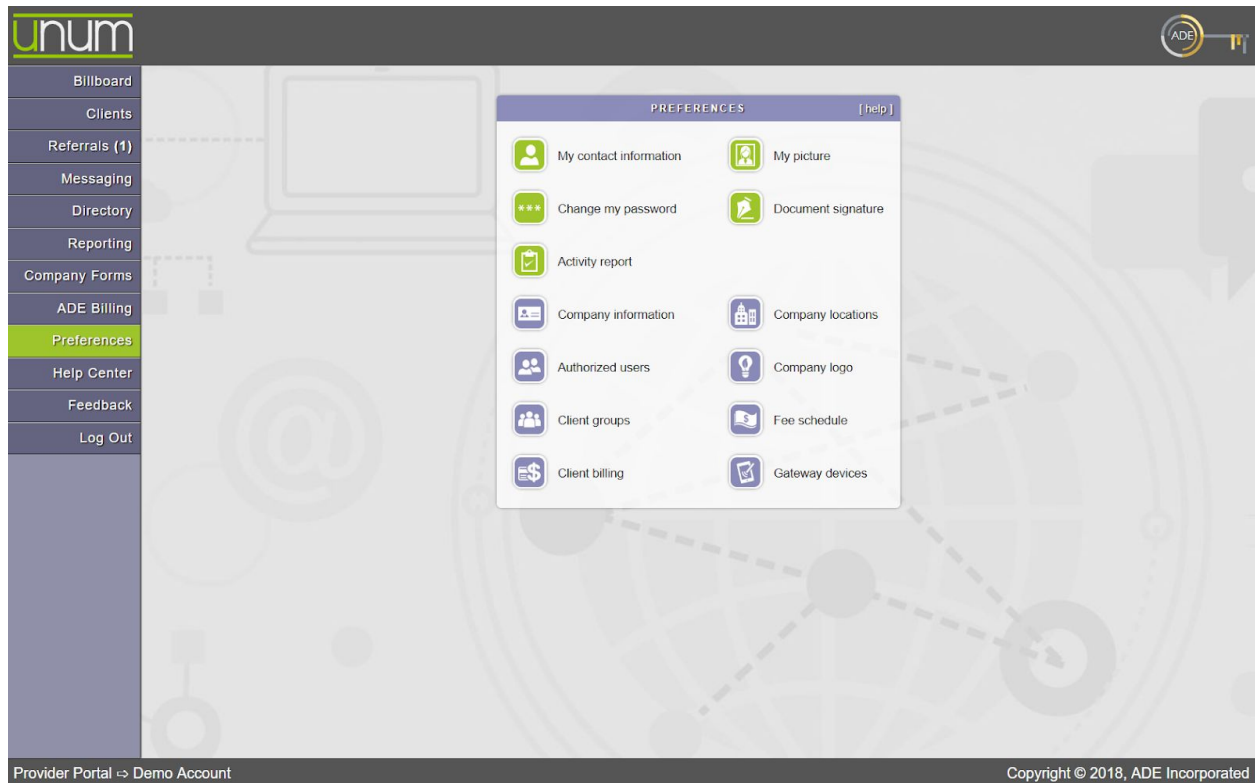
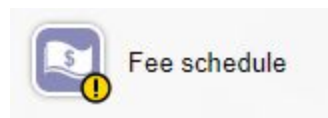


Preferences

The Preferences page is a good place to start when first setting up your account. This screen varies depending on your role in the company. If you are the company owner, you will see all of the options shown below. If you are a provider, but not a company owner, you will only see the options in green.



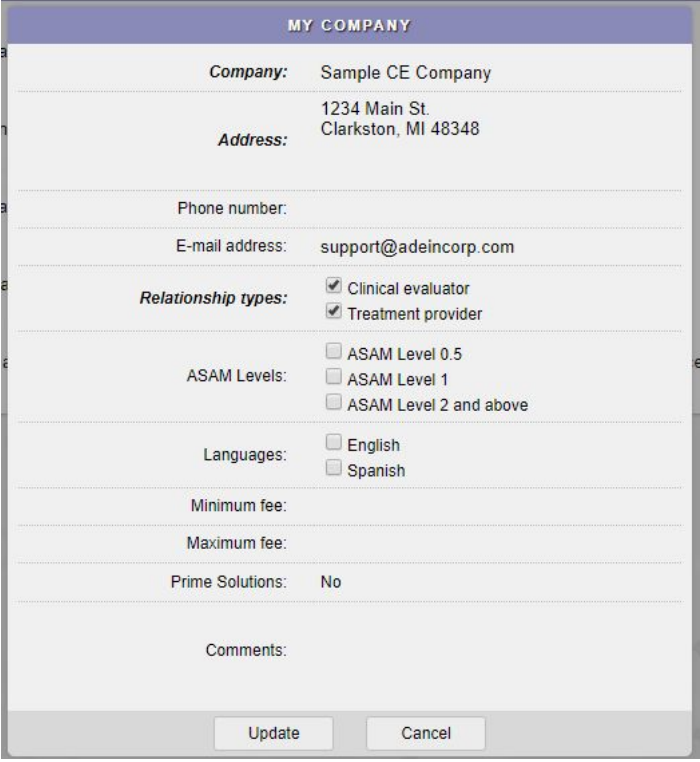
Next to any of these icons, if action is required, you will see a yellow icon. Click on that icon in order to fill in the required information that is missing. If action is required on any of your preferences, then an exclamation point (!) will appear next to Preferences in the Navigation Tab.



Company Settings

These settings are only available to the company owner. This owner is identified when a company is first added to the Unum network.

Company information



The screenshot shows a web form titled "MY COMPANY" with a purple header. The form contains several fields for company information:

- Company:** Sample CE Company
- Address:** 1234 Main St.
Clarkston, MI 48348
- Phone number:**
- E-mail address:** support@adeincorp.com
- Relationship types:** ☒ Clinical evaluator, ☒ Treatment provider
- ASAM Levels:** ☐ ASAM Level 0.5, ☐ ASAM Level 1, ☐ ASAM Level 2 and above
- Languages:** ☐ English, ☐ Spanish
- Minimum fee:**
- Maximum fee:**
- Prime Solutions:** No
- Comments:**

At the bottom of the form are two buttons: "Update" and "Cancel".

Company information can be updated here. Most of this information, such as the company name, the relationship types, and all of the additional optional information, is reflected during the client referral process. This entire process is discussed in-depth in the Referring a Client to Another Provider infographic.

Relationship Types, a required field, indicates the types of relationships your company offers to your clients.

The address entered here is reflected on invoices generated for your company.

Whether you offer Prime Solutions cannot be changed here. This information is entered when your account is created by the Unum developers. If this needs to be changed, you will need to contact Renee Eady.

Company locations

NAME ▼	STATUS
Clarkston	active
Detroit	active

Buttons: Add, Close

Every company must have at least one location listed. A location will be selected for a client when they are added to the system. Locations are also what is listed during the referral process. If no locations are listed, you will not be able to add new clients and you will not appear on the list of available companies when a client is selecting a new referral. Click “Add” to add a new location and enter that location’s information (address, phone number, etc). Name each location after the city it is in - do NOT include your company name in the location name.

Once a client is associated with a location, the location can never be deleted. However, you can deactivate a location by clicking on the location name and clicking the “Deactivate” button. Once you deactivate a location, it will no longer appear as an option when creating a client and will not appear when a client is selecting a company during the referral process.

EDIT LOCATION

Name: Detroit

Address: 8949 Dixie Hwy
Clarkston, MI 48348

Phone: +18003341918

Buttons: Commit, Deactivate, Cancel

Authorize users

[illegible]

This allows you to view all providers who work for your company. There are four roles you can choose from for each of your employees. They are owner, supervisor, guest, and staff. You can also change the roles of these individuals by clicking on their name in this box. If someone will no longer have access to your company, click on their name and click the “Remove” button.

Each of these different roles have different sets of user rights. To determine the proper role for your employees, see the chart on the following page.

You can also create custom roles. When you select a predefined role, the options in the User Rights section will change to reflect the rights of that role. However, if you change any of these presets, the role will change to “custom”. You can also select custom as the role initially and select the rights you’d like that user to have.

	Owner	Supervisor	Guest	Staff
Provider Portal Access	✓	✓	✓	✓
Create New Clients	✓	✓	✓	✓
Assign New Clients to Another Provider	✓	✓		✓
Open Client Records	✓	✓	✓	
Add/Create/View Documents in Client Records (Be a Client Custodian)	✓	✓	✓	
View ALL Company Clients	✓	✓		✓
Macro Tasks	✓	✓	✓	✓
Tasks via Client Card	✓	✓	✓	✓
Messaging	✓	✓	✓	✓
Connections	✓	✓	✓	
Reporting	✓	✓	✓	✓
My Files	✓	✓	✓	✓
Activity Report	✓	✓	✓	✓
View/Accept/Deny Referrals	✓	✓		✓
View Intake Forms & Accept Clients	✓	✓		✓
Edit Company Information	✓			✓
Authorize Company Users	✓			
ADE Billing	✓			✓

To add a new provider to your company, click “Add” and you will be able to type in the new provider’s name. If they are already using Unum, their name will automatically populate and you can select their new role with your company. Then click “Add” and they will be able to create Client Records for your company.

The 'ADD USER' dialog box has a title bar with the text 'ADD USER'. Below the title bar is a light blue instruction box: 'To create a provider-level account for a new Unum user, or to grant an existing Unum user access to your company, enter the following information, then click 'Add'.'. The main area contains three sections: 'User's name:' with a text input field; 'User role:' with radio button options for 'guest', 'supervisor', 'owner', 'staff', and 'custom'; and 'User rights:' with a list of permissions, each preceded by a checkbox. The permissions are: 'User can be client custodian', 'User can create new clients', 'User can open client workspaces', 'User can view all company clients', 'User can schedule intake questionnaires', 'User can execute macro functions', 'User can manage client referrals', 'User can generate reports', 'User can view invoices and make payments', 'User can manage company preferences', 'User can manage authorized users', and 'User can finalize documents'. At the bottom are 'Add' and 'Cancel' buttons.

ADD USER

To create a provider-level account for a new Unum user, or to grant an existing Unum user access to your company, enter the following information, then click 'Add'.

User's name:

User role:

- ☒ guest
- ☐ supervisor
- ☐ owner
- ☐ staff
- ☐ custom

User rights:

- ☒ User can be client custodian
- ☒ User can create new clients
- ☒ User can open client workspaces
- ☐ User can view all company clients
- ☐ User can schedule intake questionnaires
- ☒ User can execute macro functions
- ☐ User can manage client referrals
- ☒ User can generate reports
- ☐ User can view invoices and make payments
- ☐ User can manage company preferences
- ☐ User can manage authorized users
- ☒ User can finalize documents

Add Cancel

If they are not already in Unum, their name will not populate. When you click “Add” in this case, after selecting their role and user rights, you will be asked to enter in an email or phone number for this person. They will then receive a registration email for Unum. Once they register, they will be able to use Unum for your company.

The 'NEW USER INFORMATION' dialog box has a title bar with the text 'NEW USER INFORMATION'. Below the title bar is a light blue instruction box: 'Enter the user's contact information, then click 'Invite''. Below this is another light blue box: 'An Unum Registration Request will be sent to the E-mail address or SMS-enabled phone number provided.'. The main area contains two sections: 'E-mail or SMS:' with a text input field, and 'User's name:' with a text input field containing the name 'Bridget'. At the bottom are 'Invite' and 'Cancel' buttons.

NEW USER INFORMATION

Enter the user's contact information, then click 'Invite'.

An Unum Registration Request will be sent to the E-mail address or SMS-enabled phone number provided.

E-mail or SMS:

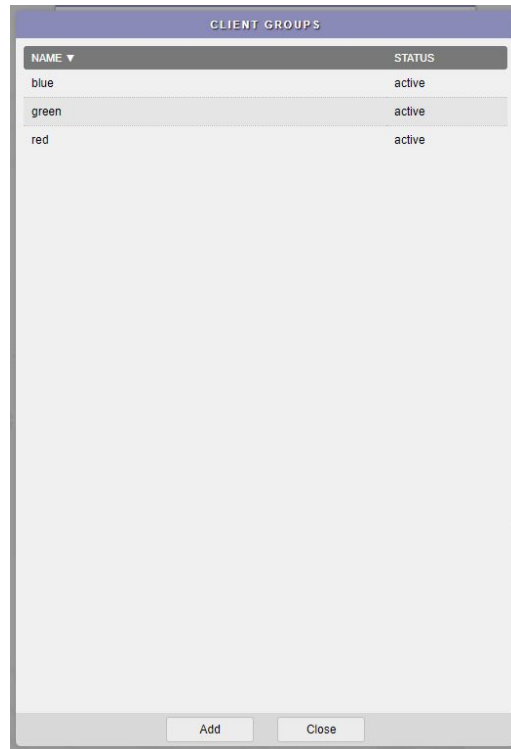
User's name: Bridget

Invite Cancel

Company logo

This process is similar to uploading your picture. This logo can be viewed when other providers click on your company name on the connections screen. This logo may also appear on some documents you create in Unum.

Client Groups

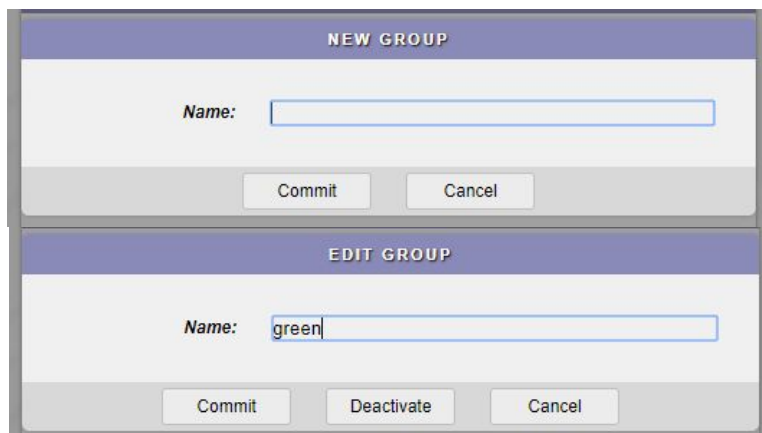


NAME ▼	STATUS
blue	active
green	active
red	active

Add Close

With this option, you can create and edit client groups. Client groups can be used to filter your client list, which can assist you when executing macro tasks, explained in the Clients and Macro Tasks infographics.

To create a new group, click “Add”, enter the name of this group, and click “Commit”. To edit the group, click on the group name in this box. Here, the group name can be changed - click “Commit” to save any changes. If a client is assigned to this group, you will not be able to remove the group, but you can deactivate it, which will remove it from the list of group options when creating a new client. However, if no client is assigned to the group, it can be removed.



NEW GROUP

Name:

Commit Cancel

EDIT GROUP

Name:

Commit Deactivate Cancel

Fee schedule

FEE SCHEDULE	
SERVICE ▼	AMOUNT
Assessment	50
Service	75
Technology Fee	15
Treatment	250

You can add, remove, or edit your company's fees from this box. To add, click "Add" and fill in the information. To remove or edit, click on the desired fee. If editing, once a change is entered, click the "Commit" button.

EDIT SERVICE FEE

Service:

Treatment

Amount:

250

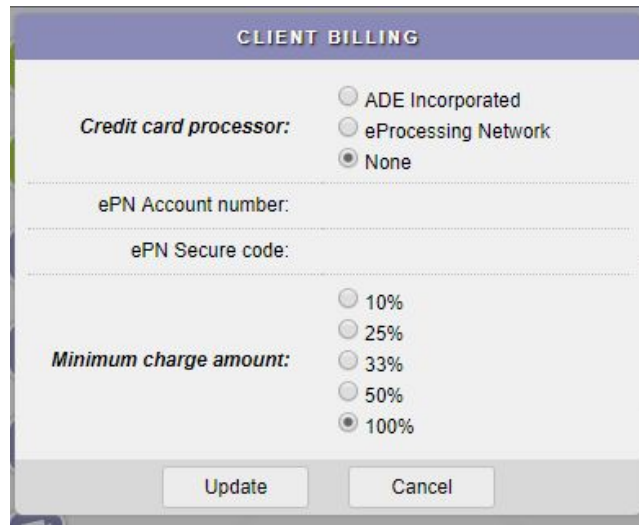
Commit

Remove

Cancel

These fees are used when you generate an invoice for a client in the Client Record.

Client billing



The screenshot shows a dialog box titled "CLIENT BILLING". It contains the following fields and options:

- Credit card processor:** Three radio button options: "ADE Incorporated", "eProcessing Network", and "None". The "None" option is selected.
- ePN Account number:** A text input field.
- ePN Secure code:** A text input field.
- Minimum charge amount:** Five radio button options: "10%", "25%", "33%", "50%", and "100%". The "100%" option is selected.
- At the bottom, there are two buttons: "Update" and "Cancel".

If you would like Unum to collect client payment information, this can be set up here.

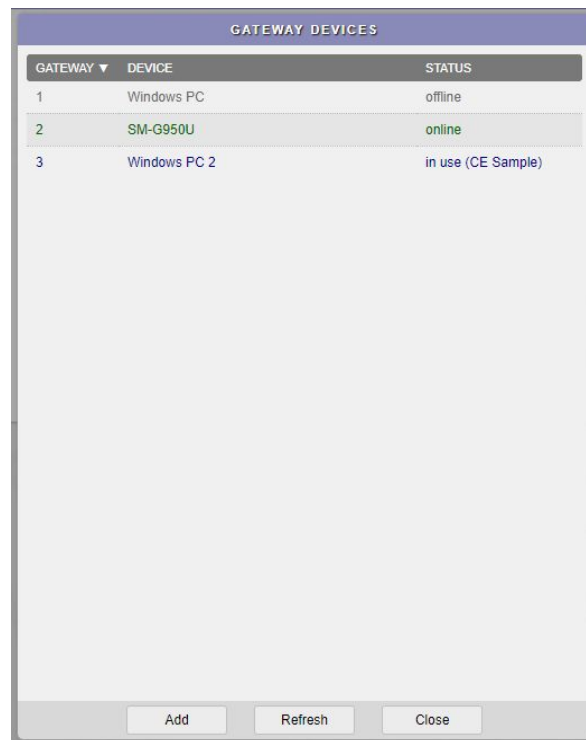
When a payment is made with ADE Incorporated selected as the processor, ADE will collect the money on behalf of your company. On the 6th of the month, when the monthly invoice is generated, the amount ADE owes your company will also be accounted for, and your balance will reflect this. If your balance is negative, you will need to make a payment within 30 days. If the balance is positive, you will receive a check from ADE shortly after.

If you would like to receive client payments immediately, you can also collect money through your own eProcessing Network. Select "eProcessing Network" as your credit card processor, enter in your ePN Account Number and Secure Code and click "Update". Now, when a client makes a payment through Unum, it will go through your ePN and be deposited into your account. However, any processing fees will not be included when the client makes a payment.

From this box, you can also allow partial payments. By default, partial payments are not accepted. If you select a Minimum Charge Amount, then when a client has a balance to pay, they can elect to pay any amount between that minimum charge and the total balance.

If you would not like to collect any payment through Unum, select "None" as the credit card processor. You will still be able to record payments in Unum, but a credit card will not be able to be charged.

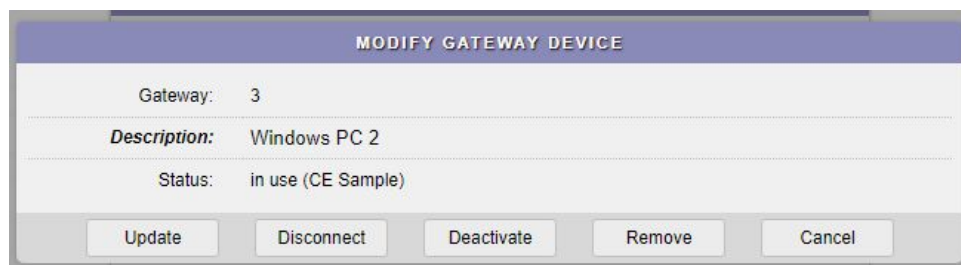
Gateway devices



GATEWAY ▼	DEVICE	STATUS
1	Windows PC	offline
2	SM-G950U	online
3	Windows PC 2	in use (CE Sample)

Add Refresh Close

This option will show you all Gateway devices registered to your company. Gateways - and how to register one - are discussed in the [Gateway Devices](#) infographic. If you would like to change a Gateway, click on the Gateway in the table. You can change the description (shown as Device in the table), deactivate a Gateway, or remove a Gateway. Deactivating will log you out of the device and require a password when you try to use it the next time. This can be undone by clicking on the Gateway in the table again and clicking “Reactivate”. Finally, the status shows if the device is in use. If it is, you can click on it and click “Disconnect” to remove the client from the device.



Gateway:	3
Description:	Windows PC 2
Status:	in use (CE Sample)
Update Disconnect Deactivate Remove Cancel	