



Choosing Sun Life for your WA PFML voluntary plan

Is it time to choose a partner to administer WA PFML benefits for your employees?

You can apply during Q4 2021 for a January 1, 2022 effective date.

If you would like to transfer to Sun Life's WA PFML administrative services only voluntary plan, we're here to help. We have provided below some of the initial steps to make your transfer successful. Please read the [WA PFML Voluntary Plan Guide](#) to understand the application process and your responsibilities.

Transferring from the state plan to Sun Life's voluntary plan

The plan will become effective on the first of the quarter after it is approved.

Step 1: Determine the voluntary plan effective date

Until your effective date, you will be required to continue to remit premium on a quarterly basis to the state plan and your covered employees will need to continue to submit their WA PFML claims to the state plan. Voluntary plans may not become effective prior to the approval of the voluntary plan by the state.

The State of Washington advises you to allow for at least 30 days from the receipt of all application requirements before your desired effective date to ensure a smooth approval process.

Your Sun Life sales and service team can help you plan your voluntary plan effective date and coordinate with the effective date of your other group coverages.

Step 2: Identify employer Unified Business Identifier numbers

Each separate entity that has a Universal Business Identifier (UBI) number must have its own voluntary plan exemption. Therefore, you will need to apply for a voluntary plan for each UBI if you want them covered by the same plan. You may upload the same plan description document for each UBI application if you intend to cover all employees, regardless of UBI, under one plan.

Step 3: Apply for a voluntary plan

You will need to apply for a voluntary plan via the [WA PFML website](#) by following these steps:

1. Provide information that identifies your business and your business contact.
2. Answer questions testing your Voluntary Plan compliance.
3. Upload a copy of your WA PFML Voluntary Plan document for review, a template will be provided to you by Sun Life.
4. Pay a fee for each UBI application that is submitted.

Reminder: to understand the application process and your responsibilities, please review the State's [Voluntary Plan Guide](#).

Benefits of a Sun Life Voluntary Plan*

- ✓ Integration of WA PFML claims with Short-Term Disability and other statutory plans you have with us
- ✓ Customizable on-demand reporting
- ✓ Claims and leave management integration for both employees and benefits administrators



Visit us at www.sunlife.com/pfml for more resources and education on PFML.

* Certain existing coverages result in a different experience.

Sun Life's self-funded or administrative-services-only WA PFML product will be administered by Sun Life Assurance Company of Canada (Wellesley Hills, MA). This service is not insurance. The information in this document is based on our knowledge of the current WA PFML law and regulations. If the regulations are revised or if the law itself is amended, we will update this document. This document is not intended to be and should not be construed as legal advice. Employers are encouraged to consult employment law counsel for legal advice.

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