



Welcome to the Group Benefits Absence and Disability online tool

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

Life's brighter under the sun





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.

The screenshot shows the Sun Life Group Benefits portal. At the top, there is a navigation bar with the Sun Life logo and the text "Sun Life". Below the logo, there is a navigation bar with the following tabs: Home, Absence and Disability, Claim Submission, View claims, and Tutorials and Information. The "Claim Submission" tab is highlighted. A dropdown menu is open under "Claim Submission", showing options: Document Upload, Standard claim forms, and SunAdvantage claim forms. A yellow circle labeled "A" is placed over the "Claim Submission" tab, and another yellow circle labeled "B" is placed over the "Document Upload" option. Below the navigation bar, there is a "Welcome to Group Benefits" message and a link to "View real time absence and disability claim information". There is also a link to "View our online tutorial". Below this, there is a "Claims information" section with a search bar and a "Find a member" button. The search criteria include: Last name, Member ID, Contract number, Billing group, Province, Benefit, and Status. A "search" button is located at the bottom right of the search criteria. A "Quick links" section is located on the right side of the page, with links to: Create a report, Report index, Standard claim forms, SunAdvantage claim forms, Disability claim form upload, View a tutorial, Search criteria definitions, and Guide to manage absences.

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

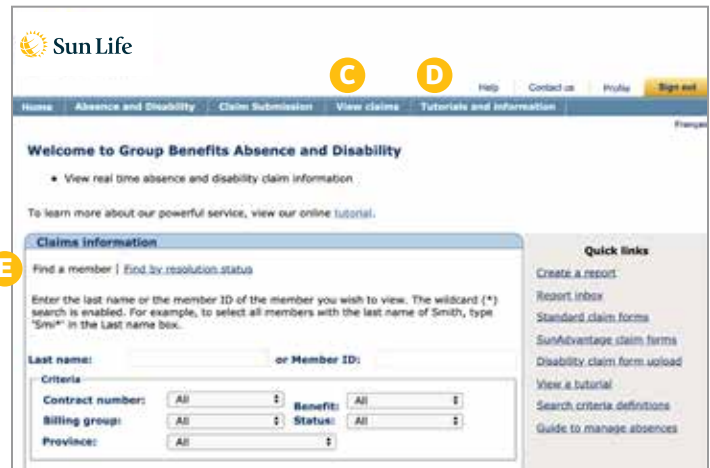
Provides an overview of the case, including the Sun Life case manager's name and their upcoming actions. Also includes whether the plan member is currently participating in a rehabilitation program (noted under Health management status) or if a gradual return to work program is expected.

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.



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.

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.

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

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.

Sun Life

Home Absence and Disability Claims Submissions View claims **Tutorials and Information**

Welcome to Group Benefits Absence and Disability

View real time absence and disability claim information

To learn more about our powerful service, view our online tutorial.

Claims information

Find a member | Find by resolution status

Enter the last name or the member ID of the member you wish to view. The wildcard (*) search is enabled. For example, to select all members with the last name of Smith, type "Smi*" in the last name box.

Last name: _____ or Member ID: _____

Criteria

Contract number:	All	Benefit:	All
Billing group:	All	Status:	All
Province:	All		

Search results are limited to a maximum of 100 claims.

search

Quick links

- Create a report
- Report inbox
- Standard claim forms
- SunAdvantage claim forms
- Disability claim form upload
- View a tutorial
- Search criteria definitions
- Guide to manage absences





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