

PLAN SPONSOR SERVICES

Group Benefits Administration at a glance

You've reached the Plan Sponsor Services Group Benefits Administration website. Here's a quick reference to accessing virtually all the functions you need to administer your member records from the welcome page.



Administer member records – easily

Group Benefits

- Select **Group Benefits** to return to the Welcome page from anywhere in the website.
- Easy access and quick links to the member functions (i.e. view, add, update etc.) as well as Resource items.

Members

- View, add or update a member's coverage information.
- Reinstate a terminated member's coverage.
- Terminate a member.
- Update Enrolment salaries for more than one member at a time.
- Use Special Requests to handle functions that need special attention.

Member Enrolment

- Use Manage member access to update life and new hire events.
- Use Member view to see the same pages as your employee sees in the process.

Billing statements, administrative reports and information – when you need them!

Billing & Reports

- View and print billing statements for the last six months.
- Generate a wide range of administrative reports, including Coverage Summary, using our standard templates.

Resources

- View Contract and Focus Updates. Select location, class and plan view specific documents (i.e. Benefit booklet, summary).
- Use Plan setup to view plan design details, including rate information.
- Get an outline of what each provincial health plan covers.

Onboarding members is easy

On the Plan Sponsor Services site/billing statement, you'll be able to view which members have been set up for enrolment. Be sure to let them know they'll be receiving an email that will guide them through the enrolment process.

Once enrolled, members have access to a copy of their coverage summary. They will then have to use the digital beneficiary tool to add a beneficiary.

For future new hires, as a plan sponsor, you will need to:

Provide the plan member demographic information on the Add a member function screen. This includes all fields on page 1 and the member's email, salary and mailing address on page 2.

They will also receive an email that will guide them through the enrolment process.

Important to remember:

Don't forget to run the member event status report regularly.

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

Accessing Plan Sponsor Services

1. Go to www.sunlife.ca/sponsor.
2. On the Sign in page, enter your access ID and password that we e-mail to you. Select **Submit**. The Plan Sponsor Services Home page appears.
3. Select **Group Benefits Administration** on the Plan Sponsor Services Home page to go to the Group Benefits Administration Welcome page.

Signing in for the first time

The first time you sign in, you'll need to:

- change your password immediately
- provide your date of birth
- choose one verification question from the list provided and enter your answer
- add or update your current e-mail address

Important: Don't share your password with anyone. Your password is a key element of our Web security to protect you and your plan members.

If you forget your password

If you forget your password, you can reset it from the Sign in page or call your Sun Life Client Service Specialist for assistance.

1. On the Sign in page, select **Forgot your password?**
2. Enter the date of birth you previously provided and answer correctly the verification question. This lets us confirm that you are a registered user.
3. Follow the instructions to create a password.

Signing out

Important: When you finish your session, remember to sign out to protect your data. Just select the **Sign out** button at the right end of the blue navigation bar.



Getting help

- For help with your online transactions and for general questions about benefits administration, select **Guides for group benefits administrators** on the Group Benefits Administration Home page.
- If you have any questions that our guides can't answer, contact your Client Service Specialist and we'll be glad to help.

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. CA9795 03-23 ds-cd

