How to connect

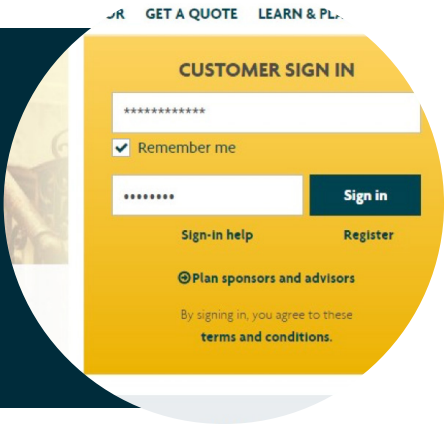
We can help!

We're always looking for ways to make it easier for you to interact with us, and our online registration process is no exception.

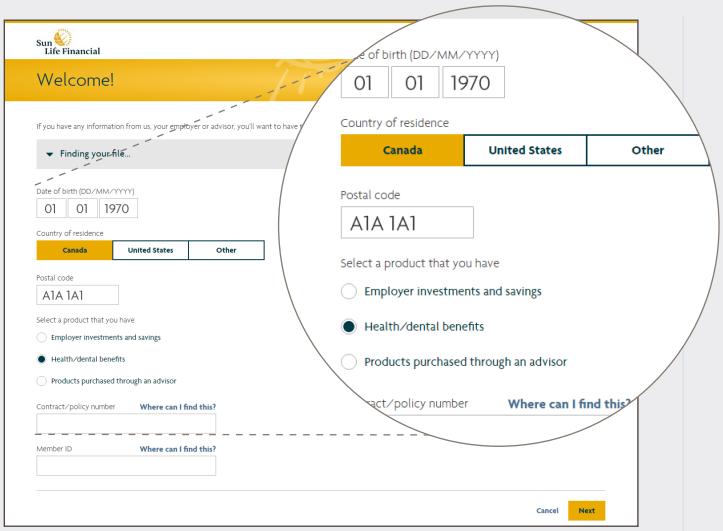
With easy-to-use navigation menus, updated content and enhanced functionality, managing your account online has never been easier.

To use **mysunlife.ca** you'll need to register to log in with your email and password.

- Go to mysunlife.ca.
- Select "**Register**".
- Already registered but having trouble connecting? Choose "**Sign-in help**".

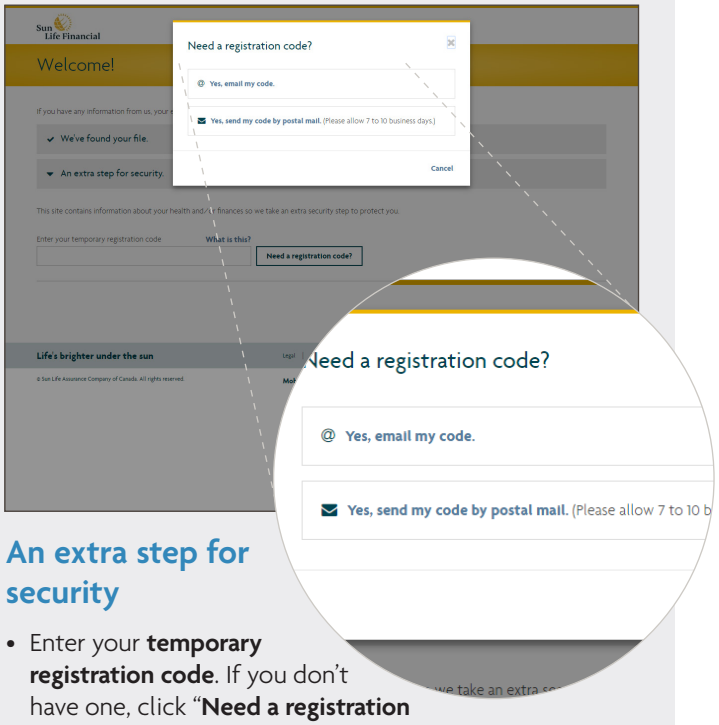


First-time users:



Finding your file

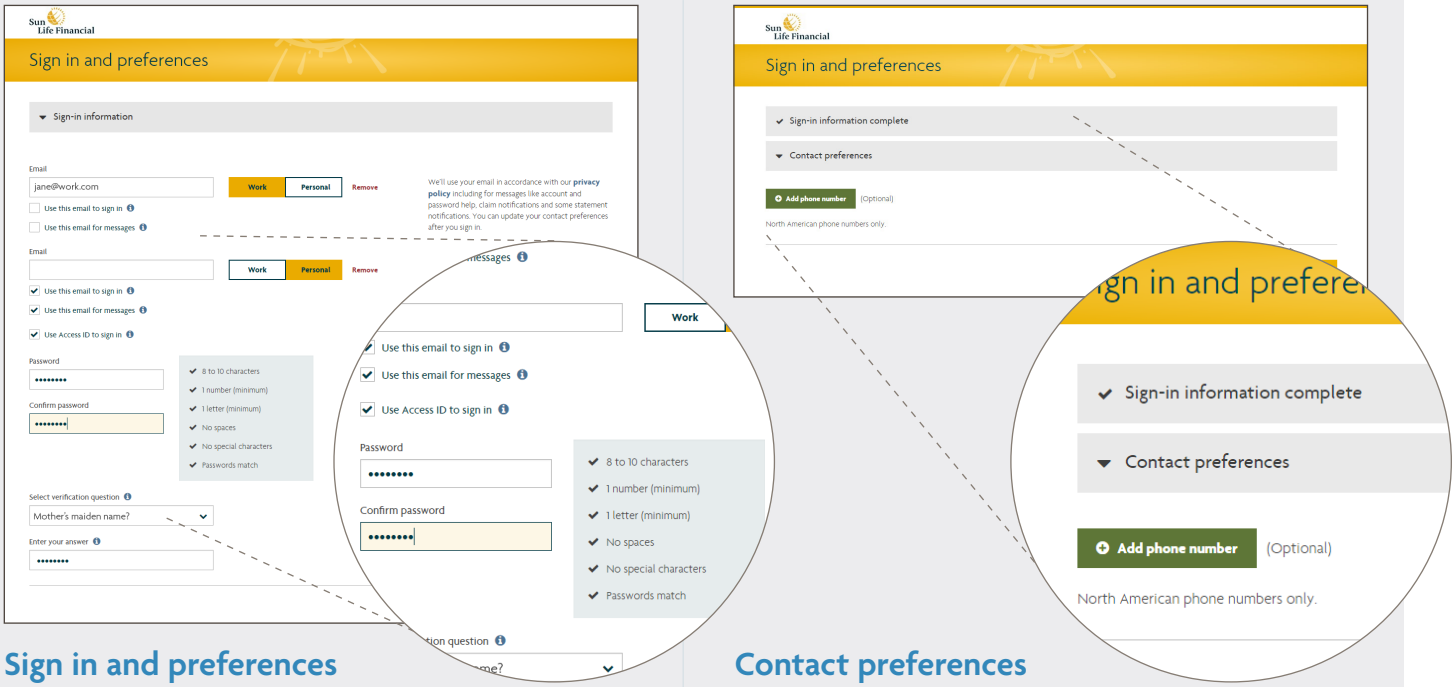
- Enter the requested information:
  - Date of birth.
  - Country of residence.
  - Postal code.
- Select "**Health/dental benefits**" as the type of plan you're registering with.
- Enter your group contract number and member ID.
- Click "**Next**".



An extra step for security

- Enter your **temporary registration code**. If you don't have one, click "**Need a registration code?**" If we have your email address on file, select "**Email**". Otherwise, select "**Postal mail**" and click "**Next**".

Sun Life Financial

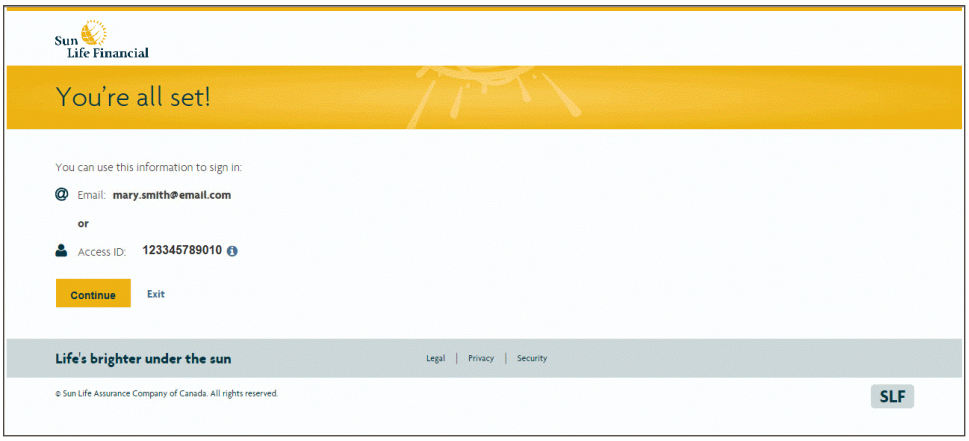


Sign in and preferences

- If we don't have your workplace email on file, add it now! You can also add your personal email address (recommended).
- Be sure to check "**Use this email to sign in**" (so you don't have to remember your numerical Access ID).
- Enter your new password.
- Select your verification question and answer.
- Click "**Next**".

Contact preferences

- You can add a phone number here for Sun Life to use to contact you if you'd like - it's totally optional, but be sure to click **"Submit"** when you're done even if you didn't add one.

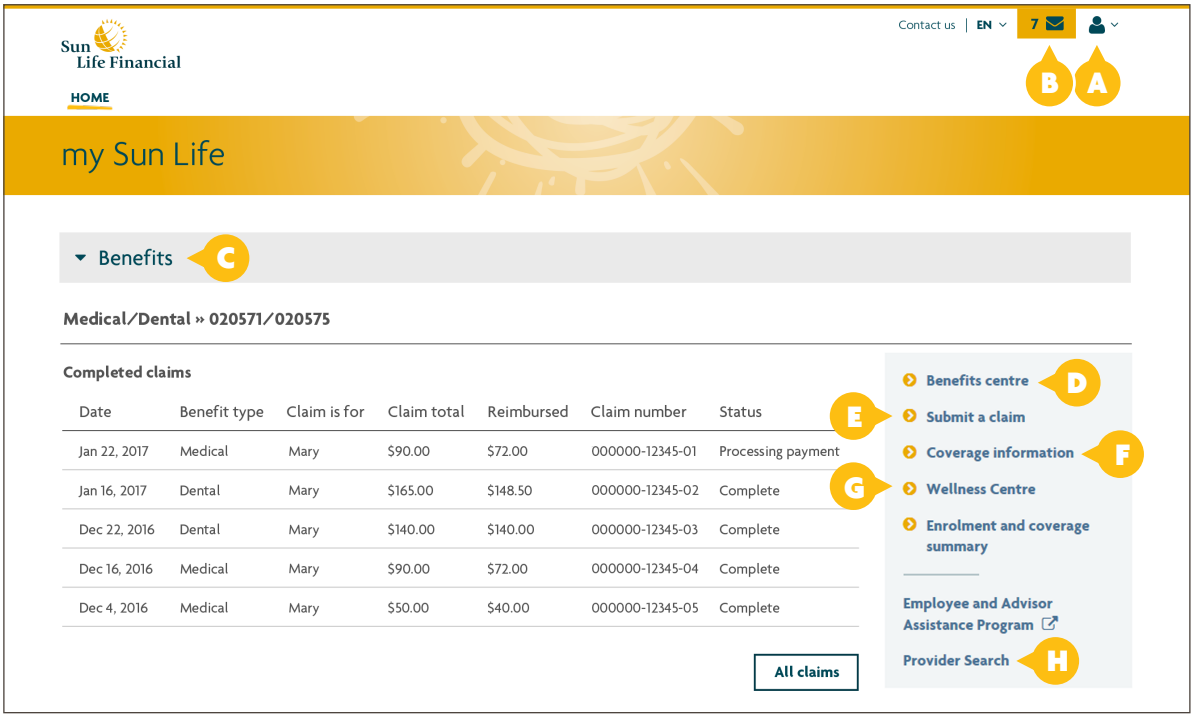


You have now completed your registration process, and can now use your e-mail or your numerical Access ID to sign in for future use at **mysunlife.ca.**

Do more, see more ... online

Sun Life Financial has created an industry-leading and award-winning website for plan members. Just visit **mysunlife.ca** to take advantage of our easy online features. Here's a quick overview of what you can see and do.

Your Home page – This is your starting page once you have signed in to the website.



A – MANAGE YOUR PROFILE SETTINGS

You have the flexibility and control to update your account at any time. Click on the **Person icon**, select **Profile > Access info** to add, change or delete your email access ID, and update your information. Or **Personal Info** to keep your file up to date with your phone number amongst other things. Choose **Preferences** to help us ensure all communications you receive are relevant and valuable to you.

B – MESSAGE CENTRE

When a number shows beside the envelope, you have important messages waiting to be reviewed.

C – BENEFITS

Displays your 5 most recent claims. Click **All claims** to view your entire claims history.

D – BENEFITS CENTRE

Provides a quick view of your claims and coverage.

E – SUBMIT A CLAIM

This provides you with quick access to Submit a claim.

F – COVERAGE INFORMATION

This provides you with quick access to coverage information.

G – WELLNESS CENTRE

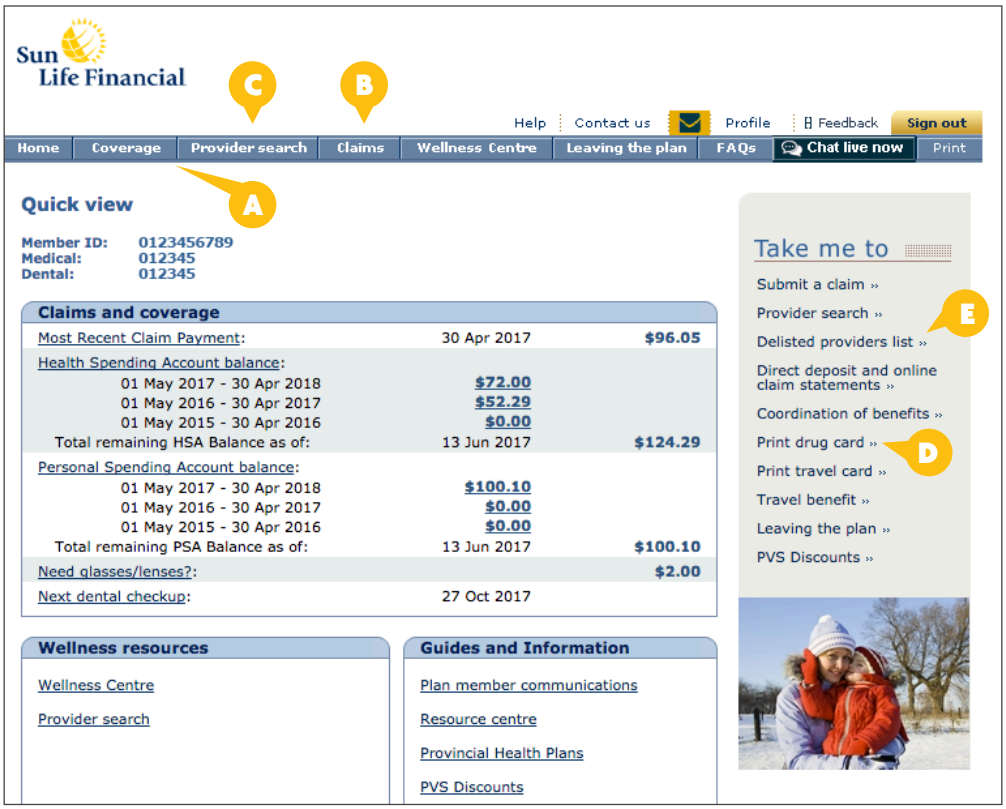
Provides a source of reliable health and medical information.

H – PROVIDER SEARCH

This provides you with quick access to start searching for providers.

The features described in this communication are based on most plans. The menu options on your own page may be slightly different, depending on your plan.

Your Quick view page – This is where you will find all the great features described below.



Once you sign in to **mysunlife.ca** and select "**Benefits Centre**", the **Quick view** page will be displayed. You will immediately see a list of the most frequently requested information.

A – COVERAGE MENU

- Get details of your **medical and dental coverage**.
- Look up **drug information**.
- Check the date of you and your dependents' last purchase, remaining amount and next purchase date on **glasses/lenses**.
- Check your next **dental** check-up and recall date for claim purposes for you and your dependents.
- Check your **Health Spending Account** balance

The features described in this communication are based on most plans. The menu options on your own page may be slightly different, depending on your plan.

B – CLAIMS MENU

- Submit a drug, dental, paramedical, vision care, Health Spending Account.
- Print personalized claim forms.
- View a claim statement.
- View most recent claims payment.
- View claims history.

C – PROVIDER SEARCH

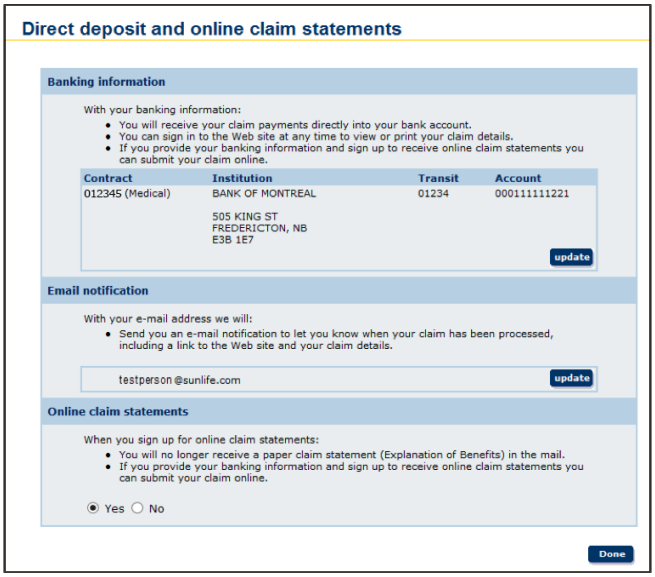
- Find a paramedical service provider in your area and see how other Sun Life Financial plan members rate them.

D – PAY-DIRECT DRUG CARD

- Print your personalized Pay-Direct Drug card.

E – DELISTED PROVIDER LISTING

- You will be provided with a list of Sun Life Financial's delisted health care service providers.



Direct deposit and online claim statements

Do you want to receive quicker payments for your health and/or dental claims? Sign up for direct deposit. You can also register for our online claim statements.

It's easy, fast and environmentally friendly! Here's how to sign up:

Select "**Benefits centre**", then go to the "Take me to..." area on the **Quick view** page and select "**Direct deposit and online claim statements**".

To add or update your banking information, select the "**update**" button. You will need to have your banking info (transit, institution and account numbers) or a cheque handy.

Enter your banking information in the boxes provided, and then select the "**submit**" button.

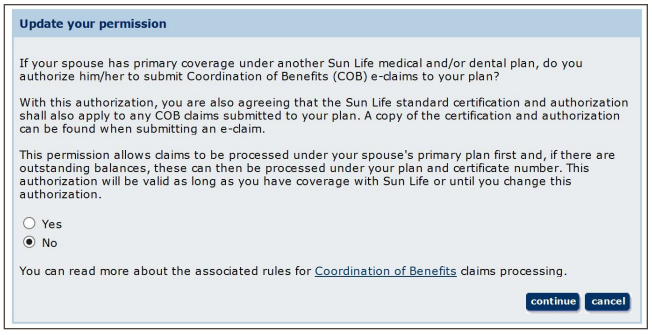
Once you have submitted your information successfully, select the "**close window**" button.

REVIEW THE EMAIL ADDRESS THAT WE HAVE ON FILE.

We will send you an email request to confirm this email address, so please ensure it is active and correct. To change or add your email address, select the "**update**" button. Enter your correct email address and select "**submit**."

Validate the email address provided by responding to an email that is automatically sent to you.

If you need paper copies of your claim statement to send to your spouse's plan to coordinate benefits or want paper copies for your records, you can easily print your claim statements from the website.



Coordination of benefits (COB)

TO CHECK CURRENT COB INFORMATION:

- Select **Coordination of benefits** under the "Take me to..." area on the **Quick view** page.

TO UPDATE YOUR CURRENT COB INFORMATION:

- Verify your spouse's primary coverage with Sun Life and select "**continue**".
- Click "**update**" next to the approriate contract.
- Select the statement that applies to your spouse's coverage under each contract number.
- Select "**submit**" when done.

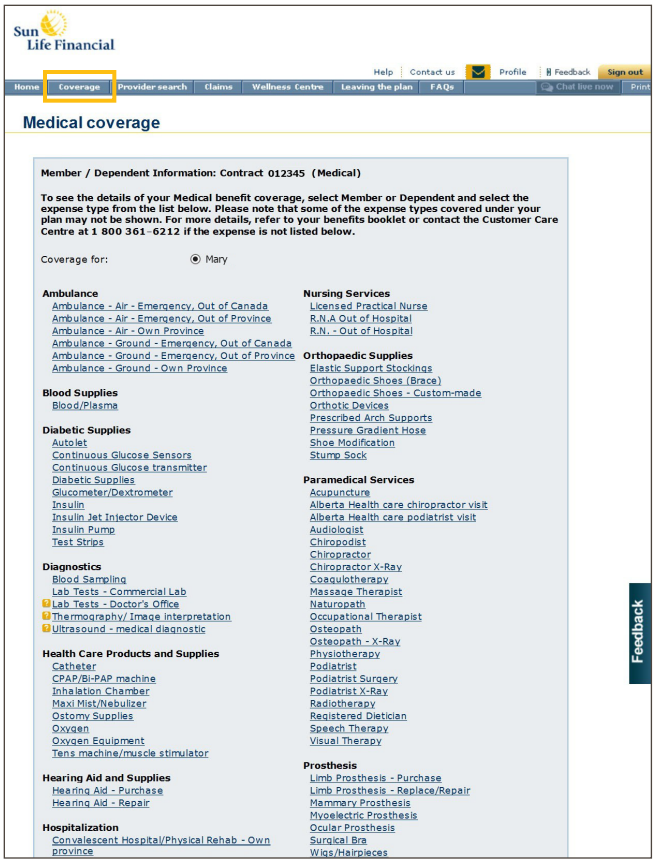
Coverage

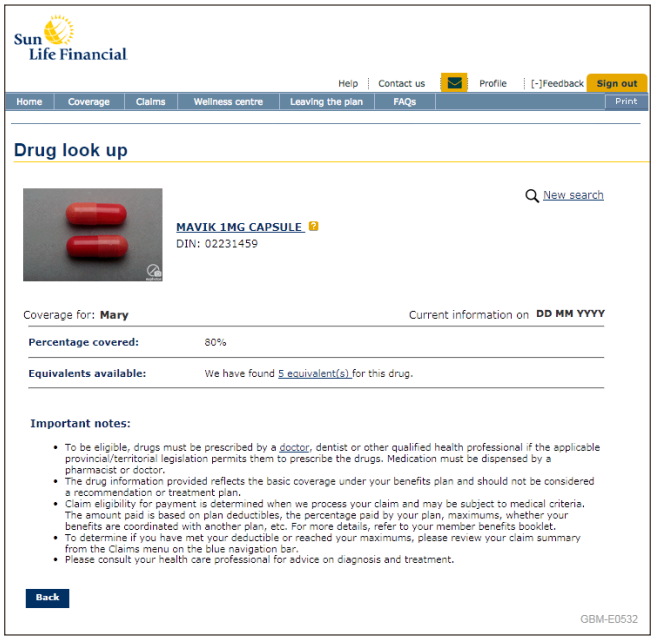
The Coverage section gives you quick and easy access to information about the coverage available for you and your dependents under your medical and dental plans.

To see your coverage details:

- Select "**Coverage information**" from the **Home** page. Choose the type of coverage for your claim.
- Select whom the inquiry is for (member or dependent).
- Select the expense you would like information about. For dental expenses, you can also search by procedure code.
- Select "**view your claims**" to view a list of the claims you and your dependents have submitted for that expense (located under "**Limits**" for medical expenses and "**Overall maximum**" for dental procedures).

(Note: Some coverage information may not be available. Please refer to your benefits booklet for details.)





Drug Look Up

The Drug Look Up function is a powerful tool that helps you get a thorough understanding of your drug coverage and the drugs that you are taking by providing you with:

- Coverage details.
- The ability to look up a specific drug by name or DIN.
- Prior authorization forms.
- Potential generic and/or therapeutic alternatives.
- Cost-saving opportunities.
- Detailed information about the drug and how it works.

To find this useful information:

- Select "**Coverage information**" from the **Home** page.
- Select "**Drug coverage**" on the Coverage page.
- Select "**Drug look up**" on the Drug coverage page.
- Select "**I agree**" once you have read the Terms and Conditions.
- Enter the drug name (the auto-fill feature will help you).
- Select the drug name from the drop-down list.
- Select "**search**".

To read more about a drug, click on the drug name in the search results screen.

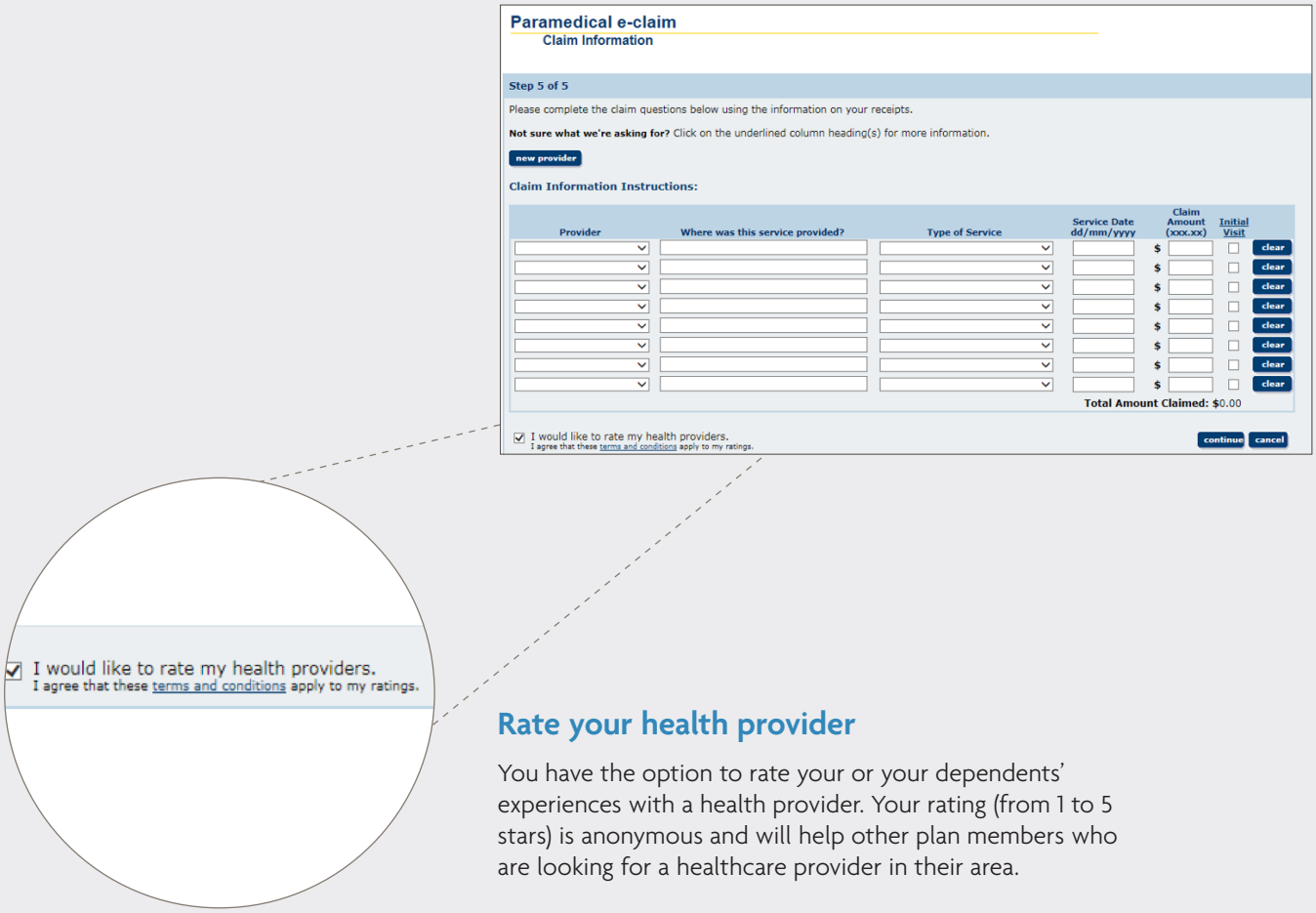
Submit claims online

Claiming made easy! You can submit claims while you're logged in to **mysunlife.ca**. You don't need a paper claim form – just fill in the information online. The system generally processes your claim immediately, and you receive an online notice telling you whether the expense is covered and usually the amount and details of your claim payment.

To submit claims online:

- Select "**Submit a claim**" from the **Home** page, then choose the type of claim you want to submit.
- You will be guided through the claiming process in a few easy steps.
- You can submit COB claims online where Sun Life is the second payer. Also, you can have COB processed automatically between plans where you and your spouse or partner are both covered under Sun Life plans.

We may randomly audit claims submitted online, so please be sure to keep your original receipts and supporting documents for 12 months. If your claim is chosen for audit, we will ask you to send us the original receipt.



Rate your health provider

You have the option to rate your or your dependents' experiences with a health provider. Your rating (from 1 to 5 stars) is anonymous and will help other plan members who are looking for a healthcare provider in their area.

Recent claims

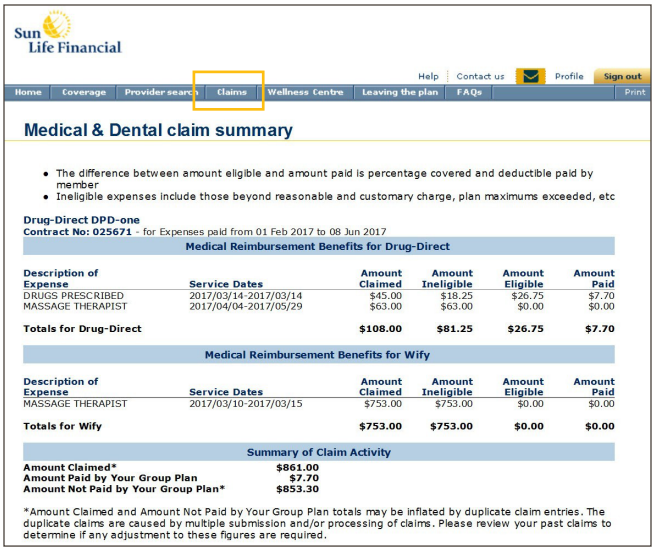
This feature provides a summary of your drug or medical and dental claims and the amount paid for the time period you specify.

To view all your recent claims:

- From the **Home** page, click on "**All claims**".
- This will take you to the **Recent claims and estimates** page, where you can view all of your claims. You can also review specific claims based on the time period you have specified.

To view a claim summary:

- From the **Home** page, choose "**Benefits centre**".
- Under "**Claims**" in the blue menu bar, select "**Drug claim summary**" or "**Medical and Dental claim summary**".
- Specify the period you would like to review.
- Select "**view summary**".



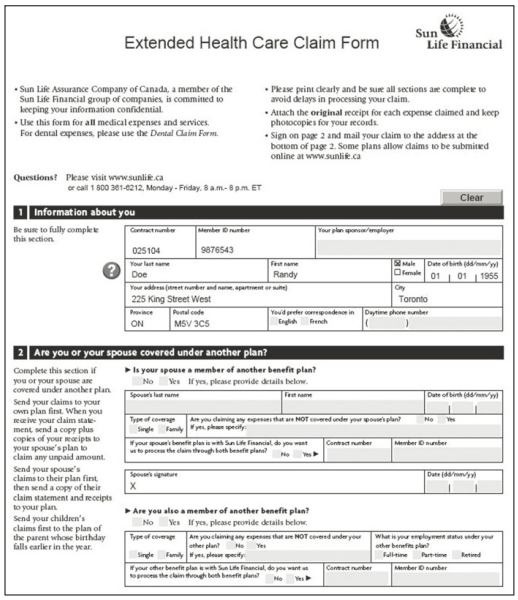
Personalized claim forms

The claim forms available for you on mysunlife.ca are already pre-filled with your contract number, member ID number, name, date of birth and address. All you have to do is complete the rest, print, sign, enclose the original receipts and send.

To download your personalized claim form:

- From the **Home** page, choose "**Benefits centre**".
- Select "**Print claim form**" under "**Claims**" on the blue menu bar.
- Choose the form you need from the list.

(Note: Adobe Acrobat Reader is required for this feature; it is available for download free of charge.)

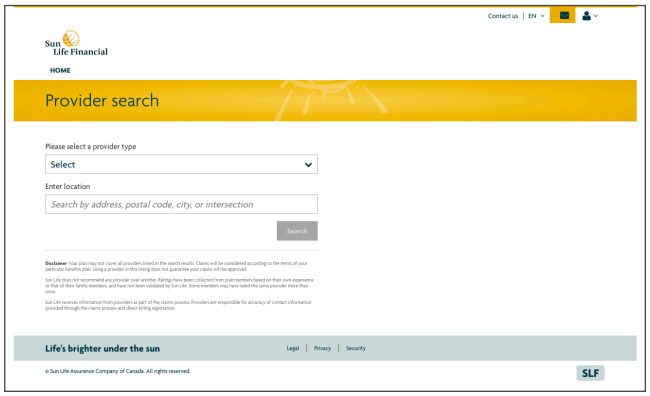


Provider Search

If you're looking for a local health service provider, **mysunlife.ca** can help. You'll be able to search by health provider category for your area, and see how other plan members rate their experience with the provider.

To use **Provider Search**:

- From the **Home** page, choose "**Benefits centre**".
- On the **Quick view** page, choose "**Provider Search**" on the blue menu bar.

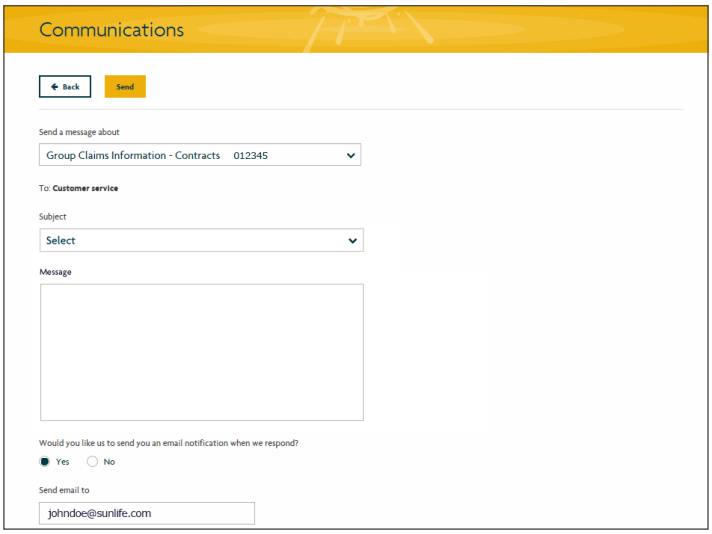


Message centre

As well as seeing messages from Sun Life Financial, you can send us a secure message through our website.

To send us a secure message:

- Click on the communications envelope icon at the top of the screen.
- Click "**Compose message**".
- Select a category for your message from the drop-down menu.
- Add a subject in the **Subject** box, then add a message in the **Message** box.
- If you would like an email notification when we have responded to you, select "**Yes**". (You can provide an email address you would prefer to receive your notication at).
- Click "**Send**" at the bottom to send us the message securely.



Wellness Centre

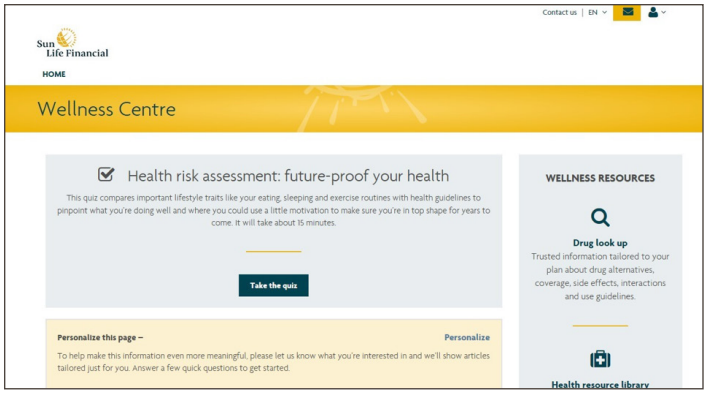
Looking for reliable health and medical information?

Our Wellness Centre provides:

- A Health Risk Assessment quiz to pinpoint what you're doing well and where you could use some extra motivation.
- Personalized articles based on a few short questions about your interests.
- Information tailored to your plan about drug alternatives, coverage, side effects, interactions and use guidelines.
- Reliable Canadian health information sources to help you make informed decisions.
- Articles about health conditions.
- Easy-to-use information on Canadian prescription drugs.
- Community support & groups.
- Natural health products information.
- Helpful information and resources on your provincial health coverage.

To use the Wellness Centre:

From the **Home** page, select "**Wellness Centre**".



Member: Mary

Member ID # 0123456

Access ID # 012345678912

Sun Life Financial

Medical / Dental / Drug / Travel / Vision Coverage

Contract #		Contract #	
012345	Medical	012345	Travel
012345	Dental	012345	Vision
012345	Drug		

This card is valid only while the benefits are in effect.

For specific information about your coverage and claims or to complete transactions online, sign in at **www.sunlife.ca/slf**

For information or help not available online, contact our toll-free Customer Care Centre at 1 800 361-6212. You can use your access id and password in our automated phone system for faster service.

To review our privacy policy visit our website: **www.sunlife.ca/privacy**

Travel Card

Sun Life Financial

If you need any medical assistance, contact Allianz Global Assistance immediately.

24/7 assistance

In the USA and Canada, call: 1-800-511-4610

From anywhere else: 1-519-514-0351
Call collect through an international operator.

Fax: 1-519-514-0374

Allianz Global Assistance

assure

Sun Life Financial

Drug Card

Member's Name: Mary

(Note: please enter all numbers)

Carrier No.	Contract No.	Member's ID No.	Issue No.
16	020671	0123456	01

Use of this card authorizes Sun Life, its agents and service providers to collect, use and disclose information about me, my spouse or dependents to any person or organization including the pharmacy, health care practitioners, institutions, investigative agencies, insurers and where appropriate my plan sponsor, for the purposes of underwriting, administration, audit, paying claims and patient safety. If I am a spouse or a dependent, my information will be shared with the plan member. To review Sun Life's privacy policy, visit www.sunlife.ca.

Print your Pay-Direct Drug (PDD) card

Using your PDD card is a fast and convenient way to claim prescription drugs. Participating pharmacies no longer require a plastic card to swipe through their system; simply print and show this paper PDD card to your pharmacist, who will input your information and submit your claim electronically.

To print your PDD card:

- From the **Home** page, choose "**Benefits centre**".
- Select "**Print drug card**" under "Take me to...".
- Select "**Print**" on the blue menu bar.

The features described in this communication are based on most plans. The menu options on your own page may be slightly different, depending on your plan.

WONDERING HOW TO SIGN OUT?

Just click the Person icon at the top of the **Home** page or "**Sign out**" on other pages.

Questions?

For questions about any of the features described in this newsletter or how to access **mysunlife.ca**, just call our Client Care Centre at **1-800-361-6212**, from 8 a.m. to 8 p.m. ET, Monday to Friday.

Check out our my Sun Life Mobile app!

PROTECTING YOUR PRIVACY

At Sun Life Financial, protecting your privacy is important to us. When you give us your personal information, we can assure you that it is collected, used or disclosed for purposes identified to you and with your permission. For more information about our privacy policy, visit **www.mysunlife.ca**.

Life's brighter under the sun

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Sun Life Financial