

## How to have a successful enrollment event

As you approach enrollment season, we want to ensure you have a successful event for your employees. If your employees are working virtually during this enrollment season, we can help. You can learn about our virtual enrollment solutions at [www.sunlife.com/virtualmeetinginabox](http://www.sunlife.com/virtualmeetinginabox).<sup>1</sup> We also put together a few helpful tips and reminders for you to consider while planning for your event.

### Enrollment material

Order your enrollment material as early as possible. The turnaround time for printing and shipping standard flyers during this time of year is 5–7 business days. If you would like rates included in the material, please provide the payroll cycle (weekly, bi-weekly, semi-monthly or monthly) when requesting the material to expedite the ordering process.

### Annual enrollment vs. open enrollment

An **annual enrollment period** is the one time per year during which employees may add, drop or make changes to their benefits. This differs from an open enrollment in that late-entrant waits or Evidence of Insurability (EOI) provisions may still apply.

An **open enrollment** generally allows late entrants to elect coverage with no late-entrant penalties and may also allow employees to add or increase coverages up to the guaranteed issue amounts. Open enrollments must be approved by Sun Life's underwriting department in advance.

Coverage elections that are subject to EOI will not be effective until the EOI application is approved by Sun Life. You should not begin payroll deductions for that coverage until the application is approved. Reach out to Client Services at 800-247-6875 for questions regarding EOI or details on your specific contract provisions.

### Signature date guidelines

**Your coverage** will take effect on the **employee's date of eligibility** providing the employee has signed their application within 31 days of being eligible for benefits. For example, if an employee was hired on June 1 and has a July 1 eligibility date, the employee will need to sign the application before August 1 for their coverage to be effective on July 1.

For additional information on the best way to submit your annual enrollment changes, reach out to your dedicated Sun Life representative. **Note that annual enrollment changes should not be entered on the employer portal.**

### Employee Dental ID cards available online

Looking for your employees' Dental ID cards? [Watch this short video](#) to learn how to find them on Sun Life Connect. **Tip:** Generally, dental providers only need the employee's Social Security number to confirm benefits. Similarly, VSP providers need the employee's name and Social Security number to access the employee's vision benefits.

1. Virtual enrollment is not available for U26 Clients.

Group insurance policies are underwritten by Sun Life Assurance Company of Canada (Wellesley Hills, MA) in all states, except New York. In New York, group insurance policies are underwritten by Sun Life and Health Insurance Company (U.S.) (Lansing, MI).

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