

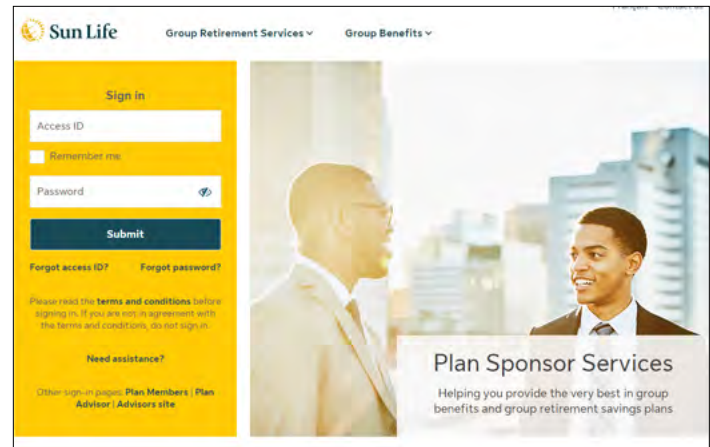
Enter member contributions through the Plan Sponsors Services website. It's easy, safe and accurate – here's how it works:



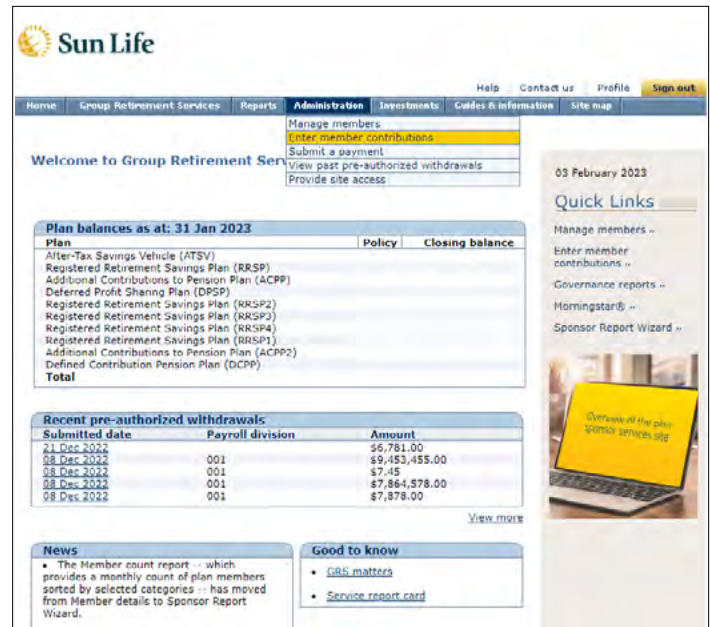
Step 1

Sign in to the Plan Sponsor Services website

- Sign in to the site at **sunlife.ca/sponsor** using your access ID and password.
- Select **Group Retirement Services**.



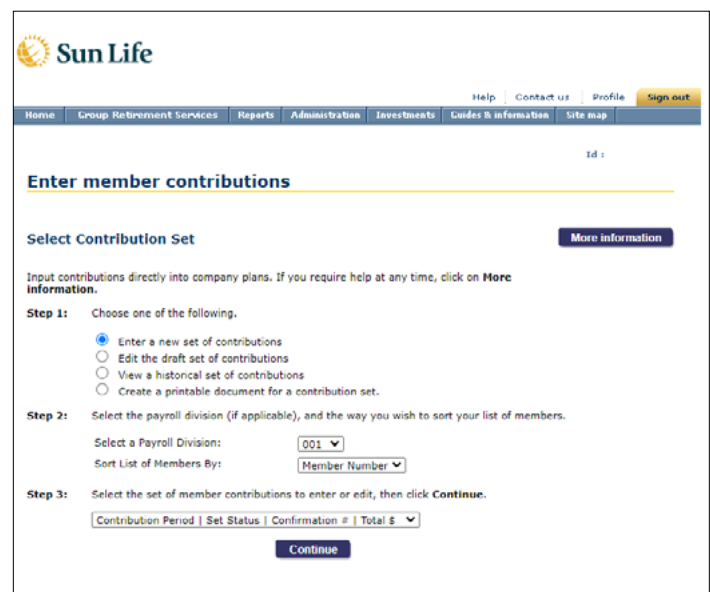
- Select **Enter member contributions** from the **Administration** dropdown menu.



Step 2

Select contribution set

- On the **Enter member contributions** screen, select **Enter a new set of contributions**.
- Select the payroll division (if applicable) and choose whether to sort your list of members by **Member Name** or **Member Number**.



Step 3

Select the set of member contributions to enter or edit

- Select **blank set** to create a new contribution set.
- OR
- From the dropdown list, select a recent contribution remittance that most closely matches the information in your current contribution file and edit where needed.

Step 4

Enter contribution information

- Select your **contribution period**. To edit a worksheet, locate the member's name by using **Previous Page** or **Next Page**, or by using the **Member Index**.
- To edit a worksheet, locate the member's name by using **Previous Page** or **Next Page**, or by using the **Member Index**.
- **View Subtotal** provides a summary and contribution dollars subtotal for review.
- Select **Save & Exit** to save the worksheet to draft, select **Save & Confirm** to review the worksheet summary and submit the contributions, or select **Cancel** to exit without saving.

Step 5

New/edit worksheet summary

- Either return to continue to **Update worksheet**, **Submit** the set of contributions for payment, or **Exit** the worksheet to return to the **Contributions Submission** main page.

Enter member contributions

Select Contribution Set [More information](#)

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- ☒ Enter a new set of contributions
- ☐ Edit the draft set of contributions
- ☐ View a historical set of contributions
- ☐ Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division:

Sort List of Members By:

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

Contribution Period	Set Status	Confirmation #	Total \$
2022-03-03 - 2022-03-11	P	202924001503	2,501.00
2022-01-15 - 2022-01-22	P	200021441503	3,251.00
2022-01-15 - 2022-01-22	P	200321411503	450.00
2022-01-15 - 2022-01-22	P	202324511503	500.00
2019-04-24 - 2019-10-24	P	205424251304	3,501.00
2019-08-13 - 2019-08-20	P	202013071408	6,002.00
2018-08-31 - 2018-09-07	P	203930291108	4,500.00
2018-08-30 - 2018-09-07	P	202330561408	4,500.00
2018-08-27 - 2018-09-03	P	202727501108	6,000.00
2018-08-15 - 2018-08-30	P	203730590808	4,500.00
2018-08-12 - 2018-08-29	P	203829380908	3,500.00

[More information](#)

Enter member contributions

New/Edit worksheet [More information](#)

Please be aware that clicking **Previous Page**, **Next Page**, or using the **Member Index** will save the values on this page. For help on this function, please click on **More information**.

For Payroll Division: 001

What is the contribution period? Start: End:

Viewing: 1 to 10 of 45376

Member Number	Member name	RRSP Monthly Contribution	Employer Required	Member Voluntary Unmatched	Employer Voluntary Matched	Total
FF184448H	TSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF194448H	TSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF194448D	TSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044479	TSTESTTSTESTTSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044125	TSTESTTSTESTTSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF04413N	TSTESTTSTESTTST, TSTESTTSTESTTSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044265	TSTESTTSTESTTSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044283	TSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044477	TSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
FF044505	TSTESTTSTESTTSTESTTSTESTTSTESTTST, TSTESTTSTESTTST	0.00	0.00	0.00	0.00	0.00
Page Total		0.00	0.00	0.00	0.00	0.00

FF184448H - FF044505 [Next page](#)

Member Name

Member Number

[View subtotals](#) [Save & exit](#) [Save & confirm](#) [Cancel](#)

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Enter member contributions [More information](#)

New/Edit Worksheet Summary

Id: 1

Contribution Period: 01 Jan 2023 - 31 Jan 2023

Client/Program: CAL

Payroll Division: CAL

Number Of Members:

Member Required Testz	Member Voluntary Unmatched	Employer Voluntary Matched	Total
100.00	150.00	200.00	450.00

Note:

- **Exit** will save the contributions set in DRAFT mode, and return you to the Select Contribution Set Screen
- **Submit** will save the contributions set in DRAFT mode, and proceed to the Payments section.
- If you wish to transact at a later time, this can be done through the Payments function under Service Centre

[Update worksheet](#) [Submit](#) [Exit](#)

Step 6

Send a pre-authorized withdrawal

- Select **Submit** to send a payment. You can set up banking information through the **Add/change banking** option in the **Administration** dropdown menu, if available for your plan. Otherwise, please contact your Sun Life Group Retirement Services representative to set up or change your banking information.

Step 7

Confirm your payment

- The **Confirmation** page will confirm that you have submitted your payment. Please print a copy of the page for your records.
- We will process payments submitted before 4 pm ET on the same business day.
- We will process payments submitted after 4 pm ET on the next business day.
- Contributions submitted before 4 pm ET will be based on the closing values of that day.
- Select **Exit** to return to the **Enter member contributions** page.

You're done!

Select **More information** to access an online user guide that walks you through the contribution process.

Need assistance?

Please contact your Sun Life Group Retirement Services representative.

The screenshot shows the 'Submit a payment' page for a Pre-Authorized Withdrawal. The page includes a navigation bar with links like Home, Group Retirement Services, Reports, Administration, Investments, Guides & Information, Site map, and Sign out. The main content area displays the following information:

Payment for:	Member Contributions
Client/Program:	
Payroll Division:	
Contribution Period:	01 Jan 2023 - 31 Jan 2023
Total:	450.00
Amount for Pre-Authorized Withdrawal (PAW):	450.00
Confirm Account:	Transit - Account

Below the table, there is a 'Note' section with two bullet points regarding the timing of contributions and payments. At the bottom, there are three buttons: 'View banking info', 'Submit', and 'Cancel'.

The screenshot shows the 'Enter member contributions' page. It includes a navigation bar similar to the previous page. The main content area displays the following information:

Select Contribution Set

Input contributions directly into company plans. If you require help at any time, click on **More information**.

Step 1: Choose one of the following.

- ☒ Enter a new set of contributions
- ☐ Edit the draft set of contributions
- ☐ View a historical set of contributions
- ☐ Create a printable document for a contribution set.

Step 2: Select the payroll division (if applicable), and the way you wish to sort your list of members.

Select a Payroll Division:

Sort List of Members By:

Step 3: Select the set of member contributions to enter or edit, then click **Continue**.

Contribution Period | Set Status | Confirmation # | Total \$

At the bottom, there is a 'Continue' button.

The screenshot shows the 'Submit a payment' page for Confirmation. It includes a navigation bar similar to the previous pages. The main content area displays the following information:

Submit a payment

Confirmation

Thank you. Your payment has been submitted. Please print a copy of this confirmation for your records.

Payment For:	Member Contributions
Client/Program:	
Payroll Division:	
Contribution Period:	01 Jan 2023 - 31 Jan 2023
Total:	450.00
Amount for Pre-Authorized Withdrawal:	450.00
From Account:	Transit - Account
Confirmation Number:	03 Feb 2023 10:49:01 EST
Effective:	03 Feb 2023

Below the table, there is a note about discrepancies and a button labeled 'Exit'.