



Frequently asked questions (FAQ)

October/2025

External FAQ

1. What is *Sun Life Benefits Explorer*?

Sun Life Benefits Explorer (Benefits Explorer) is an advanced analytics tool that helps plan sponsors better understand and manage their benefits plan. The tool enables Advisors to analyze and optimize their Clients' benefits plans by leveraging data-driven insights. Through interactive dashboards and readily available visualizations and insights, Benefits Explorer provides many benefits.

- It provides a current and historical holistic picture of their employee health plan.
- It helps users enhance their health strategy by identifying areas of focus and top contributors to their total spend for drug, medical and disability benefits.
- It allows users to analyze changes over time to understand how things have evolved from one year to the next, or from one quarter to the next.

These features help users get a clear and detailed picture of spend and usage patterns across drug, medical and disability benefits.

2. What is the difference between *Sun Life Benefits Explorer* and Plan InSite?

Sun Life Benefits Explorer and Plan InSite are both analytics tools, but they serve different purposes. Benefits Explorer focuses on helping users understand and manage their own employee health plan through interactive dashboards and visualizations. Plan InSite is designed for advisors to benchmark and compare Client plans against industry standards, offering customization options and detailed plan design information to support Client decision-making and business growth.

3. What is the difference between Group Benefits Reporting and *Sun Life Benefits Explorer*?

Benefits Explorer and BOXI reports use similar data, but *Benefits Explorer* focuses more on employee health and leverages **service date instead of payment date** (which Group Benefits Reporting uses) to show health utilization trends. It offers interactive dashboards and extra details like medication categories and disability diagnoses to help the user get more insights. Hover over the text in the Tableau dashboard to view explanations of the metrics.

4. When is the data in *Sun Life Benefits Explorer* updated?

The data is updated monthly. Once a month closes, reports are updated to include the preceding month's data. Generally, the updated data becomes available on the 10th day of each month.

5. What is the difference between Reporting Type: Calendar or Fiscal option in the 'Filter section'?

We have designed two reporting types on this dashboard:

- Calendar follows the standard January to December year.
- Fiscal allows you to select a custom Fiscal Start Month¹.

¹ This is the name of the field in the dashboard.



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- You can define the start month for your plan by using Fiscal Start Month: for example, if you choose Fiscal with a Fiscal Start Month of 2 (February), then each Fiscal Year will start from February to January of the following year.

6. Is it possible to select a different benefit start month for my plan?

Yes, to select a different benefit start month, go to the 'Filter' section and choose 'Fiscal' for Reporting Type and choose from 2 (February) to 12 (December) to define the benefit start month.

For example, if you choose Fiscal with a Fiscal Start Month of 11 (November), then each Fiscal Year will go from November to October of the following year.

7. How do data updates affect the information displayed in the *Sun Life Benefits Explorer* summary views and trending by quarter or by year?

For calendar year views:

- Complete quarters are needed for accurate comparisons and trends
- For example, the first quarter data (January, February and March) will only appear once all three months are updated

For fiscal year views:

- These are based on the benefit year start date
- If a benefit year starts in February, selecting "Fiscal" year option will include January's data in the previous year's trends, as it completes that fiscal year and quarter

8. How much historical data does *Sun Life Benefits Explorer* contain?

Benefits Explorer includes 5 years of historical data, allowing users to analyze trends and patterns over an extended period.

9. How does the language preference at set-up impact the language shown in the reports?

The language preference at set-up does not impact *Benefits Explorer*. The dashboard language is determined by your browser settings. If your browser is set to French, you'll see the dashboard in French; if set to English, you'll see it in English.

10. What are the privacy constraints?

For Drug and Medical Summary, sponsors would need to have a minimum of 10 lives for each level, i.e. sponsor, policy, billing group, plan ID to see data at that level. Sun Advantage Clients with less than 10 Lives wouldn't meet privacy rules.

To show diagnoses information for LTD Summary, the filtered data would need to have:

- at least 10 newly approved claims and 10 paid claims in each period
- at least 3 diagnoses spread within newly approved claims in each period
- less than 80% in one diagnosis within newly approved claims in each period

11. Why do some pages appear blank?



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A page is blank if:

- you don't have the respective benefit coverage with Sun Life
- it doesn't comply with our privacy rules. This is to protect personal identification.

12. How can I print a report?

You can take a screenshot using 'Snipping Tool' on Windows or use the built-in screenshot feature on Mac. On Mac, press Shift + Command + 3 to capture the entire screen, or Shift + Command + 4 to select a specific area to capture.

13. I'm an Advisor, am I able to see my block of business trends in the same dashboard?

Yes, when you first land on the *Benefits Explorer* page, the dashboard will display all sponsors that are part of your block of business and meet our privacy rules. To see trends for a specific sponsor, use Filter section to select a specific sponsor.

14. Who should I contact if I have a question about the content of *Sun Life Benefits Explorer*?

Please email Benefits.Explorer@sunlife.com for any questions.

Questions?

Contact your Sun Life Group Benefits representative.