



# Sun Life Benefits Explorer

Health insights: comprehensive plan performance review



# Sun Life Benefits Explorer: Training material

Health Insights : comprehensive plan performance  
review

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# Health insights: comprehensive plan performance overview

This document provides additional details about what you'll see on the dashboard. The Summary views you'll see for Drugs, Medical, and Long Term Disability give valuable insights into plan members' drugs usage patterns, medical expenses, as well as their health trends.

The Drug Summary view provides insights into plan members' drug usage patterns and associated costs.

## Key information includes:

- Medication categories (e.g., Diabetes, Cancer),
- Brand names (e.g., Ozempic, Humira),
- Drug names,
- Total plan member drug spend,
- Number of claiming members, and
- Average drug spend per claiming plan member

## Benefits:

The Drug Summary dashboard helps empower you to:

- optimize your benefits offerings,
- better manage drug costs,
- identify high-cost areas and potential savings,
- manage drug usage risks, and
- implement targeted wellness programs

## Drug Summary use cases help analyze:

- plan member drug costs,
- spending patterns, and
- drug claim trends

Check [Sample Use Case 3](#) to see the specific filters applicable to Drug Summary.

See [Sample Use Case 4](#) for specific examples of Drug Summary.

The Medical Summary view provides you with an overview of your plan members' medical expenses and offers valuable insights into various aspects of their medical claims.

## Key information includes:

- **Major expense categories:** includes broader categories like Paramedical Practitioners, health and PSA, and more.
- **Minor expense categories:** provides more detailed classification of expenses. Examples include:
  - Health-care services: Registered Massage Therapists, Psychologists, Chiropractors
  - Vision care: contact lenses, eyeglasses, eye exams
  - Medical equipment: hearing aids, mobility devices, blood pressure monitors

You can easily identify trends and evaluate the efficiency of your group benefits by looking at specific data like:

- Total plan member medical spend,
- Number of claiming members, and
- Average medical spend per claiming plan member

## Benefits:

The Medical Summary dashboard helps empower you to:

- optimize your benefits offerings,
- better manage medical costs,
- identify high-cost areas and potential savings,
- manage medical usage risks,
- implement targeted wellness programs, and
- ensure your plan members get access to valuable medical services

## Medical Summary use cases help analyze:

- plan member health-care costs,
- spending patterns, and
- medical claim trends

Check [Sample Use Case 5](#) to see the specific filters applicable to Medical Summary.

See [Sample Use Case 6](#) for specific examples of Medical Summary.

# LTD Summary dashboard

The LTD Summary dashboard provides important insights on plan member health trends. It also offers detailed data on various diagnoses and subcategories.

## Key information includes:

- Broader diagnosis categories (e.g. Mental Health, Cancer),
- Specific diagnosis details (e.g. Generalized anxiety disorder, Depressive disorder),
- Approval per 1000 lives,
- Comparison of approved, closed and paid claims, and
- Information on claims paid beyond Change of Definition date

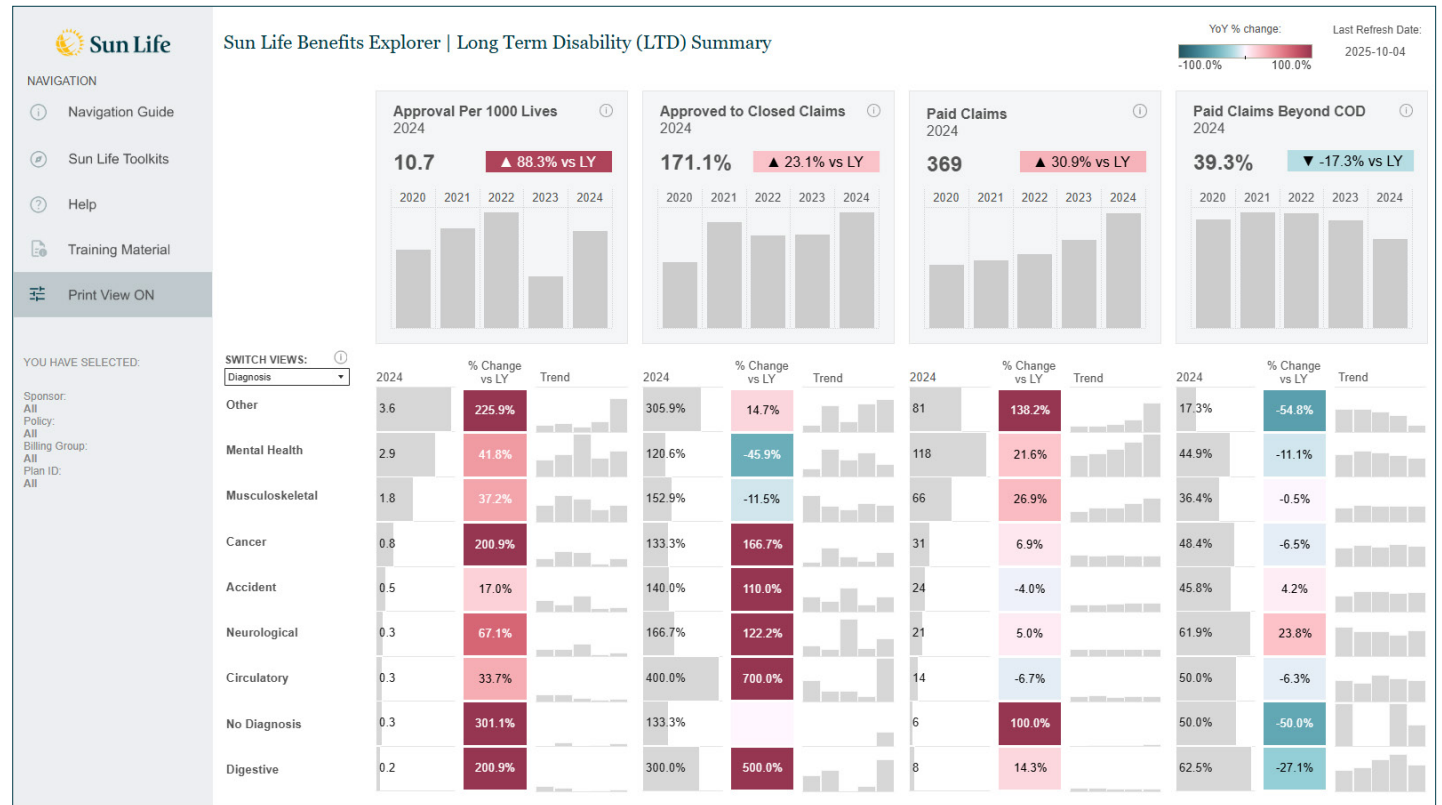
## Benefits:

The LTD Summary dashboard can help empower you to:

- identify common health issues,
- track patterns and make informed decisions,
- address health concerns,
- reduce LTD claims,
- improve overall plan member well-being, and
- develop more effective return-to-work strategies

## LTD Summary use cases help:

- understand disability claim trends
- compare trends for approved, closed, and paid claims
- understand areas of focus for each metric by understanding top disability diagnosis reasons



Please note, the **Approval per 1000 Lives** metric is only available at the policy, sponsor and block level. Selecting plan ID or billing group would not update the numbers for **Approval per 1000 Lives**. See [Sample Use Case 7](#) for more details.

Various use cases for the LTD Summary, such as top diagnoses for new claims, impact of specific disorders, claim ratios, and policy statistics, are shown in [Sample Use Case 8](#).

## Moving from data to action: Sun Life's health strategy toolkits

Sun Life's health strategy toolkits help address workplace health and wellness challenges effectively using insights from Drug, Medical, and LTD Summaries. These free resources cover mental health, musculoskeletal health, and women's health, guiding you to use data effectively and develop proactive approaches for your plan members' well-being.

To access the Mental Health, Musculoskeletal, or Women's Health toolkit:

1

Step 1: Locate the Sun Life Toolkits button on the top left of the screen. Click the Sun Life Toolkits button to open the pane

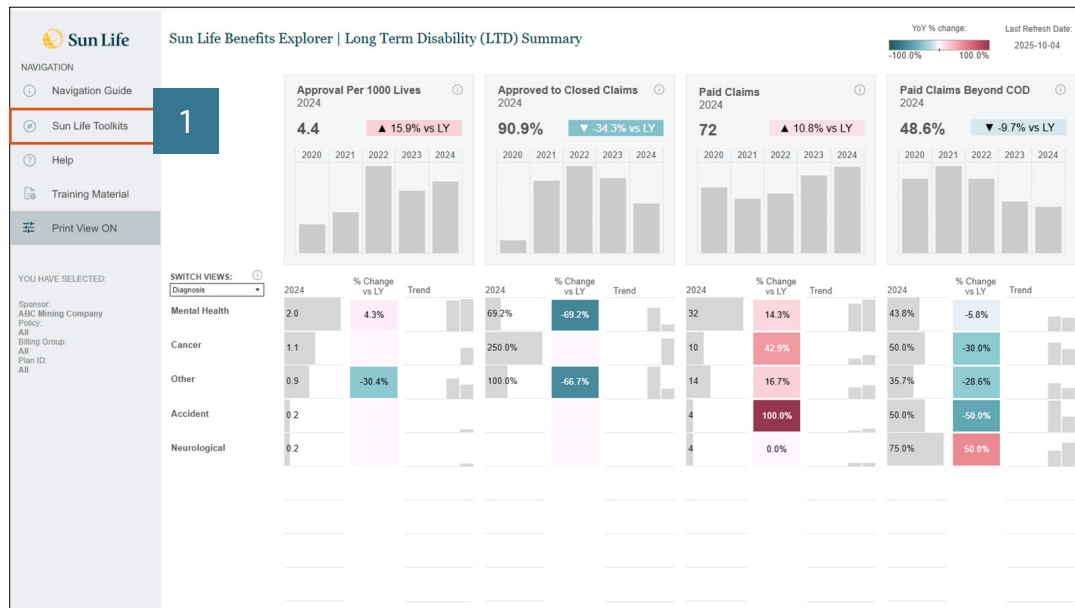
2

Step 2: Click the toolkit you would like to open. The toolkit will open in a new browser tab

3

Step 3: To close the toolkit pane, click the same spot where "Click here to close" appears

The numbers on the screenshots below are associated with the steps above:



# Information available to Advisors/Consultants

With Benefits Explorer, you can now personalize your Client dashboard through the Filter section. Your initial view of the dashboard displays information for all your Clients. This feature allows you to set up your preferences and select specific filters, tailoring the dashboards to your individual needs.

To access the information of your Client portfolio please follow the following steps:

1

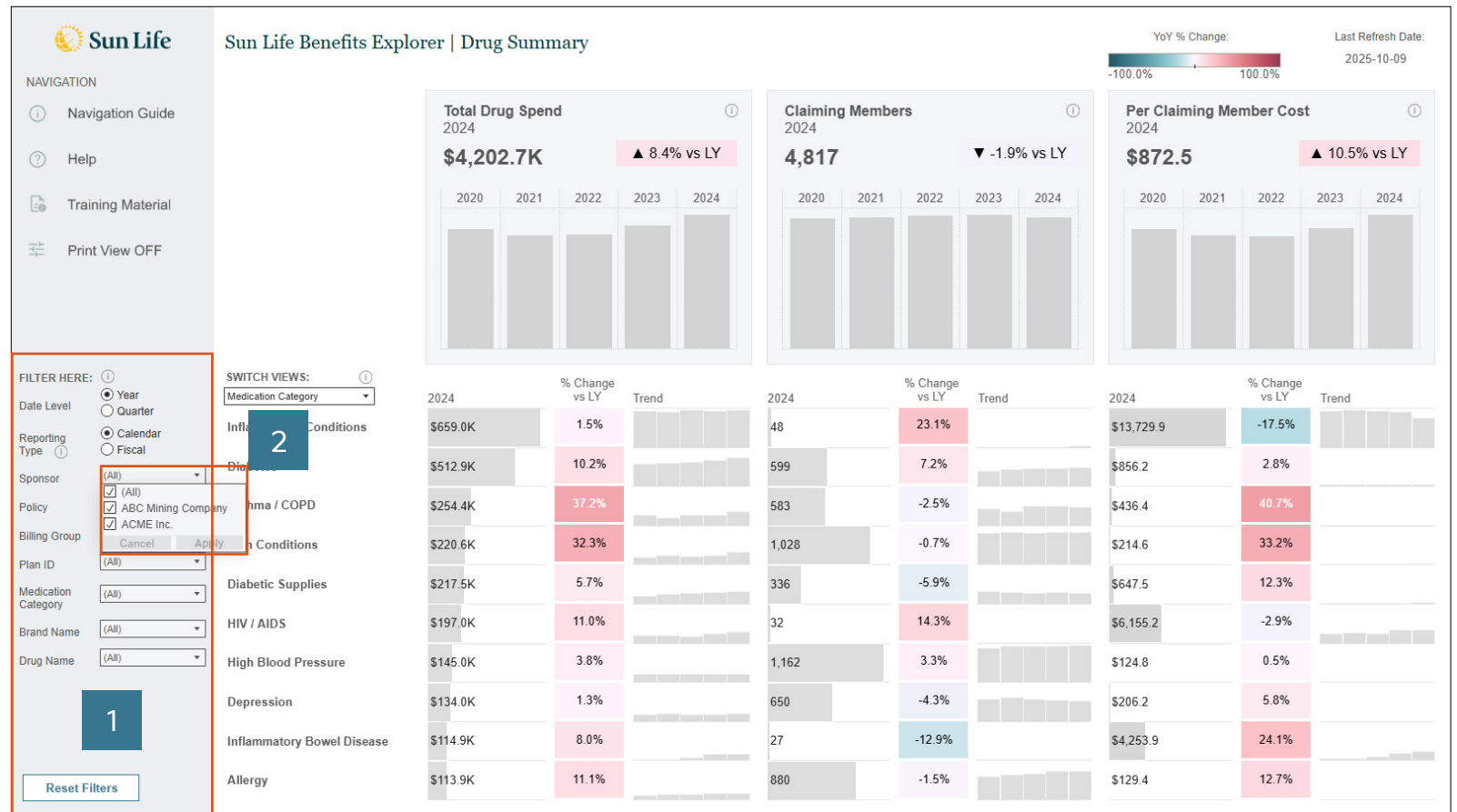
Step 1: Locate the Filter section on the left-hand pane of the dashboard

2

Step 2: Locate the **Sponsor filter** and select your **Sponsor**. Click Apply to apply your selection

The numbers on the screenshots are associated with the steps above:

To clear your selections, click **Reset Filters** at the bottom of the Filter section





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