



Key dates for day 1 benefits

When employees sign up for benefits they expect them to be available right away. Let's work together to make that happen. You will see below that we need 20+ days to process and install a case so we have put together a timeline with the goal of day 1 benefits.

Broker and/or Client

30-60+ days before the effective date

- ✓ Notify Sun Life of plan selection
- ✓ Provide prior carrier documents and bill
- ✓ Schedule enrollment meetings – Open Enrollment should end with 20+ days prior to effective date

20+ days¹ before the effective date

- ✓ Submit all signed Sun Life sold case paperwork
- ✓ Submit post-enrollment census

Before the effective date

- ✓ Email employees information² about how to use their benefits
 - Easy Start dental flyer and generic dental ID card
 - VSP information card
 - Value added services flyers
 - EAP brochure and ID card

Sun Life

30-60+ days before the effective date

- ✓ Schedule welcome call to:
 - Review initial paperwork
 - Ask questions and align on next steps
 - Request enrollment dates

Upon receipt of sold case paperwork and census

- ✓ Review submitted paperwork and census
- ✓ Reach out with questions for missing information and clarify discrepancies

Once all paperwork/census is in good order, you can expect the following updates² as your group is installed:

- ✓ Risk approval email
- ✓ Voluntary Deduction Report
- ✓ Case completion email with important information to share with employees

Day 1 benefits

We realize that this timeline won't work for all groups and when that happens we do have other options available. Please talk to us about your concerns and we can share with you the other options available.

1. If your group includes prepaid dental – employees will not be on the provider's roster for the following month if enrollments and facility IDs are not provided by the 12th of the month before the effective date.

2. Materials and reports provided will vary based on coverages and situs state.

Group insurance policies are underwritten by Sun Life Assurance Company of Canada (SLOC) (Wellesley Hills, MA) in all states except New York. Prepaid dental products are provided and administered by SLOC, and provided by prepaid dental companies affiliated with SLOC in certain states except New York. In New York, group insurance policies are underwritten by Sun Life and Health Insurance Company (U.S.) (SLHIC) (Lansing, MI). Prepaid dental products are provided and administered by SLHIC. In states other than New York, Group Hospital Confinement Indemnity "Gap" or Supplemental Medical Expense "Gap" insurance is underwritten by Fidelity Security Life Insurance Company (Kansas City, MO) and is administered by SLOC.

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