

# Sun eApps Checklist

**Making insurance applications easy**

# What can you do with Sun eApp

- Use our flexible navigation to enter information your way
- Apply for any Life or CI product, individual, joint, and corporate ownership
- eSign remotely and in-person
- Add attachments for new and inforce business
- Organize your open cases and Client actions in dashboards
- Book tele-interviews within the application
- Use Sun eApp to apply for multiple products at once
- Save applications and complete them on your schedule
- Explore Sun eApp's practice environment
- Make sure nothing is missed with smart input fields

# Before you begin

- Turn off your ad/pop up blockers. If they are left on, Sun eApp may not open for you.
- Ensure each Client who needs to sign has their own unique mobile phone number and email address. It's required to sign remotely. This includes:
  - Insureds aged 16 and over (18 and over in QC)
  - Parent/guardian for juvenile application
  - Parent/guardian is not the owner
- If corporately owned, please enter the corporation first as owner.
- If it's a conversion, Sun eApp doesn't support that yet. Please use paper application, E260.
- If it's an internal replacement, Sun eApp doesn't support that yet. Please use a paper application.

# Getting started

- When adding a Client, add each only once and ensure you select all involvements that apply (e.g. 'insured' and 'signing officer,' instead of trying to add each involvement separately.)
- The first Client added to the eApp can't be deleted after saving. This includes their involvement(s).
- If a Client's involvement was not entered correctly and they are not the first Client entered, you will need to remove them and re-add them with their correct involvement(s).
  - Please note: Removing a Client will delete all answers previously entered for that Client.
- If submitting a Trial application:
  - Include the Client's Doctor's information so that the APS can be ordered
  - Indicate that Sun Life will order the medical requirements
  - In 'special instructions' on the 'Summary' screen, indicate that this is a 'trial application – no medical requirements to be ordered.'

# Completing the application

- If the Client will be completing a tele-interview, ask them to visit [sunlife.ca/tele](https://sunlife.ca/tele). This content will help them prepare – leading to a more positive experience.
- On the payment screen, select the premium frequency first. Then select if the banking information will be provided 'now' or 'upon policy acceptance'.
- If the Client was born in a country not included in the drop-down list, select 'Canada' and list the country of birth in the 'special instructions' on the 'Summary' screen.
- For backdating, Sun eApp only supports up to 90 days.
  - Par, UL, Term and Perm plans can be backdated up to 180 days. If you would like to backdate more than 90 days, add the request in 'special instructions' on the 'Summary' screen.
- If there's a connected policy submitted in a different eApp, please include the policy number in the 'special instructions' on the 'Summary' screen.

# Remember

- If the application is for UL, PAR or Perm and applying for temporary insurance, Sun eApp will require an AML form (4830 or 4831) to be added in the 'Attachments' screen.
- If your Client is eligible and would like to apply for temporary insurance, please answer the three qualifying questions under the 'Evidence – Temporary insurance' section. If they qualify, you will be presented with the 'Offers' screen where you can add the temporary insurance.
- Once the application has been eSigned, it can't be unlocked. This means edits can't be made.
- As of Aug 31<sup>st</sup>, eSign will no longer be compatible with Internet Explorer. We recommend Chrome or Edge
- Applications will expire after 60 days of inactivity. They will no longer show on your dashboard once expired.

**Questions?** *We're here to help.*

**Contact the Advisor Experience Team:**

**Phone**

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- Options 1-3-3

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