Sun Life

Plan Sponsor - Group Benefits Administration Guide

For clients with the Digital Member Enrolment Tool

November 2024

Introduction to Plan Sponsor Services

Our **Plan Sponsor Services** website accessed through **Group Benefits Administration** gives you access to manage your plan online.

With our Digital Member Enrolment tool you can

- Enable plan members to enroll digitally or complete enrolment on their behalf.
- Update, terminate or reinstate plan member's coverage.
- Access to administrative reports.
- View, download and print monthly bills, benefit booklets and member coverage cards.

This resource accompanies the:

- Web-Based Admin Guide
- Group benefits contract and
- Benefit booklet.

This guide is focused on the Digital Member Enrolment Tool. The complete Plan Administration guide is available in the guide **administer your benefits online through our website**. This is the web-based admin guide found on the Guides for Group Benefits Administrator page.

Note: This guide does not override the terms and provisions of your group benefits contract. You're responsible for administering your plan according to the terms of your contract. When communicating with us, you should always include your company name and contract number. If you're writing about a plan member, be sure to include the plan member's full name and Member ID.

Table of contents

Roles and responsibilities

As a plan administrator, it's up to you to maintain your plan member records directly via your Plan Sponsor Site (PSS) on a timely basis. We use this information to prepare your monthly premium bill.

As a Sponsor, you are responsible for

Updating the Sun Life Plan Sponsor Services website immediately when:

- An employee is hired or re-hired.
- Submitting a Special request to waive the waiting period.
- An employee's employment is terminated.
- An employee has a salary change, if the plan has salary based benefits.

Or opening a life event when:

- An employee has a marital status change, or is living in a common-law relationship or dependant change (ie. birth of child).
- An employee loses coverage through a spouse's Health/Dental plan.
- Supporting employees during enrolment.
- Using the **Member Enrolment Event Status** report to check if members have completed their enrolment and follow-up if they have not done so.

This will help ensure we have up to date information on plan members and their dependents that will allow us to pay claims. If Sun Life Plan Sponsor Services website is not updated by the plan administrator within 31 days, a Health Statement may be required.

Protecting members' privacy

All of our representatives must comply with our code of conduct. We're committed to protecting your plan members' personal information. Our global privacy commitment specifies a common and consistent set of principles that all Sun Life companies follow.

Our privacy policy and code for Canada is on our website at **sunlife.ca**. It includes obligations related to the collection, use and disclosure of personal information. Unless we have the plan member's consent, **we don't disclose** personal plan member information to third parties. Some examples are:

- Plan sponsors
- Doctors
- Workplace medical or health centre staff

Even when we have consent, we'll disclose information only in some situations. As the administrator of your benefits plan, you may need to handle documents that contain personal information. Please keep up that same level of respect for the privacy of all plan member data.

Getting started

When you receive your Plan Sponsor Access ID and password, go to **sunlife.ca/sponsor**.
Enter Access ID and password and select **Submit**.

The first time you use our website, we'll ask you to:

- change your password immediately – for security reasons
- enter your date of birth
- choose a verification question from the list provided and enter an answer that only you know.

Do not share your Access ID or password with anyone. They're key elements of our web security, created to protect you and your plan members' information.

If you forget or lose your Access ID or password in the future, you can reset it online by selecting Forgot your Access ID or password.

You can access a variety of plan member and administration options from our Welcome to Group Benefits Administration page.

Select **Group Benefits Administration** to access online administration.

Add a member

How to add a member

Step 1 Select **Add a member** from the **Members** menu on the navigation bar.

Step 2 Enter the member's personal information, once completed select Continue.

- **Member ID:** You must assign a unique member ID to each employee
- **Payroll ID:** Is not a required field
- **Dependant status:** defaults to family
- **Tax exempt:** to be used if employee is first nations and resides on a reserve.
- * **Requested Enrolment Date:** If Requested Enrolment date is editable, use today's date

Step 3 Enter the member's **salary** and **address information, email address.** Once the email address has been added, check the **Send email notification box**. This will ensure the Enrolment email will be deployed once the member has been added in the system. This can take 24-48 hrs.

Step 4 **Scroll to the bottom of the page** and select **submit** to finish the process of adding your new member. The member's coverage summary appears, check it to ensure you entered all the information correctly.

Warning: The beneficiary nomination section in the Plan Sponsor Site is not legally binding unless you have the paper form. The plan member will be asked to fill in beneficiary information during the enrolment process in the Digital Member Enrolment tool, it is important that they do so.

Manage member access

Step 1 Hover on the **Members** tab in the navigation bar, select **Manage member access.**

Step 2 Search for employee: Note: The wildcard (*) is enabled. For example, to select all members with last name smith, type "Smi*" in the last name box.

Step 3 In the Event Type field select **New Hire.**

Step 4 Confirm effective date matches benefit effective date. Start date will default to current date, this can be changed if needed. Update expiry date (the recommended is an additional 7 days to complete enrolment).

Member view

This option lets you see what your member sees. This will allow you to support your member through the enrolment process if required.

Step 1 Select **Member view** from the **Members** menu on the navigation bar.

Step 2 Enter the member's last name, or the member's ID number.

Note: You can use a "wildcard" to help you search for a member. For example, to search for the last name Smith, type Smi*. The system will display all last name that start with Smi Select **Search**.

Step 3 Choose the member record you need to view.

It may take the little bit of time, but the **Welcome to group benefits enrolment** page will appear.

Resend enrolment email or reopening enrolment window

Here you can re-open a New Hire event if the member has missed their enrolment window which includes redeploying the new hire enrolment email. You can also open a life event enrolment window for members to update their dependant information and benefits.

Member Changes(Life event changes) must be submitted within 31 days of its occurrence.

Step 1 Hover on the **Members** tab in the navigation bar, select **Manage member access.**

Step 2 Search for the member by the **Effective date** of the change (For New Hire event, use the effective date of the benefits. For Life Event, use the date of the event) and the member's **last name**, or the **member's ID number**.

Note: You can use a "wildcard" to help you search for a member. For example, to search for the last name Smith, type Smi*. The system will display all last name that start with Smi Select **Search**.

Step 3 Choose the member record.

Step 4 If making a change to an existing event, select it from the Open Events section and change dates if needed, otherwise go to step 5.

Step 5 From the Manage Member Events section

- **Transaction Type:** Select Enable Enrolment
- **Event Type:** Select from the drop list
- **Effective Date of the event:** enter the effective date, for new hire it should be the member's earliest benefit effective date
- **Start Date:** is the date you wish to open access to online enrolment the default is today's date
- **Expiry Date:** is the date you wish to close access to online enrolment
- **Send email notification:** Box is checked off by default. This will deploy the enrolment email. Note: if the field is not enabled, you will need to update the member record to add their email address.
- Select **submit**. The confirmation page appears

To prevent your member from opening their own event (i.e., when on leave)

Step 1 Hover on the **Members** tab in the navigation bar, select **Manage member access.**

Step 2 Search for the member by the **Effective date** of the change (For Life Event, use the date of the event) and the member's **last name**, or the **member's ID number**.

Note: You can use a "wildcard" to help you search for a member. For example, to search for the last name Smith, type Smi*. The system will display all last name that start with Smi Select **Search**.

Step 3 Choose the member record.

- **Transaction Type:** Select Disable Enrolment
- **Disable Enrolment Start Date:** Current date appears, change it if required
- **Disable Enrolment Expiry Date:** Enter date the member should be able to manage their own life events (i.e. return to work date etc.)
- **Disable Enrolment Reason:** Select option from drop list
- Select submit, confirmation page appears

To cancel an existing event

Step 1 Hover on the **Members** tab in the navigation bar, select **Manage member access.**

Step 2 Search for the member by the **Effective date** of the change (For New Hire event, use the effective date of the benefits. For Life Event, use the date of the event) and the member's **last name**, or the **member's ID number**.

Note: You can use a "wildcard" to help you search for a member. For example, to search for the last name Smith, type Smi*. The system will display all last name that start with Smi Select **Search**.

Step 3 Choose the member record.

Step 4 Select **Terminate**.

Step 5 Select **Ok** to message Are you sure you want to terminate this event?

Confirmation page appears.

Member Enrolment Status Report

As a Member Enrolment client, you have access to the **Member Enrolment Event Status Report**

The report provides a list of members with New Hire or Life events created. You can schedule the report to run whenever you need to.

Reminder: You are responsible for using the **Member Enrolment Event Status** report to check if members have completed their enrolment and follow-up if they have not done so. This will help ensure we have up to date information on plan members and their dependents that will allow us to pay claims and prepare your monthly premium bill.

How to pull the report

Step 1 Select Member Enrolment Event Status Report in the Quick Link section on the home page.

Step 2 The required fields are prefilled, you can make adjustments if needed.

Step 3 The **thank you** window will populate. Click on the **view report** link.

Step 4 Next the **Administrative Reports – View** will populate. Toward the bottom of the list, you will see Member Enrolment Status Report. Select the **All Active Members** button.

Note: In the drop down list, the reports will be listed by time and will either say scheduled if its still running or available.

Then click on **View**.

For a list of all Administrative reports available, refer to the **administer your benefits online** through our website - Web-based admin guide.

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. OP1113 11-24 lj-na