Customer Connectivity Information Guide

This Sample's Background

'Customer Connectivity' was a new product being released by SLF that simplified and secured the transfer of sensitive customer information. By design this 'Information Guide' was both informational and promotional and intended to provide clients with:

- Eligibility – who could get the new product (and when)
- Capabilities – what the new product could do
- Installation – how simply it could be implemented.

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What is Customer Connectivity?

Customer Connectivity (CC) is a new file transfer method that enables SLF's customers to collect their latest employee billing and eligibility data and send it directly to SLF via a secure Internet connection.

The CC service is available, free of charge, to qualified and approved users of SLF's Life and Disability products. In fact, going forward, most new Life and Disability customers will have CC automatically installed as part of their overall implementation project. Existing customers can make a request for Customer Connectivity through their account representatives.

How does it work?

Customer Connectivity performs a one-way transfer of data between a customer and Sun Life Financial. For security purposes, this data is never transmitted back to the customer – this ensures that the customer always has the most current version of the data file. Benefits Administrators can also use CustomerLink to check on the status and details of CC transfer operations.

What are the file specifications?

To ensure the efficiency of the product, customers are required to use the streamlined file specification.[1] Customers can select either XML or flat file formats to host their data files. SLF provides each customer with a sample format document (XML or Flat File) before implementation begins.

[1] Sun Life cannot accept customer files formatted in any other specification. However, new Dental clients should continue to use HIPPA 834 for their file transfers until the Dental integration is complete.

Advantages of Customer Connectivity

Automated Data Entry

Rather than manually entering updated benefits and eligibility data, Benefits Administrators can automatically import this information from their HR system. This ensures that data is only updated at one place (HR system) it also relieves Benefits Administrators from the manual task of keying-in these updates.

Automated Data Transfer

Benefit Administrators can automatically send updated benefit and eligibility data to SLF on a regular basis (weekly, monthly, etc.). This eliminates the non-secure practice of sending updates to SLF via email, traditional mail, or fax machine.

Automated Error Detection

Error-reporting capabilities enable Benefits Administrators to accurately determine the type of problem that might be occurring – as well as when and where it is happening. This advantage ultimately leads to quicker, more accurate resolutions and a smoother running process.

Selling Customer Connectivity

Acceptance Criteria

In order to ensure quality customer service, SLF will only provide CC to customers that are "qualified and approved." This means that customers must be able to demonstrate and maintain a minimum level of required technical sophistication and their eServices must be current. This policy works in the best interest of all parties involved.

Acceptance may also vary depending upon the bandwidth capability of SLF's CC Team at any given time. The goal is to ensure a quality implementation. Therefore, if necessary, scheduling may be regulated to achieve this goal.

Appeal Process

If a Customer Connectivity request is denied, the requester can appeal the decision. Before it can be reconsidered, the appeal must satisfy all of the following requirements:

- **New Business Only** – due to potential backlogs of new customers, conversions cannot be guaranteed to occur in 2008.
- **Contract** – FTP capabilities must be listed in the contract.
- **Account Manager** – must personally initiate the appeal.

To be accepted, the appeal must also include:

- **Effective Date** – an anticipated effective date must be provided.
- **Coverage Types** – must be included.
- **TPA or Not** – will the file be sent through a Third-Party Administrator or directly from the customer's IT shop?

Setting up Customer Connectivity

Implementation Process

The following is a high-level description of the process by which Customer Connectivity, in *a new customer*, goes from request to reality:

1. **Request** – A request is sent to the CC Workgroup.

2. **Review** – The CC Workgroup reviews the request and approves or denies it within one business day.

3. **The Three Scenarios** – one of the three scenarios below will be applied depending upon the customer's billing setup.
    a. **OASIS** – if the customer is already setup in OASIS, the Workgroup will request the necessary billing codes to create the custom specification.
    b. **Non-OASIS/e-Bill Ready** – customers without OASIS and converting to e-Bill will be contacted by billing for setup within 2-3 business days. Codes are delivered upon completion of the e-Bill setup.
    c. **Self-Admin** – no billing codes are required and the steps above are skipped.

4. **Custom Spec** – will be created by the Workgroup within 2-3 business days.

5. **Custom Spec Review** – the custom specification will be reviewed by either the customer's IT department (via a phone conference with the Account Manager, Customer Service and the Workgroup) or by a TPA (Third-Party Administrator).

6. **Data Feed & FTP Setup** – are performed simultaneously:
    a. **Data Feed** – is gathered and built by either the customer or TPA (Third Party Administrator). Turn-around time varies based on how long the customer or TPA requires to load the information into a spec.
    b. **FTP Setup** – if they choose to use an FTP method, the Workgroup helps to setup an FTP connection with the customer or TPA. Turn-around time varies depending on the responsiveness of the customer's IT department or TPA (typically a two-week average).

7. **Data Transmission/Validation** – when the data feed is ready to send to SLF, and the FTP connection is established, the customer/TPA sends the first data file. Next, the successful arrival of the data at SLF is validated. Any issues must be identified and resolved between the Workgroup and customer/TPA.

8. **Live** – the customer is up and running.

Conversion Process

The following is a high-level description of the process by which Customer Connectivity, in *an existing customer*, goes from request to reality:

1. **Request** – a request from an existing customer is received and logged into the tracking system.

2. **Response** – the Workgroup will contact the case's Account Manager to let them know if the customer can convert to Customer Connectivity. The selection order is on a first-come, first served basis.

3. **The Three Scenarios** – one of the three scenarios below will be applied depending upon the customer's billing setup.
    a. **OASIS** – if the customer is already setup in OASIS, the Workgroup will request the necessary billing codes to create the custom specification.
    b. **Non-OASIS/e-Bill Ready** – customers without OASIS and converting to e-Bill will be contacted by billing for setup within 2-3 business days. Codes are delivered upon completion of the e-Bill setup.
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7. **Data Transmission/Validation** – when the data feed is ready to send to SLF, and the FTP connection is established, the customer/TPA sends the first data file. Next, the successful arrival of all the data at SLF is validated. Any issues must be identified and resolved between the Workgroup and customer/TPA.

8. **Live** – the customer is up and running.

Contact/Additional Information

For more information about Customer Connectivity, please contact a Sun Life Representative or the Customer Connectivity Workgroup at:

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