

How to sign up for a direct deposit

With direct deposit, when you submit a claim, we'll put the money into your account for you. You don't have to wait for a cheque in the mail. And, you don't have to go to your financial institution to deposit the cheque.

- It's easy
- It's fast
- It's convenient

Sign up today...



How to sign up for a direct deposit

1. Go to www.mysunlife.ca.

The screenshot shows the Sun Life Financial website's my Sun Life portal. The header includes the Sun Life Financial logo, navigation links (Home, Site map, Contact Us, Find an advisor, Get a quote, Français), and a search bar. Below the header is a navigation menu with options: Group Retirement Services, Group Benefits, and SunAffinity. The main content area features a banner for "Sun Life Canadian Unretirement™ Index" with the text "This is how retirement is changing." Below the banner are three columns of links: "my coverage" (My plan made easy, Discover the benefits of going online, Resource centre), "my money" (Join my group retirement and savings plan, Make the most of my group plan, Understand financial planning and investing), and "I would like to ..." (Submit or track a claim, Find a form, Check my balance, Speak to someone). On the right side, there is a "Sign in" section with fields for Access ID and Password, a "Remember my Access ID" checkbox, and a "Sign in" button. Below the sign-in fields are links for "Forgot your Access ID?", "Forgot your password?", "Don't have an Access ID? Register now", and a note about terms and conditions. At the bottom, there are three promotional boxes: "What others are saying about us" with a testimonial from Suzanne W, "brighter life" with a list of articles and a link to visit BrighterLife.ca, and "Accessibility information" and "Security, privacy and fraud" with "Learn More" links.

How to sign up for a direct deposit

2. Enter your access ID and password and click the **sign in** button.

The screenshot shows the my Sun Life website interface. At the top, there is a navigation bar with the Sun Life Financial logo, a search bar, and links for Home, Site map, Contact Us, Find an advisor, Get a quote, and Français. Below this is a secondary navigation bar with links for Group Retirement Services, Group Benefits, and SunAffinity. The main content area features a banner for the Sun Life Canadian Unretirement™ Index, a sign-in form, and several informational sections. The sign-in form is highlighted with a red box and a red arrow pointing to it from the right. The form includes fields for Access ID and Password, a 'Remember my Access ID' checkbox, and a 'Sign in' button. Below the form are links for 'Forgot your Access ID?' and 'Forgot your password?'. There are also links for 'Don't have an Access ID? Register now' and a note about agreeing to terms and conditions by signing in. The 'my coverage' section lists links like 'My plan made easy', 'Discover the benefits of going online', and 'Resource centre'. The 'my money' section lists links like 'Join my group retirement and savings plan', 'Make the most of my group plan', and 'Understand financial planning and investing'. The 'I would like to ...' section lists links like 'Submit or track a claim', 'Find a form', 'Check my balance', and 'Speak to someone'. There is also a testimonial section titled 'What others are saying about us' with a quote from Suzanne W. and a 'Brighter life' section with links like 'Growth versus value investing' and 'At what age do you expect to retire?'. Finally, there are sections for 'Accessibility information' and 'Security, privacy and fraud'.

For step-by-step instructions explaining how to register at mysunlife.ca watch the webinar available at www.c-hip.ca.

How to sign up for a direct deposit

3. Click **my claims**.

The screenshot shows a web portal interface. At the top, there is a navigation bar with links for 'Home', 'Resource Centre', 'Help', 'Contact us', 'Secure messages', 'Profile', and 'Sign out'. Below this, the user's name 'RANDY DOE' and last visit date 'Last visit was on June 15, 2012' are displayed. The main content area is divided into two columns. The left column contains a 'PLEASE READ' section with a date of 'July 19, 2012' and links for 'Enhancements to the Home page' and 'Short term trading policy'. Below this is a promotional banner for 'Fresh start? Fresh ideas!' featuring a woman holding up a white cloth. The right column is titled 'my health and well-being' and includes a 'Preferences' dropdown menu. Underneath, there are links for 'Medical/Dental >> 025104 Wellness centre', 'my coverage', 'my claims' (highlighted with a red box and a red arrow), 'Health Spending Account', 'Next dental checkup', and 'Leaving the plan'. At the bottom of this section is a 'Take me to...' dropdown menu.

How to sign up for a direct deposit

4. Click **direct deposit** from the menu on the right.

The screenshot shows a web portal interface. At the top, there is a navigation bar with links: Home, Coverage, Claims, Wellness centre, Leaving the plan, FAQs, Help, Contact us, Secure messages, Profile, and Sign out. Below this is a secondary bar with Home, Coverage, Claims, Wellness centre, Leaving the plan, FAQs, and Print. The main content area is titled 'my claims' and contains three sections: 'Submit a claim' with links for Prescribed Drug e-claim, Vision Care e-claim, Paramedical e-claim, Dental e-claim, Health Spending Account e-claim, and Print claim form; 'View a claim statement' with links for Recent claims and Dental estimates; and 'View claim summary' with links for Drug claim summary and Medical and Dental claim summary. On the right side, there is a 'Take me to' menu with links: Quick view, Need glasses/lenses?, Next dental checkup, Direct deposit (highlighted with a red box and a red arrow), Coordination of benefits, Print drug card, Print travel card, Health Spending Account balance, and Provincial health plans. Below the menu is a small image of two children playing in a sprinkler.

How to sign up for a direct deposit

5. Click **register**.

Help | Contact us | Secure messages | Profile | **Sign out**

Home Coverage Claims Wellness centre Leaving the plan FAQs Print

Direct deposit

Register

By registering:

- You can access your claim details online.
- You can sign in to the website at any time to view or print your claim details.
- You will no longer receive a paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.
- You can submit a claim online.

register

Review your banking information

With your banking information:

- You will receive your claim payments directly into your bank account.
- You can sign in to the website at any time to view or print your claim details.
- You will no longer receive a paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.
- You can submit a claim online.

Contract	Institution	Transit	Account
025104 (Medical/Dental)	XYZ BANK 505 KING ST FREDERICTON, NB E3B 1E7	01234	1234567

update

Review your e-mail address

With your e-mail address we will:

- Send you an e-mail notification to let you know when your claim has been processed, including a link to the Web site and your claim details.

randydoe@company.com **update**

How to sign up for a direct deposit

6. Click **update**.

Help | Contact us | Secure messages | Profile | **Sign out**

Home | Coverage | Claims | Wellness centre | Leaving the plan | **FAQs** | Print

Direct deposit

Review your banking information

With your banking information:

- You will receive your claim payments directly into your bank account.
- You can sign in to the website at any time to view or print your claim details.
- You will no longer receive a paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.
- You can submit a claim online.

Contract	Institution	Transit	Account
025104 (Medical/Dental)	XYZ BANK 505 KING ST FREDERICTON, NB E3B 1E7	01234	1234567

update

Review your e-mail address

With your e-mail address we will:

- Send you an e-mail notification to let you know when your claim has been processed, including a link to the Web site and your claim details.

randydoe@company.com **update**

You are registered to receive an e-mail notification when your claim has been processed, including a link to the website and your claim details.

If you choose to deregister:

- You will no longer receive an e-mail notification to let you know when your claim is processed.
- You will not be able to submit a claim online.
- You will receive your paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.

deregister

How to sign up for a direct deposit

7. A new screen will appear and you will need to enter your transit, institution and account number. This information can be found on at the bottom of your cheque. A sample cheque like the one shown below, will be displayed showing you where you can find these numbers. Enter the information and click **submit**.

If you don't have a cheque, please contact your Canadian financial institution and they can provide you with the information to help you complete this section.

Direct Deposit

Update Direct Deposit Details

Type in your updated direct deposit details and press the submit button. This sample cheque shows the information that you need to provide. Enter numbers only, without spaces or hyphens. Please note: Claim payments can be deposited into accounts at Canadian financial institutions only.

The screenshot shows a form for updating direct deposit details. At the top is a sample cheque with the MICR line: `⑈000⑈ ⑆0⑆234⑆00⑆ 1234 56⑈⑈⑈⑆`. A red arrow points from this line to a table below. The table has columns for Contract, Transit, Institution, and Account. The 'Transit' field contains '01234', 'Institution' contains '001', and 'Account' contains '1234567'. There are 'submit', 'cancel', and 'close window' buttons.

Contract	Transit	Institution	Account
025104 (Medical/Dental)	01234	001	1234567

Example shows where the information can be found on the cheque.

How to sign up for a direct deposit

8. You will receive a message confirming that the information has been submitted successfully. Click **close window**.

Your information has been updated successfully.



How to sign up for a direct deposit

9. When your claims are processed you will receive an email. Please ensure your email address is correct. If you would like to make a revision, click **update**.

Help | Contact us | Secure messages | Profile | Sign out

Home | Coverage | Claims | Wellness centre | Leaving the plan | FAQs | Print

Direct deposit

Review your banking information

With your banking information:

- You will receive your claim payments directly into your bank account.
- You can sign in to the website at any time to view or print your claim details.
- You will no longer receive a paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.
- You can submit a claim online.

Contract	Institution	Transit	Account
025104 (Medical/Dental)	XYZ BANK 505 KING ST FREDERICTON, NB E3B 1E7	01234	1234567

[update](#)

Review your e-mail address

With your e-mail address we will:

- Send you an e-mail notification to let you know when your claim has been processed, including a link to the Web site and your claim details.

randydoe@company.com [update](#)

You are registered to receive an e-mail notification when your claim has been processed, including a link to the website and your claim details.

If you choose to deregister:

- You will no longer receive an e-mail notification to let you know when your claim is processed.
- You will not be able to submit a claim online.
- You will receive your paper Claim Statement (Explanation of Benefits) or dental expense estimate (pre-determination) in the mail.

[deregister](#)



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10. A new screen will appear. Fill in the information with your preferred email address. Click **submit**.

E-mail address update

Help us stay connected to you concerning your business with us.

Update the information below and select **Submit**.

E-mail address:

When you provide an e-mail address:

1. We will send you an e-mail
2. Open the e-mail
3. Select the link in the message to validate this address

Remember to review all of your information on the Personal info page to ensure all information is up to date.



How to sign up for a direct deposit

11. You will receive a message confirming that your email information has been successfully updated. Click **close window**.

E-mail address - Thank you

Your e-mail information has been updated successfully.



How to sign up for a direct deposit

Congratulations. You are now set up for direct deposits. Now you can enjoy the convenience of receiving your payments directly into your account.

Questions?

Contact the Sun Life Financial Customer Care Centre at 1-800-361-6212 any business day from 8 a.m. to 8 p.m. ET.

