

Anisha Seepersad

Subject: FW: Account Structure for N.B. Handy Company - Sun Life Policy 936196
Attachments: SLF_H2_834_5010_Implementation_Guide_V1.0_N.B. Handy Company_936196_.xlsx

From: Brittany Dodson <Brittany.Dodson@sunlife.com>
Sent: Monday, February 3, 2020 12:39 PM
To: Anisha Seepersad <aseepersad@tekpartners.com>; Katie Wiggins <kwiggins@nbhandy.com>; EDX <EDX@sunlife.com>
Cc: Daniels, Donna (MMA) <donna.daniels@marshmma.com>; Latasha G Hooks-Sutherland <Latasha.G.Hooks-Sutherland@sunlife.com>; Reid Waller <Reid.Waller@sunlife.com>; Betsy Haynes <Betsy.Haynes@sunlife.com>; Kyle Edens <kyle.edens@sunlife.com>; Robert Wiley <Rob.Wiley@sunlife.com>
Subject: Account Structure for N.B. Handy Company - Sun Life Policy 936196

Good day,

Attached you will find the Account Structure detailing the policy specific coding for the **N.B. Handy Company** file. We would ask that you notify EDX@sunlife.com when you are ready to send your first test file. At that time, the implementation of this feed will be assigned to a Connection Consultant for the testing process.

Please use the following naming convention for files: **SLFULT8345010_V003_936196_20200130_<SequencNo>.in**

File Reminders (Vendor):

Please be aware of the following with this file setup:

- This is a full file in testing and production.
- The full population and all benefits must be present on the file (we cannot accept a partial file feed).
- Full elected amounts (unreduced) should pass on the file.
- The FTP under login **SLUGRPULTIMATESOFTE** should be used for files
- Files should be delivered to the root, not the inbox underneath.
- Port 10022 should be used.
- FTP site is st2tst.sunlife.com – 159.208.39.17 for test files
- Please let our team know when the first test file is sent so we can confirm successful receipt.

Timeline (Vendor – Please Confirm Highlight Fields):

Since the overall implementation timeline is a critical component for our mutual client, and Sun Life we would ask that you provide an ETA within **2 business days** regarding the delivery of the first test and the ongoing SLA for test file updates to Sun Life.

Implementation Task	Owner	Expected Timing
Account Structure Delivery - Sun Life provides the Account Structure to the vendor.	SLF	02/03/2020
Initial File Build - Vendor builds out the first test file and sends to SLF via FTP.	Vendor	
Testing of the File and Delivery of Results - SLF tests the file (compliance, group and member data) and sends back the results and any member discrepancies.	SLF	3-5 business days

Review and Respond/New Test File Delivery - Vendor reviews coding issues and updates the test file. Member discrepancies are addressed with the client, as applicable. New test file is sent to SLF.	Vendor	
Overall Estimated Testing Timeline - Average, expected timing required to establish a file feed. This will be dependent on # and type of benefit(s) passing on the file, responsiveness to testing questions/issues, and adherence to the implementation timeline. This is not a guarantee of project completion by a certain date.	All Parties	8-12 weeks
<i>Any changes to the above schedule should be communicated, as possible, to all parties. The Sun Life EDX Team can be reached at EDX@sunlife.com.</i>		

Interim Enrollment (Important Client Process While in Test):

To ensure billing and claims stay current while we're setting up the file connection for **N.B. Handy Company** please use one or more of the following options to submit any new enrollments, terminations, and other member changes:

- Provide a change spreadsheet from **ULTIMATE SOFTWARE** sent on a regular basis (e.g. weekly or monthly) to CustomerAdvocacy@sunlife.com. Enrollments, terminations, and changes are completed within 5 business days.
- Utilize the Sun Life Connect web portal www.SunLifeConnect.com to enroll, terminate and complete policy maintenance changes.
- New enrollments, terminations and other policy maintenance changes can be faxed to the Sun Life Eligibility Team at 888.208.2323.

Please note, you will need to ensure **ULTIMATE SOFTWARE** is updated to reflect the eligibility sent to Sun Life Financial.

Please let us know if there are questions.

Best regards,

Brittany Dodson, MSOD | EDX Operations Consultant | Sun Life Financial

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