

Plan Sponsor Services - Group Benefits Administration at a glance

Welcome to our Group Benefits Administration website. Here's a quick reference to accessing virtually all the functions you need to administer your member records from the welcome page.

ADMINISTER MEMBER RECORDS – EASILY

A Group Benefits

- Select **Group Benefits** to return to the Welcome page from anywhere in the website
- Easy access and quick links to the member functions (i.e. view, add, update etc.) as well as Guides and Information items

B Members

- View, add or update a member's coverage information
- Reinstate a terminated member's coverage
- Terminate a member
- Update many salaries, to change salaries for more than one member at a time
- Use Special Requests to handle functions that need special attention

C Coverage summary & Drug card – at your fingertips!

Within the **View a Member** screen, a sponsor can view/print member coverage and drug card (if included within medical plan)

BILLING STATEMENTS, ADMINISTRATIVE REPORTS AND INFORMATION – WHEN YOU NEED THEM!

D Billing & Reports

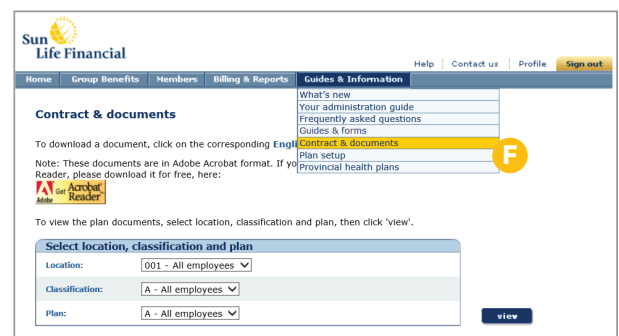
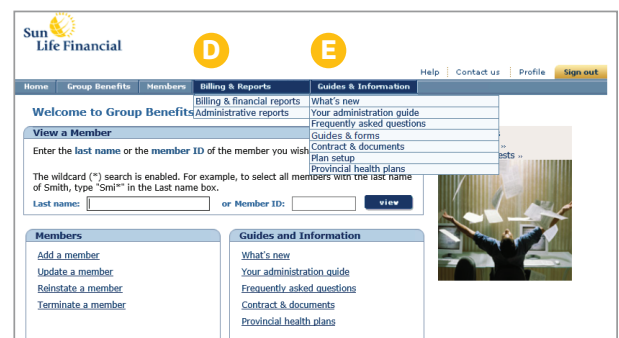
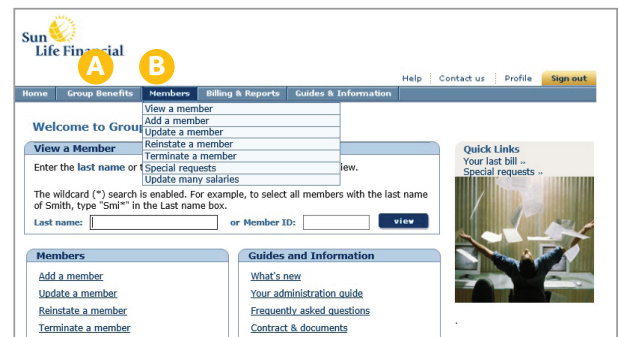
- View and print billing statements for the last six months
- Generate a wide range of administrative reports, including Coverage Summary, using our standard templates

E Guides & Information

- See What's new with upgrades to our website
- If you have a question about using Group Benefits Administration to administer your group benefits plan, our Administration Guide and Frequently asked questions can help
- Download administration guides and forms
- Download Contract and plan documents including Benefit booklets
- Use Plan setup to view plan design details, including rate information
- Get an outline of what each provincial health plan covers

F Contract & documents - at your fingertips

- View Contract and Focus Updates
- Select location class and plan to view plan specific documents (i.e. Benefit booklet, summary)



ONBOARDING MEMBERS AS EASY AS 1-2-3

For members who have completed their enrolment forms and have been added to our Sun Life system, as a Plan Sponsor, you will need to provide these new members with the following:

1. Welcome Guide (also available on the Guides & forms page)

Guides the member to register online at mysunlife.ca and provides details on the Sun Life mobile app. Once registered, the member can:

- Access their drug card
- View their benefit booklet
- Access e-claim features

2. Coverage Summary (a report for all members is available through Administrative Reports or individual reports are available through View a Member)

- Provides a summary of benefit coverage and beneficiary nominations for each member

3. Optional: Benefit summary (available within the Contracts & documents page)

- Provides an high level overview of the benefit booklet

For new hires who have not yet completed an enrolment form, as a Plan Sponsor, you will need to provide the new hire with:

1. Enrolment Guide (available on the Contracts & documents page)

- Guides the new hire on completing the enrolment form (also included within the guide) and includes a benefit summary

2. Add the member to the Sun Life system using the Plan Sponsor Services website

3. Provide the new member with their Welcome Guide and Coverage Summary

ACCESSING PLAN SPONSOR SERVICES

1. Go to www.sunlife.ca/sponsor.
2. On the Sign in page, enter your access ID and password that we e-mail to you. Select **Submit**. The Plan Sponsor Services Home page appears.
3. Select **Group Benefits Administration** on the Plan Sponsor Services Home page to go to the Group Benefits Administration Welcome page.

Signing in for the first time

The first time you sign in, you'll need to:

- change your password immediately
- provide your date of birth
- choose one verification question from the list provided and enter your answer
- add or update your current e-mail address

Important: Do not share your password with anyone. Your password is a key element of our Web security to protect you and your plan members.

If you forget your password

If you forget your password, you can reset it from the Sign in page or call your Sun Life administrative contact for assistance.

1. On the Sign in page, select **Forgot your password?**
2. Enter the date of birth you previously provided and answer correctly the verification question. This lets us confirm that you are a registered user.
3. Follow the instructions to create a password

Signing out

Important: When you finish your session, remember to sign out to protect your data. Just select the **Sign out** button at the right end of the blue navigation bar.

GETTING HELP

- For help with your online transactions and for general questions about benefits administration, select **Guides for group benefits administrators** on the Group Benefits Administration Home page. Or, select **Guides & Information**, then **Your administration guide** on the blue navigation bar from any screen to get a quick summary.
- If you have any questions that our guides can't answer, contact your Client Service Administrator and we'll be glad to help.

Life's brighter under the sun

Group Benefits are provided by Sun Life Assurance Company of Canada, a member of the Sun Life group of companies. CA-8815-E 03-20 ds-mp

