

How to sign up for 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 direct deposit

1. Go to www.mysunlife.ca.

The screenshot displays the Sun Life Financial website interface. At the top, the Sun Life Financial logo is on the left, and the 'my Sun Life' branding is on the right. A navigation menu includes links for Home, Contact us, Find an advisor, Get a quote, and Français. Below this is a search bar and a secondary menu with categories like Wellness, Family, Money, Working life, Retirement, Plans and coverage, and Resources and support. A central banner promotes 'my Sun Life Mobile' with a smartphone image and a 'GET IT ON Google play' button. To the right is a 'Sign in to my Sun Life' section with fields for Access ID and Password, a 'Remember my Access ID' checkbox, and a 'Sign in' button. Below the sign-in section are links for 'I need help' such as 'forgot my Access ID', 'forgot my password', and 'My Access ID is locked out or suspended'. A list of articles is shown under the heading 'ARTICLES', with the first article titled 'Should you turn your retirement hobby into a business?'. The article text states: 'Post-retirement may not seem like the ideal time to be launching a new business venture, but an increasing number of Canadians are doing just that.' Below the text is a photo of a man and a woman looking at a shopping bag. A list of other articles follows, including 'Eight great travel tips for retirees', 'Four myths of summer: Fact or fiction?', 'Finding the right long-term care facility', 'Five ways to avoid Internet fraud', 'Who gets the pension in a divorce?', 'Four mortgage rules you need to know', 'Get ready for a U.S. road trip', and 'How will I cover my health costs when I retire?'. At the bottom of the article list is a 'View all articles' link and a logo for 'brighter life'.



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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, Contact us, Find an advisor, Get a quote, and Français. Below this is a menu with categories like Wellness, Family, Money, Working life, Retirement, Plans and coverage, and Resources and support. The main content area features a sign-in form titled "Sign in to my Sun Life" which is highlighted with a red box. 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 "I need help: I forgot my Access ID", "I forgot my password", and "My Access ID is locked out or suspended", along with a "Register now" link. The website also displays a mobile app advertisement for "my Sun Life Mobile" and a list of articles under the heading "ARTICLES".



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

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3. Click **my claims**.

The screenshot shows a user's online account dashboard. 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' is displayed along with the last visit date 'Last visit was on June 15, 2012'. The main content area is titled 'my health and well-being' and includes a 'Preferences' dropdown menu. Underneath, there are several links: 'Medical/Dental >> 025104 Wellness centre', 'my coverage', 'my claims' (highlighted with a red box and a red arrow), 'Next dental checkup', 'Leaving the plan', and 'Health Spending Account'. A 'Take me to...' dropdown menu is also visible.

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

The screenshot displays 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, Sign out, and Print. Below this, the 'my claims' section is visible, containing three sub-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, a 'Take me to' menu lists various options: Quick view, Need glasses/lenses?, Next dental checkup, Direct deposit (highlighted with a red box and a red arrow pointing to it), Coordination of benefits, Print drug card, Print travel card, Health Spending Account balance, and Provincial health plans. At the bottom right of the menu area, there is a small image of two children playing in a sprinkler.

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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**



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6. Click **update**.

Home Coverage Claims Wellness centre Leaving the plan FAQs Print

Help Contact us Secure messages Profile Sign out

Direct deposit

Review your banking information

With your banking information:

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- 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 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 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.

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

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

close window

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

Your information has been updated successfully.



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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

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- 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.
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- 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 direct deposit

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 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 direct deposit

Congratulations, you are now set up for direct deposits!
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.

