

ENROLLMENT

Our Enrollment Process

A successful enrollment event can make all the difference in how satisfied employees are with their new benefits. We have created a simple process to help you increase their satisfaction.

Your team

We provide you an Enrollment Team who will partner with you to help make your enrollment event a success.



- **Voluntray Solutions Manager (VSM)**—Your main point of contact during the entire enrollment process (planning through implementation). Your VSM will manage the Benefit Counselors during the enrollment, create a pre-enrollment marketing strategy, and follow through with post-enrollment needs such as payroll deduction reports.
- **Benefit Counselors**—These experienced counselors will meet one on one with your employees to help them make the best decision based on their particular insurance needs. They represent Sun Life and are trained on the specific benefits you choose to offer your employees. Counselors are paid a per diem, making them a true consultant, not a pushy salesperson.

- Mandatory meetings with our Benefit Counselors give employees the opportunity to learn about the benefits, elect coverage or waive coverage.
- In addition to paper, you can choose to offer your enrollment telephonically or electronically (laptops or tablets).
 - Telephonically: Employees can dial into a Call Center and speak to a Benefit Counselor about benefits offered, ask any questions they may have, and select the benefits that best fit their needs.
 - Electronically: Groups can utilize a self-service platform for enrolling, or work with Benefit Counselors in a one-on-one setting to input their benefits selection and make educated choices in live time.

Pre-Enrollment Education

The Voluntray Solutions Manager will help you promote the enrollment period and communicate benefit changes/additions. Product information can even be distributed in advance so employees have time to review their options before employee meetings. We usually recommend a combination of announcements including posters, eBlasts, payroll stuffers or flyers.



The Enrollment Event

Employee access can be the key to a successful enrollment. We recommend group and one-on-one meetings to make sure employees have a full understanding of the benefits offered.



Post-Enrollment Support

When the enrollment period ends we will:



- Provide a preliminary Payroll Deduction Report—the report itemizes and totals each participant's elections.
- Conduct our Medical Underwriting review of necessary employee applications for certain products.
- Distribute your final Payroll Deduction Report that will contain any changes after our Medical Underwriting review.
- Conduct a conference call or meeting to provide you any employee feedback and discuss the effectiveness of the enrollment.



To learn more, call your local Sun Life Employee Benefits Representative.

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. Products and features may not be available in all states and may vary based on state laws and regulations. Contact us for costs and complete details.

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