

Sun Life Benefits Explorer

Sample Use Cases



Sun Life Benefits Explorer: Training material

Sample Use Cases

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Sample Use Cases

These Sample Use Cases provide detailed information like customization options for each dashboard, specific filters to select and help you find exactly and easily what you're looking for.

Sample Use Case 1 – Example to calculate the percentage change from this quarter to the same quarter last year

☰ Table of contents

To see the Total Plan Member and Dependent Drug Spend for each quarter, hover over the grey bars shown in the screenshot below:

- 1

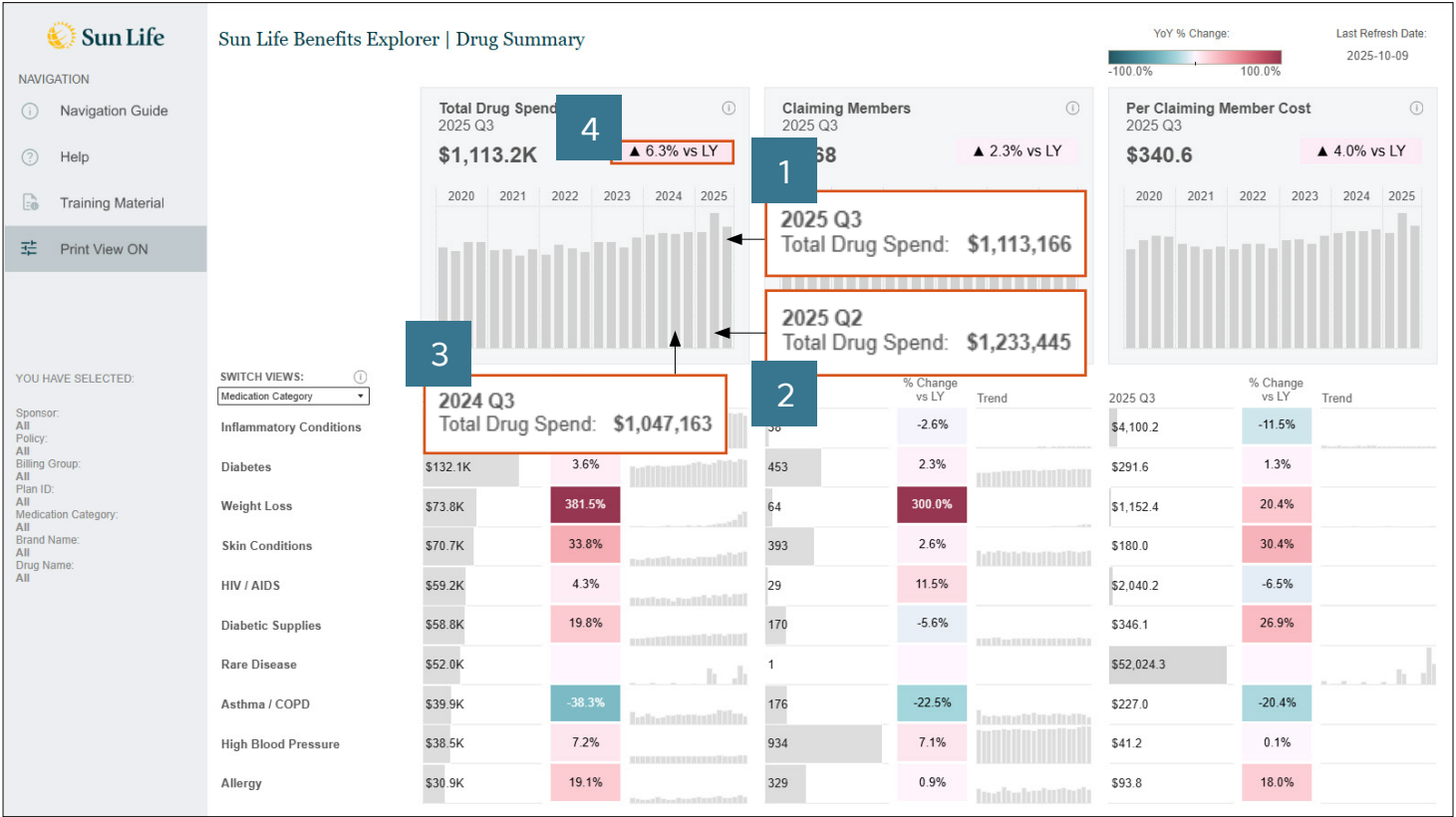
2025 Q3 Total Drug Spend: \$1,113,166
- 2

2025 Q2 Total Drug Spend: \$1,233,445
- 3

2024 Q3 Total Drug Spend: \$1,047,163
- 4

In this example, the % vs LY metric calculates the percentage change comparing 2025 Q3 vs 2024 Q3. This shows an increase of 6.3%

To calculate the percentage change from this quarter to last quarter, i.e., 2025 Q3 vs 2025 Q2, you need to manually calculate the percentage change using 2025 Q3 Total Drug Spend and 2025 Q2 Total Drug Spend. This would be a decrease of **9.8%**, calculated by $((\$1,113,166 / \$1,233,445) - 1) * 100$



We’ve designed dashboards to give you flexible access to the information/data you need. Whether you’re a sponsor, an advisor, or a consultant, you can easily tailor your dashboard view to suit your requirements.

Sponsors

- How can I view information for my organization (ABC Mining Company)?
- How can I view employee-only information?
- How can I view information for specific policies within my organization (ABC Mining Company)?
 - To view one policy (123455):
 - To view multiple policies (123455, 123466, 456799):
- How can I view information for specific Plan ID or Billing Groups?

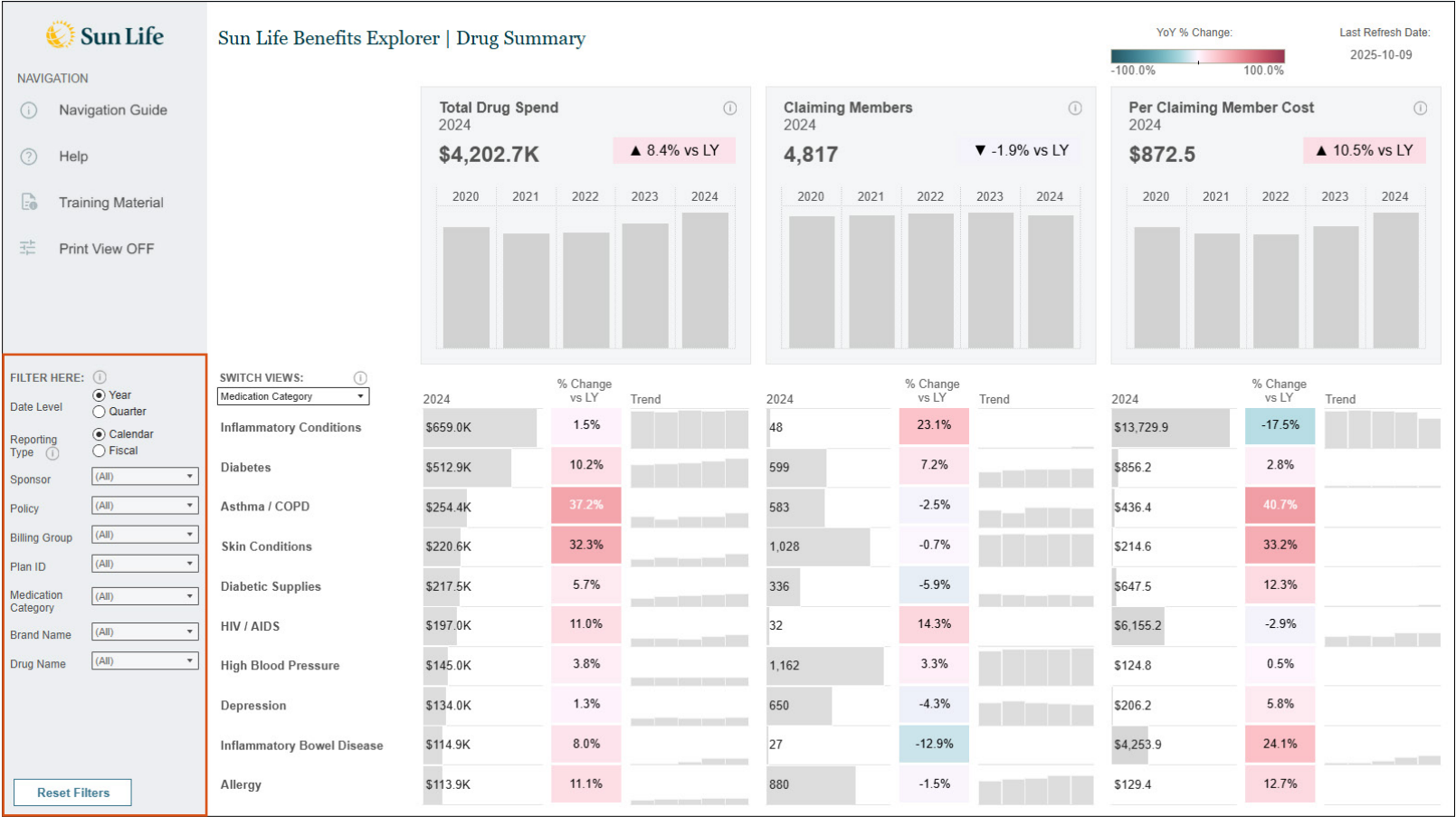
Advisors/Consultants

- How can I view information for my entire block of business?
- How can I view information for specific sponsors?
 - To view a specific sponsor (ABC Mining Company):
 - To view multiple sponsors (ABC Mining Company and ACME Inc.):
- How can I view employee-only information?
- How can I view information for specific policies within ‘ABC Mining Company’ sponsor?
 - To view one policy (123455):
 - To view multiple policies (123455, 123466, 456799):
- How can I view information for specific Plan ID or Billing Groups?

Sample Use Case 2 – Use filters to customize dashboards

The **Filter section** can be found in the lower half of the left-hand pane of the dashboard. Use filters to customize your dashboards.

For Advisors/Consultants, if you want to access information for your entire block of business, including all sponsors, or view data at a more detailed level, [click here](#).



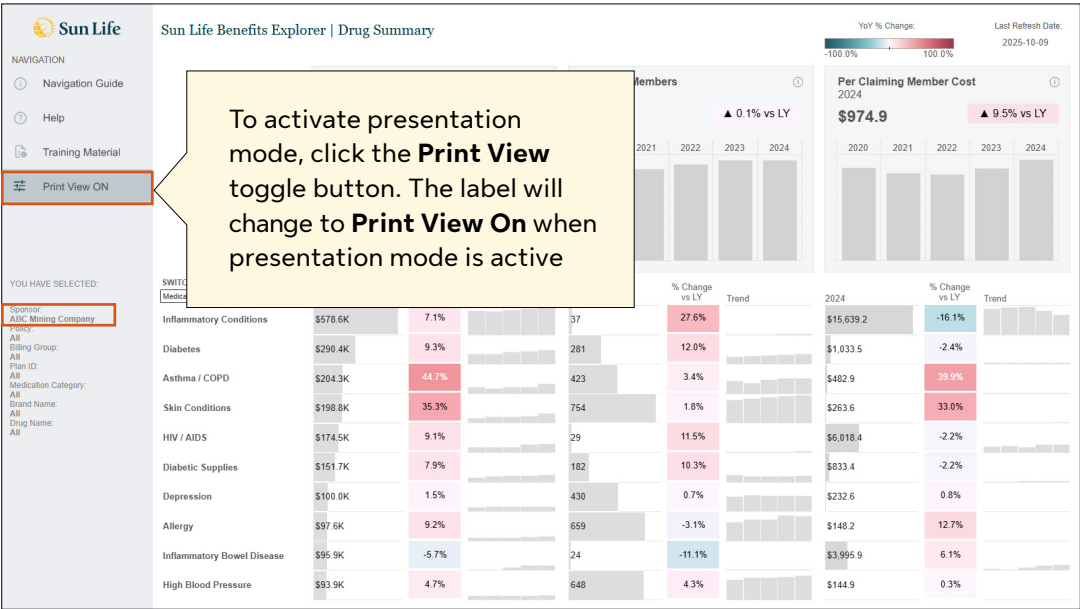
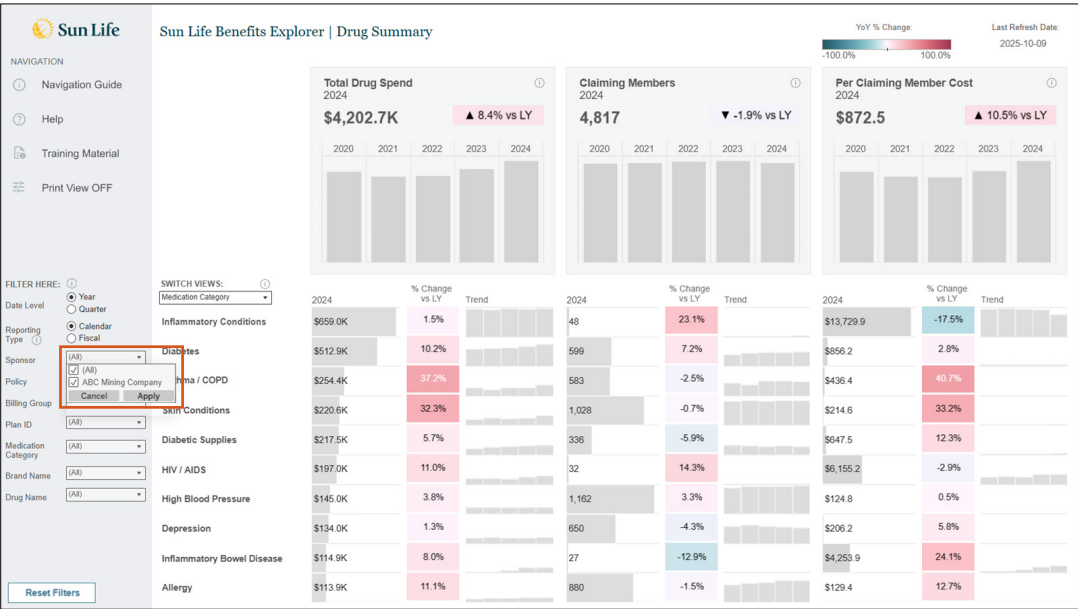
Sample Use Case 2 – Use filters to customize dashboards

Sponsors, customizing dashboards allows you to access information for your organization, or view data at a more detailed level.

How can I view information for my organization (ABC Mining Company)?

When you first open the dashboard, it displays information for your organization. To make sure this is for your organization, ensure no filters are applied.

Your organization will already be selected in the sponsor filter and that is the only organization you will see.

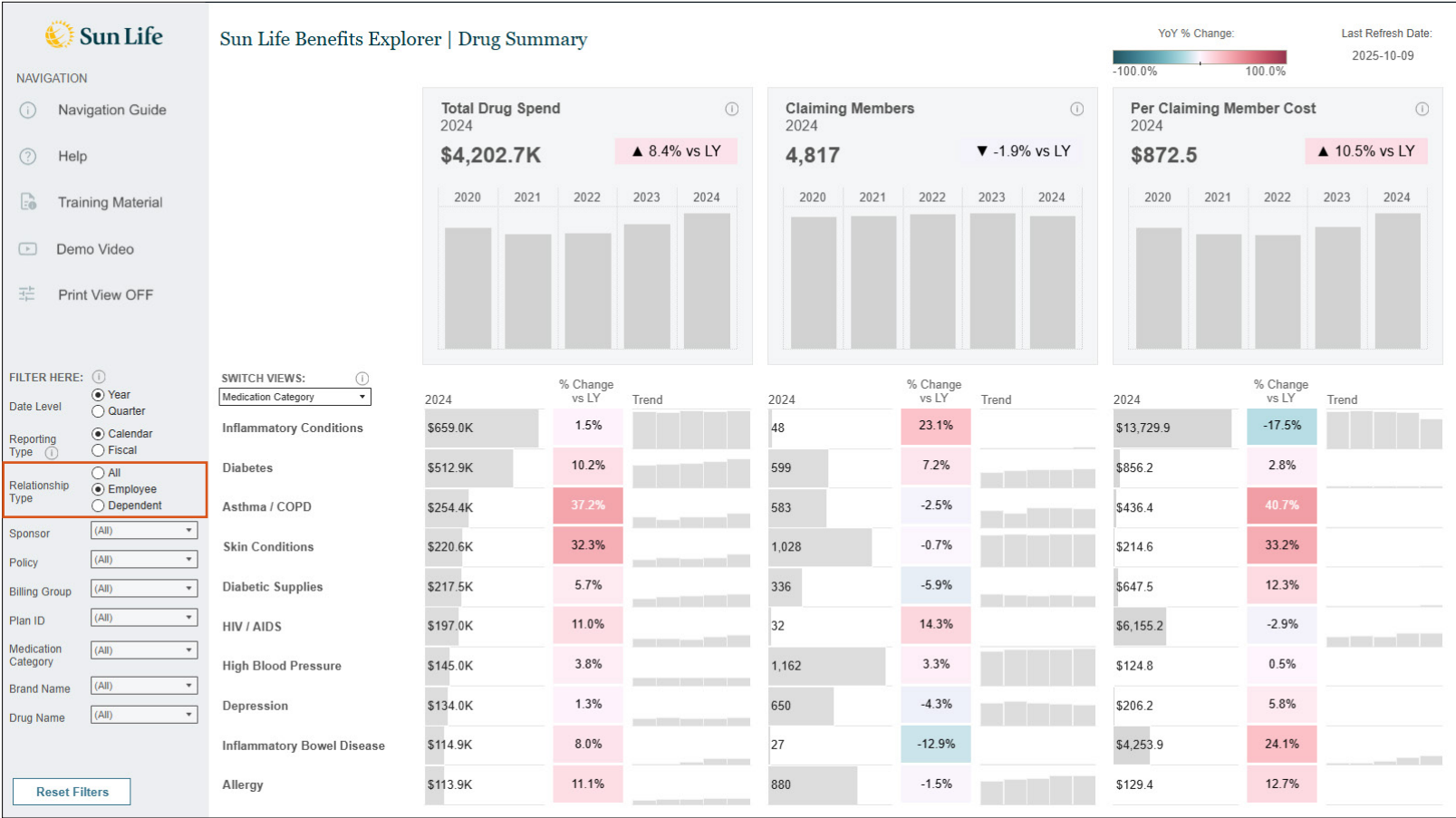


Sample Use Case 2 – Use filters to customize dashboards

How can I view employee-only information?

In the Filter section, customize your data preferences: Choose “Employee” for Relationship Type.

The dashboard will only show information for employees. To view dependent-only information, choose “Dependent” for Relationship Type.



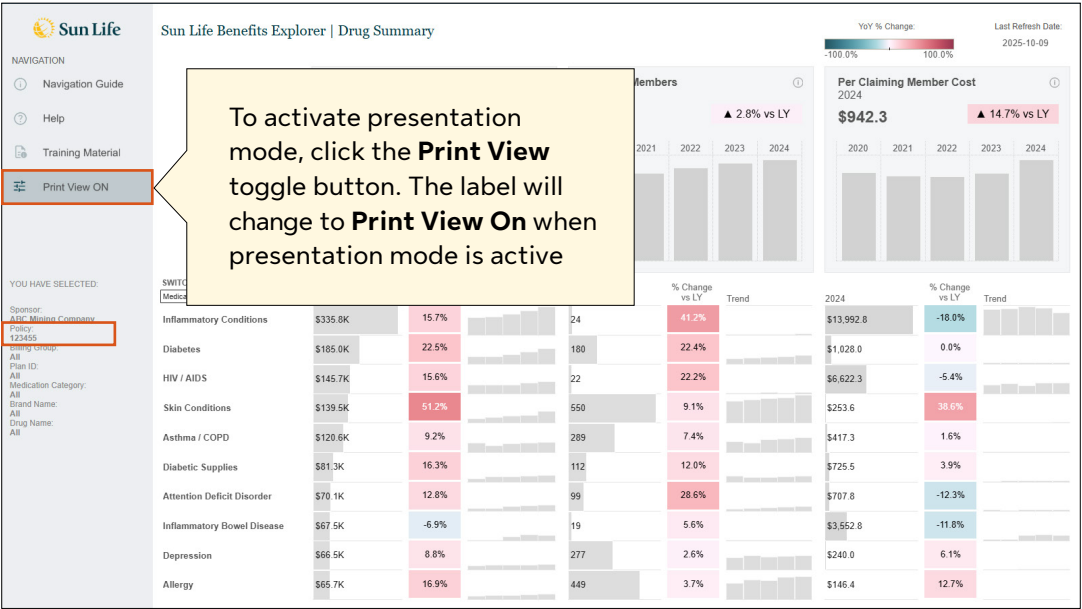
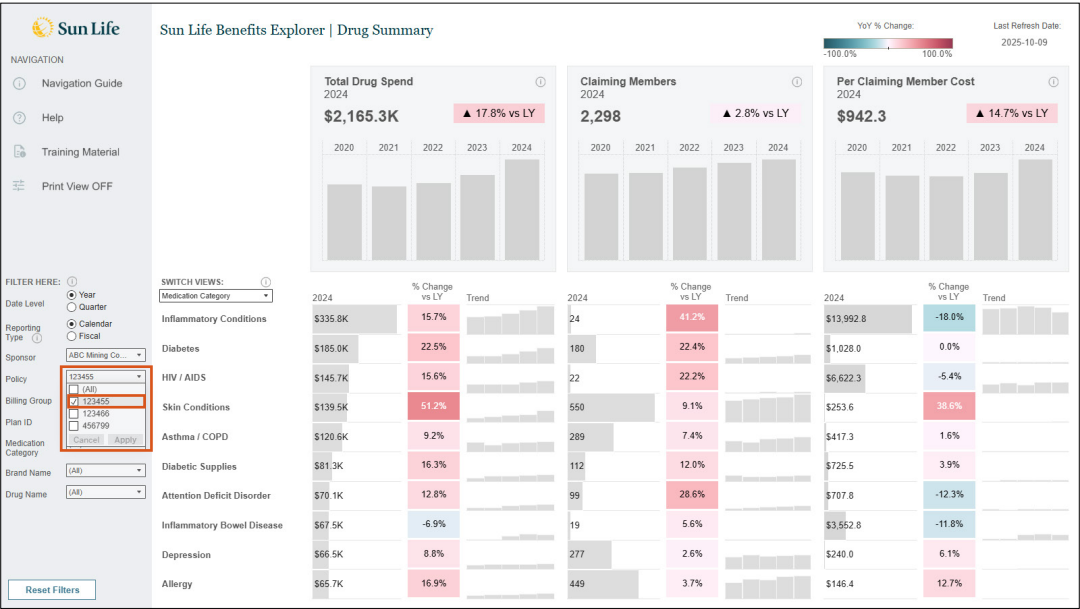
Sample Use Case 2 – Use filters to customize dashboards

How can I view information for specific policies within my organization (ABC Mining Company)?

To view one policy (123455):

- In the Filter section, click on the drop-down beside the Policy filter.
- Click on All to deselect all policies.
- Choose '123455'. Click on Apply.

If you have a long list of policies you can use the search bar in the drop down list to type in the policy of interest.



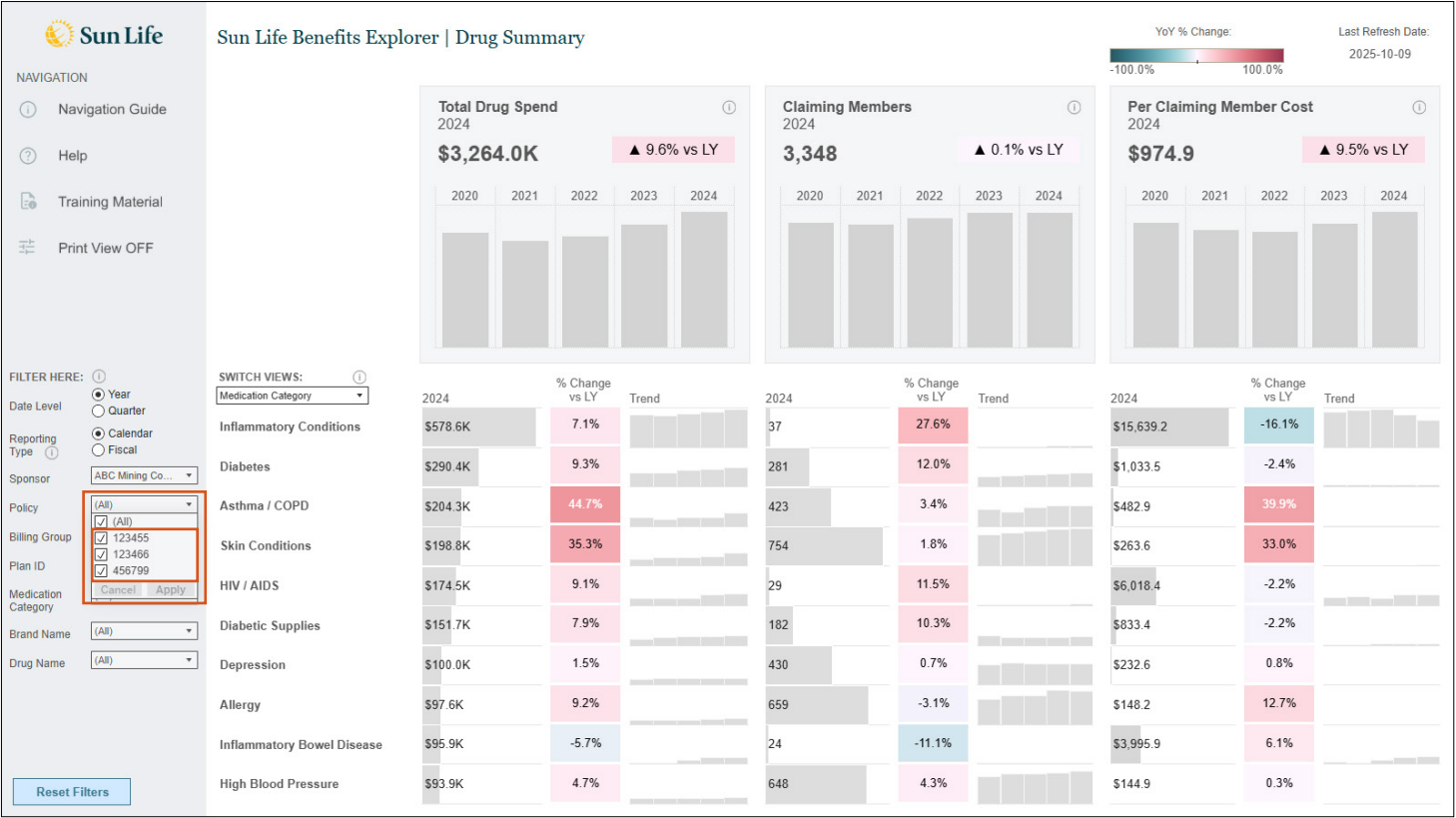
The dashboard will only show information for the '123455' policy

Sample Use Case 2 – Use filters to customize dashboards

To view multiple policies (123455, 123466 and 456799):

- In the Filter section, choose '123455', '123466' and '456799' for policy

The dashboard will only show information for the '123455', '123466' and '456799' policies

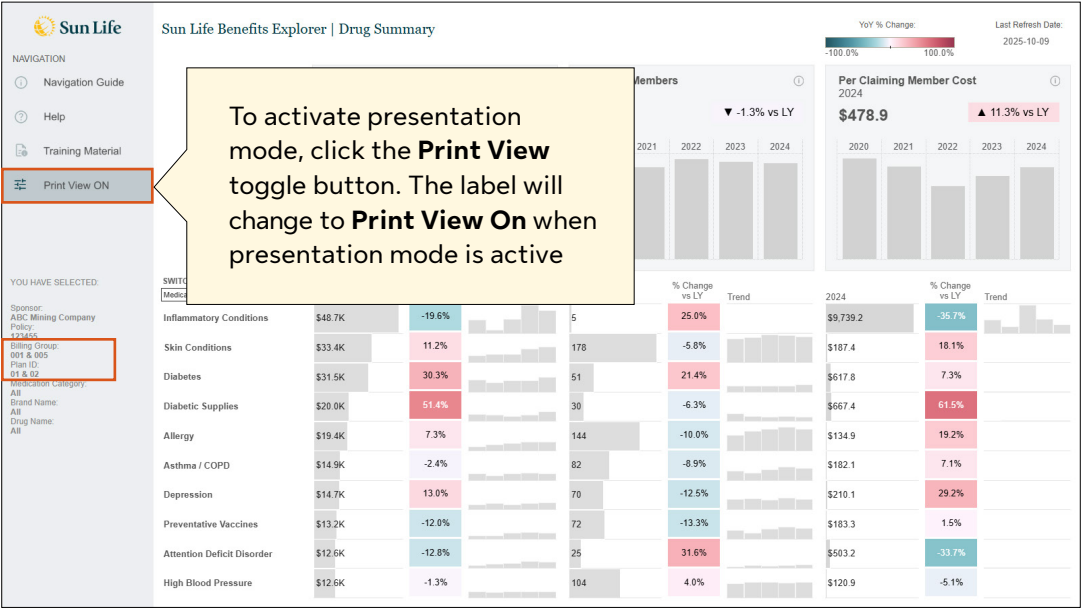
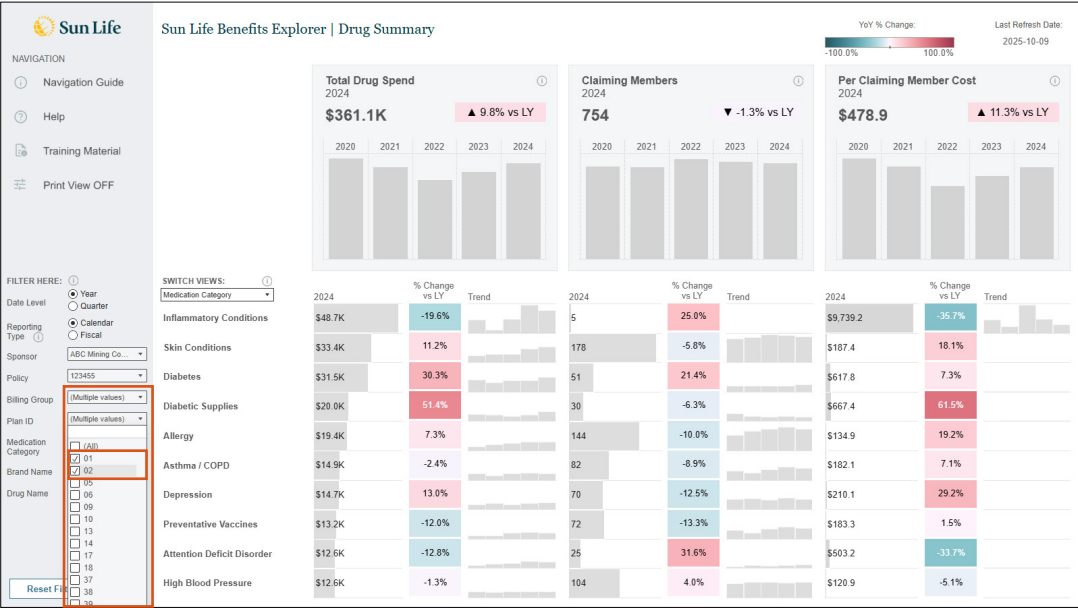


Sample Use Case 2 – Use filters to customize dashboards

How can I view information for specific Plan ID or Billing Groups?

Similar to sponsor and policy selection, in the Filter section you can select the plan ID and billing groups you are interested in seeing information for.

In the example below, plan IDs '01' and '02', and billing groups '001' and '005' are selected.

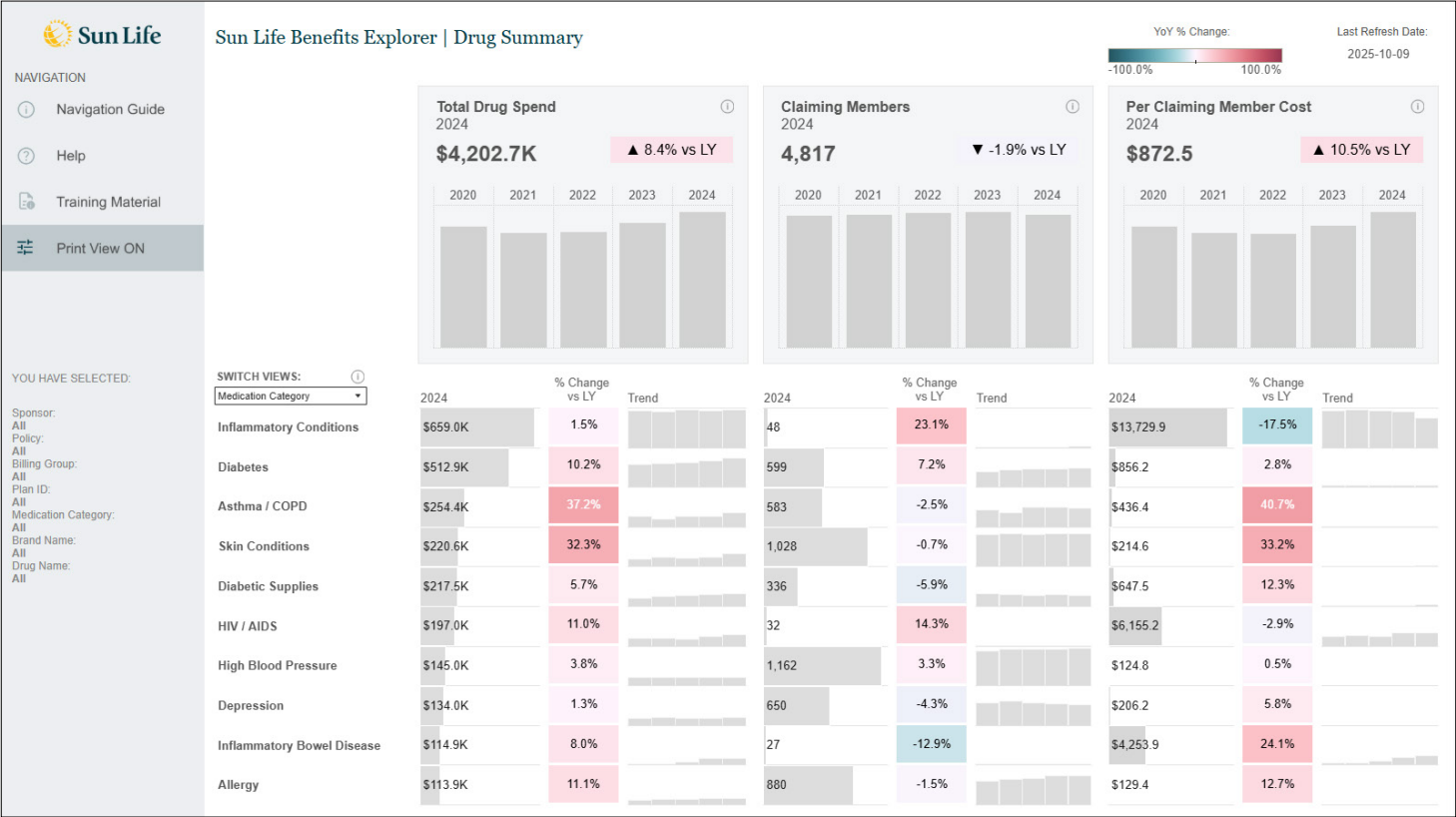


Sample Use Case 2 – Use filters to customize dashboards

Advisors/Consultants, customizing dashboards allows you to access information for your entire block of business, including all sponsors, or view data at a more detailed level.

How can I view information for my entire block of business?

When you first open the dashboard, it displays information for your entire block of business. To make sure this is for your entire block of business, ensure no filters are applied.

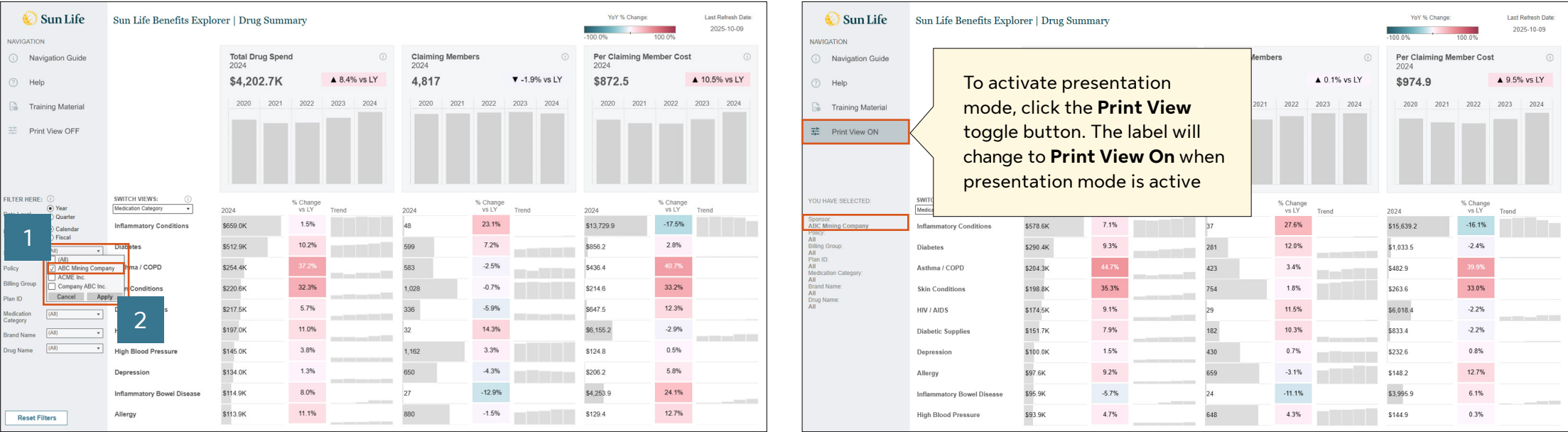


Sample Use Case 2 – Use filters to customize dashboards

How can I view information for specific sponsors?

To view a specific sponsor (ABC Mining Company):

- 1
- 2
- Step 1: In the Filter section, choose 'ABC Mining Company' for sponsor
- Step 2: Click Apply to apply your selection



The dashboard will only show information for the 'ABC Mining Company' sponsor

Sample Use Case 2 – Use filters to customize dashboards

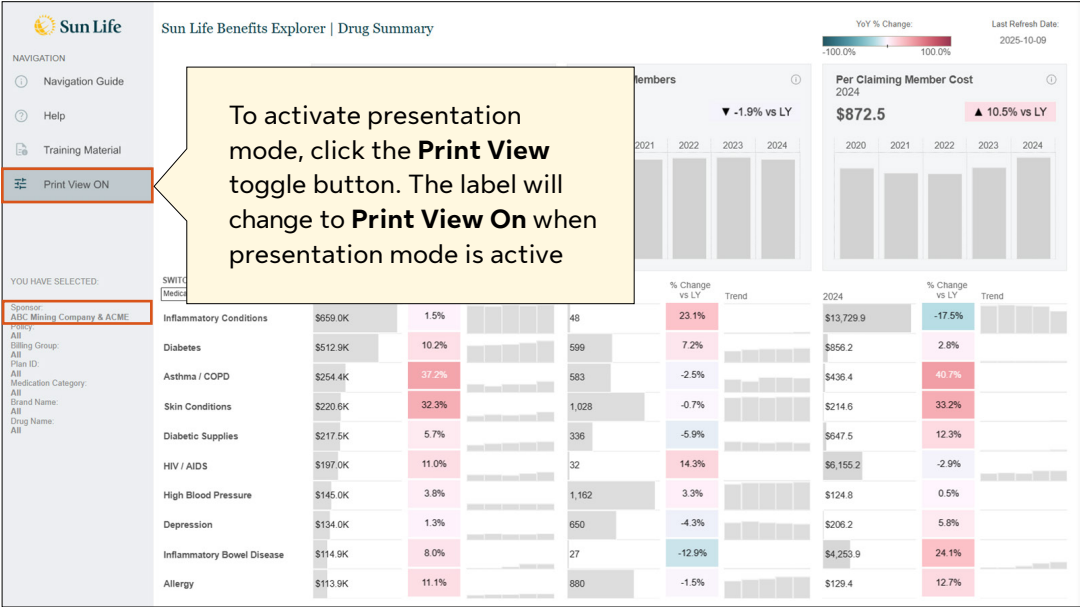
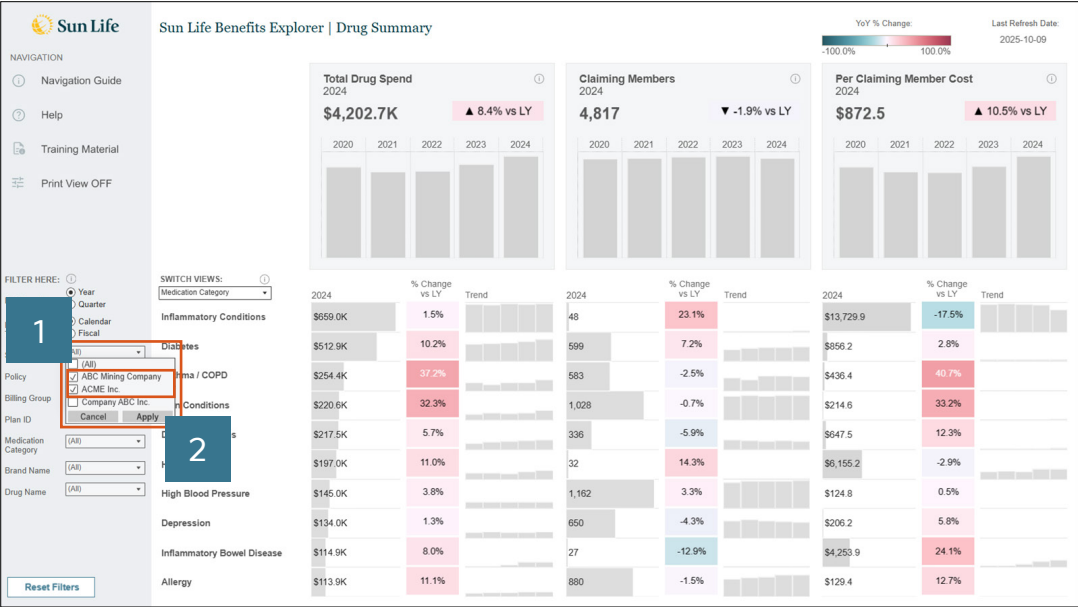
To view multiple sponsors (ABC Mining Company and ACME Inc.):

1

Step 1: In the Filter section, choose 'ABC Mining Company' and 'ACME Inc.' for sponsor

2

Step 2: Click Apply to apply your selection



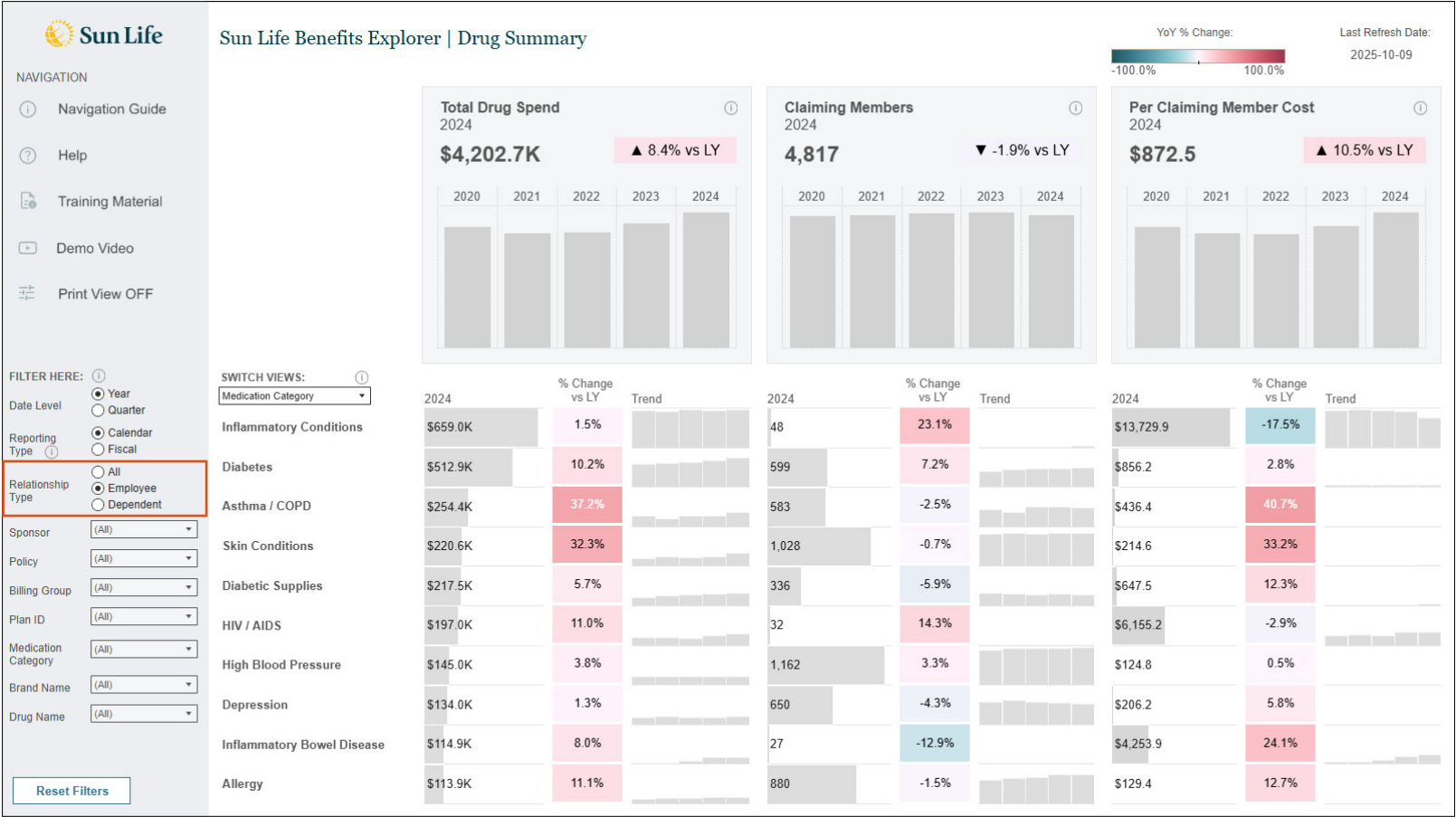
The dashboard will only show information for the 'ABC Mining Company' and 'ACME Inc.' sponsors

Sample Use Case 2 – Use filters to customize dashboards

How can I view employee-only information?

In the Filter section, customize your data preferences: Choose “Employee” for Relationship Type.

The dashboard will only show information for employees. To view dependent-only information, choose “Dependent” for Relationship Type.

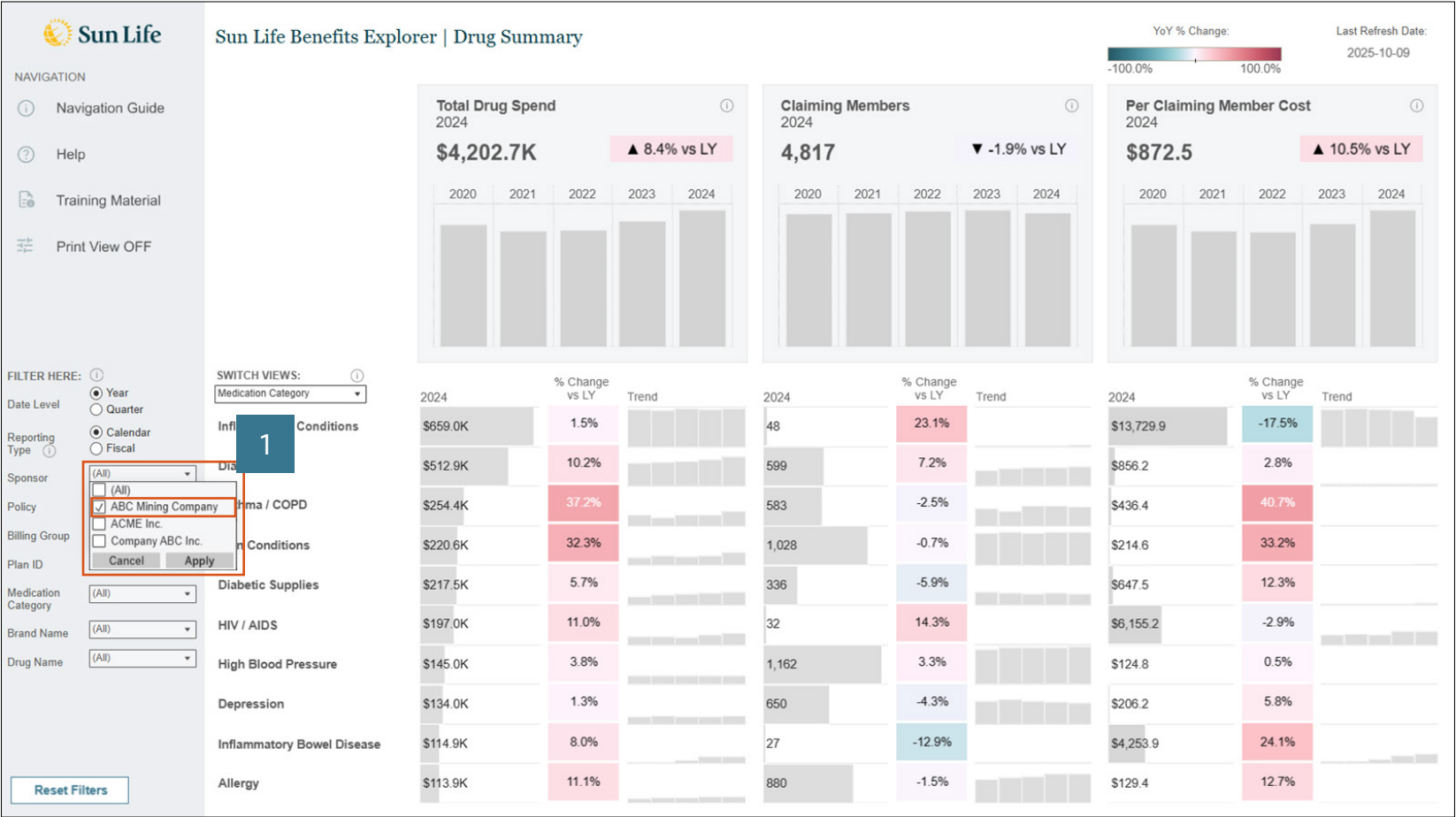


Sample Use Case 2 – Use filters to customize dashboards

How can I view information for specific policies within the 'ABC Mining Company' sponsor?

1

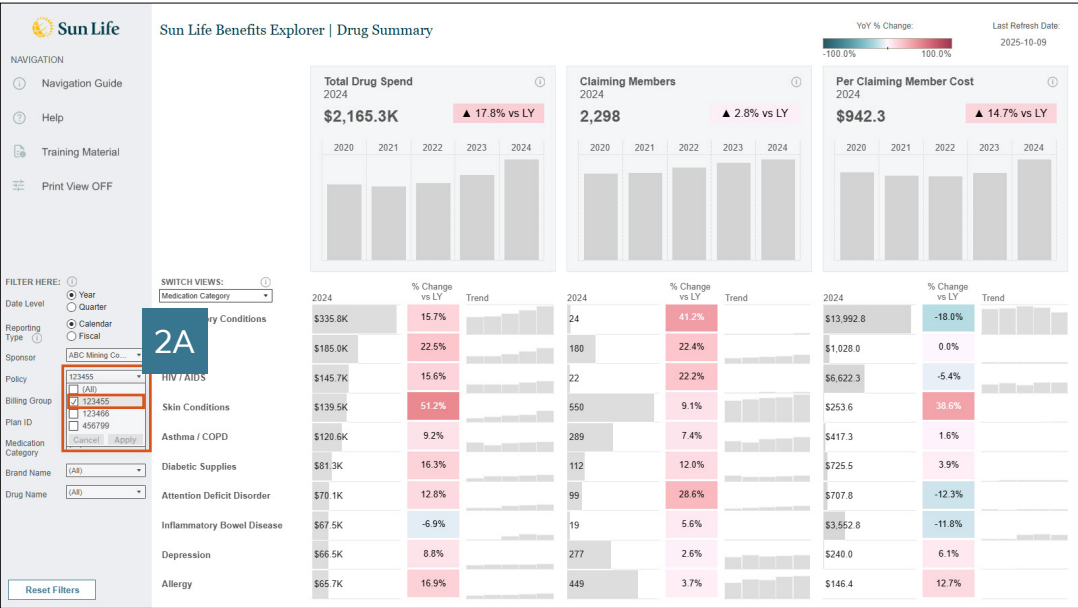
Step 1: In the Filter section, choose 'ABC Mining Company' for sponsor



Sample Use Case 2 – Use filters to customize dashboards

2A

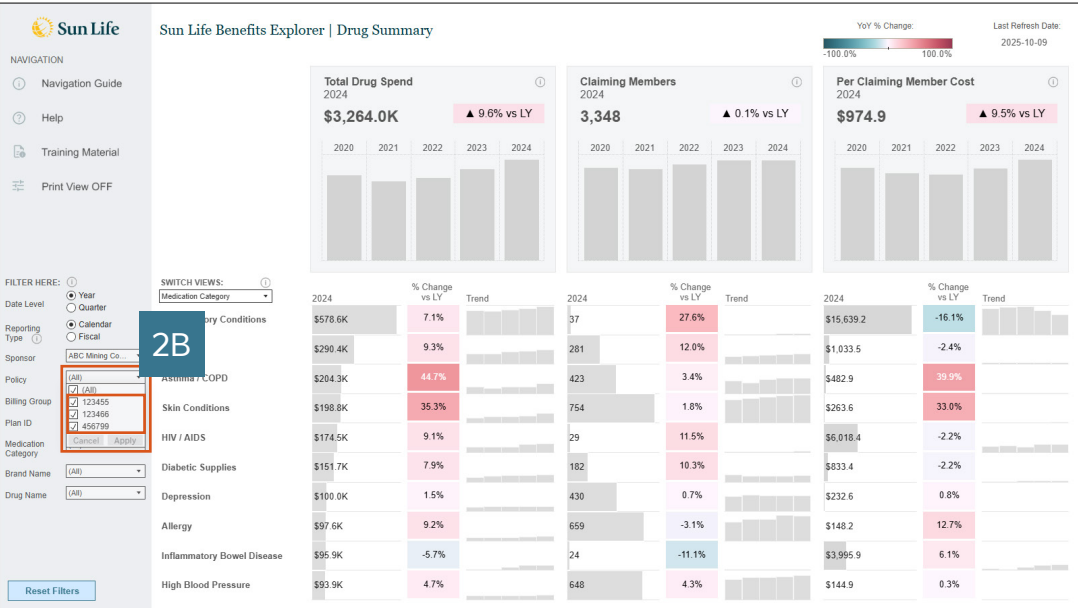
To view one policy (123455):
Step 2: In the Filter section, choose '123455' for policy



The dashboard will only show information for the '123455' policy

2B

To view multiple policies (123455, 123466 and 456799):
Step 2: In the Filter section, choose '123455', '123466' and '456799' for policy
The dashboard will only show information for the '123455', '123466' and '456799' policies

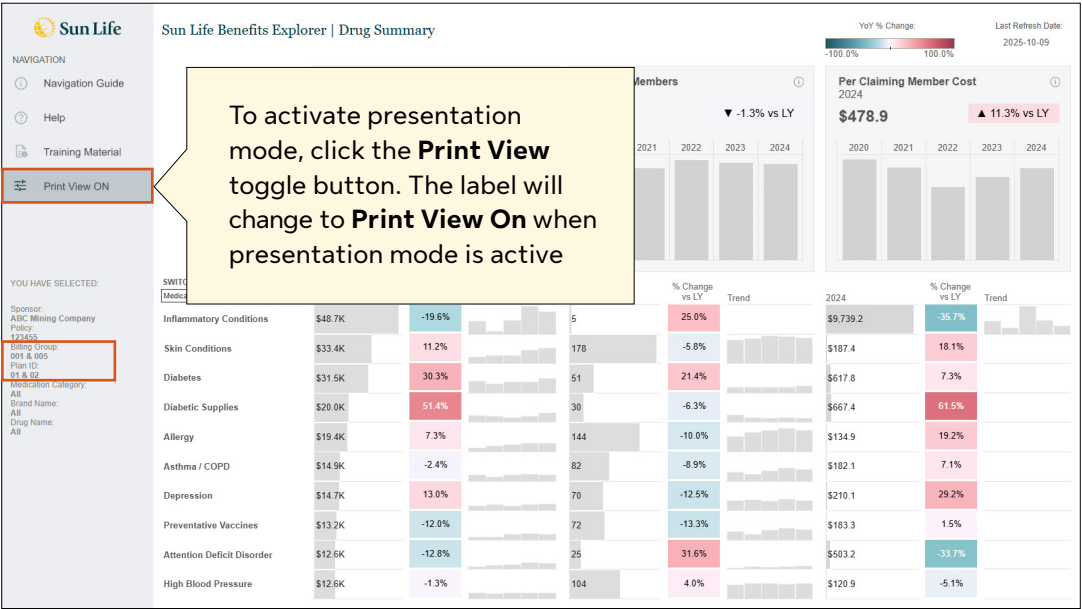
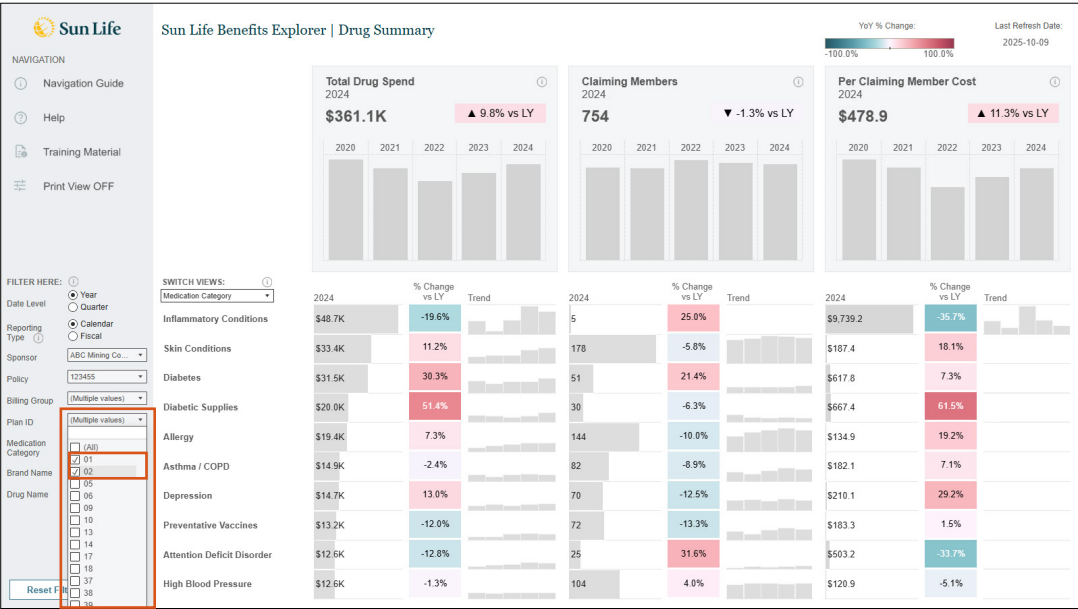


Sample Use Case 2 – Use filters to customize dashboards

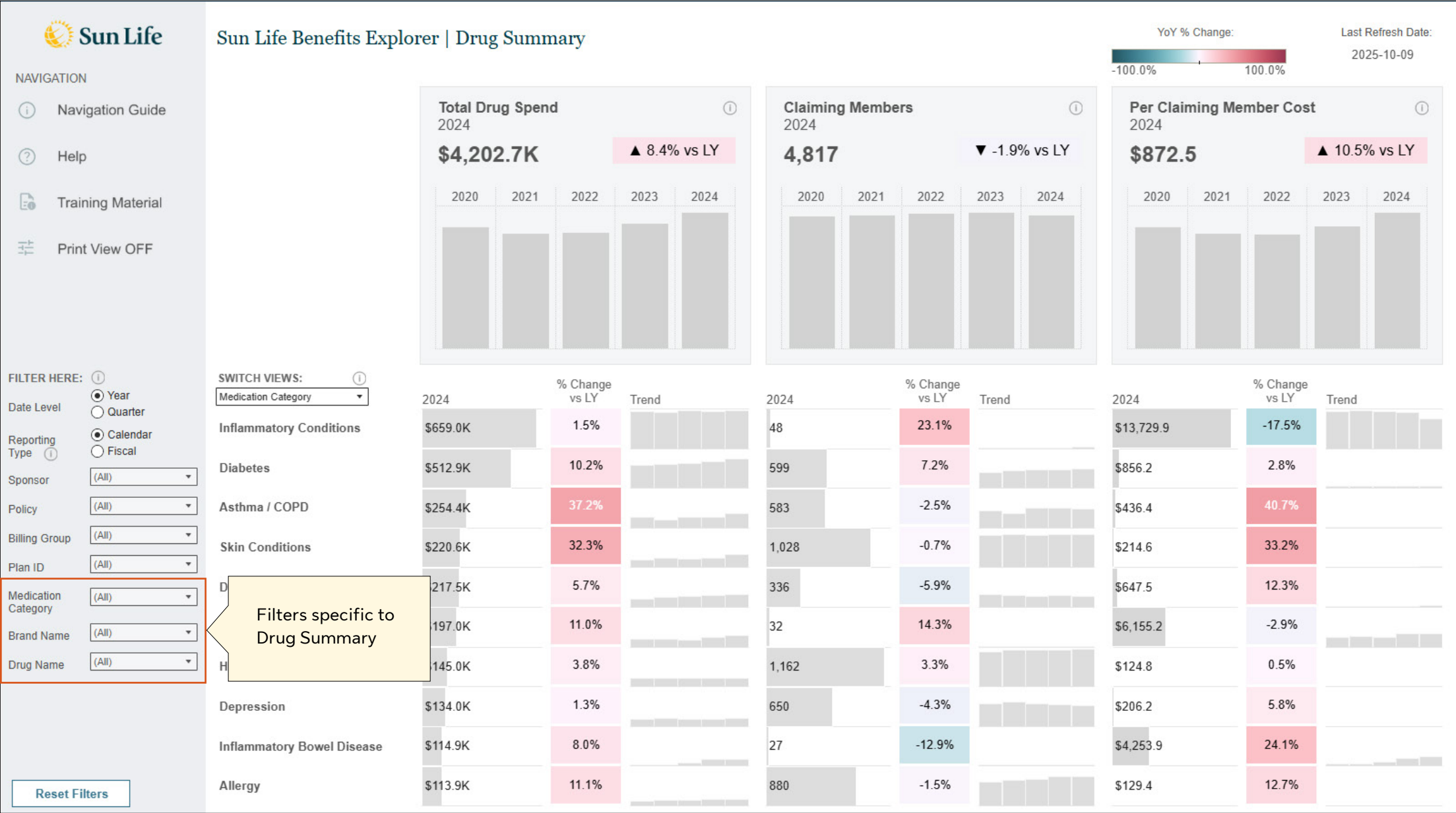
How can I view information for specific Plan IDs and Billing Groups?

Similar to sponsor and policy selection, in the Filter section you can select the plan IDs and billing groups you are interested in reviewing.

In the example below, plan IDs '01' and '02', and billing groups '001' and '005' are selected.



Sample Use Case 3 – Specific drug summary filters



Sample Use Case 4 – Drug summary

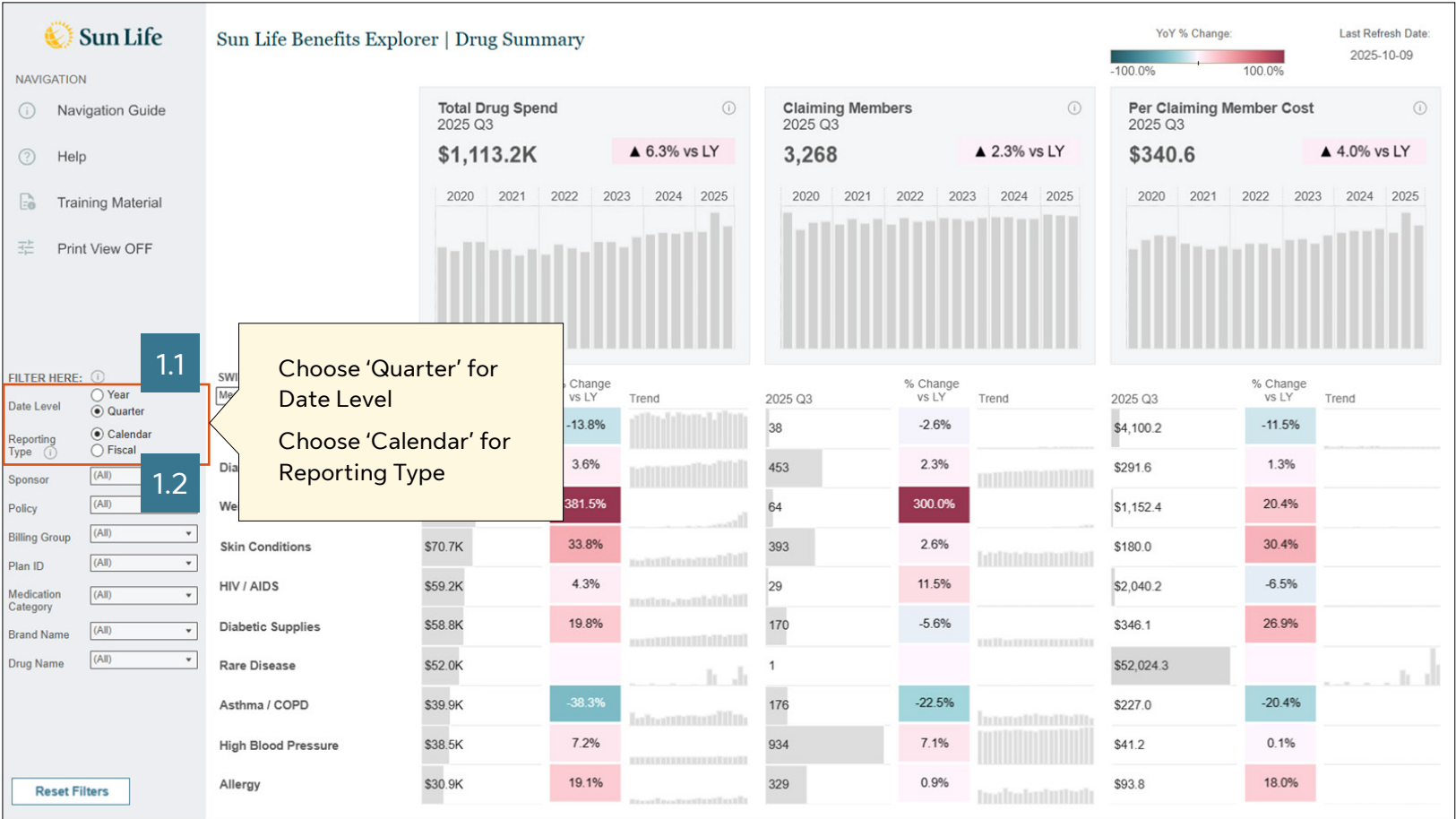
For my Client who follows a calendar reporting year, how can I use the Drug Summary view to analyze the Diabetes cost trend and explain the quarterly increases?

In the Filter section, you can find a menu of options and filter data based on your preference.

Step 1: Customize your data preferences:

- 1.1 Choose 'Quarter' for Date Level
- 1.2 Choose 'Calendar' for Reporting Type

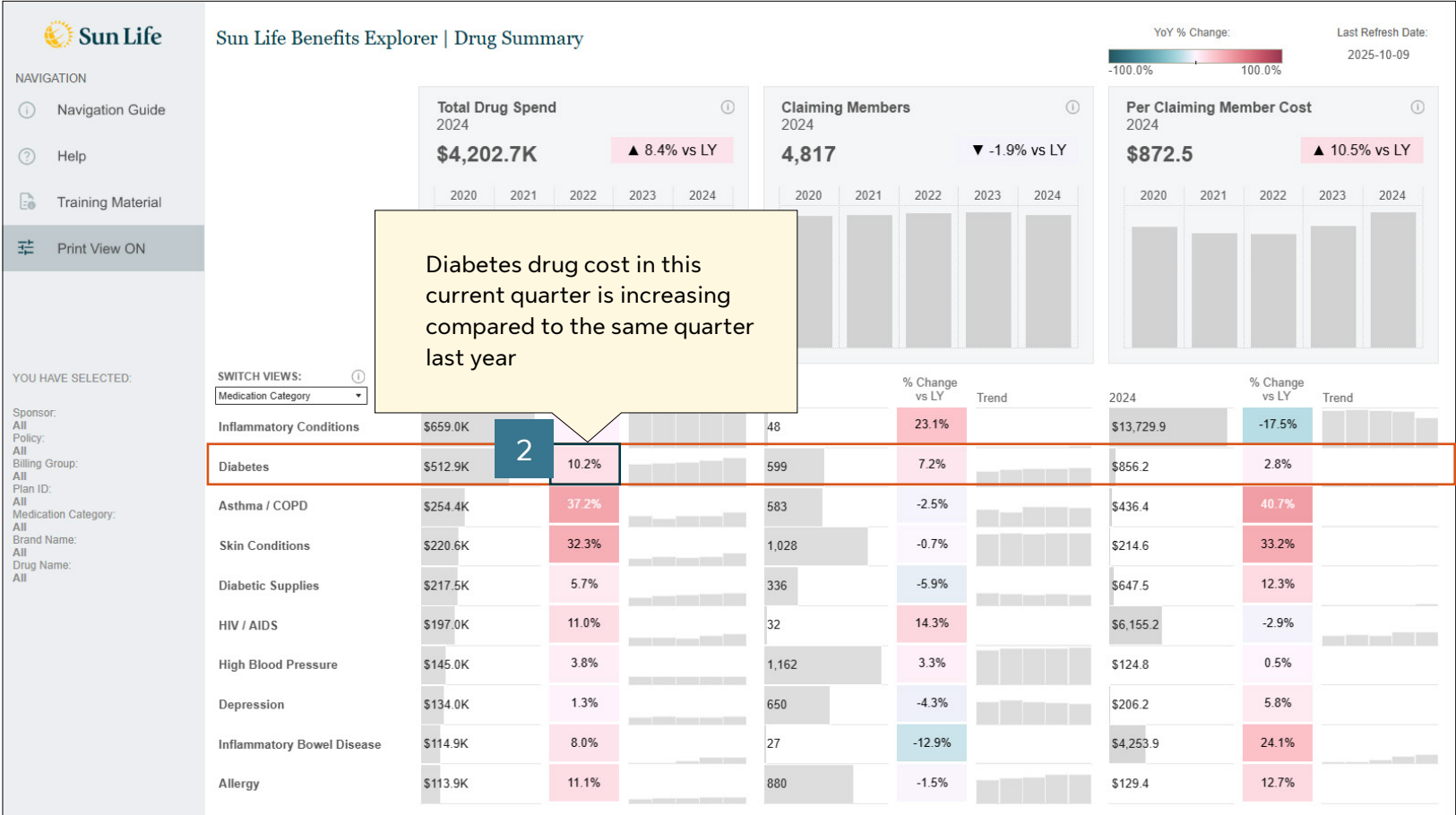
The numbers on the screenshots are associated with the steps above:



Sample Use Case 4 – Drug summary

2

Step 2: Assess trends on Medication Category

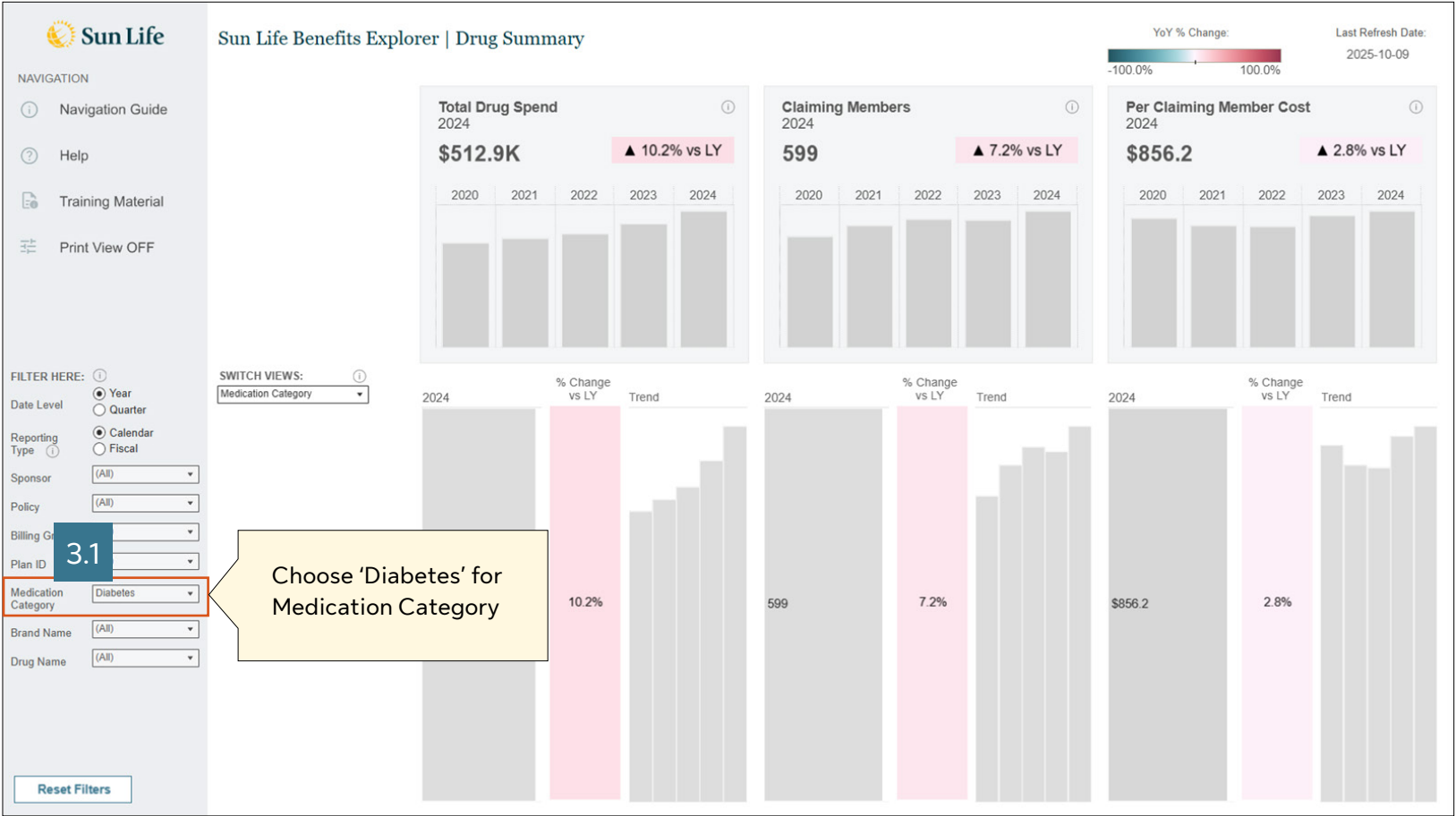


Sample Use Case 4 – Drug summary

Step 3: Drill down on Diabetes costs

You can choose Diabetes in the Medication Category and switch the view to 'Drug Name' to understand which drugs are driving that Medication Category in the previous quarter and their growth. To do this:

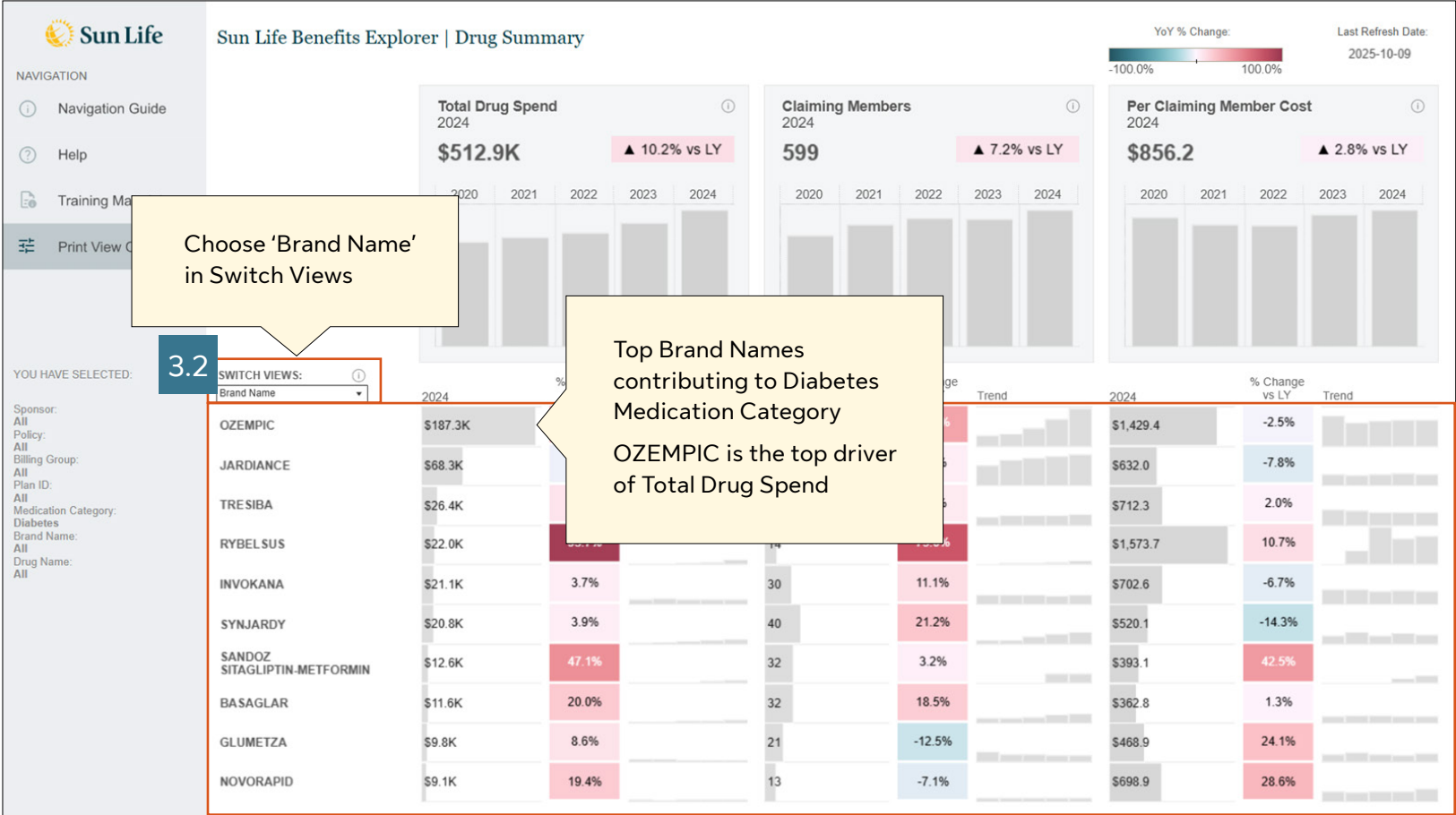
- 3.1 In the Filter section, choose Diabetes in the Medication Category



You can use 'switch views' on the main page to investigate the reasons for the Diabetes cost increase by focusing on top Brand Names or top Drug Names.

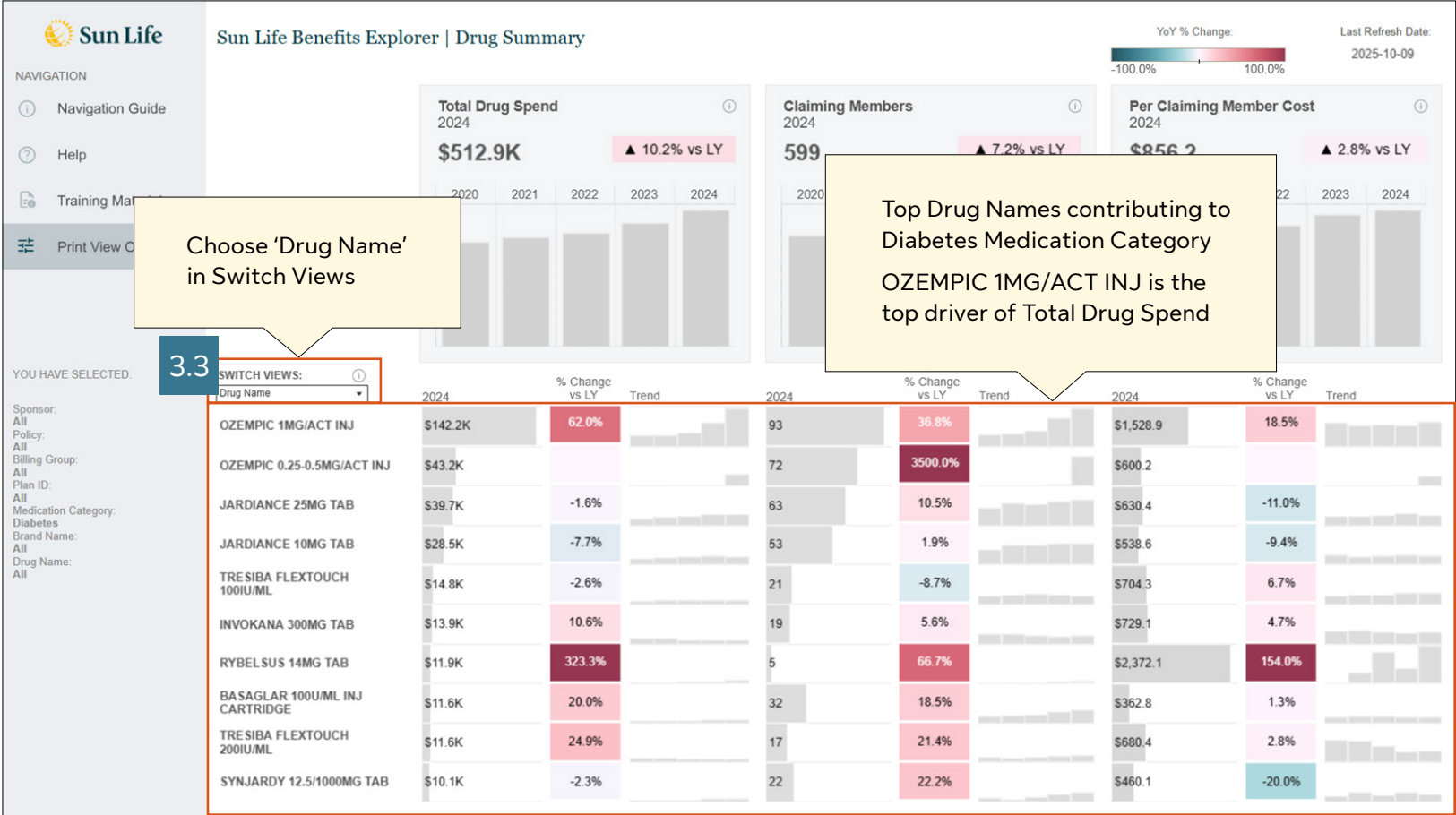
Sample Use Case 4 – Drug summary

3.2 Switch view to Brand Name

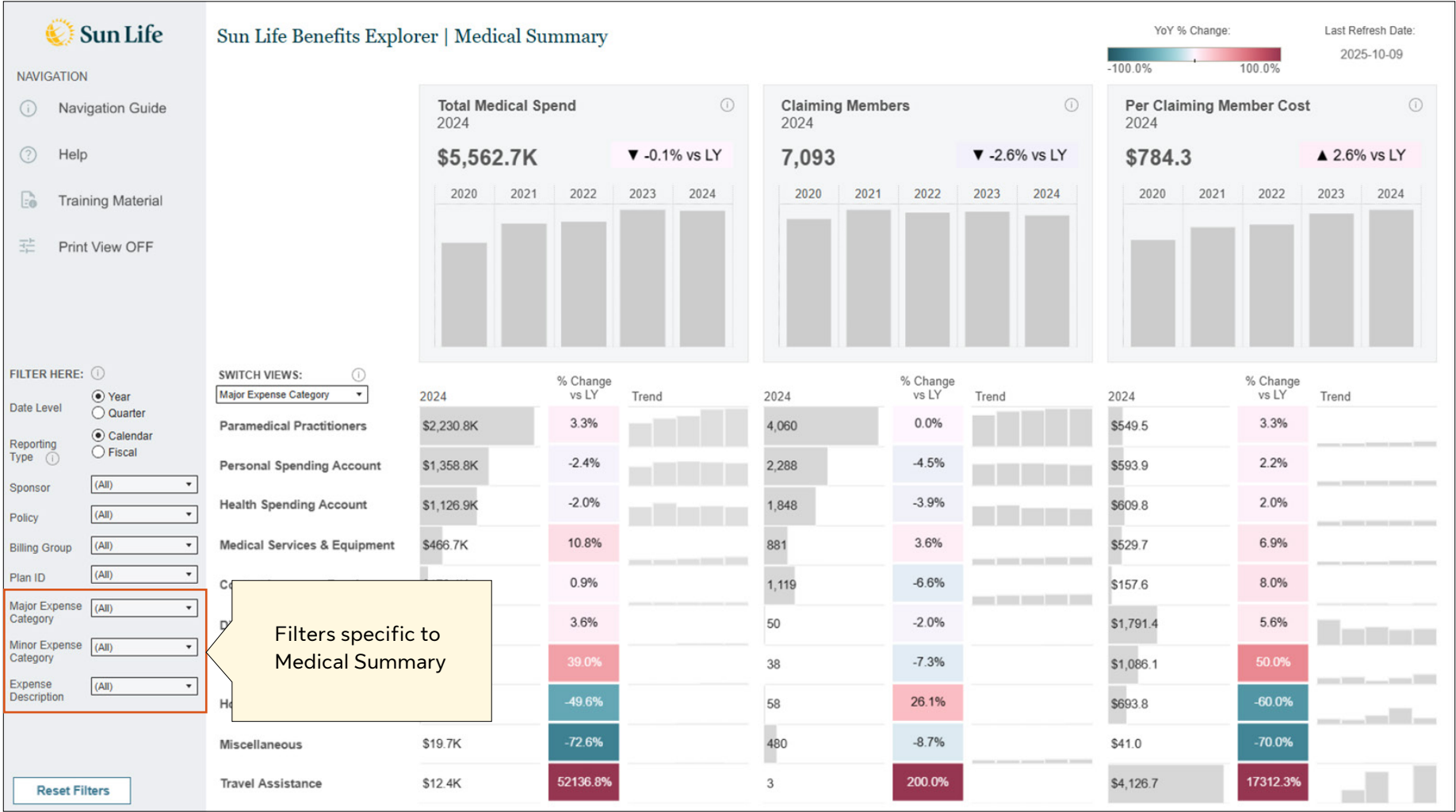


Sample Use Case 4 – Drug summary

3.3 Switch view to Drug Name



Sample Use Case 5 – Specific medical summary filters



Sample Use Case 6 - Medical summary

What are the top 3 medical expenses that contribute to the Total Medical Spend for Plan ID 01 in the most recent benefit year starting December 1st, 2023?

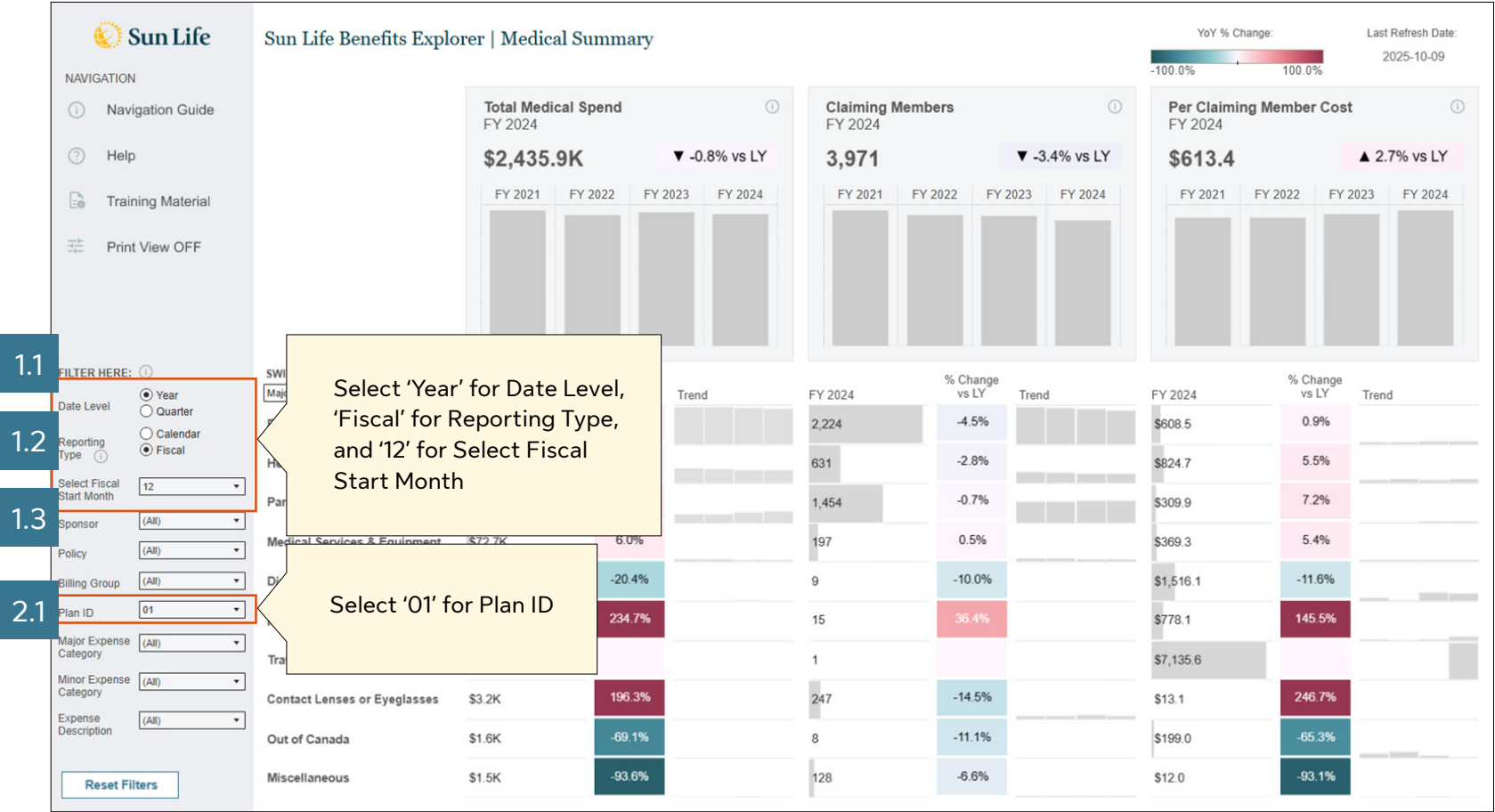
1. Customize your data preferences:

- 1.1 Choose 'Year' for Date Level
- 1.2 Choose 'Fiscal' for Reporting Type
- 1.3 Select Fiscal Start Month = 12

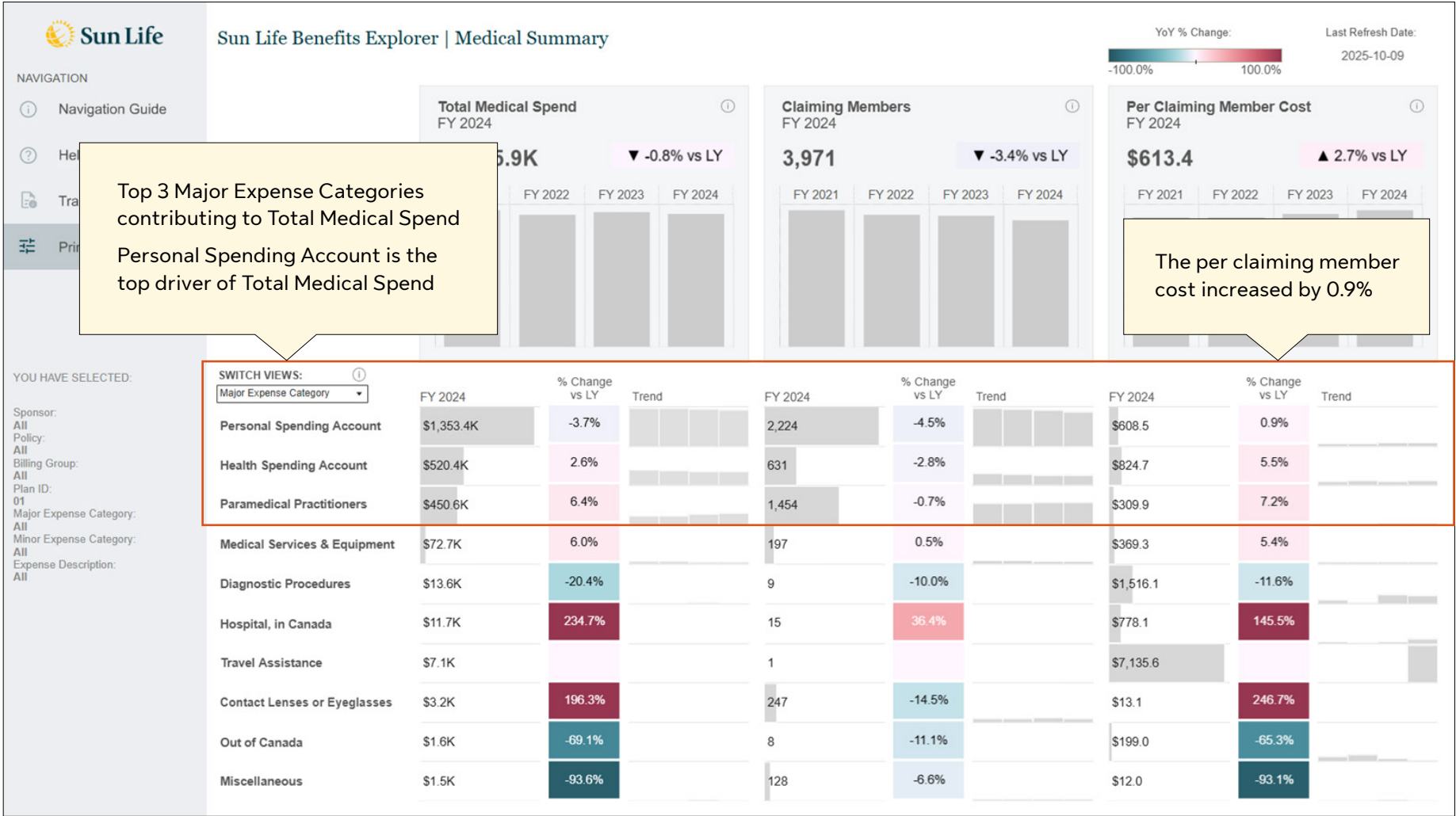
2. Customize your filters:

- 2.1 Select '01' for Plan ID

The numbers on the following screenshots are associated with the steps above:

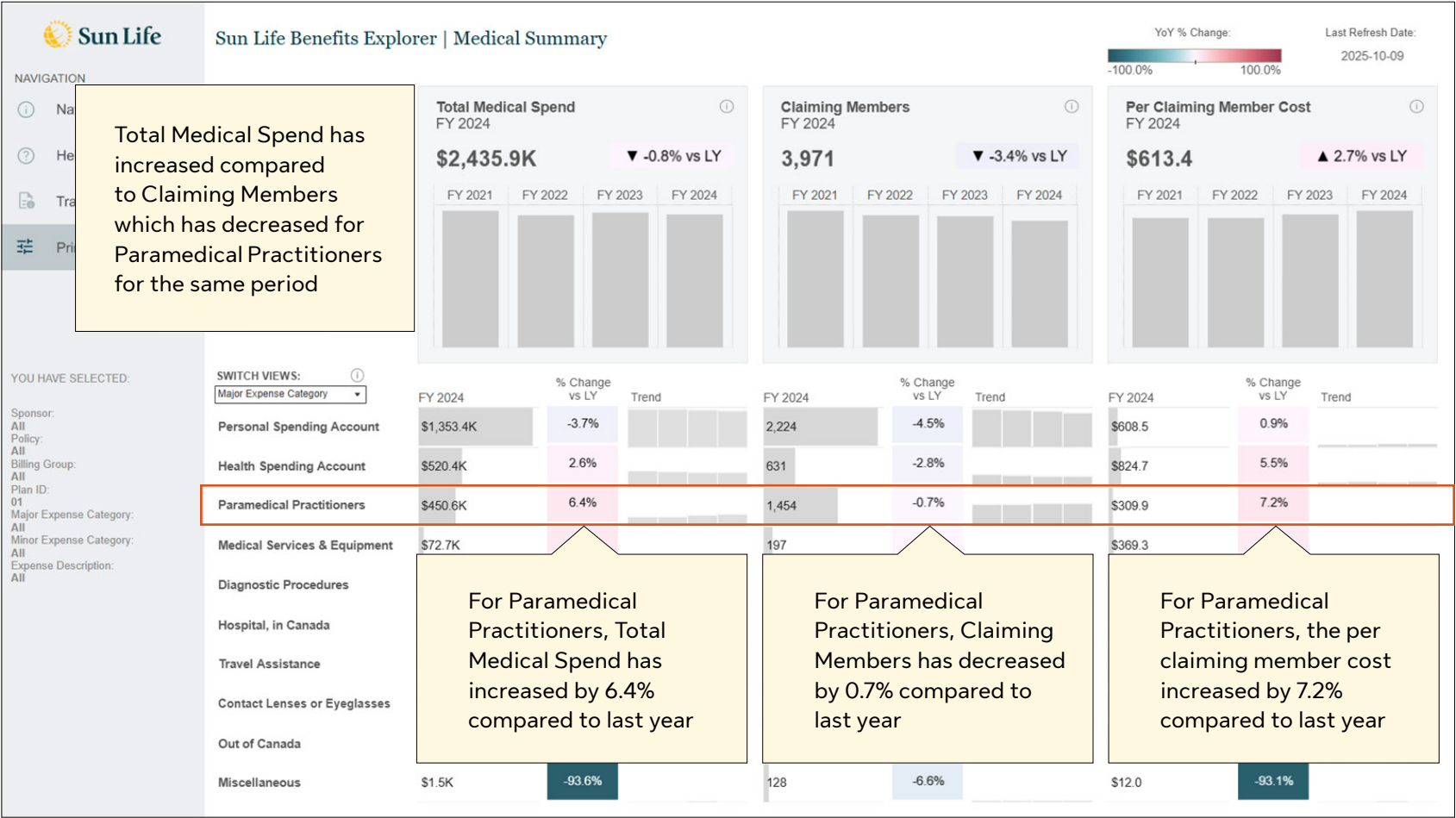


Sample Use Case 6 - Medical summary



Sample Use Case 6 - Medical summary

How have the Claiming Members trend changed year-over-year? Does it have the same trend as the Total Medical Spend for Paramedical Practitioners?



Sample Use Case 6 - Medical summary

How have my plan members used their HSA to complement their Paramedical benefit?

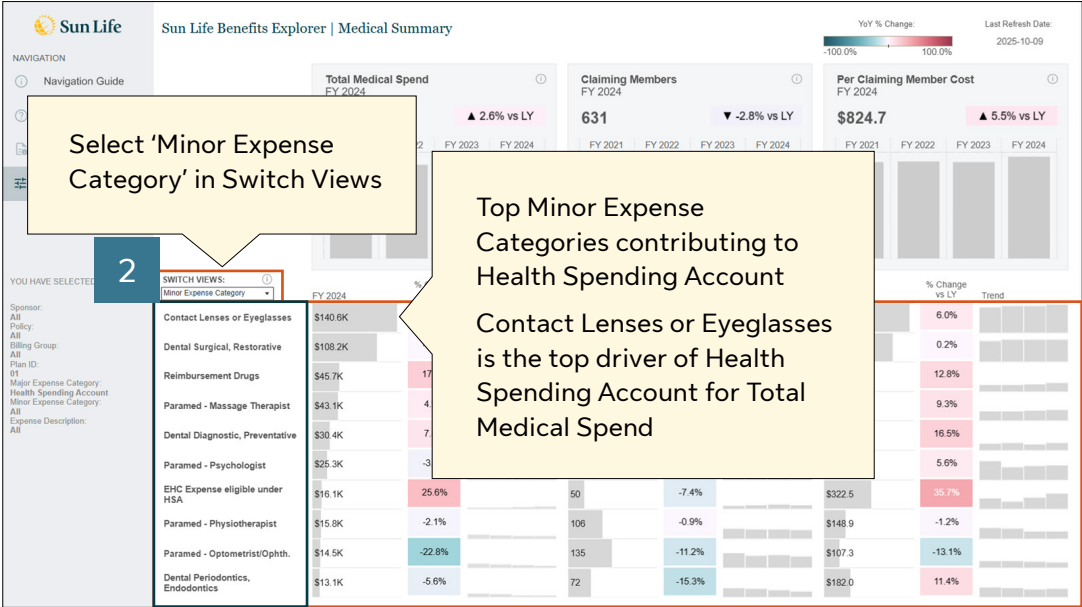
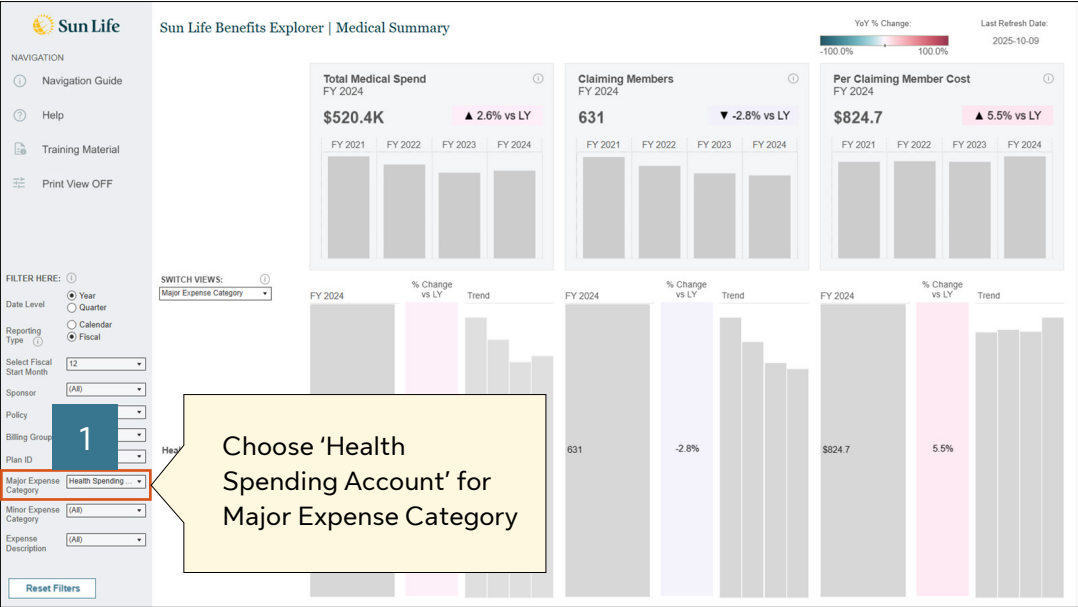
You can focus on one Major Expense Category like HSA to better understand the benefit utilization:

- 1

Step 1: In the Filter section, select **Major Expense Category** as HSA
- 2

Step 2: Switch view to **Minor Expense Category**

The numbers on the screenshots below are associated with the steps above:



Sample Use Case 7 – Approval per 1000 Lives for plan ID and billing groups

Please note, the **Approval per 1000 Lives** metric is only available at the policy, sponsor and block level. Selecting plan ID or billing group would not update the numbers for **Approval per 1000 Lives**.

How can I filter for plan ID or billing group? What happens to the Approval per 1000 Lives metric?

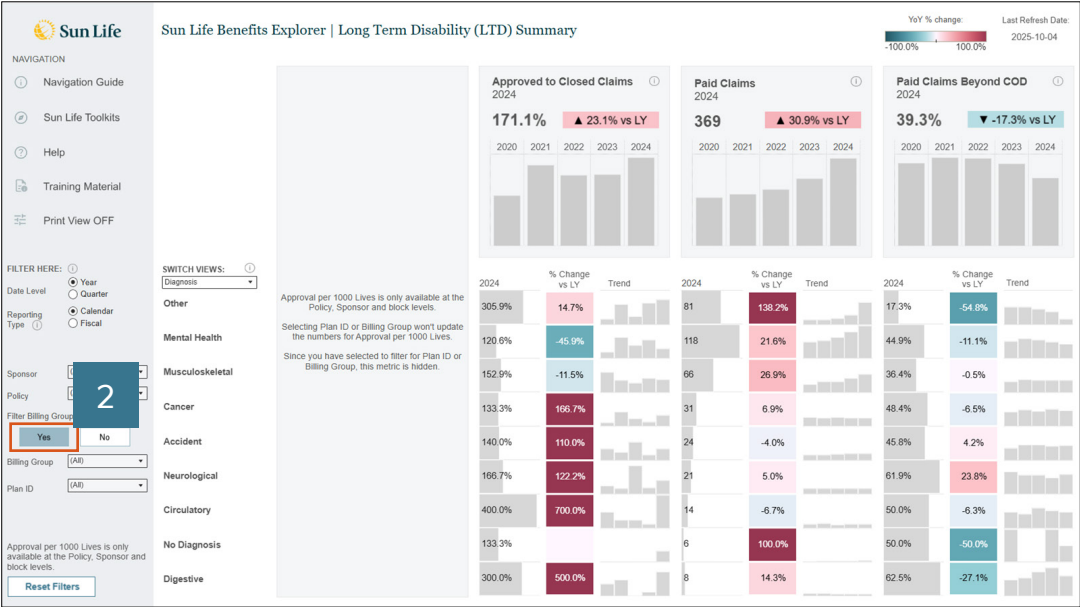
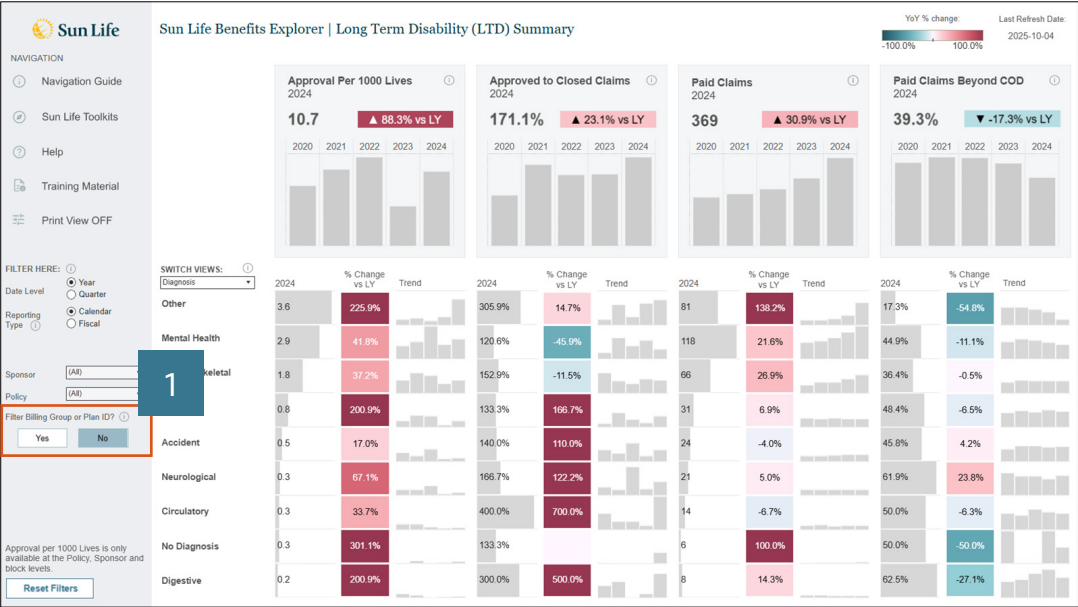
1

Step 1: In the Filter section, you have the option to select if you would like to filter for **plan ID** or **billing group**. 'No' is selected as default.

2

Step 2: Click the 'Yes' button. The button will turn blue once it is selected.

The numbers on the screenshots below are associated with the steps above:



Sample Use Case 7 – Approval per 1000 Lives for plan ID and billing groups

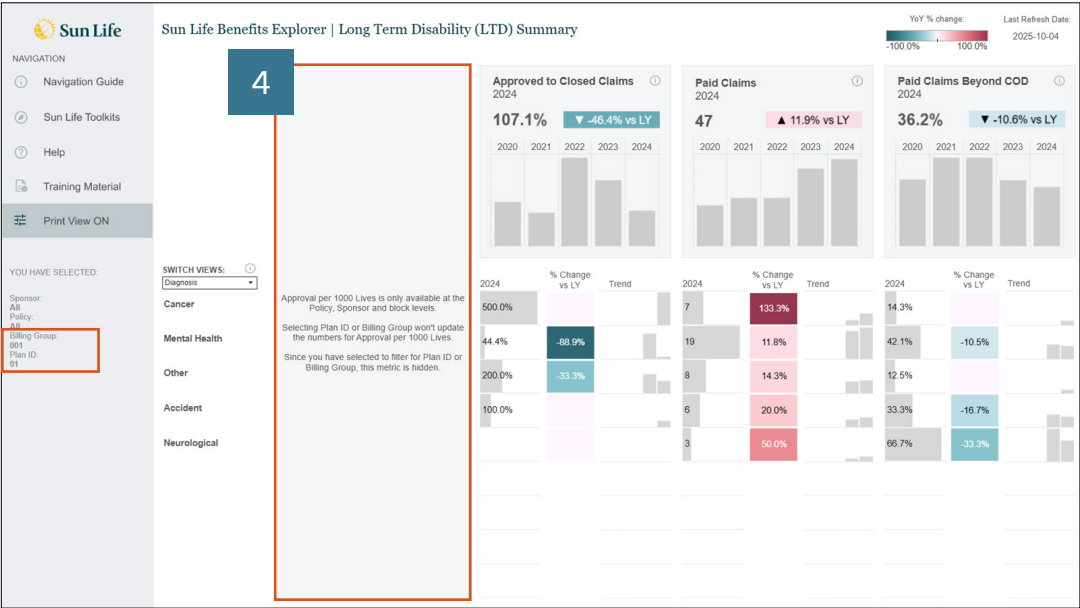
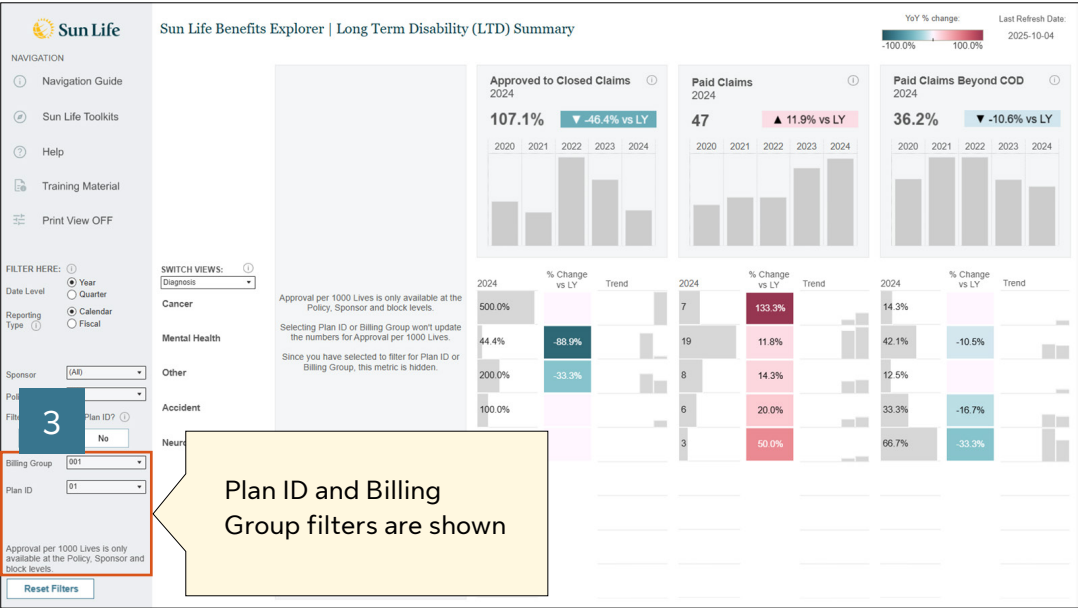
3

Step 3: In the Filter section, plan ID and billing group filters will show up. Select your filters.

4

Step 4: In the dashboard view, the **Approval per 1000 Lives metric is now hidden**. The rest of the metrics are filtered based on your selection.

The numbers on the screenshots below are associated with the steps above:



Sample Use Case 7 – Approval per 1000 Lives for plan ID and billing groups

How can I stop filtering for plan ID and billing group? What happens to the Approval per 1000 Lives metric?

- 1

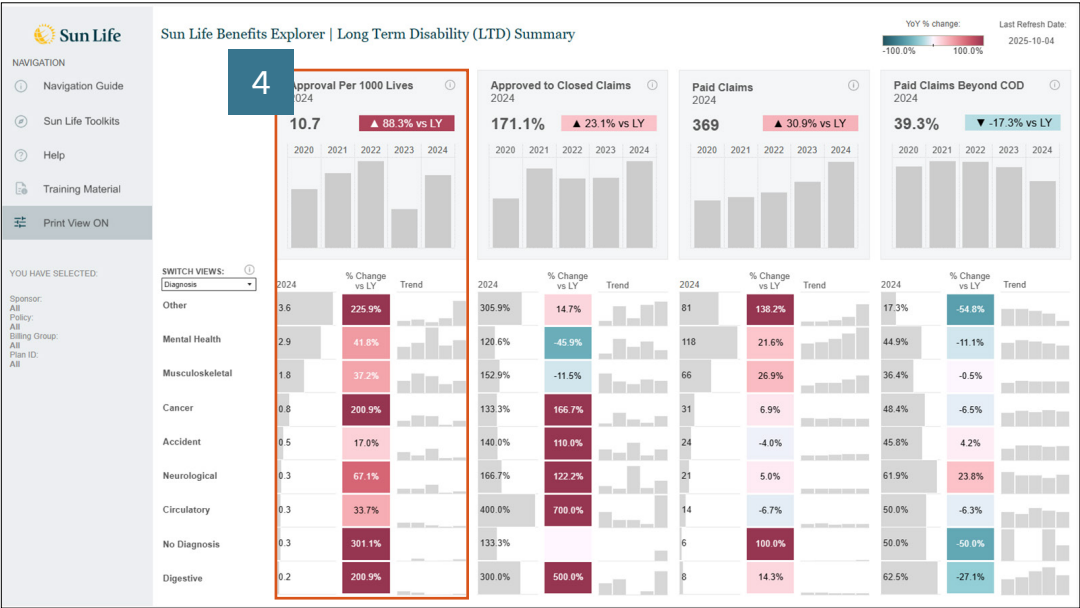
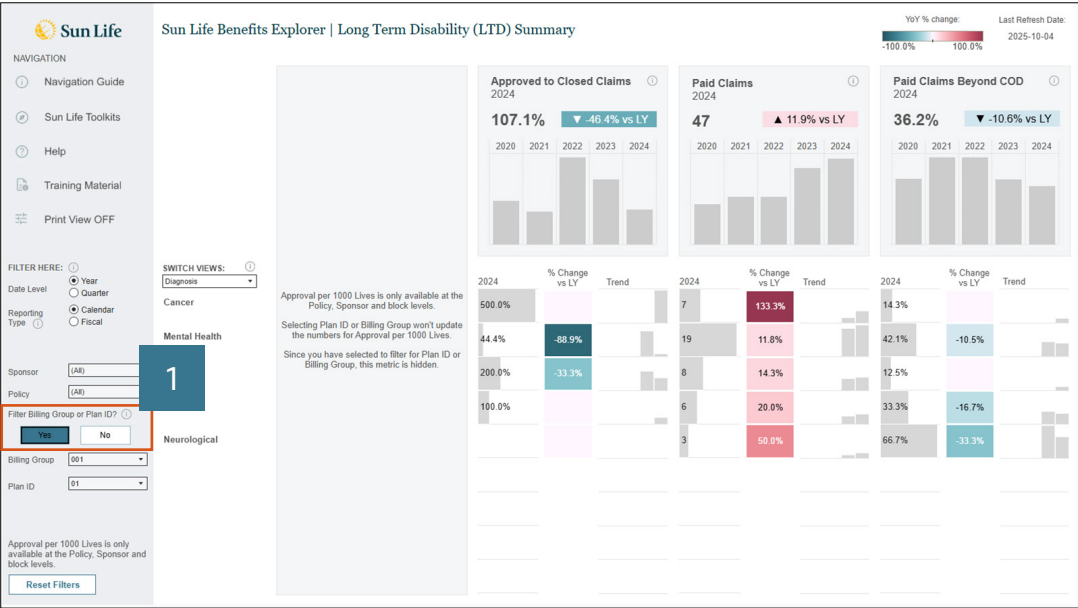
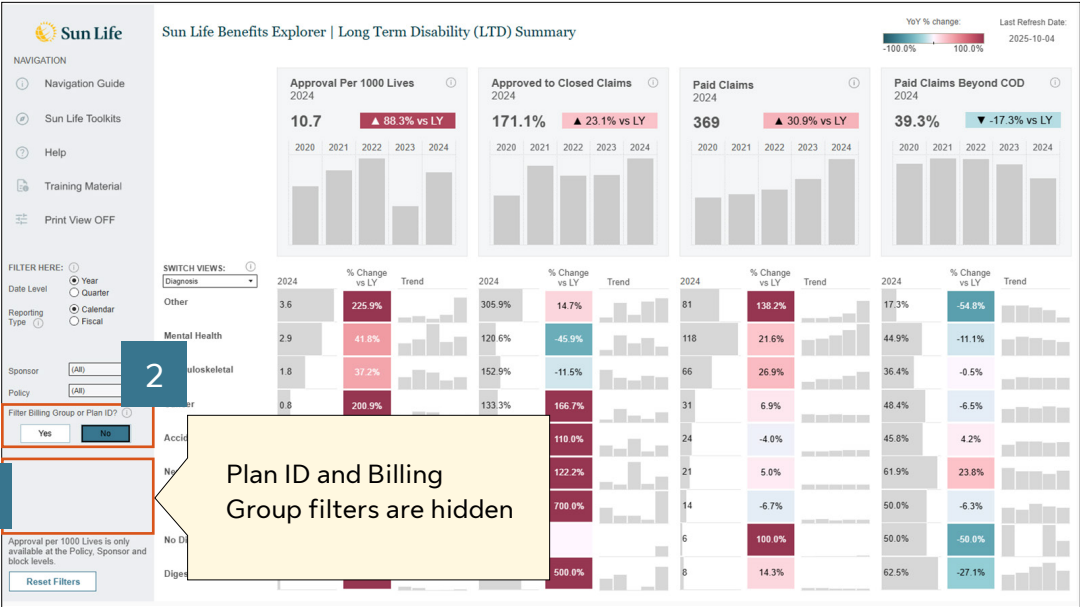
Step 1: In the **Filter** section, you have the option to select if you would like to filter for **plan ID** or **billing group**.
- 2

Step 2: Click the 'No' button. This may require two clicks. The button will turn blue once it is selected.
- 3

Step 3: In the **Filter** section, the plan ID and billing group filters will reset to select all, and the filters will be hidden.
- 4

Step 4: In the dashboard view, the **Approval per 1000 Lives metric is now shown**.

The numbers on the following screenshots are associated with the steps above:



Sample Use Case 8 – LTD summary

Using ABC Mining Company as an example, what are the top 3 diagnoses contributing to new LTD claims for this sponsor?

1

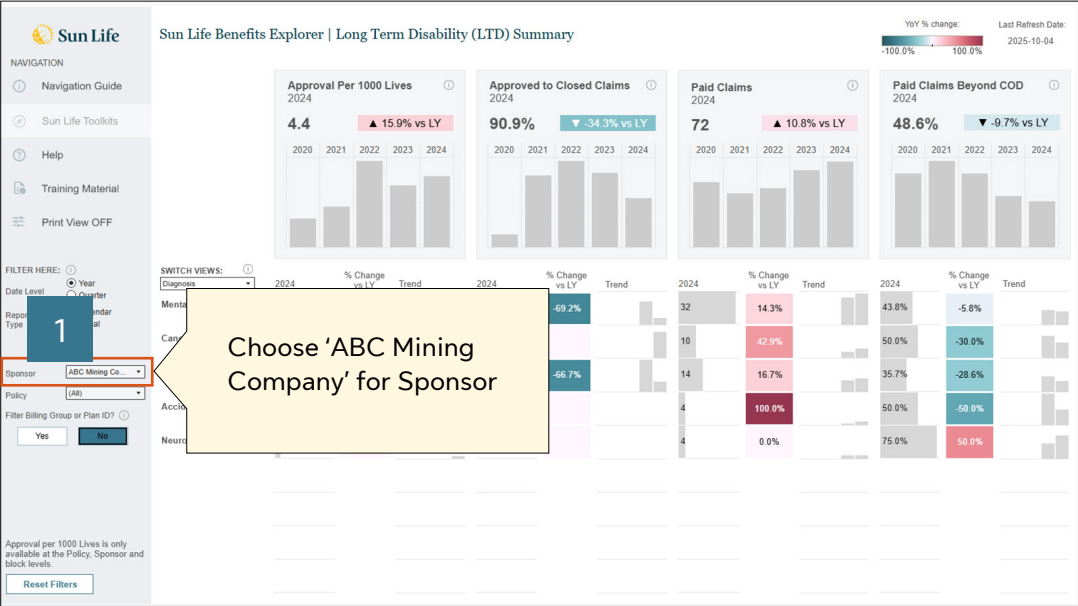
Step 1: In the Filter section, select 'ABC Mining Company' for Sponsor

2

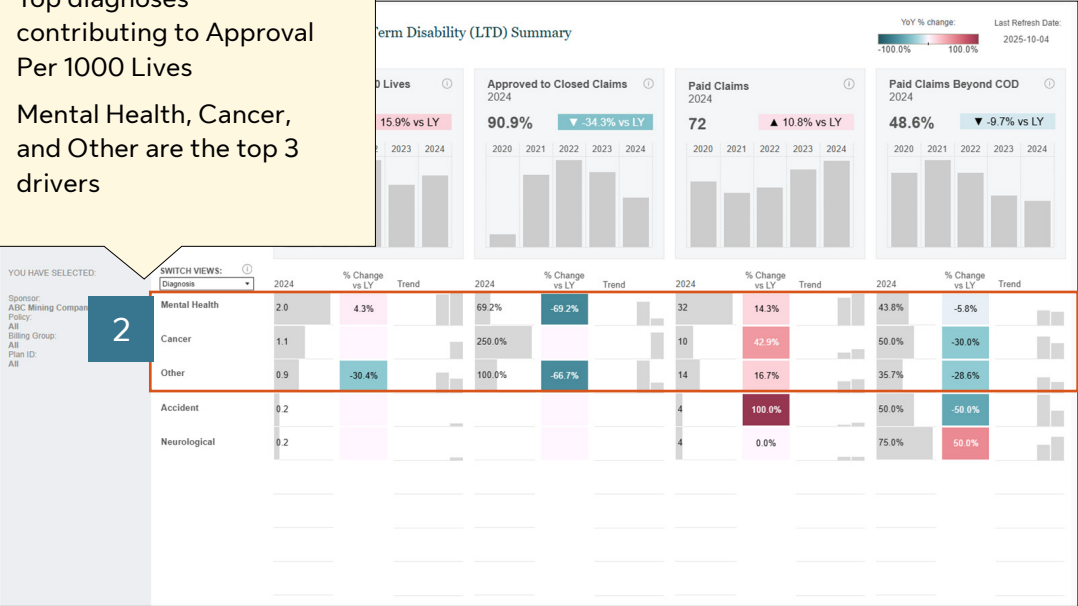
Step 2: View the information for top 3 diagnoses

For ABC Mining Company, Mental Health, Cancer, and Other are the top 3 diagnoses for approved per 1000 lives (2).

The numbers on the screenshots below are associated with the steps above:



Top diagnoses contributing to Approval Per 1000 Lives
Mental Health, Cancer, and Other are the top 3 drivers



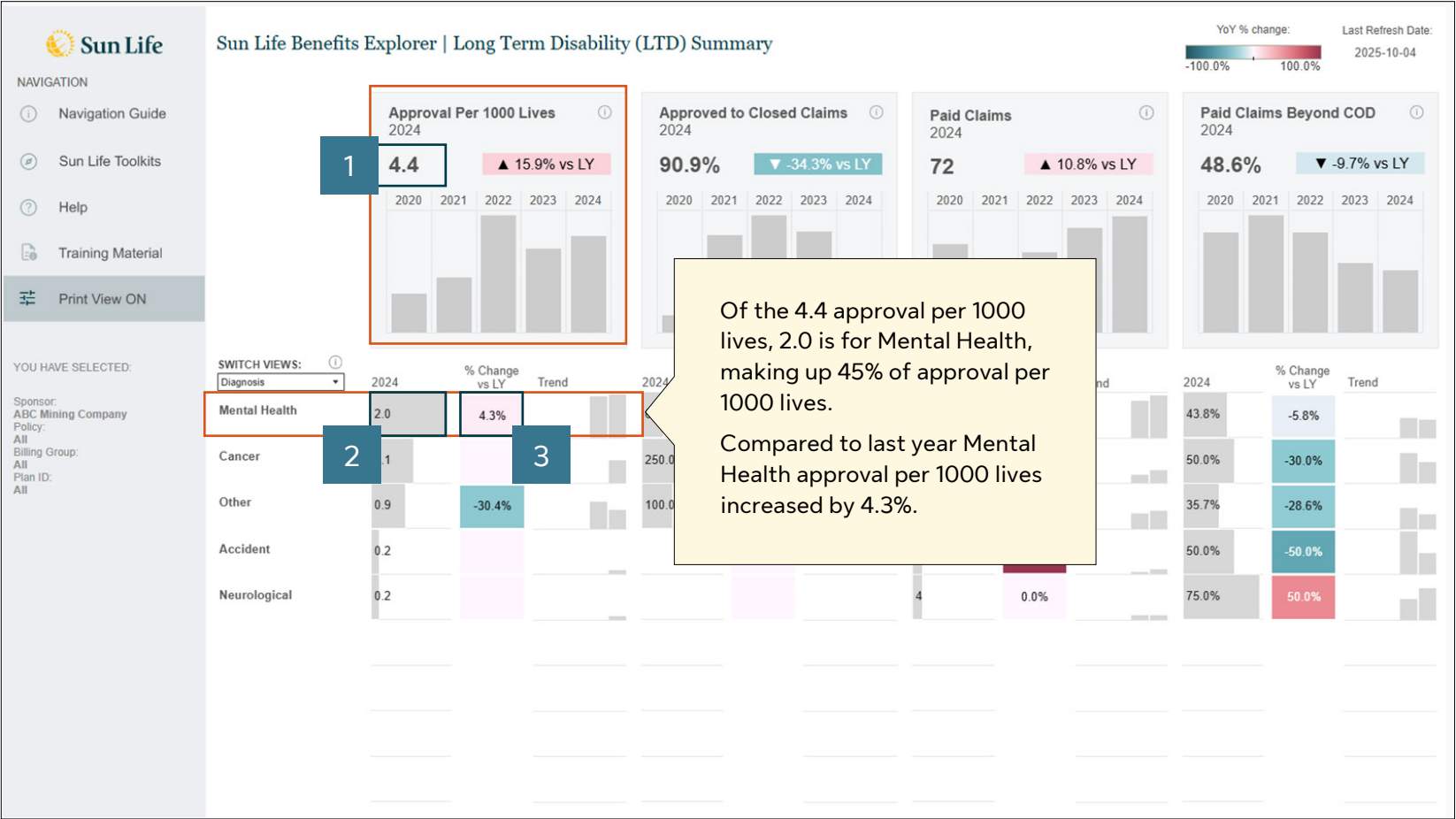
What is the impact of Mental Health on the Approval per 1000 Lives metric?

You can find the information for Approval per 1000 Lives below:

- 1 Value in the most recent complete year, overall (not split by Diagnosis)
- 2 Value in the most recent complete year for Mental Health (split by Diagnosis)
- 3 Percentage change from this year compared to last year for Mental Health

Of the 4.4 approval per 1000 lives (1), 2.0 is for Mental Health (2), making up 45% of approval per 1000 lives. Compared to last year Mental Health approval per 1000 lives increased by 4.3% (3).

The numbers on the screenshot are associated with the steps above:



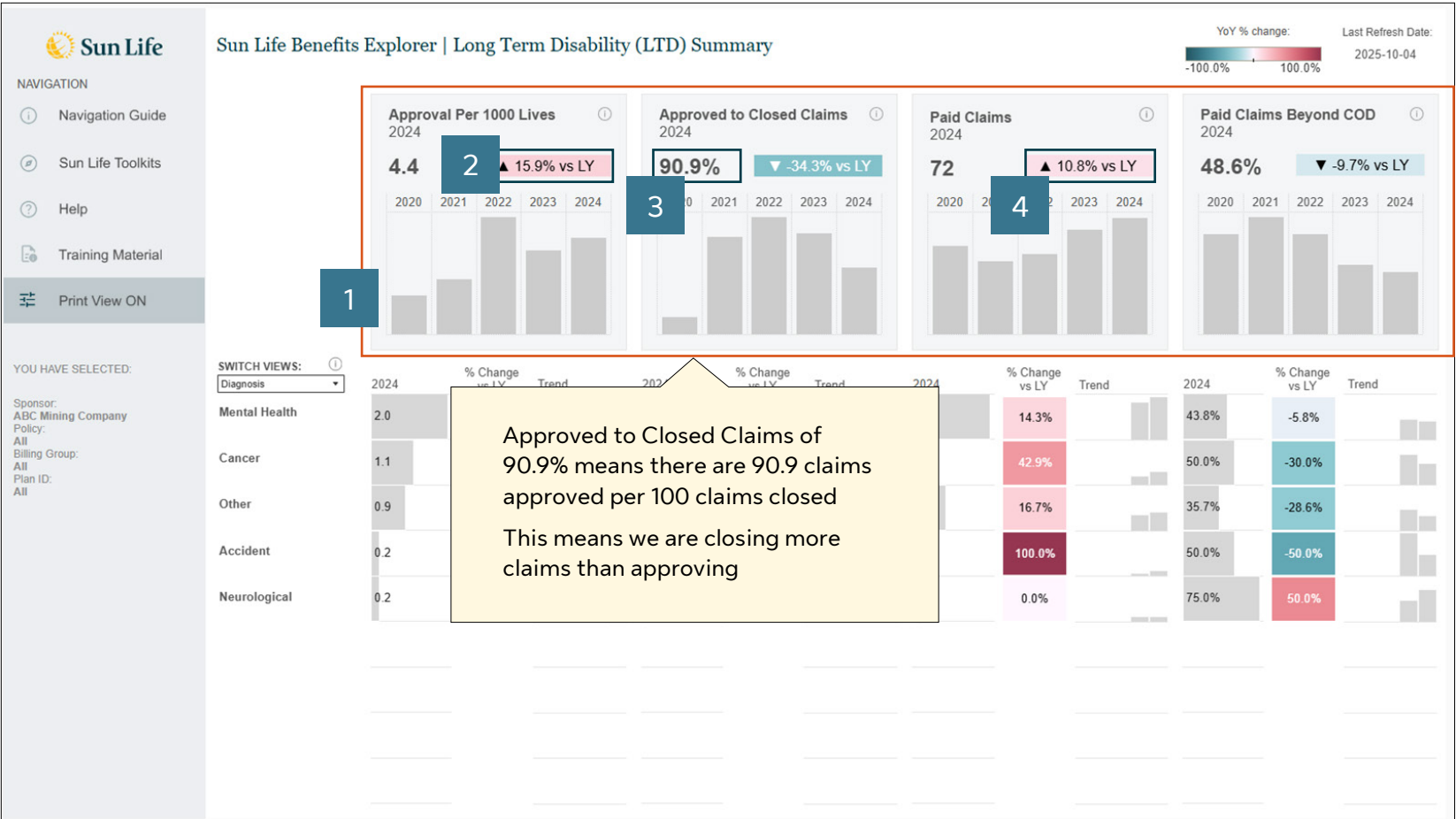
Sample Use Case 8 – LTD summary

How does ABC Mining Company's metric of approved to closed claims contribute to paid claims?

- 1 To view metrics at the overall/block level, i.e., not split by Diagnosis, focus on the top section
- 2 Approval per 1000 lives comparing this year to last year
- 3 Ratio of approved claims to closed claims
- 4 Paid claims comparing this year to last year

While approval per 1000 lives increased (2), approved to closed claims is below 100% (3), meaning that closed claims exceeded the approved claims. Despite this, the increase in approval per 1000 lives still contributed to an overall rise in paid claims (4).

The numbers on the screenshot are associated with the steps above.



Sun Life Benefits Explorer

Sample Use Cases



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. DS-1213-E 05-26 ri-dm