



# Sun Life Benefits Explorer

Navigating Benefits Explorer



# Sun Life Benefits Explorer: Training material

Navigating Benefits Explorer

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# Navigating Benefits Explorer

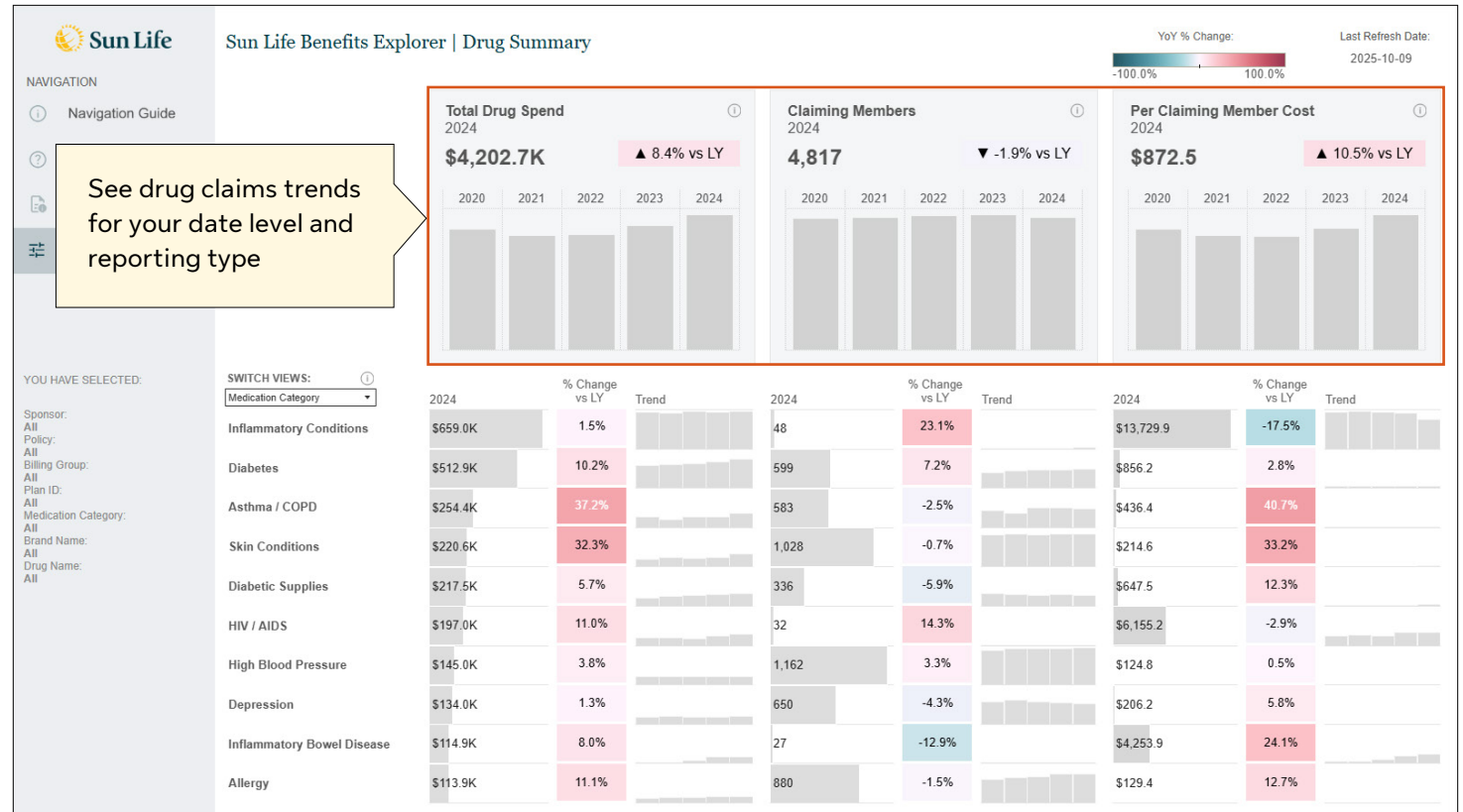
Benefits Explorer includes three dashboards:

- **Drug Summary**
- **Medical Summary**
- **Long-Term Disability (LTD) Summary**

This guides you through navigating the Benefits Explorer tool, using the Drug Summary dashboard as an example. By exploring the Drug Summary dashboard, you'll gain an understanding of the types of data and insights available across all three dashboards.

## Top section

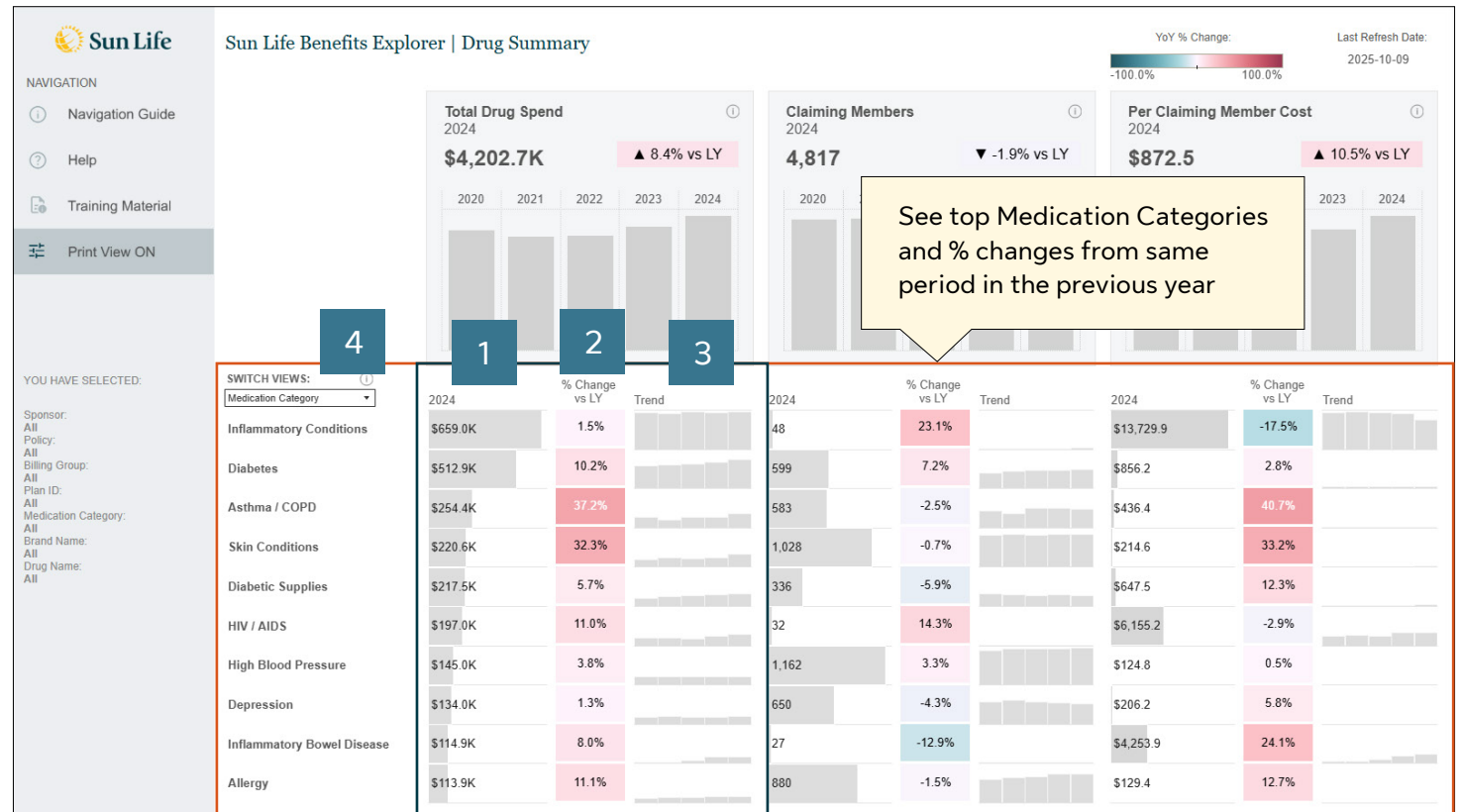
The top section displays views of specific data, comparing current periods to previous years or quarters, helping you evaluate long-term trends and growth patterns. (See chart)



## Bottom section

The bottom section allows you to select different categories (e.g., for Drug Summary, you can select between Medication Category, Brand Name, or Drug Name) for more detailed analysis. This section shows:

- 1 Data values for the current period,
- 2 Percentage changes compared to the same period last year (with a heat map for easy identification of the magnitude of trends),
- 3 Trends in your plan members' health over the last 5 years,
- 4 Different views using the dropdown menu below "Switch Views," and (see next page)



- 5 Which category it belongs to at the highest level by hovering over the category header.

To activate presentation mode, click the **Print View** toggle button. The label will change to **Print View On** when presentation mode is active

The screenshot shows the Sun Life Benefits Explorer | Drug Summary dashboard. It features three main summary cards at the top: Total Drug Spend 2024 (\$4,202.7K, ▲ 8.4% vs LY), Claiming Members 2024 (4,817, ▼ -1.9% vs LY), and Per Claiming Member Cost 2024 (\$872.5, ▲ 10.5% vs LY). Below these are three data tables for 2024, each with columns for 2020-2024, % Change vs LY, and Trend. The first table is for 'N/A - DIABETIC SUPPLIES', the second for 'OZEMPIC', and the third for 'DUPIXENT'. A 'SWITCH VIEWS' dropdown is set to 'Brand Name'. A 'Print View ON' toggle is active. Annotations include a callout for the 'Print View ON' toggle, a callout for the 'Brand Name' dropdown, and a callout for the 'OZEMPIC' brand name which shows its medication category as 'Diabetes'.

**Choose 'Brand Name' in Switch Views**

**Hover over 'Ozempic' brand name to view that it belongs to Diabetes medication category**

Category	2020	2021	2022	2023	2024	% Change vs LY	Trend
Total Drug Spend					\$4,202.7K	▲ 8.4%	
Claiming Members					4,817	▼ -1.9%	
Per Claiming Member Cost					\$872.5	▲ 10.5%	
N/A - DIABETIC SUPPLIES						5.7%	
OZEMPIC					\$187.3K	34.4%	
DUPIXENT						65.0%	
REMDA						3.5%	
						13.4%	
						-15.8%	
						20.4%	
						-38.2%	
						122.4%	
HUMIRA					\$70.0K	-41.6%	

Are you interested in specific data such as Total Drug Spend? Look at the dashboard vertically (see below)

## At the top of the dashboard, you'll find:

- 1 Total Plan Member Drug Spend for the period
- 2 Percentage change from this year compared to last year
- 3 Spending trend over the past 5 years

## In the bottom section:

- 4 present the same information as the top section but broken down by categories
- 5
- 6

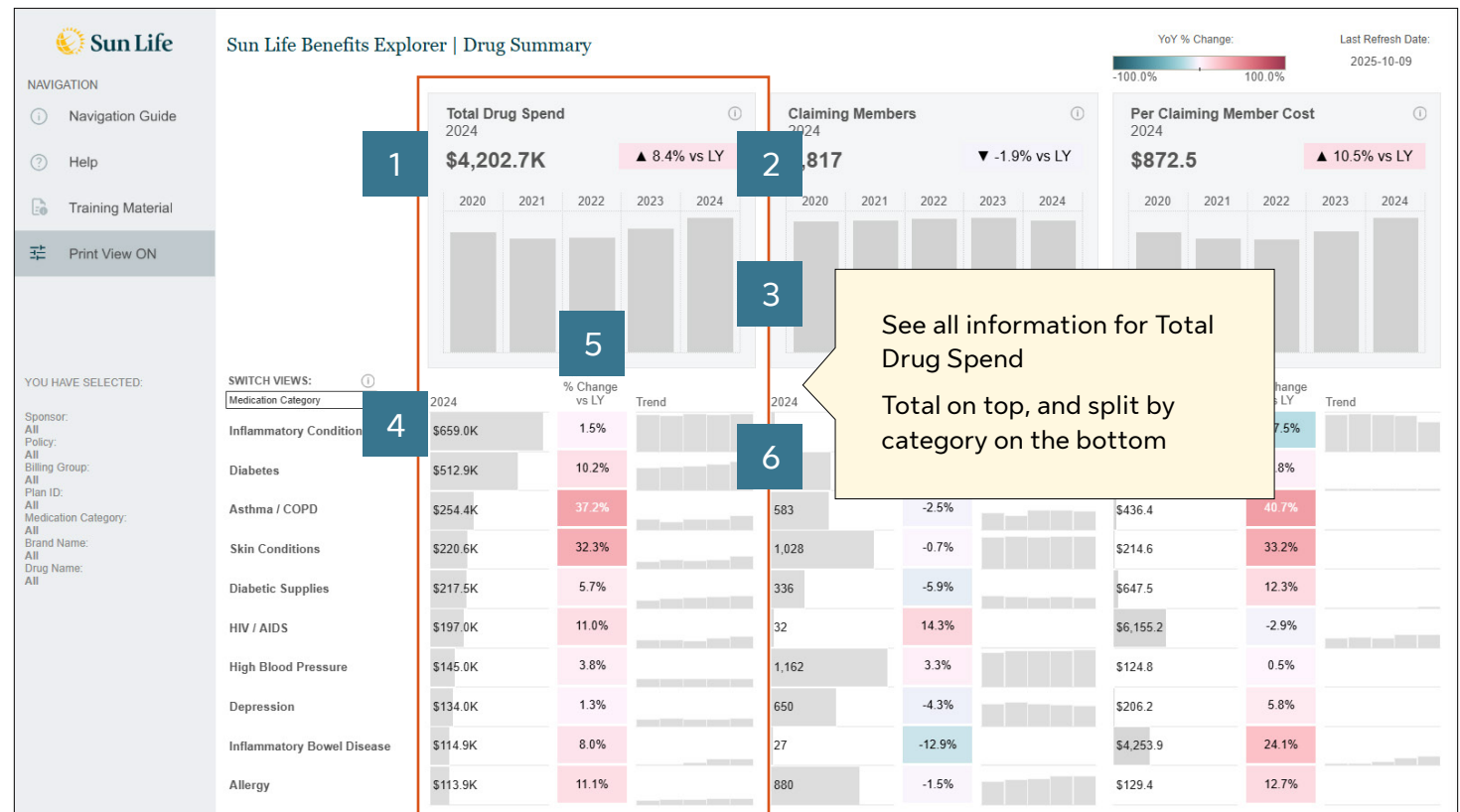
### How to compare the percentage change from this year to the previous year

Look for the “% Change vs LY” column to see Total Plan Member Drug Spend for each year compared to the previous year.

The data presents a heatmap with a color scale ranging from dark blue (-100%) to dark red (+100%), which:

- highlights areas with the most significant changes
- helps identify key areas requiring focus or attention

See [Sample Use Case 1](#) for a detailed example on a quarterly view.



## How to access additional information about the dashboard and data

There are many ways to access additional information about the dashboard and data:

- Information Icons
- Tooltips
- Navigation Guide
- Help
- Training Material

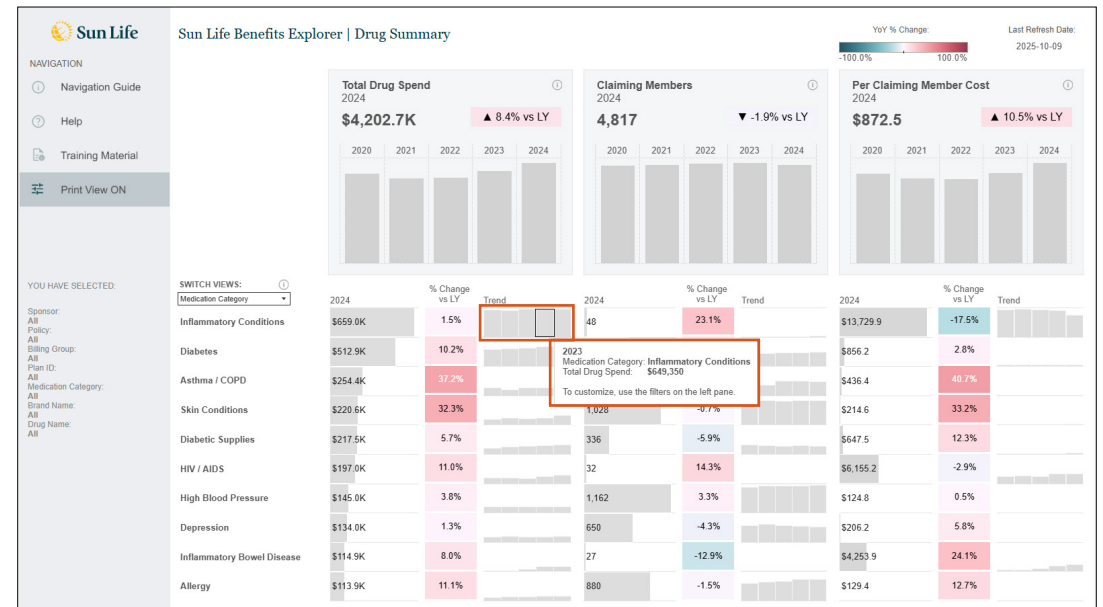
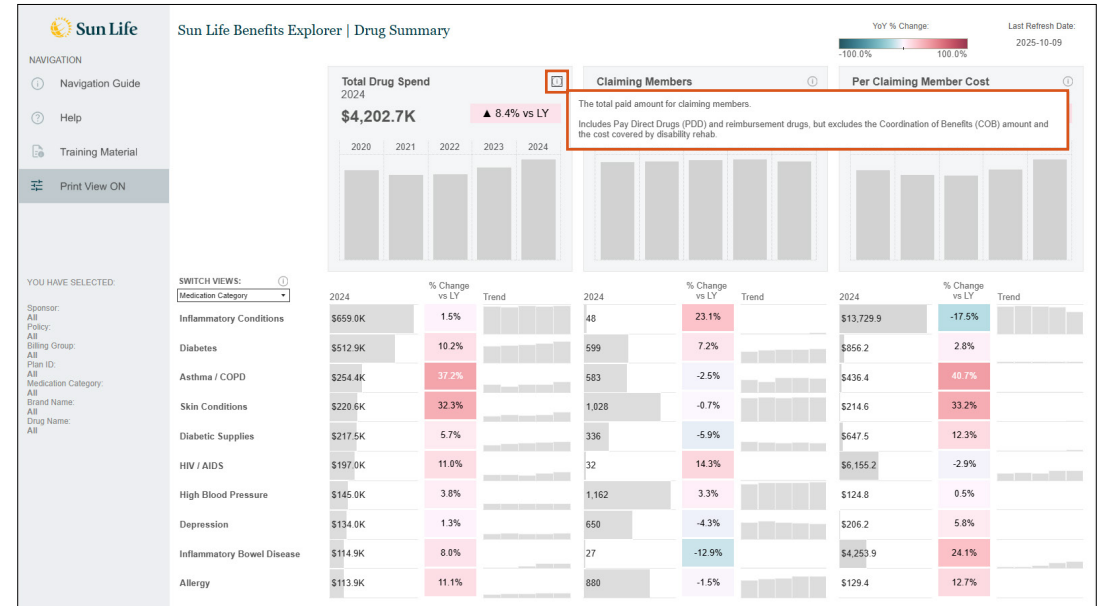
## Information Icons:

Look for the information icons on the dashboard. These are depicted as a circled lowercase letter "i". Hover over these information icons for more details about the metric or view.

## Tooltips:

Hover over the charts to access their tooltip information. This may show information about their category, year/quarter, and metric value.

In the Trend charts, you can hover over the bars to view values for each year/quarter.



## Navigation guide:

The Navigation Guide button can be found in the top left corner of the dashboard. Click on Navigation Guide button for an image on how to use all functionalities provided.

**Sun Life Benefits Explorer | Drug Summary**

YoY % Change: -100.0% to 100.0% | Last Refresh Date: 2025-10-09

**Per Claiming Member Cost 2024**  
**\$872.5** ▲ 10.5% vs LY

Year	Cost	% Change vs LY	Trend
2020			
2021			
2022			
2023			
2024			

**2024 Data Table:**

2024 Cost	% Change vs LY	Trend
\$13,729.9	-17.5%	
\$856.2	2.8%	
\$436.4	40.7%	
\$214.6	33.2%	
\$647.5	12.3%	
\$6,155.2	-2.9%	
\$124.8	0.5%	
\$206.2	5.8%	
\$4,253.9	24.1%	
\$129.4	12.7%	

**NAVIGATION GUIDE**

- ← Close this Navigation Guide.
- ← Information on how to read these charts.
- ← Additional supporting materials.
- ← View your selections and make the dashboard presentation ready.

**How to Filter**

1. Click the dropdown arrow beside a filter to open the list of options.
2. Unselect All by clicking the checkbox beside (All). This clears all selections.
3. Select the options you want to view. You can also type to search.
4. Click Apply to update the dashboard.
5. Click anywhere outside the filter box to close the dropdown.

**Filters are located on the left pane.**

**Filter Panel:**

**FILTER HERE:** ⓘ

Date Level:  Year  Quarter

Reporting Type:  Calendar  Fiscal

Sponsor: (All) [v]

Policy: (All) [v]

Billing Group: (All) [v]

Plan ID: (All) [v]

Medication Category: (All) [v]

Brand Name: (All) [v]

Drug Name: (All) [v]

**Reset Filters**

To reset your filters, click the 'Reset Filters' button on the bottom left corner of the dashboard.

## Help page:

The Help button can be found in the top left corner of the dashboard. Click on Help button for an image on how to read this view.

Sun Life Benefits Explorer | Drug Summary

YoY % Change: -100.0% 100.0%  
Last Refresh Date: 2025-10-09

NAVIGATION

- [Navigation Guide](#)
- [Click here to close](#)
- [Training Material](#)
- [Print View ON](#)

YOU HAVE SELECTED:

- Sponsor: All
- Policy: All
- Billing Group: All
- Plan ID: All
- Medication Category: All
- Brand Name: All
- Drug Name: All

The metric.

**Total Drug Spend**  
2023

**\$43,653.8K** ▲ 19.3% vs LY

The yearly metric value for the last few years.

The metric value change from this year to last year.

Select to view a breakdown by medication category, brand name or drug name.

The metric % change from this year to last year, by brand name.

SWITCH VIEWS: Brand Name

Brand Name	2023	% Change vs LY	Trend
OZEMPIC	\$2,833.4K	77.4%	
PIN - DIABETIC SUPPLIES	\$1,352.3K	29.9%	
VYVANSE	\$1,182.2K	41.9%	
MYOZYME	\$1,069.7K	171.4%	
HUMIRA	\$1,003.6K	51.4%	
DUPIXENT	\$888.2K	38.7%	
STELARA	\$711.8K	-22.5%	
OCREVUS	\$595.7K	117.8%	
REMICADE	\$530.8K	-5.4%	
JARDIANCE	\$518.9K	18.7%	

The metric value for this year, by brand name.

The yearly metric value for the last few years, by brand name.

Note: Data shown is for illustrative purposes only

For questions about Benefits Explorer, please contact [Benefits.Explorer@sunlife.com](mailto:Benefits.Explorer@sunlife.com)

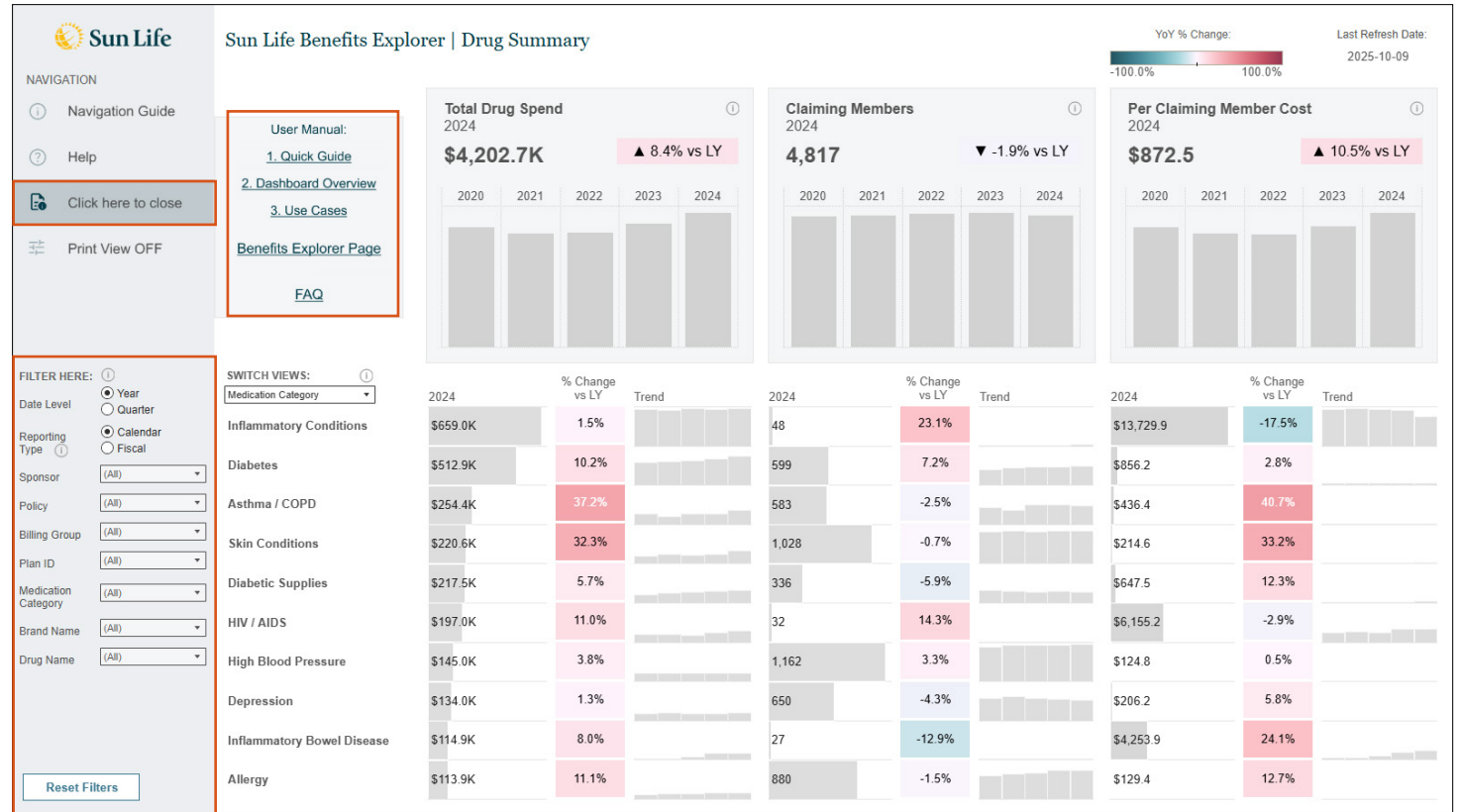
## Training Material

The Training Material button can also be found in the top left corner of the dashboard. Click on the button to access the links to the Overview and FAQ pages.

## Filter data

The Filter section can be found in the lower half of the left-hand pane of the dashboard. It offers you flexibility in:

- choosing data preferences:
  - Date level (view data by year or quarter)
  - Reporting type (select between calendar or fiscal reporting types and define a custom fiscal period start month)
- selecting filters for your reporting needs:
  - Sponsor Name,
  - Policy Number,
  - Billing Group,
  - Plan ID, and specific categories for Drug and Medical views.





# Sun Life Benefits Explorer

Navigating Benefits Explorer



Life's brighter under the sun

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