

Request centre guide

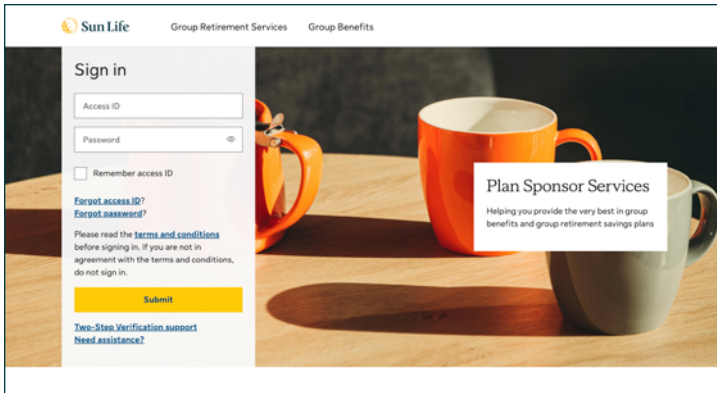


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It takes a few easy steps

Step 1

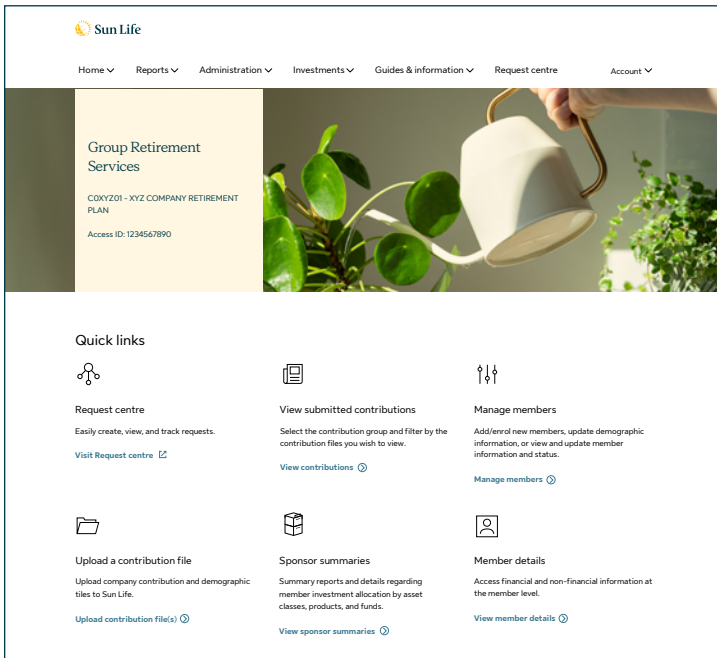
Sign into the **Plan Sponsor Services** website at sunlife.ca/sponsor.



Step 2

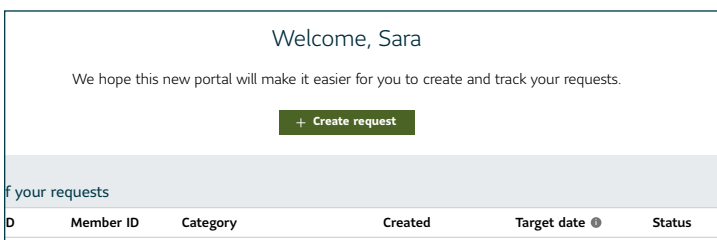
On the **Home** page, select **Request centre** from the top menu.

It's also available as a quick link.



Step 3

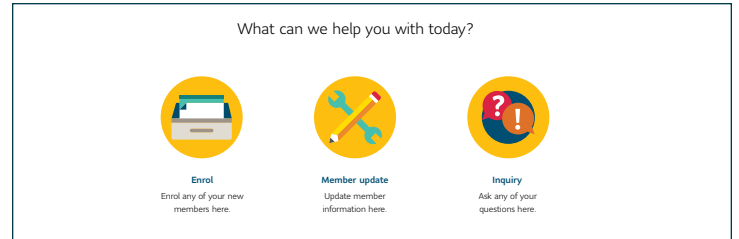
Click on the **Create request** button.



Step 4

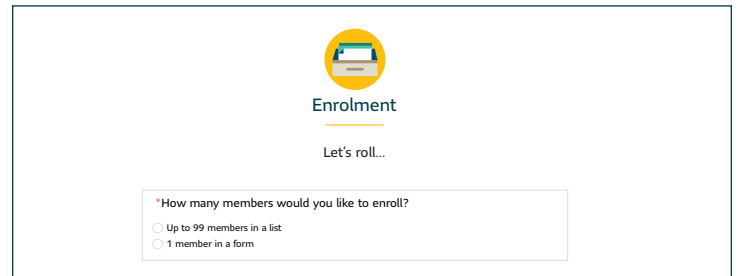
Choose one of the categories:

- **Enrol** (to submit enrolment information) or
- **Member updates** (to make changes to your members' information)
- **Inquiry** (to ask a question)



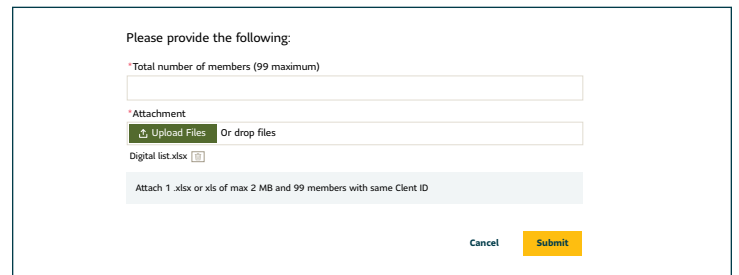
Step 5

Fill in the information required by the system (number of members, member ID, etc.)



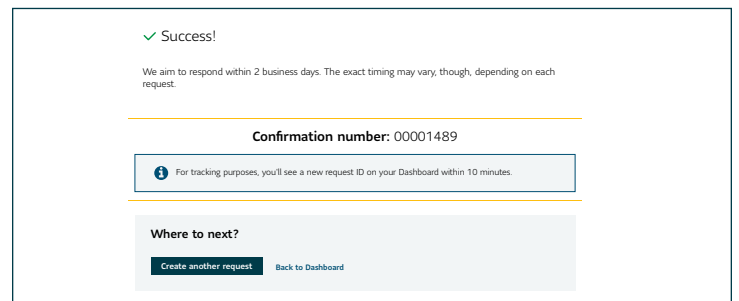
Step 6

Upload or drop in your file.



Step 7

Once the request is submitted, you'll see a confirmation page with the request reference number.



How to use inquiries feature

Select the topic of your question

Inquiry

Ask away...

What do you want to ask us about?

- Contribution
- Withdrawal
- Payroll deduction
- Audit
- Life event
- Enrolment
- Termination
- Billing
- Other

Fill in required information and upload or drop in your file, if necessary.

Inquiry details

Urgent

Member ID

Member name

Subject

*Tell us more (required field)

Get your confirmation number.

✓ Success!

We aim to respond within 2 business days. The exact timing may vary, though, depending on each request.

Confirmation number: 00002814

For tracking purposes, you'll see a new request ID on your Dashboard within 10 minutes.

Where to next?

[Create another request](#) [Back to Dashboard](#)

Once you've submitted an inquiry, you can click on the Request ID on the dashboard. You'll be able to see your conversation with the Operations team in a separate tab.

Request ID	Member ID	Category	Created	Target date	Status
GRS-91496	12345	Inquiry - Contribution	June 10, 2024	June 15, 2024	Received
GRS-91495	12345	Inquiry - Contribution	June 10, 2024	June 15, 2024	Received

Messages

Download attachments

Initial inquiry

From: Plan sponsor
To: GRS team
May 2, 2024 at 11:27 a.m. ET
Hi there!

I mailed you an enrolment form last week for Sam. Could you please confirm that you've received that form?

Thanks for your help!

Outbound messages

“Outbound messages” is a secure and efficient two-way communication functionality that allows support teams at Sun Life to communicate with you when we have a question or want to send you a report. At the same time, you can respond with a follow-up question or to request a clarification.

Important: You'll get an email notification each time there is a new message in the Request Center that requires your attention. Make sure to log in the secure site and check your dashboard.

Sun Life

A message is waiting, please visit Request centre

Client/Plan ID: ABC001/02
Request ID: GRS-56789
Category: Inquiry-Contribution

Dear plan sponsor,
We have a message ready for you. At your earliest convenience, please visit Request centre to review what we've sent you.

To review the message:

- Sign in to sunlife.ca/sponsor
- Select **Request centre**
- Select the **Request ID** on your **Dashboard**

New to Request centre?
Request centre is how the GRS team stays in touch with plan sponsors. To learn more about Request centre, [contact your GRS rep.](#) Or read the [Request centre guide](#).

Thank you,
GRS team

Please do not reply to this message. This mailbox is not monitored.

Outbound messages from Sun Life will be easy to identify on the dashboard (marked with the Sun Life logo beside the message).

Sun Life

Request centre

COVIZ/01 XYZ COMPANY RETIREMENT PLAN1
Access ID #:

Welcome, Sara

This portal will make it easier for you to create and track your requests.

[+ Create request](#)

Request ID	Member ID / Member name	Who can view the request	Category	Created	Target date	Status
GRS-113600		Everyone	Inquiry Contribution	Mar 19, 2025	Mar 26, 2025	Assigned
GRS-113449	TEST	Everyone	Inquiry Enrolment	Mar 18, 2025	Mar 18, 2025	Response required
GRS-113440	TEST1803 SushmitaTest	Everyone	Inquiry Withdrawal	Mar 18, 2025	Mar 19, 2025	Assigned