






# Digital enrolment for you and your employees. End-to-end user guide.

|   |  | Click for additional resources               |
|---|--|--|
| <b>Step 1</b><br>                      | <b>Add a member.</b><br><br>Use <b>Enrol a member</b> feature to input demographic information of the new hire or an existing eligible member, who is not yet enrolled.<br><br>If you have a group of employees to enrol you can use <b>Demographic File Upload</b> feature.                             | <b>Video Guide</b><br><br><b>Video Guide</b> |
| <b>Step 2</b><br>                      | <b>Member completes enrolment online.</b><br><br>Member receives <b>Enrol email</b> .<br><br>They <b>register</b> on <b>mysunlife.ca</b> and complete <b>Enrol</b> .<br><br>Member receives a <b>Welcome Letter</b> .  | <b>Video Guide</b>                           |
| <b>Step 3</b><br>                    | <b>Online enrolment report.</b><br><br>You have access to an <b>online enrolment report</b> . It shows any of your plan members who've enrolled online.<br><br><b>IMPORTANT:</b> Be sure to check this report regularly to ensure members have completed enrolment, before you start payroll deductions. | <b>Video</b>                                 |
| <b>Step 4</b><br>                    | <b>Payroll instruction.</b><br><br>Follow up with the member to get their <b>payroll instruction</b> .   |  |
| <b>Step 5</b><br>                    | <b>You're all set!</b><br><br>Start payroll deductions and <b>submit contributions</b> to Sun Life.  | <b>Video Guide</b>                           |
| <b>If at any time you need to edit member information you can use <b>View or Update Member Information</b> feature.</b> |  | <b>Video Guide</b>                           |