Payment of Claims for P&M

Professional Development Reimbursement

Annual PDR expenses claimed must be incurred and paid by the employee by December 31st of each calendar year. Employees can submit authorized claims using the Expense Claim System [1], in accordance with University policies, at any time during the calendar year. The University's Financial Services (Payment Services) will issues instructions regarding the claim submission deadlines for each calendar year. Employees retiring or resigning must have all PDR claims submitted prior to their last day of employment.

Health Care Spending Account (HCSA)

HCSA claims can be submitted either through:

- Sun Life Members Services Portal [2]
  - Sign in with your sign-in ID and password.
  - Go to Health and scroll down to New Claim.
  - Select the type of claim you're submitting.
  - Complete, update or verify your personal information.
  - After agreeing to the terms and conditions, confirm who the claim is for and if you're claiming for a remaining balance not covered by another plan (coordination of benefits/COB).
  - Use the information on your receipt to answer the questions about your claim. If you're adding a new provider, select New provider or Add new provider. You'll see these choices in the drop down menu under Provider.
  - Continue to follow the steps until you receive a claim confirmation.
- Sun Life Mobile App [3]
  - Select Health > Health > Submit a claim and follow the steps.
- Paper Claim Form and submitting to:
  Sun Life Assurance Company of Canada
  PO Box 2010 Stn
  Waterloo, ON, N2J0A6

You should always try to submit your claims as soon as possible during the year in which you made the expense. However, you have until March 31st of the following year to submit expenses you incur during the current year.

Expenses not fully covered under the University's group benefits will only be reimbursed from the HCSA if you have checked of the appropriate box on the Extended Health Care Claim Form. If you have secondary coverage from your partner/spouse, claims should be submitted to the group benefit plans first in accordance with the standard coordination of benefit rules [4], and then any balance can be submitted to the HCSA.

How to find your HCSA balance through SunLife [5]

Taxable Wellness Spending Account (TWSA)

TWSA claims must be submitted using the Taxable Wellness Spending Account Claim Form [6].

Completed claim forms must be submitted by email (myclaims@sunlife.com [7]) or mailed to:

Sun Life Assurance Company of Canada
PO Box 2010 Stn

Waterloo, ON, N2J0A6

Submitted claim forms must include an original receipt or other original proof of payment for every item claimed. The documentation must clearly outline the type of expense and amount you are claiming as well as the date the expense was incurred. Some receipts may be more difficult to obtain than others. For example, a fitness club membership is typically paid monthly through automatic bank withdrawals or credit card payments. In this case, as proof of payment, you may submit a bank statement, if the type of expense is clearly indicated and the statement itself is identifiable as relating to your bank account or, if you prefer, ask your fitness club or service provider for a valid receipt.

You should always try to submit your claims as soon as possible during the year in which you made the expense. However, you have until March 31st of the following year to submit expenses you incur during the current year.

How to find your TWSA balance through Sun Life [5]

Source URL:https://www.uoguelph.ca/hr/staff-faculty/benefits/professional-and-managerial-pm-benefits/flexible-spending-credits/payment

Links
[1] https://www.concursolutions.com/ [2] http://www.mysunlife.ca/ [3] https://www.sunlife.ca/ca/Customer+support/Download+our+app/my+Sun+Life+Mobile?vgnLocale=en_CA [4] https://www.uoguelph.ca/hr/staff-faculty-benefits/coordination-benefits [5] https://www.uoguelph.ca/hr/system/files/Finding%20Flexible%20Spending%20Credit%20Balances%20through%20SunLife%282%29%20-%20Copy.pdf [6] https://www.uoguelph.ca/hr/system/files/TWSA%20Claim%20Form.pdf [7] mailto:myclaims@sunlife.com