

Sun Life

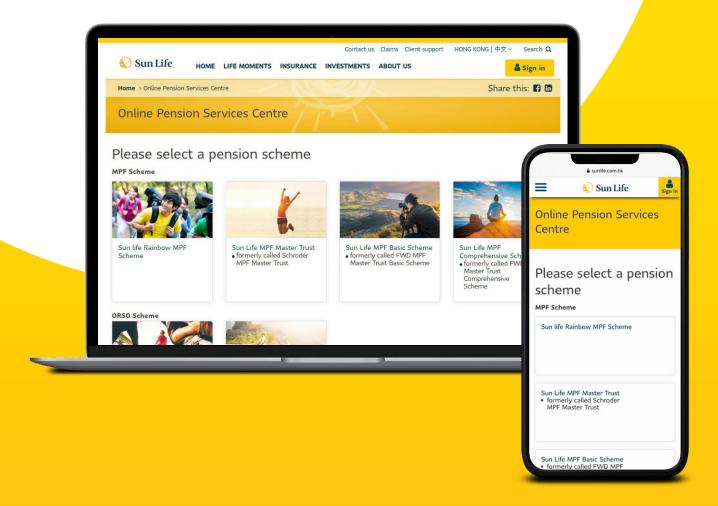


Getting Started

Whenever and Wherever, Always Be There for You

Online Pension Services Centre

Welcome to Online Pension Services Centre! We understand the challenges associated with managing an organization. To help you out, we partner with you to make your MPF administration experience carefree at the online portal Online Pension Services Centre. Follow this step-by step guide and be prepared to be surprised by how simple this can be.

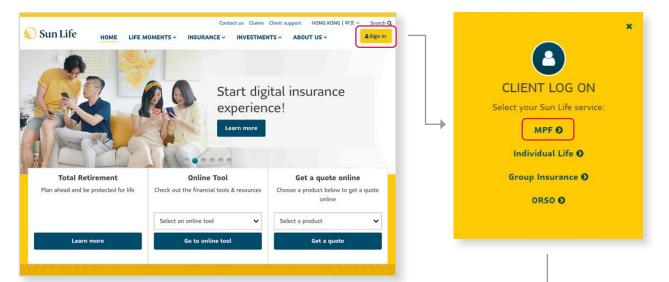


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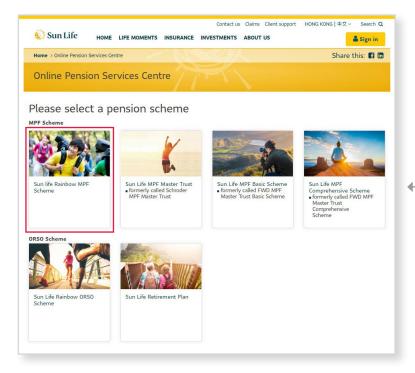
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1 Visit Online Pension Services Centre

- 1. Visit Sun Life Hong Kong's homepage www.sunlife.com.hk.
- 2. Select [≜]Sign in in the navigation bar → select "MPF".



3. Select "Sun Life Rainbow MPF Scheme".

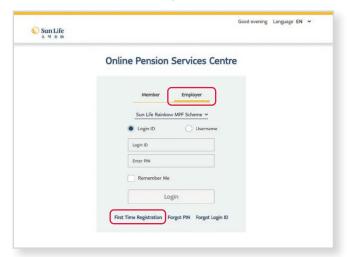


4. Then you have landed to the Online Pension Services Centre!

2 First Time Registration

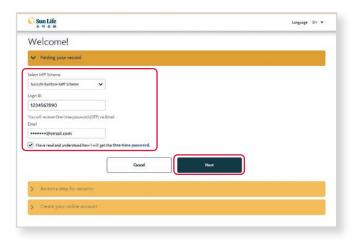
For first time users, please follow the steps below to complete registration. If you have already registered, please login directly.

 Select "Employer" at the login page → Select "First Time Registration".



Select your MPF Scheme → Input your login
 ID with your registered e-mail for receiving
 One-time password (OTP) → Select

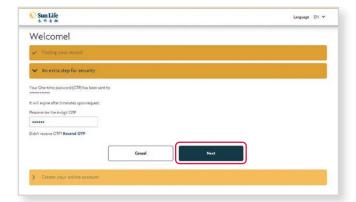
Next



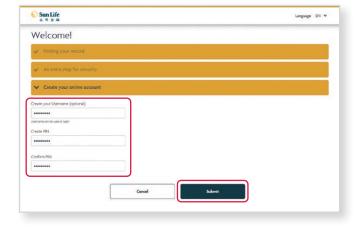


Tips: We have delivered your login ID via e-mail. Please check your e-mail to receive your own login ID.

3. You will receive your One-time password (OTP) via e-mail. Enter the 6-digit OTP ⇒ Select Next.



4. Create your username and PIN → Confirm PIN→ Select Submit





Remarks: To secure your account information, the OTP will expire after 5 minutes upon request. Please select "Resend OTP" if necessary.

Congratulations!
Your registration has completed.



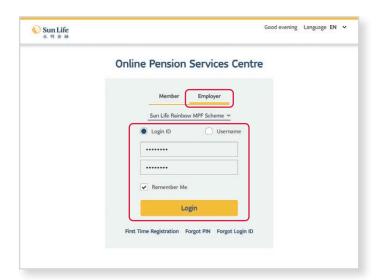
Tips: You can create your own username. It only takes you a few minutes!

3 Login and Logout

Almost there! Once you have finished the first time registration, you'll be on the way to enjoy our online services.

Login

- Go to Online Pension Services Centre ⇒ Select "Employer".
- 2. Select your MPF Scheme.
- 3. Input your Login ID / Username and PIN.
- Check the "Remember Me" box if you want to keep your login details in your device for simpler and faster future login.
- 5. Select Login, that's it!



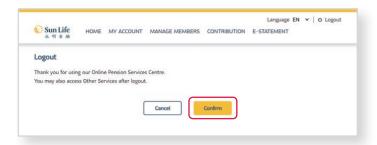


Tips: If you are an existing client (it means you have joined this scheme before 5 October 2020), your login ID = Employer Code + 00000.



Remarks: If you have forgotten your PIN, you can select "Forgot PIN" to receive a One-time password and reset your PIN.





Logout

Please log out after visiting the Online Pension Services Centre.

1. Select "Logout" in the navigation bar.



Tips: Log out when you've finished - especially in case of a shared device!

2. Select Confirm if you are sure to logout.



Remarks: To protect your account information, you will be automatically signed out after being idled for 15 minutes.

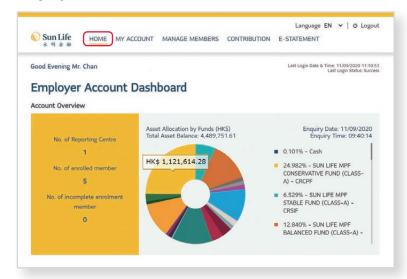


After logging in, you will be directly landed to the Employer Account Dashboard page. Here you can check a comprehensive summary on your reporting centres, enrolled members and asset allocation by funds.



Tips: More importantly, you can simply view whether there are outstanding contributions and available balance left at a glance.

Employer Account Dashboard



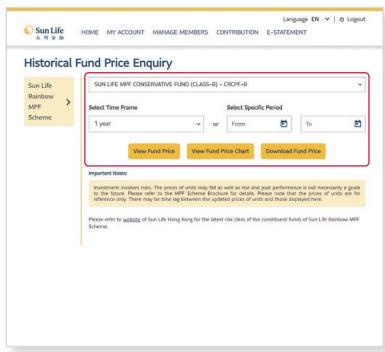


Remarks: You can always go back to this page by selecting "Home" in the navigation bar.



Tips: You can mouse-over on the Account Overview pie chart to view **fund balance**. You can also click on the pie chart for the **Historical Fund Price**.

Historical Fund Price Enquiry



- 1. Select particular constituent fund and time frame / specific period.
- Select View Fund Price /
 View Fund Price Chart to view details;
 or
- 3. Select Download Fund Price to download historical fund price in CSV format.

Outstanding Item Summary

1. Scroll down to view the **Outstanding Item Summary** under the Account Overview.





Tips: Here you can always be reminded if there are outstanding contribution period and outstanding member enrolment form to be handled.

- Select the Reporting Centre Code drop-down menu to choose another reporting centre (if any) you would like to view.
- Click on the corresponding number of outstanding contribution period
 / member enrolment form to view details.



Tips: You will be directly landed to the **Online Submission / Outstanding Contributions** page to proceed handling on contribution period(s) with outstanding contributions and/or contribution with discrepancy.

Choose Account Type

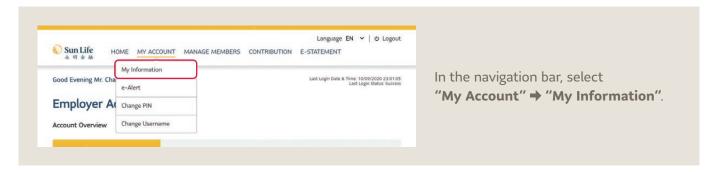


4. Scroll down to view details of Employer Cash Account / Employer Forfeiture Account.

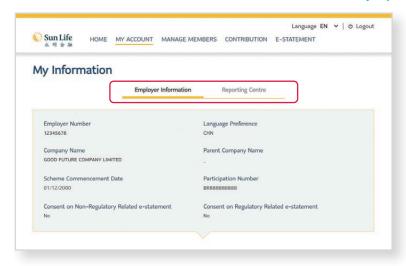
5 My Account

5.1 My Account – My Information

You can view your existing business information including contact person and details of reporting centre(s) in the **My Information** page.



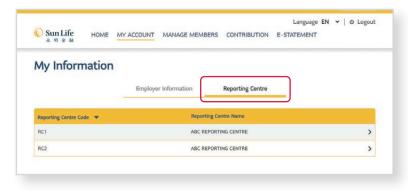
1. Your latest business information is shown in the Employer Information.





Tips: You can switch to view information between your company and its reporting centre(s) by selecting "Employer Information" or "Reporting Centre".

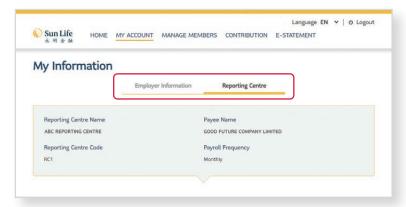
2. For details of reporting centre(s), select "Reporting Centre" → Choose the particular reporting centre you would like to view by selecting ">".



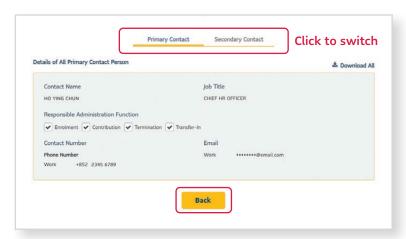


Tips: Here you can view all of your reporting centres at a glance, sorted by "reporting centre code".

3. You will see details of the Reporting Centre including payee name and payroll frequency.



4. Scroll down to view details of primary and secondary contact.



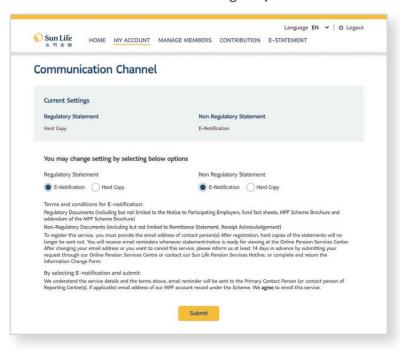
5. Select Back to go back to the Reporting Centre List page.

5.2 My Account – e-Alert

Here you can change how you would like to receive your regulatory / non-regulatory statement.



1. You can view the current settings of your communication channel.



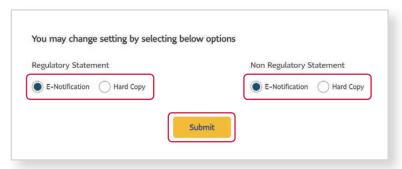


Tips: Go green! Here you can choose to receive your statements by e-notification.



Remarks: Remember to check your designated electronic mail box regularly, including the junk mail box.

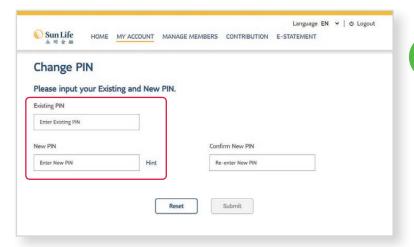
2. Select "E-Notification" / "Hard Copy" to choose the way you would like to hear from us → Select Submit ...



5.3 My Account - Change PIN

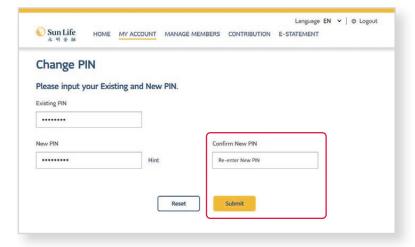


1. Input your existing and new PIN.





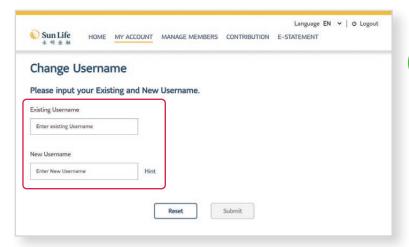
2. Confirm new PIN → Select Submit



5.4 My Account – Change Username



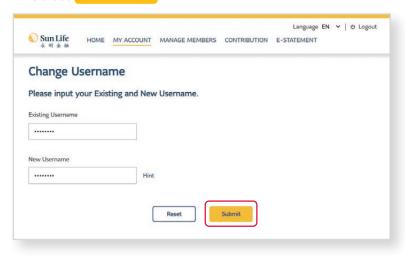
1. Input your existing and new username.





Tips: If you have not created an username, the function is named "Create Username" here.

2. Select Submit

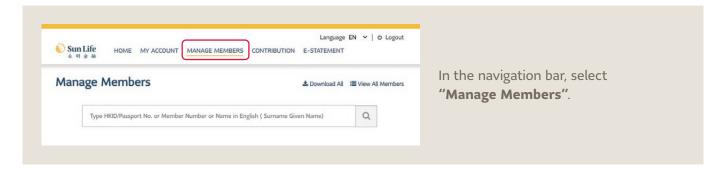


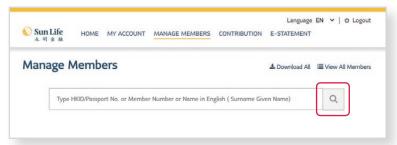


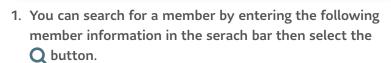
Tips: You can click "Hint" for the requirements of setting a new username.

6 Manage Members

Want to view the details of a particular member? The Manage Members page can help you out to keep your member management streamlined by putting together their personal information.





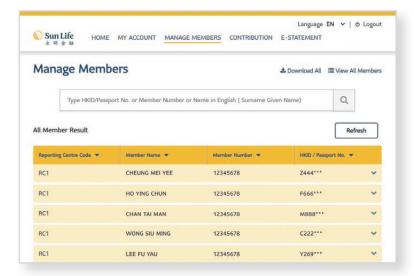




Tips: Do you know what kind of member information you can use for searching?

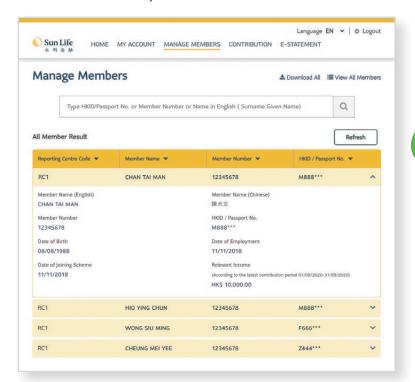
- HKID / Passport No.
- Member No.
- Name in English (Surname / Given Name)

2. All members with matching result will be shown.



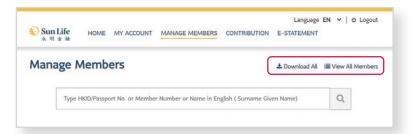
3. Sort the result in ascending or descending order by selecting the ➤ button of corresponding column.

4. Select **∨** to view particular member information.

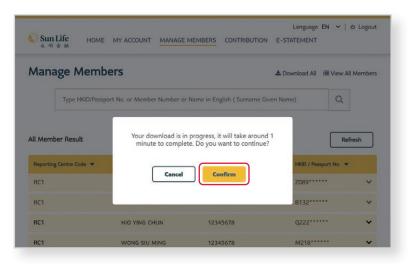


Tips: Confidential! Here you can view members' information including:

- Member Name (Chinese & English)
- · ()-
- Member No.
- HKID / Passport No.
- Date of Birth
- Date of Joining Scheme
- Date of Employment
- Relevant Income



- You can also select "View All Members" to show all member result.
- To download all member data in CSV format, select "Download All".



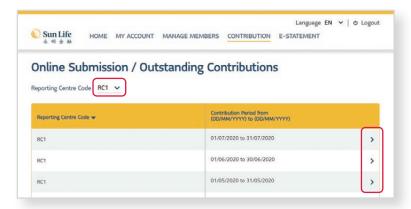
 Select Confirm if you are sure to download all member data. It will take around 1 minute to complete your download.

7 Contribution

7.1 Online Submission / Outstanding Contributions

We understand how heavy and complicated it can be when it comes to the MPF matters that need to be handled. With the new Online Pension Services Centre, calculating and making contributions have never been easier.





- Click this drop-down menu for particular reporting centre.
- Here you can view outstanding contribution of relevant contribution period and finish the submission online → Choose the contribution period to be handled by selecting ">".
- Language EN ∨ | ७ Logout Sun Life HOME MY ACCOUNT MANAGE MEMBERS CONTRIBUTION E-STATEMENT Remittance Statement Contribution Period from 01/07/2020 to 31/07/2020 Reporting Centre Code RC1 Important Notes: *2 For those members with *2 mark, Member Enrolment Form was not signed by the member. Please arrange the member to sign the returned Member Enrolment Form and re-submit the same as soon as possible so as to complete the enrolment process. READ MORE Please input Relevant Income and / or Basic Salary before Last Date of Employment to report member termination. Settled Contributions **Outstanding Contributions** Contribution Information with Discrepancy Partially Paid Contributions Outstanding Payment Date of Employmen (DD/MM/YYYY) Last Date of Employment (DD/MM/YYYY)

3. You will be landed to the Outstanding Contributions – Current Contributions column in the online Remittance Statement page.



Important: Read the "Important Notes" carefully before handling contribution data submission.

• Settled Contributions:

Click to view settled contributions of members in the selected contributions period (if any).

Outstanding Contributions:
 Click to proceed outstanding contributions handling.

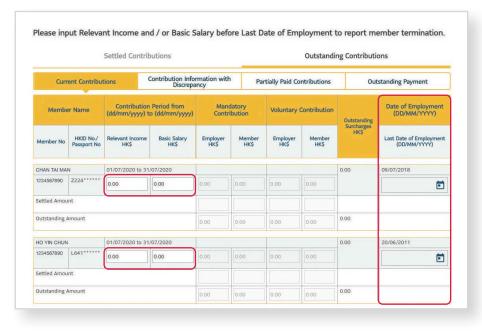
3. For the **Outstanding Contributions**, there are 4 columns with different functions:



Tips: There are 4 columns with different functions under **Outstanding Contributions**.

3	Current Contributions	Contribution information with Discrepancy	Partially Paid Contributions	Outstanding Payment
	The main column to input required contribution data by employers.	You may find records here with calculation problems.	View contributions with incomplete payment.	After submission of contribution data, your outstanding payment will be shown here for your further payment processing.

4. Input relevant income and basic salary (if applicable) for members available in the contribution table ⇒ mandatory contribution, voluntary contribution (if applicable) and outstanding surcharges (if applicable) amounts will be automatically calculated once you entered the data.



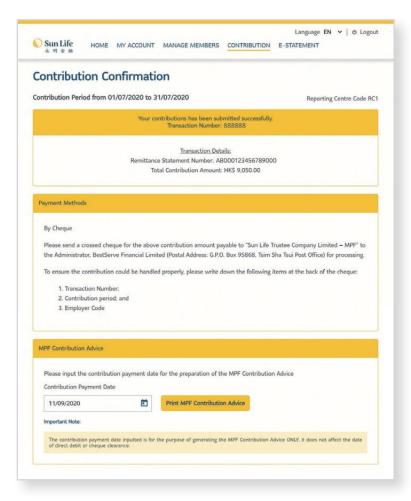
Remarks:



For any terminated employee, you can fill in the "Last Date of Employment" field.







- 5. After inputting all required information, scroll down to the bottom and select save and the information you input will be saved.
- 6. If you would like to go back for another contribution period, select Go To Contribution Period
- 7. If you are sure to submit the contribution information, select Confirm and View Summary .

8. Just that easy! You have done the contribution submission. You will go to the Contribution Confirmation page and receive a transaction number.

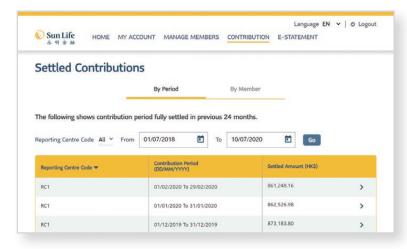
9. Scroll down for details to view payment methods, and also to generate and print an MPF Contribution Advice.

7.2 Settled Contributions

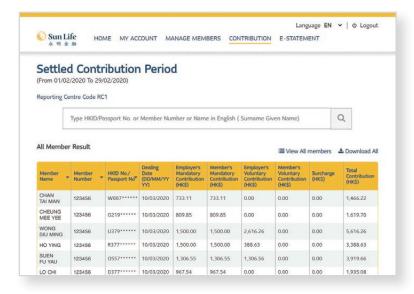
In the **Settled Contributions** page, our Online Pension Services Centre keeps you ahead of contribution period fully settled in the past 24 months.



View by Period



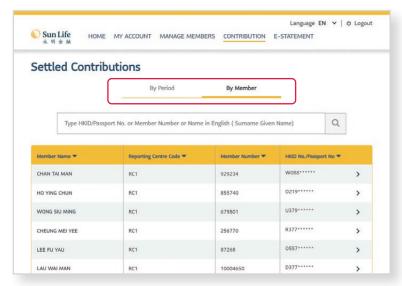
- Choose the contribution period you would like to view → Select Go.
- 2. Select ">" to view particular contribution details.





Tips: You can also sort the data by entering information in the search bar or sort the result in ascending or descending order by selecting the ▼ button of corresponding column.

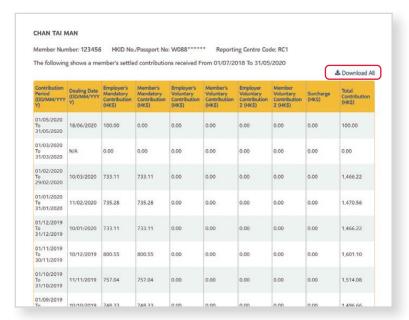
View by Member





Tips: You can switch to view between **By Period** and **By Member** by selecting this bar.

- Select "By Member" → Search for a member by entering the member information in the search bar → Select the Q button.
- All members with matching result will be shown → Select ">" to view particular contribution details.



- 3. You will see contribution records of the particular member.
- 4. Select "Download all" to download the full record in CSV format.

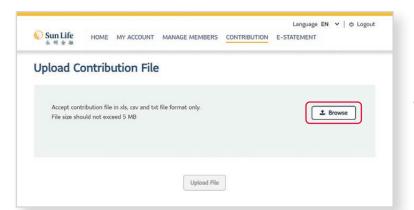
7.3 Upload Contribution File



Remarks: Only contribution files in XLS, CSV and TXT format with file size less than 5MB are accepted. Please contact our call centre or your relationship manager for a template.

If you want / need to upload your contribution information, you can use the **Upload Contribution File** function.

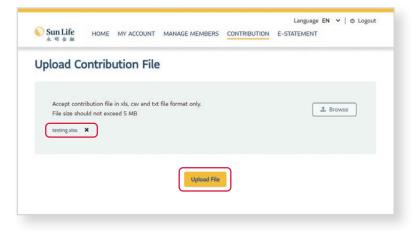




1. Select Browse to choose the file you would like to upload.



Tips: Select **X** to cancel the upload of the chosen file. Only one file can be uploaded at one time.

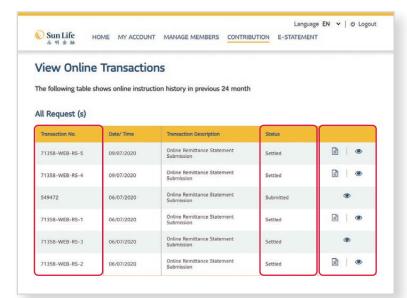


- 2. You will see the chosen file name in the box.
- 3. Select Upload File to confirm the upload of the file. That's it!

7.4 View Online Transactions

You can view your transaction history in the past 24 months to clearly keep track of what transaction you have done.





- 1: For particular transactions, select then the system will generate the statement.
- 2: Then select **(*)** to view details of the statement.



Tips: If you see a particular transaction with only to select, it means there is already a statement record in the system, or the transaction is a non-contribution instruction. Please click on to directly view the details.

Transaction No.

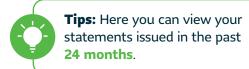
Status Click the icons for details



Tips: "Status" is shown for you to monitor the transaction progress. Remember to submit your contribution data and payment before the contribution day.

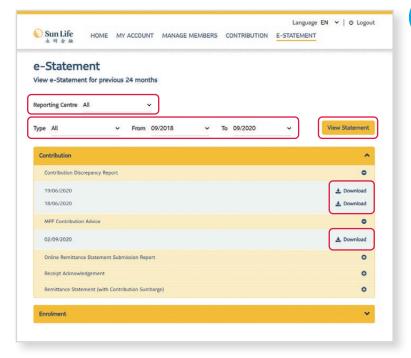
8 e-Statement

In the **e-Statement** page, you can now view and download your digital statements in the most eco-friendly and convenient way.





- 1. Choose the reporting centre.
- 2. Choose the type and period of the statement.



Remarks: Do you know what kind of statement you can view here?



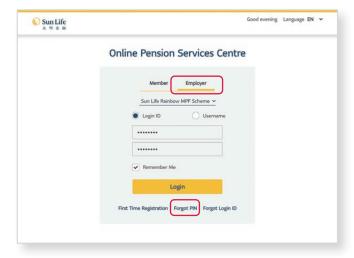
- Contribution
- Enrolment
- Asset Transfer-In/Out
- Miscellaneous
- 3. Select View Statement
- You can now download to view your e-statement and letters sorted by statement type.

9 Forgot PIN / Login ID

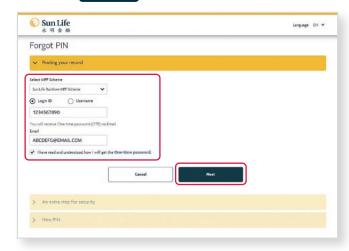
If you have forgotten your password or login ID, now you can easily reset a new one by using the One-time password – as simple as the first time registration!

Forgot PIN

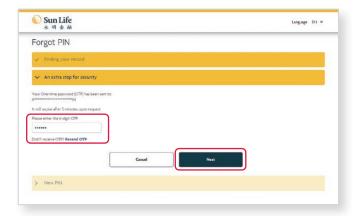
1. Select "Employer" at the login → "Forgot PIN".



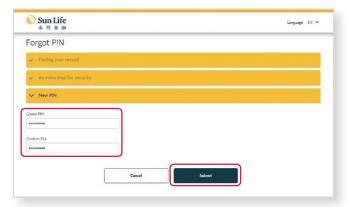
Select your MPF scheme, input your Login ID / Username with your registered e-mail for receiving One-time password (OTP) → Select Next



Your OTP will be sent to your e-mail. Enter the
 6-digit OTP → Select Next.

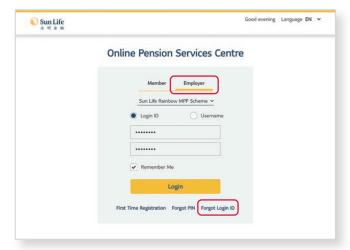


4. Create new PIN → Confirm PIN → Select Submit



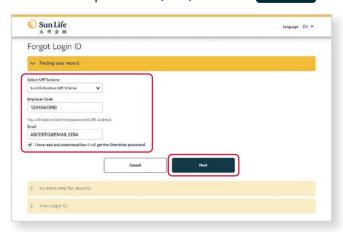
Forgot Login ID

 Select "Employer" at the login → "Forgot Login ID".



Select your MPF scheme, input your Employer
 Code with your registered e-mail for receiving
 One-time password (OTP) ⇒ Select

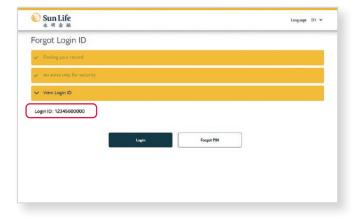
Next



Your OTP will be sent to your e-mail. Enter the
 6-digit OTP → Select Next



 Your login ID will be displayed here for your future login.





Tips: If you have forgotten your username, please use your login ID to log in. After logging in, your username will be shown. If you want / need to reset your username, you can select "My Account" in the navigation bar → "Change Username".

10 More Functions

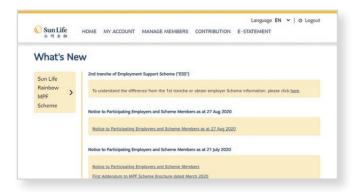
Can't wait to explore the Online Pension Services Centre? At the footer navigation, we have integrated with more functions fitting in your need.

Scroll down to the bottom of any web page to view the navigation footer.



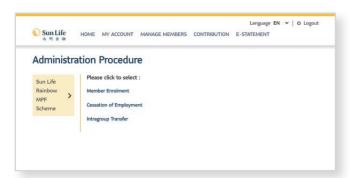
What's New

Here we will keep you posted on news and any amendments. Keep an eye on our updates!



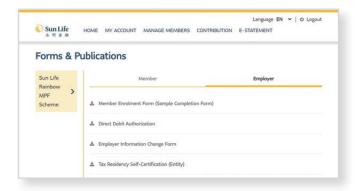
Administration Procedure

Click here to learn more about our administration procedure.



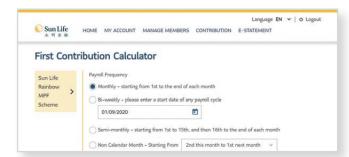
Forms & Publications

Check out the list here for our most commonly used forms and publications.



First Contribution Calculator

Simply input basic information to calculate the first contribution amount for employees (for reference only).



Log in the Online Pension Services Centre now to experience more!



Sun Life Hong Kong Limited

(Incorporated in Bermuda with limited liability)
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Hunghom, Kowloon, Hong Kong

Administrator:

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10th Floor, One Harbourfront, 18 Tak Fung Street Hunghom, Kowloon, Hong Kong

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