



# Sponsor Administration end-to-end user guide.



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## Step 1

### Set up a pre-authorized withdrawal (PAW).

Set up PAW to process your contributions automatically overnight each time you submit them. To do this, you just need to connect your bank account to your profile. This is a one-time setup.

You need to do this at least 30 minutes before submitting contributions or the payment method will default to cheque.

[Guide](#)

[Video](#)

## Step 2

### Assign member ID.

Assign a unique member ID (member identification number) to each new employee. You can do it yourself or use our ID Generator tool\*.

**Important:**

- Use the method you outlined on your application.
- If you assign member IDs yourself, make sure they don't contain any part of the member's Social Insurance Number (SIN).

[Guide](#)

## Step 3

### Add a member.

Use **Enrol a member** feature to input demographic information of the new hire or an existing eligible member, who is not yet enrolled.

If you have a group of employees to enrol you can use **Demographic File Upload** feature.

[Video](#)

[Guide](#)

[Video](#)

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#### Step 4

##### Member completes enrolment online.

Member receives **Enrol email**.

They [register](#) on [mysunlife.ca](#) and complete **Enrol**.

Member receives a **Welcome Letter**.

[Video](#)

[Guide](#)

#### Step 5

##### Online enrolment report.

You have access to an **online enrolment report**. It shows any of your plan members who've enrolled online.

**IMPORTANT:** Be sure to check this report regularly to ensure members have completed enrolment, before you start payroll deductions.

[Video](#)

#### Step 6

##### Payroll instruction.

Follow up with the member to get their **payroll instruction**.

You can use the [payroll deduction form](#) enclosed on the right.

[Form](#)

#### Step 7

##### You're all set!

Submit contributions to Sun Life according to frequency selected in your application.

Use the method available to you:

- Excel contributions
- Keyed contributions

Make sure to use member IDs (assigned or obtained through the ID Generator tool in Step 1) on your contribution sheets.

*If you requested bulk contributions through your payroll provider, please wait for the set up confirmation before submitting your first contributions.*

[Video](#)

[Excel guide](#)

[Keyed guide](#)

##### What's next for members?

Once the contributions are deposited, members can log into the member website ([mysunlife.ca](#)) to view their contribution information and balances.

If at any time you need to edit member information (ex. employment status or address change) you can use **View or Update member information feature**.

[Guide](#)

[Video](#)

# Contact list

## Sun Life Directory for plan sponsors

|   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>Submit an Inquiry to ask a question or notify us of an issue</li> </ul>  | Plan Sponsor Services website<br>( <a href="https://sunlife.ca/sponsor">sunlife.ca/sponsor</a> )<br>> <b>Request Centre</b>  | <a href="#">Sponsor Request Centre Guide (PDF)</a>                                |
| <ul style="list-style-type: none"> <li>Change in Employee Address</li> <li>Change Employment Status (e.g. terminations)</li> </ul>  | Plan Sponsor Services website<br>( <a href="https://sunlife.ca/sponsor">sunlife.ca/sponsor</a> )<br>> Administration<br>> Manage Members<br>> <b>View or Edit Member Information</b> | <a href="#">View or Update member information feature Guide (PDF) &amp; Video</a> |
| <ul style="list-style-type: none"> <li>General Inquiries</li> <li>Contributions</li> <li>Withdrawals</li> </ul>   | Client Services Team<br>> 1-833-292-5400<br>> <a href="mailto:Sunnet25@sunlife.com">Sunnet25@sunlife.com</a>   | Monday to Friday<br>8:30 a.m. to 4:30 p.m. ET                                     |
| <ul style="list-style-type: none"> <li>Plan Sponsor Website Support</li> <li>Plan Level Changes</li> <li>Amendments</li> <li>Product Add</li> <li>Legislation Update</li> </ul> | Sponsor Business Centre<br>> 1-800-387-7262<br>> <a href="mailto:SponsorBusinessCentre@sunlife.com">SponsorBusinessCentre@sunlife.com</a>  | Monday to Friday<br>8:30 a.m. to 4:30 p.m. ET                                     |

## Sun Life Directory for plan members

|  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>Contact Information for Plan Members</li> </ul> | Client Care Centre<br>> 1-877-SUN LIFE<br>Plan Member website<br>> <a href="https://mysunlife.ca">mysunlife.ca</a> | Monday to Friday<br>8 a.m. to 8 p.m. ET |
|--|--|---|

