Plan Sponsor - Group Benefits Administration Guide

For clients with Member Enrolment Tool

September 2023

Introduction to Plan Sponsor Services

Welcome to Sun Life's Plan Sponsor Services (PSS) –
Group Benefits Administration (GBA), our customer-driven, web-based tool.

When the Member Enrolment (ME) Tool is enabled, the following functions are available to the Sponsor in the GBA Tool:

- Member View
- Manage member access
- Administrative Report - Member Enrolment Event Status Report
- Create your own report

This resource accompanies the:

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

With our Group benefits Administration Tool you can also:

- Enrol plan members; update their records.
- Terminate or reinstate plan members' coverage.
- View details of your benefits plan coverage.
- Download and print a wide range of standard forms for benefits administration.
- View and print a monthly premium statement.
- View, print or save plan members' documents including coverage summaries.
- Create a variety of standard and custom (if applicable) administrative reports.
- Download contract, booklets, and plan document (if applicable).

Details related to above GBA functions are 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.

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Flex/Standard Plans

Flex Plans

Roles and responsibilities

As a GBA plan administrator, it's up to you to maintain your plan member records directly on our administration system on a timely basis. We use this information to prepare your monthly premium bill. It's up to you and your members as a member enrolment tool user to update as necessary.

As a Sponsor, when the ME Tool is enabled, you are responsible for

- Day-to-day plan administration, including member eligibility.
- 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.
- Using the **List of Members with Pending Benefits** report to follow up on members that have not submitted a health Statement

This will help ensure we have up to date information on plan members and their dependents that will allow us to pay claims.

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

To use our Plan Sponsor Services website, you'll need:

- a plan sponsor Access ID and password
- this Administration Guide, your group benefits contract and booklet, your Access ID and Password

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 password in the future, you can reset it online by selecting Forgot your Access ID. Then, enter the date of birth you first provided, and answer the identity verification question correctly. This information will allow the system to validate you as a registered user.

If you haven't already done so, be sure to submit a current and valid email address. When done, you'll receive an email from Sun Life. This will confirm that your password was re-set. Please follow the instructions in that email, to complete the validation process.

When you enter your plan sponsor Access ID and password, the **Plan Sponsor Services** home page will appear.

From here, you can:

- Select an application.
- Read messages about relevant topics.
- Select links to useful information.

Select **Group Benefits Administration** to access online administration >Select **Group Benefits** from the menu at any time to return to the Welcome page >When you are finished your session, select **Sign Out**. Signing out helps to ensure your data is protected.

You can access a variety of plan member and administration options from our Welcome to Group Benefits Administration page. The options available to you may vary, depending on your administrator access and plan design.

Add a member

How to add a member

Step 1 Select **Add a member** from the **Members** menu on the navigation bar, or from the **Group Benefits Welcome page**.

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

Step 3 Enter the member's **salary** and **address information**.

Note: Ensure to include member's email address, it makes their registration process easier and will allow us to send the Welcome / enrolment email.

Step 4 **For members within plans that do not have flex credits:** 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.

For members within plans that have flex credits: Select continue, enter the flex credit allocation amount, then 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.

For additional details on how to add a member refer to the **administer your benefits** guide online through our website - on the Web-based admin guide.

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.

To return to GBA from the ME tool select Home.

Manage member access

This option lets you add or update a plan member's New Hire and or Life event to the enrolment tool. It also allows you to prevent your member from opening up their own events.

Step 1 Select **Manage member access** from the **Members** menu on the navigation bar.

Step 2 Enter the **Effective 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 you need to make changes or add an event to.

Step 4 If making a change to an existing event, select it from the Open Events section, 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
- **Expiry Date:** is the date you wish to close access to online enrolment
- **Send email notification:** Select the checkbox option if you want your member to receive an 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

Manage member access

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

Execute steps 1 to 3

Step 4 From the Manage Member Events section

- **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 Terminate an existing event

Execute steps 1 to 4

Step 5 Select **Terminate**,

Step 6 Select **Ok** to message Are you sure you want to terminate this event?

Confirmation page appears

Administrative reports

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 schedule the report

Step 1	Select Administrative reports from the Billing & Reports menu.
Step 2	Select Schedule a report.
Step 3	Select whether you need the report that day or the next day.
Step 4	Select the report format Excel.
Step 5	Select the **Member Enrollment Event Status Report**. Enter date range for the events to report on.
Step 6	Select Submit to run the report.

How to retrieve, print and save administrative reports

Step 1	Select Administrative reports from the Billing & Reports menu.
Step 2	Select View a scheduled report.
Step 3	Select your report and click View. The report appears in the format you selected.
Step 4	Save or print the report using your usual process.

Some large reports may be compressed to reduce the file size. These files can be accessed using popular compression utilities, such as WinZip.

Reminder to use the **List of Members with Pending Benefits** report to follow up on members that have not submitted a Health Statement

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

For clients with flex credits:

- ignore column titled “**Email Sent?**” as it is not applicable to your group
- the “**Enrolment Report**” is available to you during the enrolment period.

Create your own report

For Clients who have flex credits, this section provides a list of additional fields available to you when the ME Tool is enabled:

Basic Member Information section

Fields to support the Electronic Non-smoker Declaration functionality:

- Member Non-Smoker Declaration
- Member Non-Smoker Declaration Date

Stopping members from accessing the Flex ME tool:

- Stop Enrol Start Date
- Stop Enrol Expiry Date
- Stop Enrol Reason

Benefit Information section

Fields to support the functionality of pending benefits due to an option change:

- Option Change Pending Status
- Option Change Effective Date
- From Option
- To Option
- Main Funding Pool Allocation
- Funding Pool 5-10 Allocation

Fields to support the Comparable Coverage Electronic Declaration:

- Comparable Cov. Declared For
- Declared By
- Declared Province
- Date of Declaration

Field to support modular plan setup:

- Modular Plan Name

Dependent Information section

Fields have been added to the report:

- Disabled Child

Fields to support the Electronic Non-smoker Declaration functionality:

- Spouse Non-Smoker Declaration
- Spouse Non-Smoker Declaration Date

Create your own report

Events section

Fields to support Life and New Hire events:

- Event Type
- Event Initiator
- Event Initiate Date
- Event Effective Date
- Event Start Date
- Event Expiry Date
- Event Commit Date

Flex & Taxable Benefit Information Section:

Fields to support flex credit funding

- Main Funding Pool Allotment
- Funding Pool 5-10 Allotment
- Unused Main Funding Pool
- Unused Funding Pool 5-10
- Flex Effective Date

Data extract – Field definitions

Section name	Description
Contract Number	Benefit policy number
Location Code	Member's location
Location Name	Name of location
Plan Code	Member's plan
Plan Name	Name of member's plan
Class Code	Member's class
Class Name	Name of member's class
Reason	Reason the member's coverage ended: • Not Selected • Terminated • Deceased • Entered In Error
Flex Code	Three-digit alphanumeric field – benefit option selected or available to the member – mostly required on plans with more than one option.

For a list of all fields available, refer to the **administer your benefits online** through our website - Web-based admin guide for more details on options available to you.

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