

ACTIVATION

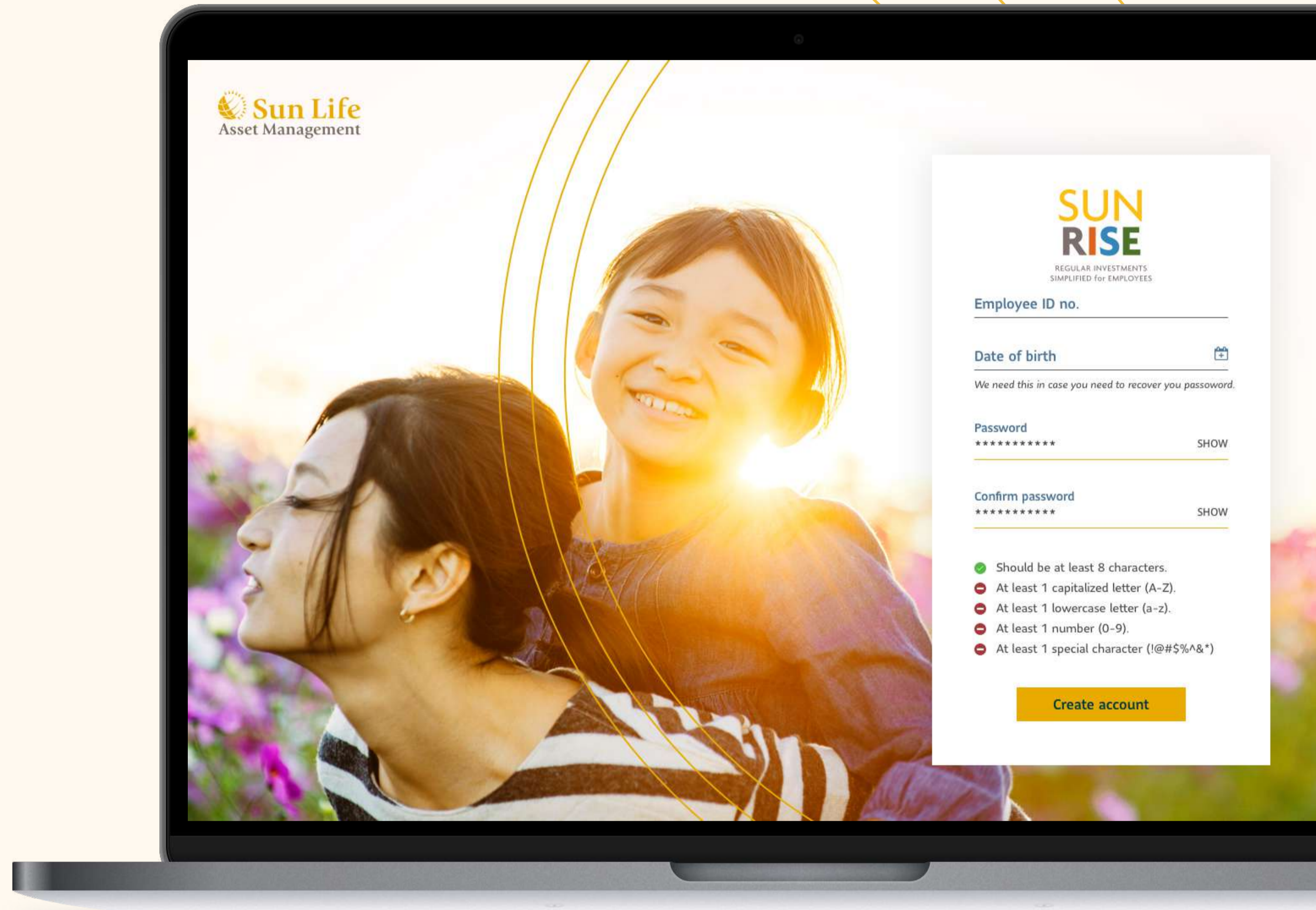
Begin your brighter journey with the Sun RISE Portal!

1 You will receive an e-mail with the subject "Sun Rise Portal - Account Activation". Click on the activation link. You will be navigated into the Sun RISE Portal activation page.

2 Once in the Sun RISE Portal, enter your date of birth and employee ID, nominate a password, and click on "Create account".

Note: The password should be at least eight (8) characters long, and must contain at least one capitalized letter, one lowercase letter, one number, and one special character.

3 You will be asked to log in for the first time. Enter the email address and password you nominated previously. A one-time PIN (six-digit code) will be sent to your registered mobile number. Enter that when prompted and then proceed.



HR HOME SCREEN

Manage your company's activities with ease.

1

Find here a list of employees and the status of their respective enrollment requests.

2

Find here a list of pending tasks (e.g. employee profiles for confirmation, subscription adjustment requests, service requests).

All employees 300

Search

Employee name	Member ID	Status
Jerome Perez	97911-0424	For extract
Robert Olson	97911-0424	Inco

10 Employee profiles for confirmation

12 Subscription adjustment requests

15 Service requests

Employee name	Employee share	Date s
Joel Daniels 05885-6640	PHP 55,569.49 PHP 718.15	Oct 9 08:4
Stephen O'Brien 09663-2342	PHP 42,799.77 PHP 290.24	
Don Paul 21084-6200	PHP 13,090.08 PHP 995.47	
Brett Reeves 402-5842	PHP 82,595.42 PHP 276.57	
	PHP 35,991.13	

3

This portion of the dashboard shows the investment details of the organization you are handling.

- Current total value of the fund selection
- Total accumulated monthly subscriptions
- Total number of current shares accumulated
- NAVPS (Net Asset Value Per Share) as of publish date

Employee totals as of July 2018

PHP 10,689.71 Total current fund value	PHP 10,750.00 Total investment amount	PHP 5,318.00 No of Shares	2.0101 Current NAVPS
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DASHBOARD

Take a quick look at your employees' pending accounts requests and investment amounts.

1 Dashboard tabs. Your goal is to zero-out the number of employee profiles, adjustment requests, and service requests, to ensure that employee reports are current and updated.

2 Content listings area. You will have the option to search, filter, and sort through employee activities.

3 The action bar. These action buttons confirm the main task required in each tab. Details on the next steps to proceed with requests shall be displayed in the succeeding pages.

HOME EMPLOYEES TO DO New MARIE BELL HR ADMIN

10 Employee profiles for confirmation

12 Subscription adjustment requests

15 Service requests

PHP 94,212 Total investments to pay

Extract member investments Proof of payments

Search Sort by First name A-Z

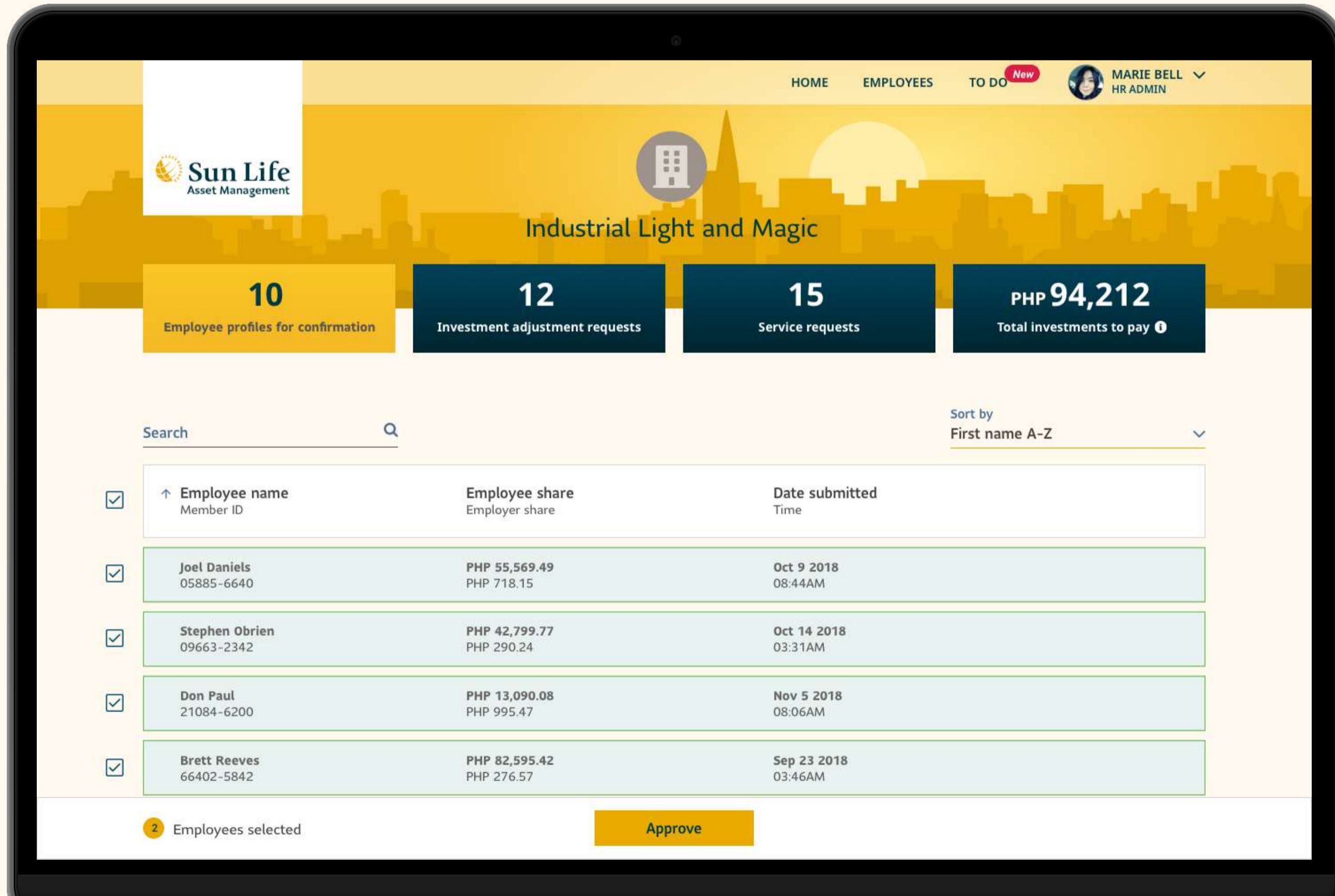
Employee name Member ID	Employee investment amount PHP 59,226.47	Employer investment amount PHP 11,762.98	Total investments PHP 94,527.74	Edit with Excel
Frederick Banks 97911-0424	PHP 454.58	PHP 86.46	PHP 3,081.86	
Ian Fields 97911-0424	PHP 315.33	PHP 0	PHP 1,230.44	
Elsie Frank 97911-0424	PHP 656.19	PHP 0	PHP 8,055.11	
Rosetta Jennings 97911-0424	PHP 249.11	PHP 90.41	PHP 4,298.25	

212 Employee investments **3** Submit investment payment Lock payments Grand total **PHP 94,527.74**

DASHBOARD

(Confirmation of Enrollees)

Registered employees are required to completely fill out the Sun RISE online application form before proceeding to enroll in the Sun RISE Program. You, as HR Admin, will have to confirm the applications to ensure each member is enrolled in the program.



The dashboard displays the Sun Life logo and the company name 'Industrial Light and Magic'. It features a navigation bar with 'HOME', 'EMPLOYEES', and 'TO DO' (with a 'New' badge). The user is identified as 'MARIE BELL HR ADMIN'. Four summary cards show: 10 Employee profiles for confirmation, 12 Investment adjustment requests, 15 Service requests, and PHP 94,212 Total investments to pay. A table lists employee details for confirmation, with 2 employees selected. An 'Approve' button is visible at the bottom.

Employee name Member ID	Employee share Employer share	Date submitted Time
<input checked="" type="checkbox"/> Joel Daniels 05885-6640	PHP 55,569.49 PHP 718.15	Oct 9 2018 08:44AM
<input checked="" type="checkbox"/> Stephen Obrien 09663-2342	PHP 42,799.77 PHP 290.24	Oct 14 2018 03:31AM
<input checked="" type="checkbox"/> Don Paul 21084-6200	PHP 13,090.08 PHP 995.47	Nov 5 2018 08:06AM
<input checked="" type="checkbox"/> Brett Reeves 66402-5842	PHP 82,595.42 PHP 276.57	Sep 23 2018 03:46AM

2 Employees selected Approve

DASHBOARD

(Confirmation of Subscription Adjustments)

All employees requesting for adjustment of their contribution amounts will be listed here. You may confirm or reject their request at your discretion, depending on their net pay and other considerations. An e-mail notification will be sent to the member on either action.

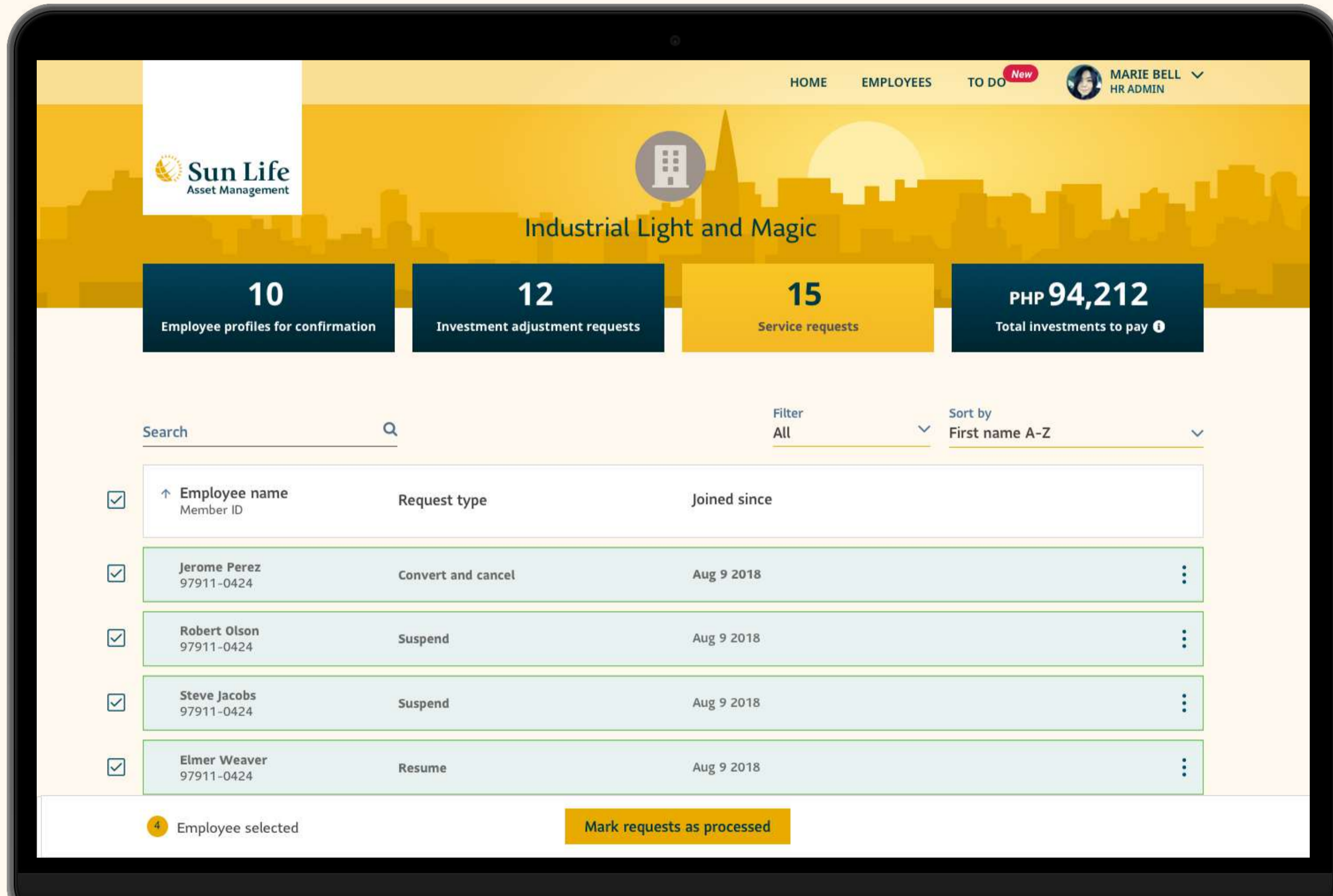
The dashboard displays the Sun Life logo and the company name 'Industrial Light and Magic'. It features a navigation bar with 'HOME', 'EMPLOYEES', and 'TO DO' (with a 'New' badge). The user profile 'MARIE BELL HR ADMIN' is visible in the top right. The main content area shows four summary cards: 'Employee profiles for confirmation' (10), 'Investment adjustment requests' (12), 'Service requests' (15), and 'Total investments to pay' (PHP 94,212). Below these is a search bar and a table of requests. The table has columns for Employee name (with Member ID), MF Account No., Fund, Date submitted (Time), and Requested amount (Current contribution). At the bottom, there are 'Reject' and 'Confirm adjustments' buttons, and a status indicator '2 Employees selected'.

<input checked="" type="checkbox"/>	Employee name Member ID	MF Account No.	Fund	Date submitted Time	Requested amount Current contribution
<input checked="" type="checkbox"/>	Frederick Banks 97911-0424	21447-2688	Philippine Equity Fund	Aug 9 2018 02:10AM	PHP 475.9 NEW
<input checked="" type="checkbox"/>	Ian Fields 97911-0424	62916-4671	Dynamic Fund	Aug 9 2018 02:10AM	PHP 446.04 PHP 340.81
<input checked="" type="checkbox"/>	Elsie Frank 97911-0424	80893-6520	Philippine Equity Fund	Aug 9 2018 02:10AM	PHP 411.63 NEW
<input checked="" type="checkbox"/>	Rosetta Jennings 97911-0424	14356-2417	Philippine Stock Index Fund	Aug 9 2018 02:10AM	PHP 943.58 NEW

DASHBOARD

(Service Requests)

All employees requesting for suspension or resumption of their regular contributions and convert to individual account will be listed here. Click "Mark requests as processed". A confirmation message will be displayed once successful. A member requesting the resumption of his regular contributions will be added on the subscription list. An e-mail notification will be sent to the member on the suspension or resumption of his monthly investment.



The dashboard displays the following metrics:

- Employee profiles for confirmation: 10
- Investment adjustment requests: 12
- Service requests: 15
- Total investments to pay: PHP 94,212

Navigation: HOME EMPLOYEES TO DO New MARIE BELL HR ADMIN

Search: Filter: All Sort by: First name A-Z

<input checked="" type="checkbox"/>	Employee name Member ID	Request type	Joined since	
<input checked="" type="checkbox"/>	Jerome Perez 97911-0424	Convert and cancel	Aug 9 2018	⋮
<input checked="" type="checkbox"/>	Robert Olson 97911-0424	Suspend	Aug 9 2018	⋮
<input checked="" type="checkbox"/>	Steve Jacobs 97911-0424	Suspend	Aug 9 2018	⋮
<input checked="" type="checkbox"/>	Elmer Weaver 97911-0424	Resume	Aug 9 2018	⋮

4 Employee selected Mark requests as processed

DASHBOARD

(View and Submit Member Investments)

1 This portion allows you to review the list of members with investments (i.e. those who you will deduct salary from) and the total investment amount due for payment.

2 Find this icon (📄) if you wish to download or upload information on your employees, to be extracted in an Excel file. The file shall contain the following details:

- Client ID
- Employee ID number
- Last name
- Fund name
- First name
- Total ER shares
- Fund code
- Total EE shares

Important!

After step 2, you must deposit payment through a Sun Life partner bank (this will be coursed outside the Sun RISE Portal). The total amount to be paid should be the same as the Grand Total indicated on the portal.

3 Once total investment amount is final, click "Lock payments".

Note: All pending requests will be processed on the next cut-off date.

4 Once payment has been made, click "Submit investment payment".

Once the Terms and Conditions are displayed, tick the box to agree with the terms and conditions of the program and click "Submit".

5 Click "Browse", then upload a scanned copy of the deposit slip. Enter the total amount value in the deposit slip then click "Submit".

Note: The total amount on the deposit slip should be the same as the Grand Total indicated on the portal.

Await confirmation that your payment has been queued for processing. This will be posted within 72 hours.

The screenshot shows the Sun Life Asset Management dashboard for 'Industrial Light and Magic'. The top navigation bar includes 'HOME', 'EMPLOYEES', 'TO DO' (with a 'New' badge), and a user profile for 'MARIE BELL HR ADMIN'. The dashboard features four summary cards: '10 Employee profiles for confirmation', '12 Subscription adjustment requests', '15 Service requests', and 'PHP 94,212 Total investments to pay'. Below these are two tabs: 'Extract member investments' (active) and 'Proof of payments'. The 'Extract member investments' tab shows a table with columns for Employee name, Employee investment amount, Employer investment amount, and Total investments. A search bar and a 'Sort by First name A-Z' dropdown are at the top of the table. A red box highlights the table, with a red circle '1' over the table header and a red circle '2' over the Excel icon in the 'Total investments' column. Below the table, there are buttons for 'Submit investment payment' (with a red circle '4'), 'Lock payments' (with a red circle '3'), and 'Grand total PHP 94,527.74'. A modal titled 'Upload proof of payment' is overlaid on the right, with a red arrow pointing from the Excel icon in the table to the modal. The modal contains an 'Upload image Choose file' section with a 'Browse' button, a 'Payment type' dropdown set to 'Cash deposit', an 'Input total amount value' field, and a 'Submit' button. A 'CLOSE' button is in the top right of the modal.

Employee name Member ID	Employee investment amount PHP 59,226.47	Employer investment amount PHP 11,762.98	Total investments PHP 94,527.74
Frederick Banks 97911-0424	PHP 454.58	PHP 86.46	PHP 3,081.86
Ian Fields 97911-0424	PHP 315.33	PHP 0	PHP 1,230.44
Elsie Frank 97911-0424	PHP 656.19	PHP 0	PHP 8,055.11

EMPLOYEE PAGE

(Register New Employee)

1

Click the blue call to action button to start adding a new employee.

2

Input the following details:

- First name
- Last name
- Date of birth
- Employee ID no.
- Mobile number
- Email address

For bulk registration, you can upload an accomplished csv file.

Self Registration [CLOSE]

Register a single employee

Register more than 1 employee via CSV template

Done in three simple steps...

1. Download this [CSV template](#) (you may skip this step if you already have the file).
2. Fill-up the "email" column inside the CSV file.
3. Click on the upload button below.

First name *

Last name *

Employee ID no *

Mobile number *
+63

Date of birth *

Email address

Add new member

Upload accomplished CSV File

HOME EMPLOYEES TO DO New MARIE BELL HR ADMIN

Emma Fowler

employees 300

Filter: All | Sort by: First name A-Z

Employee name Member ID	Status	Joined since
Jerome Perez 97911-0424	For extraction	Aug 9 2018
Robert Olson 97911-0424	Incomplete	Aug 9 2018
Steve Jacobs 97911-0424	Incomplete	Aug 9 2018
Elmer Weaver 97911-0424	Incomplete	Aug 9 2018
Cordelia Little 97911-0424	For extraction	Aug 9 2018

EMPLOYEE PAGE

(Adjust Employee Investments)

1

Click the three dots beside the name of the employee and select "Adjust employee investments".

2

Select a fund on the dropdown field. You may adjust the employee contribution amount and the employer contribution amount.

Adjust employee investments CLOSE

Fund name
 Philippine Index Fund ▼

Employee subscription amount
 PHP 2,000.00

Save changes

Navigation: HOME EMPLOYEES TO DO New MARIE BELL ▼ HR ADMIN

Employee Profile: Emma Fowler

employees 300

Filter: All | Sort by: First name A-Z

Employee name Member ID	Status	Joined since	
Jerome Perez 97911-0424	For extraction	Aug 9 2018	⋮
Robert Olson 97911-0424	Incomplete	Aug 9 2018	⋮
Steve Jacobs 97911-0424	Incomplete	Aug 9 2018	⋮
Elmer Weaver 97911-0424	Incomplete	Aug 9 2018	⋮
Cordelia Little 97911-0424	For extraction	Aug 9 2018	⋮

1

- Adjust employee investments
- Redeem employer shares
- Redeem employee shares
- View employee transactions
- Suspend member investments

2

EMPLOYEE PAGE

(Redeem Employer Shares)

1 Click the three dots beside the name of the employee and select "Redeem employer shares".

2 Select available fund on the dropdown field. Enter the redemption details and your password.

Enter your password and tick the terms and conditions checkbox to accept and click on submit.

A confirmation message will be displayed. Click "OK" to exit.

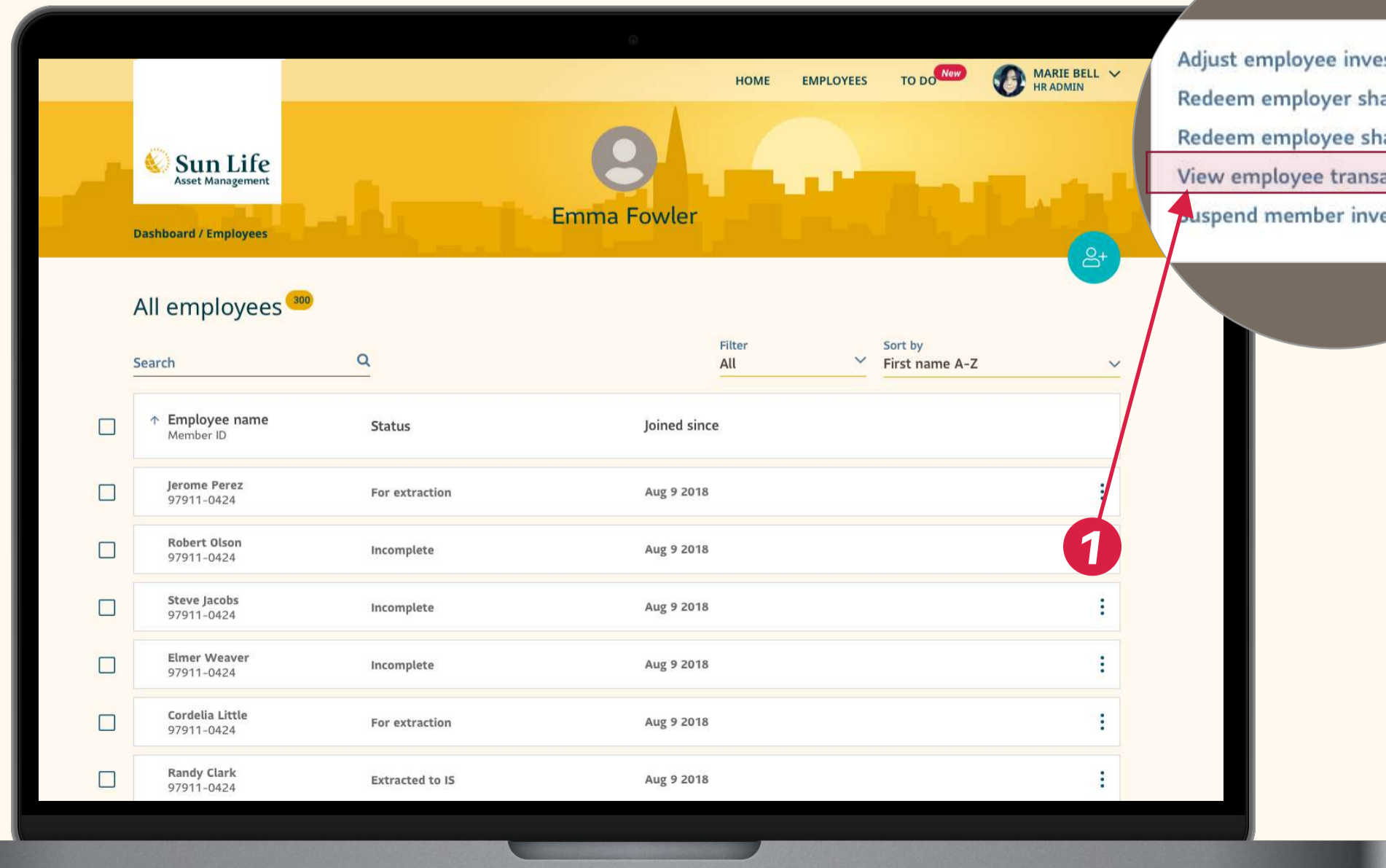
Employee name Member ID	Status	Joined since
erome Perez 7911-0424	For extraction	Aug 9 2018
obert Olson 7911-0424	Incomplete	Aug 9 2018
teve Jacobs 7911-0424	Incomplete	Aug 9 2018
lmer Weaver 7911-0424	Incomplete	Aug 9 2018

EMPLOYEE PAGE

(View Employee Transactions)

1 Click the three dots beside the name of the employee and select "View employee transactions".

2 You will be redirected on a new page containing that particular employee's transaction history.



EMPLOYEE PAGE

(Suspension of Member's Investments)

If, for any reason, an account on the Sun RISE portal must be suspended, visit this page.

1 Click the three dots beside the name of the employee and select "Suspend member investments".

2 Click "Confirm suspension" to proceed; otherwise, click "Cancel" to cancel the request.

A confirmation message will be displayed. Click "Close" to exit.

