

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

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) as well as Resource items

Members

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

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!

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

Resources

- Forms includes a link to the public SunAdvantage forms page where you can download administration guides and forms
- Download Contract and plan documents including Benefit booklets and Focus Updates. Select location, class and plan to view specific documents (like Benefit booklet, Summary, etc.)
- Use Plan setup to view plan design details, including rate information
- Get an outline of what each provincial health plan covers

Onboarding members

You'll need to provide new members, who have completed their enrolment forms and who you have added to our Sun Life system, with the following:

1. **Welcome Guide** (available on the Resources - Contract and documents 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 and travel cards
 - View their benefit booklet
 - Access e-claim features
2. **Coverage Summary**
 - A report for all members is available through Administrative Reports
 - 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 on the Resources - Contract and documents page)
 - Provides a high level overview of the benefit booklet

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 email 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 email 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 Client Service Specialist for assistance

1. On the Sign in page, select **Forgot your password?**
2. Enter the date of birth you previously provided and correctly answer the verification question. This lets us confirm that you're 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.
- If you have any questions that our guides can't answer, contact your Client Service Specialist and we'll be glad to help.