

Welcome to the Disability online tool

Your one-stop online portal for the management
of your disability benefits.



With our disability online tool you can

- submit your documents to Sun Life using a secure platform – no need to fax, email or mail documents
- access detailed claims information at your convenience in a self-serve platform, including:
 - detailed case notes to stay up-to-date with member absences
 - expected return-to-work date
 - benefit payment details
 - new claims statements that are received and outstanding
- run reports to help manage your disability benefits

Here's an overview on how to use the tool to find the information you need, exactly when you need it.

Access Management

Users will need different levels of access to submit documents, view basic details and view case summary notes. There are three types of access available:

1. Basic view access allows you to search and view basic claims information (i.e., if the claim is approved or closed), when the next case management action is planned, and if we have received all the claims forms we need. This access also allows you to run reports.
2. Second type of access involves detailed case summaries and notes describing claims actions plans and other information about a plan member's absence.
3. Third type of access involves the ability to submit claims electronically without needing to send us any paper documents by mail or fax.

Users can receive all three types of access or they can only have access to the items they need.

If you find that you don't have the access you need, or if you want to change your level of access, contact your Sun Life group benefits representative for help.

How to submit claims online

The process for submitting claim documents is the same for STD, LTD or Salary Continuance benefits.

- A** Select the **Claim Submission** tab on the top navigation bar. From the drop-down menu, you can select **Standard claim forms** or **SunAdvantage claim forms**. You can complete the form online – there's no need to print out and scan for upload.
- B** Select **Document upload** from the drop-down menu under **Claims Submission** to upload your completed claims form.

You'll receive a confirmation message once we've received your document.

How to find claim status information

C View claims

The system is updated as soon as a Case Manager enters new information so you can see claim status in real-time.

D Tutorials and information

Click here to access tutorials on how to interpret the data found in the tool.

E Find a member

Click here to find a plan member by name, ID, contract number, billing group, province, benefit (STD, LTD or Salary Continuance), status or resolution status. Once you've found a member, you'll have access to their detailed claims status information.

* If your plan has more than one billing group, you might not have access to view details for all the billing groups. If you don't see a billing group or a set of claims that you need to see, you must request a change to your access needs. Only authorized people can request access changes within your organization. If you need assistance with access requests, contact your Group Benefits representative for help.

F Claim Details

Provide core information about the claim, such as plan sponsor name, contract number, billing group and the benefit (STD, LTD or Salary Continuance).

G Plan member information

Shows important plan member information such as name, member ID, occupation and employment status.

H Claim details

Provides real-time status of a claim or absence. You can also clearly see when a claim will be addressed, which can help you manage absences at your organization. In addition, when a new claim is submitted, you will be able to see which new claim forms we have received and which ones are still outstanding.

I Case management details


Provides an overview of the case, including the Sun Life case manager's name and their upcoming actions. Also includes whether the plan member is currently participating in a rehabilitation program (noted under Health management status) or if a gradual return to work program is expected.

J Benefit payment details

View the benefit payment frequency, member's pre-disability earnings and the gross benefit amount to which the member is entitled. You'll also see CPP, Rehab or other payment offset amounts (if any).

K Detailed case summaries & notes

You can request access to view detailed case summaries and notes in addition to the basic claim details described above. You can access up to five previous summaries to track progress on a claim and see next steps. You can also print these details if you need them for your records.



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Claim Details

print

Plan Sponsor: ABC Company Inc.

Contract number: 012345

Billing group: 001

Benefit: LTD

Control number: 011011-12177-00

As of: 22 May 2018 01:23 PM ET

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Plan member information

Member name:	Mike Smith	Member ID:	999999999
Plan member's age:	45	Date of birth:	10 Jun 1966
Gender:	Male	Province of residence:	AB
Occupation:	Labourer	Original hire date:	01 Jan 2011
Employment status:	Employed, job available		

H

Claim details

Claim status:	Approved	Resolution status:	Approved
Plan sponsor statement received:	Yes	Date of disability:	15 Jul 2014
Plan member statement received:	Yes	Duration of absence:	
Attending physician's statement received:	Yes	Duration from 1st payment:	
Last date worked:		Benefit expiry date:	30 Sep 2020
Definition change date		Estimated reserve amounts:	

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Case management details

Case manager:	Peter Smith	Health management status:	
Next activity date:		CPP/QPP status:	
Gradual return to work?	No	GRTW start date:	
GRTW end date:			

J

Benefit payment details

Benefit frequency:	Monthly	Taxable:	Non-taxable benefit
Pre disability earnings:	\$3,468.52	First payment date:	13 Jan 2015
Current gross benefit:	\$1,734.26	Member last paid to:	31 Dec 2017
CPP/QPP off-set amounts:		Next scheduled date:	
Rehab offsets:		Payment approved to:	31 Dec 2017
Other offsets:		Anticipated closure date:	01 Jan 2018

K

Notes for plan sponsor

2019-10-01

2019-05-28

2019-05-01

Benefits supported to:

2019-10-01

Details

New medical information is required to assess further. Member is capable of participating in alternate work at this time.

Anticipated closure date:

2019-10-01

Anticipated outcome at closure date:

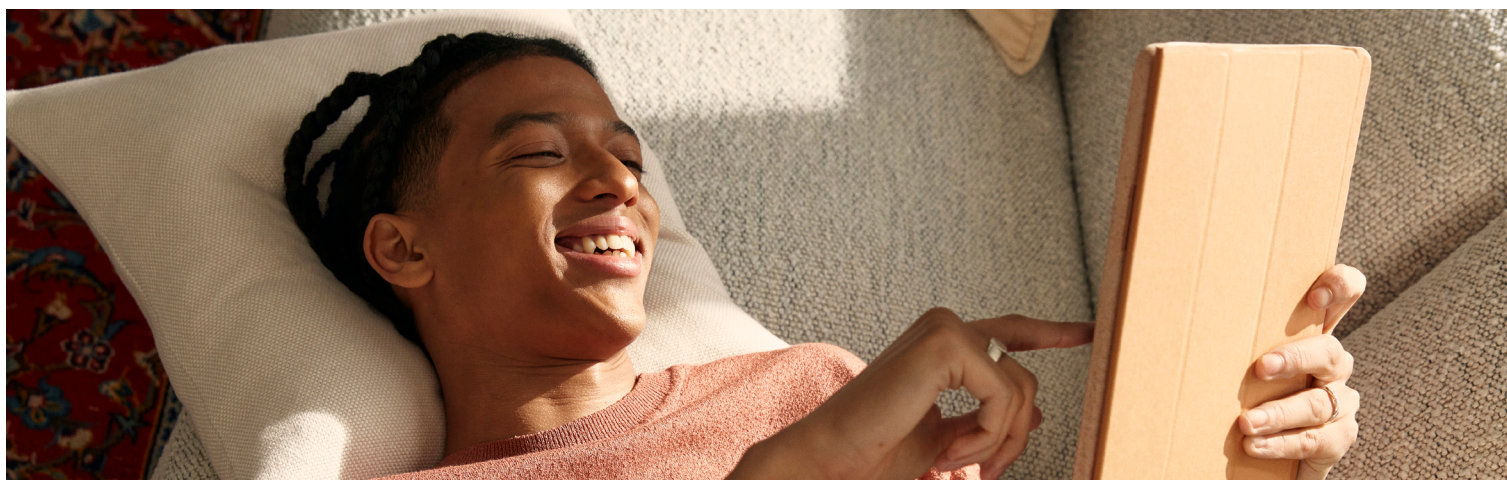
Member should be able to return to alternate duties, such as sedentary work, that aligns with his current level of training, education and experience.

Restrictions and/or limitations:

No lifting greater than 15 lbs
No walking or standing for prolonged periods
No repeated bending, squatting, pushing or pulling

Next steps:

We have informed Mr Smith of our decision to discontinue benefits beyond the change of definition date. We have offered job search assistance to help with the return to work planning. Should Mr. Smith disagree with our decision, he should provide additional medical information to re-assess his claim.



How to create a report

L There are two ways to create a report. Click on **View claims** in the top navigation bar, and then on **Create a report** in the drop-down menu. You can also access **Create a report** in the Quick links box to the right on your home page.

M Create a report for contract(s)

Create your own reports based on the contract(s) numbers you select and your company's disability data.

N Report contents

Customize the report contents to meet your different reporting needs. Select which benefits and claims status to be displayed.

O Report contents

You can further refine the data elements you would like to report on. You can select the billing groups, provinces and languages you want included. For your billing group selection, you must select an individual contract in order to refine by billing group. If you select multiple contracts at once, it will include all billing groups.

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Member search
Create a report
Report inbox

Create a Report

Choose the content and parameters to be included on the report. Select 'Submit' when ready to create the report.
Please note that only two years of history can be retrieved for claims that have a status of resolved or declined.
Specific billing groups can only be selected one contract at a time. Go 'Back' to select a specific contract

Create a report for contract(s)

012345

Save report as: _____

Report contents

Benefit/Status: ☒ LTD ☒ STD ☒ Salary Continuance
☒ Pended ☒ Pended ☐ Not Supported
☒ Active ☒ Active ☒ Supported
☒ Decline ☒ Decline ☒ No Longer Supported
☐ Resolved ☐ Resolved
☐ Litigated ☐ Litigated

Report contents

Billing group(s):

☒ 001 ☒ 002 ☒ 003
☒ 004 ☒ 005

Province of member's residence:

☒ Alberta ☒ Northwest Territories ☒ Quebec
☒ British Columbia ☒ Nova Scotia ☒ Saskatchewan
☒ Manitoba ☒ Nunavut ☒ Yukon
☒ New Brunswick ☒ Ontario ☒ Other
☐ Newfoundland and Labrador ☐ Prince Edward Island

select all **clear all**

How to look up past reports

P There are two ways to look up past reports. Click on **View claims** in the top navigation bar, and then on **Reports inbox** in the drop-down menu. You can also access the **Reports inbox** in the Quick links box to the right on your home page.

Q Report Requests

View reports that you have created within the past 45 days. You can see the title of the report, the date it was created and the status of the report. To open the report, click on the report name. You can customize the view of report requests by selecting a display option and clicking **Update View**. If you need to keep this report for longer than 45 days, click on **Select** to download the report to your computer. If 45 days has passed, you can still re-run the report from this application.

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Member search
Create a report
Report inbox

Disability Online Report Inbox

Reports are saved for 45 days. To save the report for a longer period, please download report and save it to your computer.

If the report is larger than 1MB, it will be zipped. When you download the report, you will receive a dialogue box asking if you would like to open or save it. If you are unable to open the zip file, you can download WinZip.

If the Status shows:

- In Progress - the report is still being generated, select refresh in the drop down menu to see if the status has changed or check later.
- Available - the report is ready to be viewed.
- Unsuccessful - an error has occurred, please re-create the report.

Display Options:
The 10 most recently created reports appear in the list. Select a display option to customize your view.
If you would like to refresh an existing report, click on the Report name in the list.

You can also create a new report.

Report Requests

Report Name	Date report created (YYYY-MM-DD HH:mm)	Report status	Download reports
Status Report	2018-04-23 10:15	Available	select

Select **Update view**

Questions?

R Click **Tutorials and information** on the homepage for more information on how to interpret the data found in Claim or Absence details.

If you have any questions that our guides can't answer, please contact your Sun Life group benefits representative and we'll be glad to help.

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Life's brighter under the sun

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