Manulife Bank

Manulife Bank Document Transfer Portal

The Manulife Bank Document Transfer Portal allows you to securely submit your clients' banking documentation for underwriting and processing for the following solutions:

- Cash Surrender Value (CSV) Line of Credit
- Immediate Financing Arrangement (IFA)
- RRSP Loan
- Investment Loan
- Insured Retirement Program (IRP) Line of Credit
- Access Lines of Credit (ALOC) and Access Lines of Credit Plus (ALOC Plus)
- Advantage Account, Business Advantage Account, Registered Advantage Account (RSP), Tax-Free Advantage Account (TFSA), and Retirement Income Advantage Account (RRIF)
- Guaranteed Investment Certificate (GIC)
- Manulife One® and Manulife Bank Select® mortgage referrals

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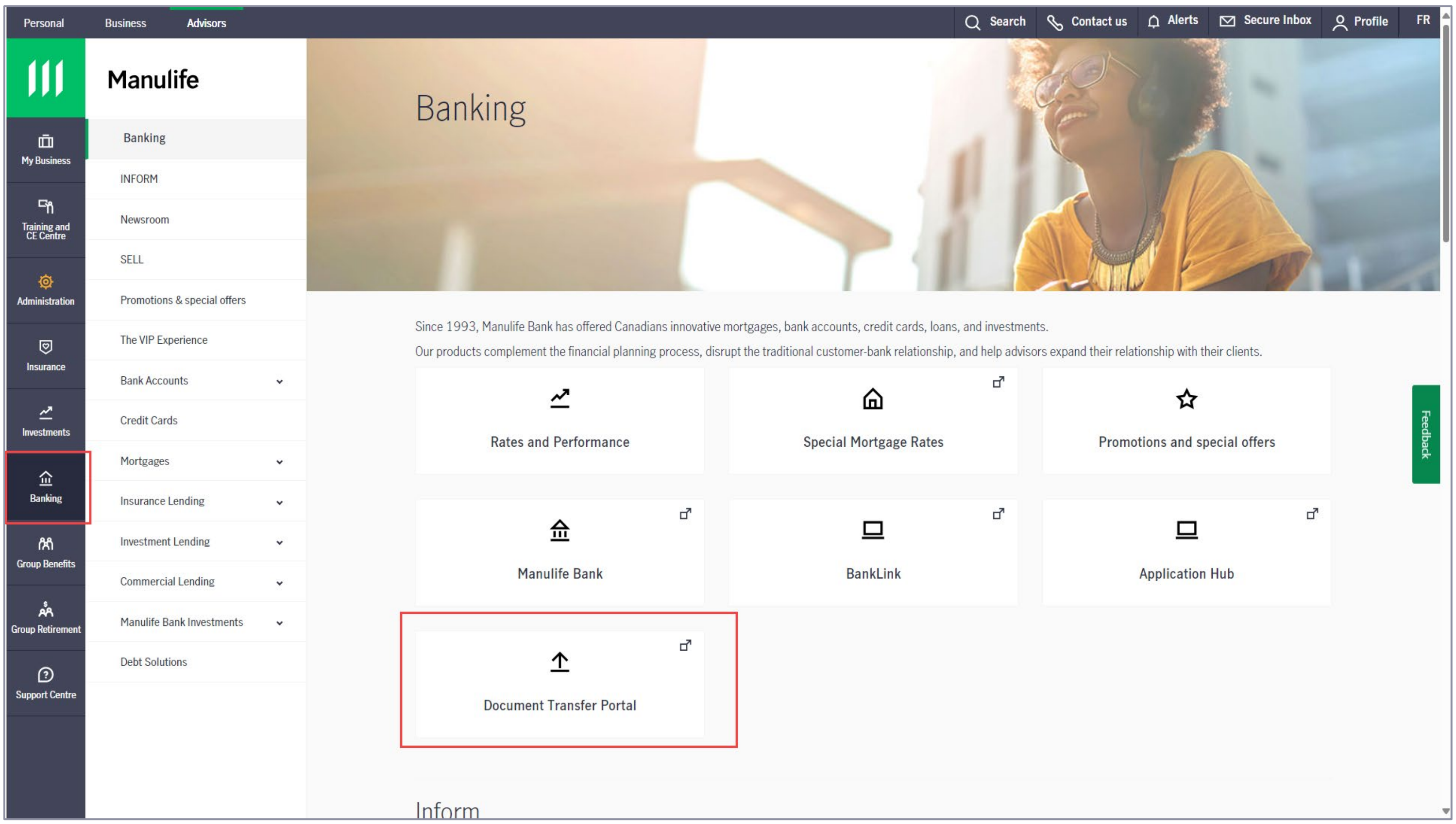
Locating the Document Transfer Portal

The Document Transfer Portal is accessible from both the public and secure pages within Advisor Portal, under the Banking category. You will need your Advisor Manulife ID to access.

- If you are **logged in** to Advisor Portal with your Advisor Manulife ID, then you will automatically be logged into the Document Transfer Portal once the link is selected.
- If you are **not logged in** to Advisor Portal, when the Document Transfer Portal link is selected you will be prompted to log in with your Advisor Manulife ID.

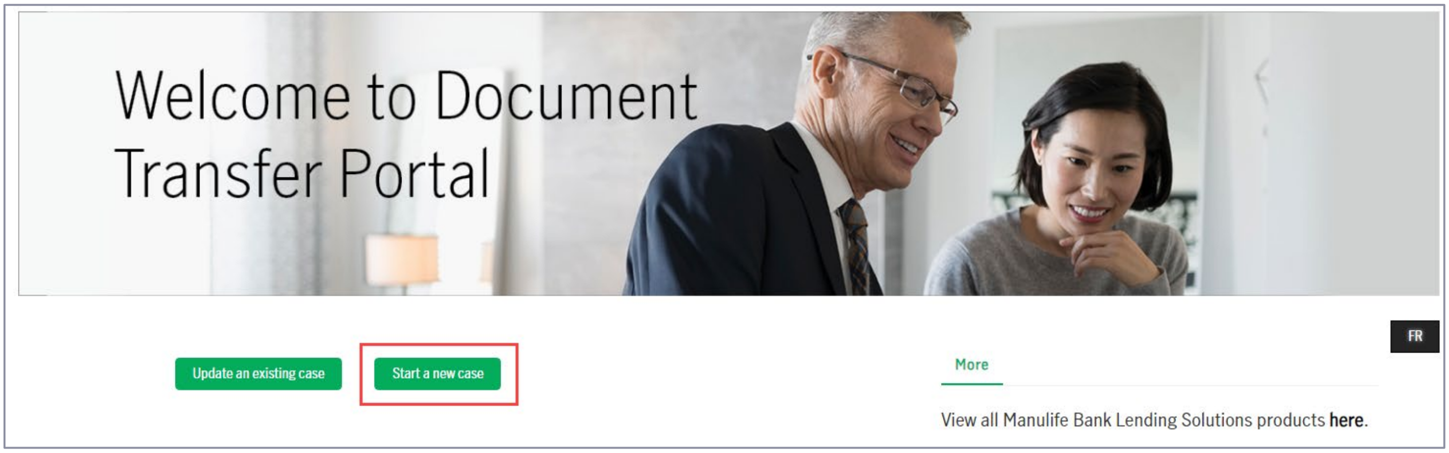
> **Tip:** A user must log in using their own Manulife ID. If they receive an error, they can try clearing their cache and cookies and try again.



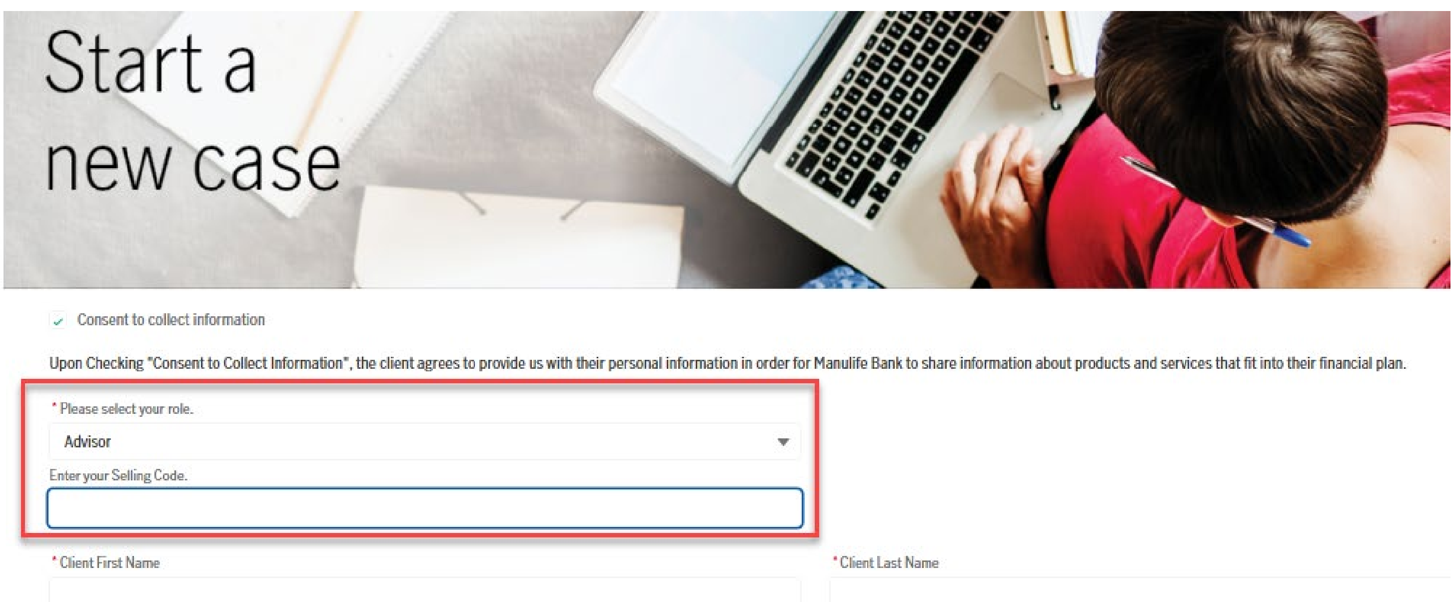
Create a new case

Tip: A user cannot create a new case for a mortgage referral. They can only update an existing case.

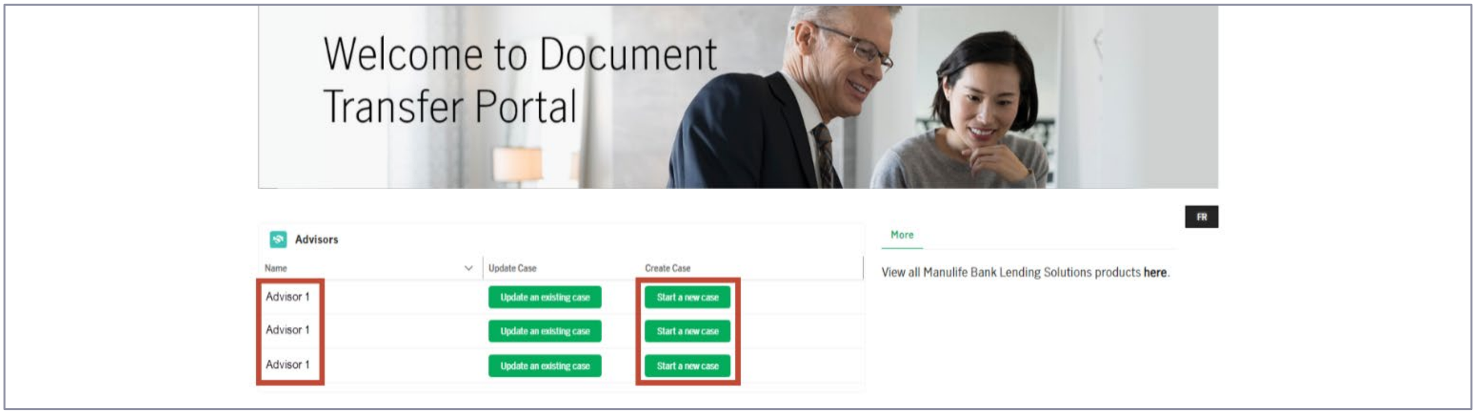
Step 1: For **Advisors**, the first step is to create a client record. Select **Start a new case**.



When submitting a new case, you may be required to fill in **two additional fields**. After clicking "**Start a new Case**," you may be prompted to select your role—choose "**Advisor**"—and provide an **<u>active</u>** selling code. If you have multiple active selling codes, it doesn't matter which one you choose as it is not linked to the product application. The purpose of that selling code field helps us configure your profile for the Document Transfer Portal. Advisors will be compensated based on the selling code listed on the specific product application.

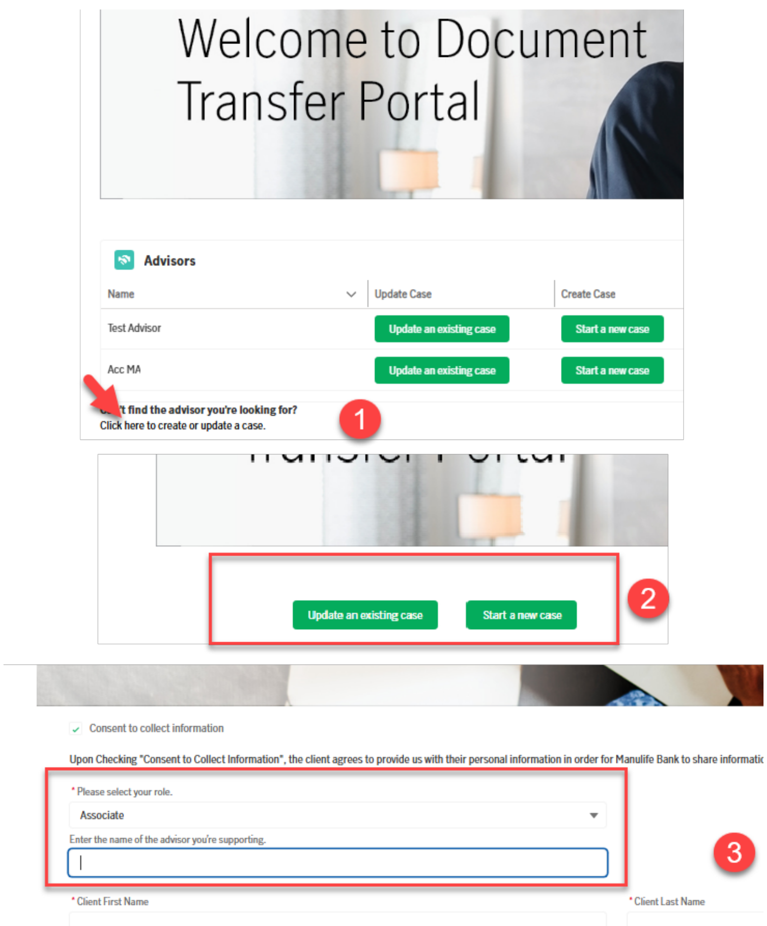


Step 1a: Marketing Assistants who are linked to an Advisor's profile, will be able to view the advisor's name. If the MA assists more than one Advisor, there will be a list of advisors. Choose the right advisor and select **Start a new case**.



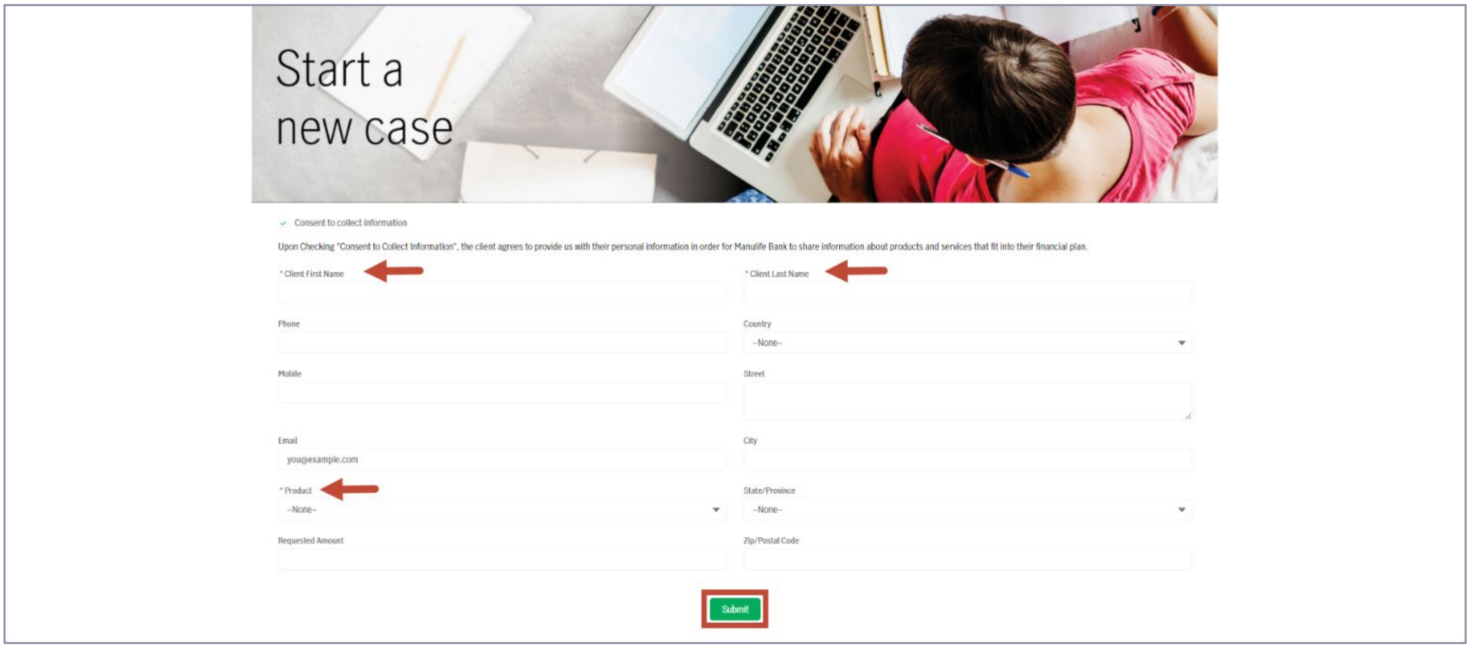
If you are a Marketing Assistant and don't see the name of the advisor you're supporting, take the following steps:

1) Click on **Click here to create or update a case**
2) Click **Start a new case**
3) Select **Assistant** for your role, and enter the **name of the advisor** that you support.

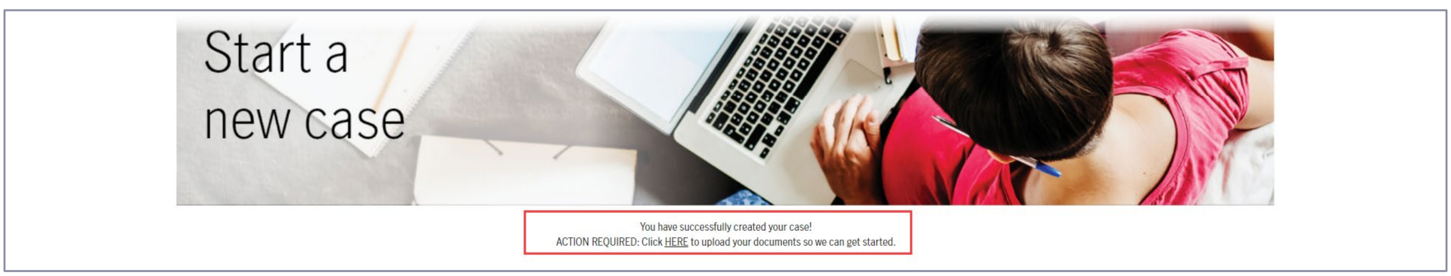


Step 2: Complete the required fields as indicated by the asterisk. Although the other fields are not mandatory, please add additional client information, if available, at the time of creating the case and select **Submit.**

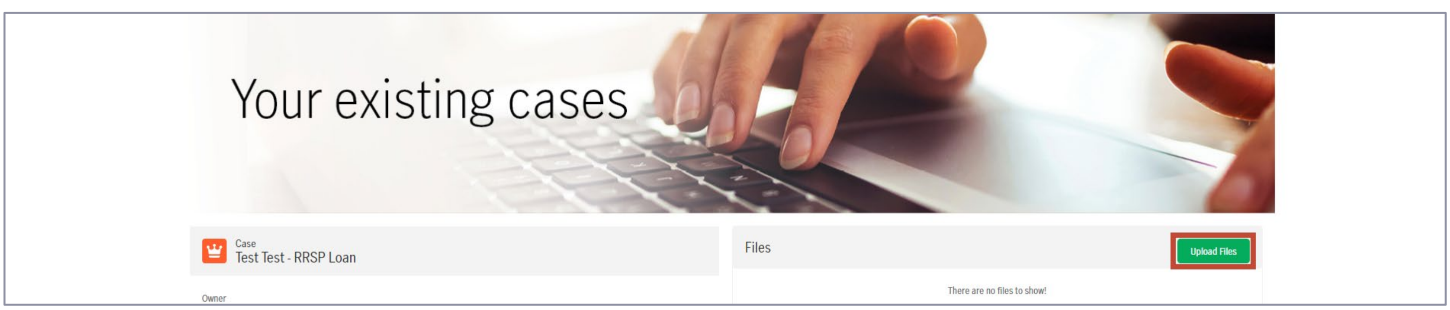
> **Tip:** If you're creating a case for a CSV Personal Line of Credit Application (form AB0810), select IRP, ALOC or ALOC Plus in the product field in the Document Transfer Portal.



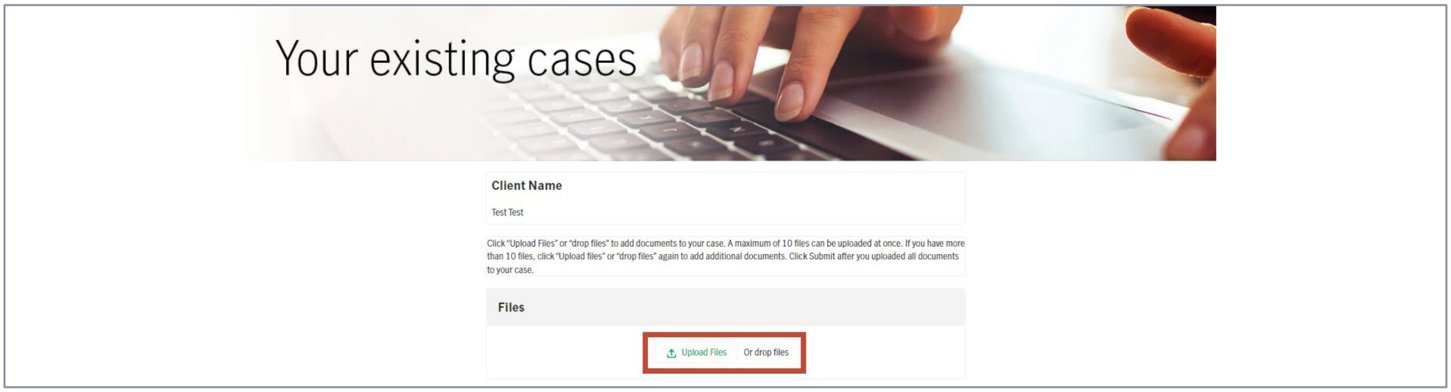
Step 3: Now that you've created the case, you are ready to upload your documents by selecting the link on screen.



Step 4: Select **Upload Files**.

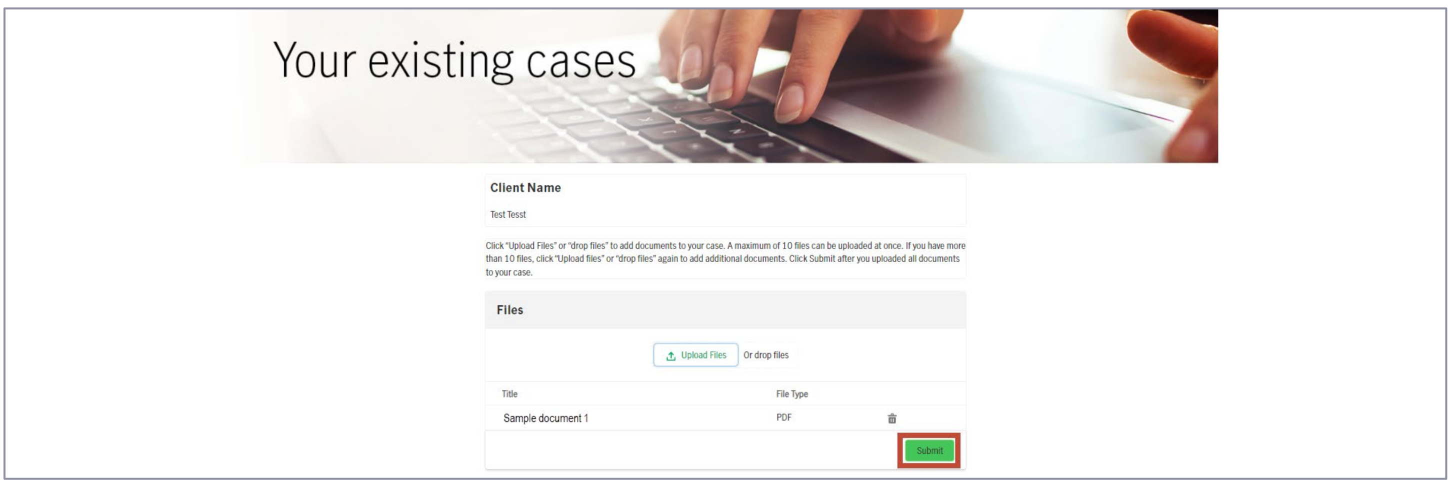


Step 5: Then you can **Upload Files** or use the **Drop File** feature. It's recommended to have all files saved to the same location on your computer and upload at once.



Please note: The portal allows for 10 documents (all document types accepted) to be uploaded at one time. If you have more than 10 documents, please upload the first 10, then update an existing case and add the remaining documents.

Step 6: Select **Submit** once all files have been uploaded. Once **Submit** is selected, this will notify our head office that documents have been uploaded and are ready for review.



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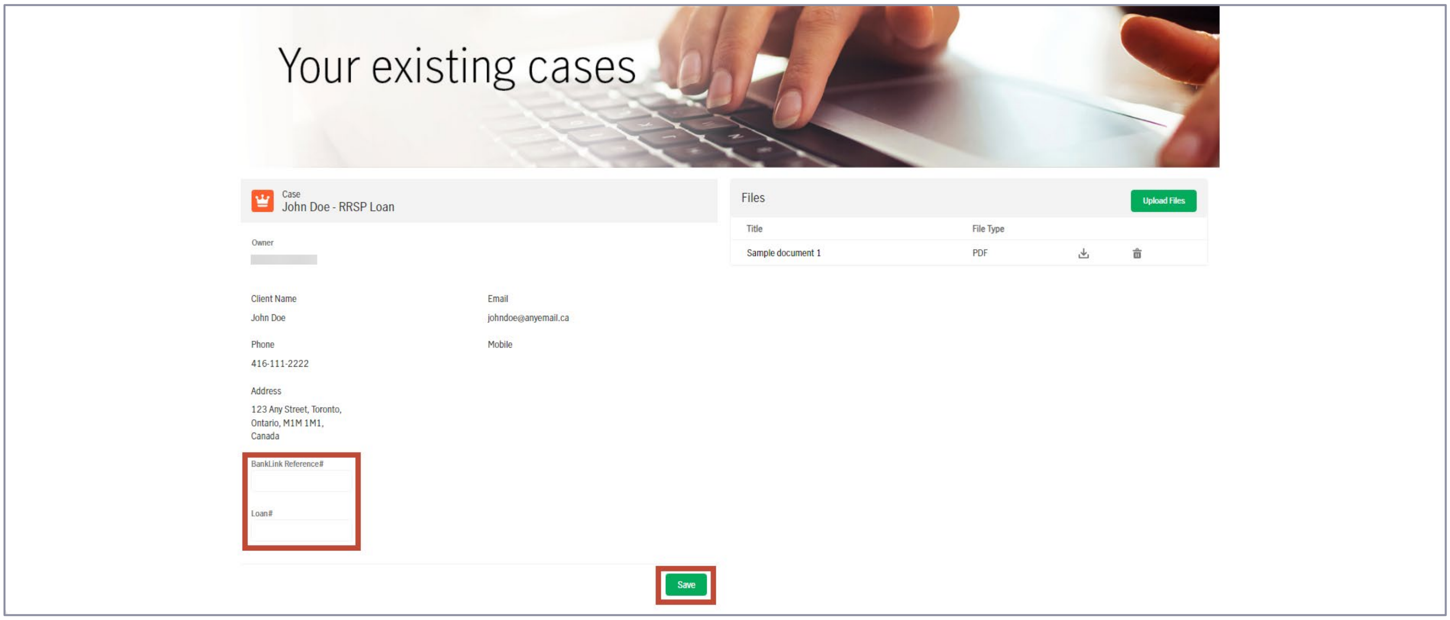
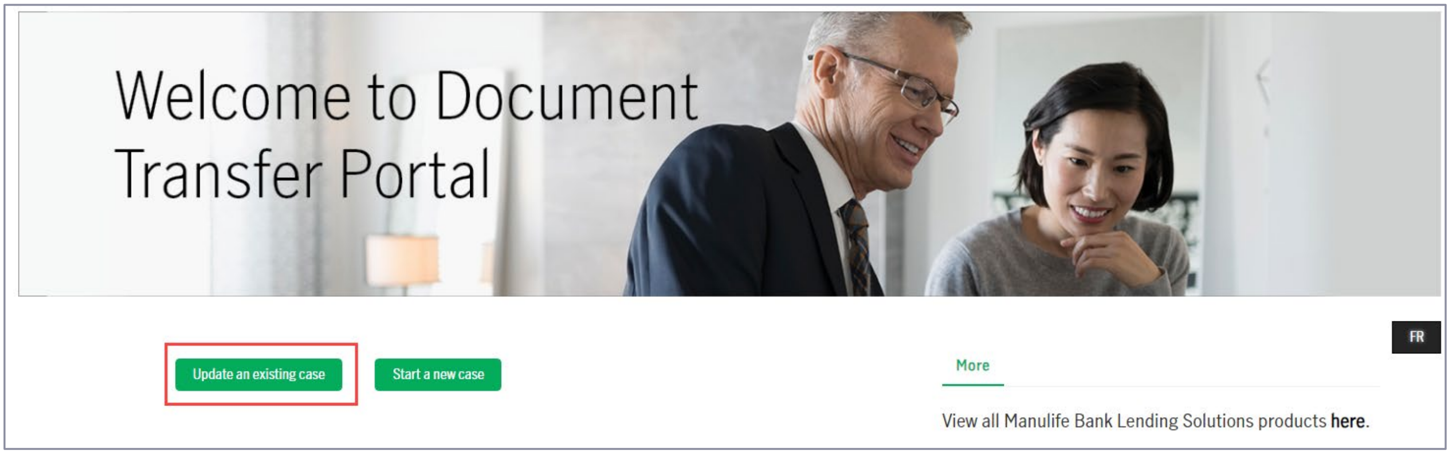
Step 7: If this case is related to an application submitted through BankLink, you can go ahead and add the **BankLink Reference** number. If it's in relation to a Loan, provide the **Loan** number, then select **Save**.



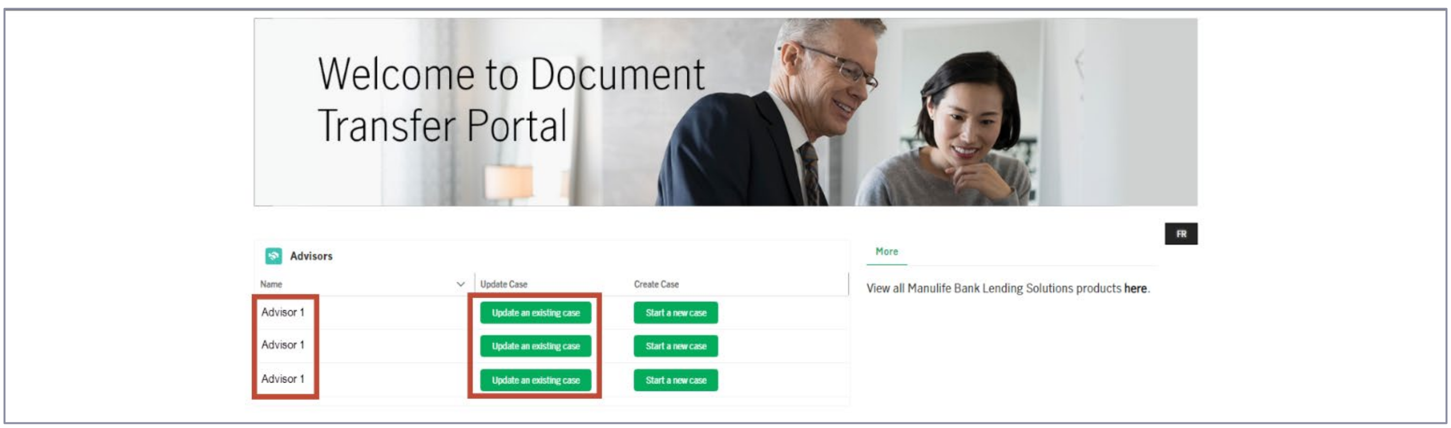
Update an existing case (for applications in-flight)

Once a case is in-flight, you have the option to upload applications and/or client documentation. **This applies to all products (deposit, loan, specialized lending and mortgage).**

Step 1: Once logged into the **Document Transfer Portal,** select **Update an existing case**. A list of cases you created will appear in the list.



Step 2: For **Marketing Assistants** updating a case on behalf of an advisor, find the advisor's name and select **Update an existing** case.



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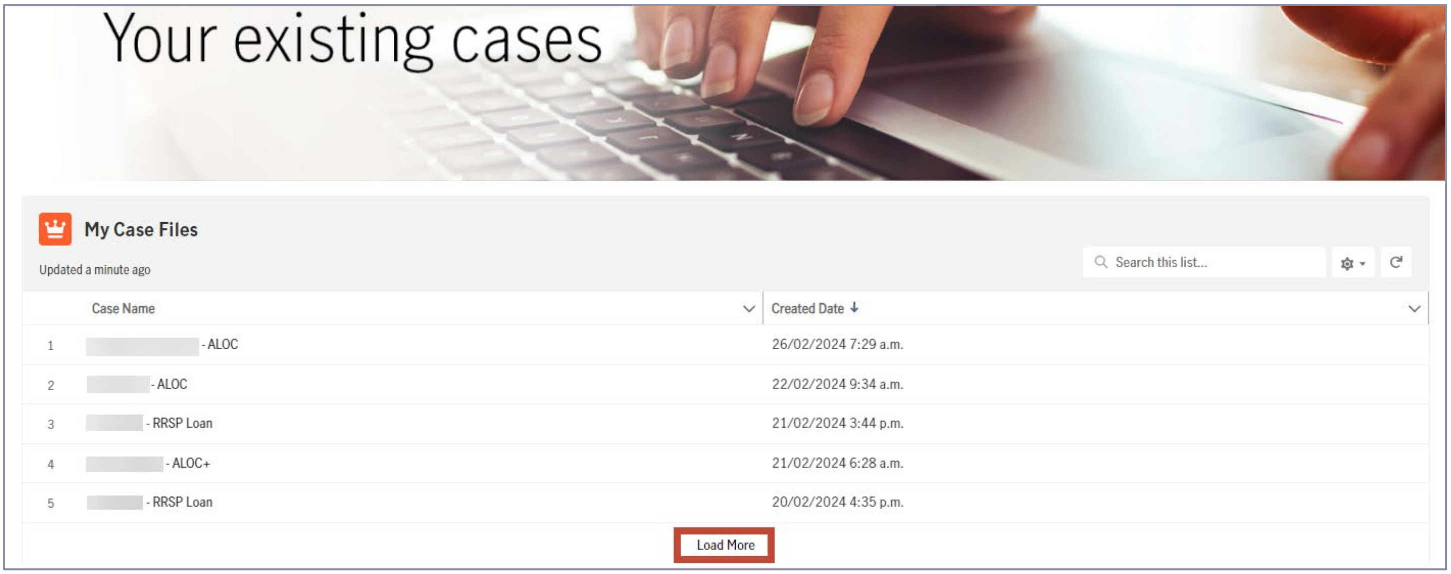
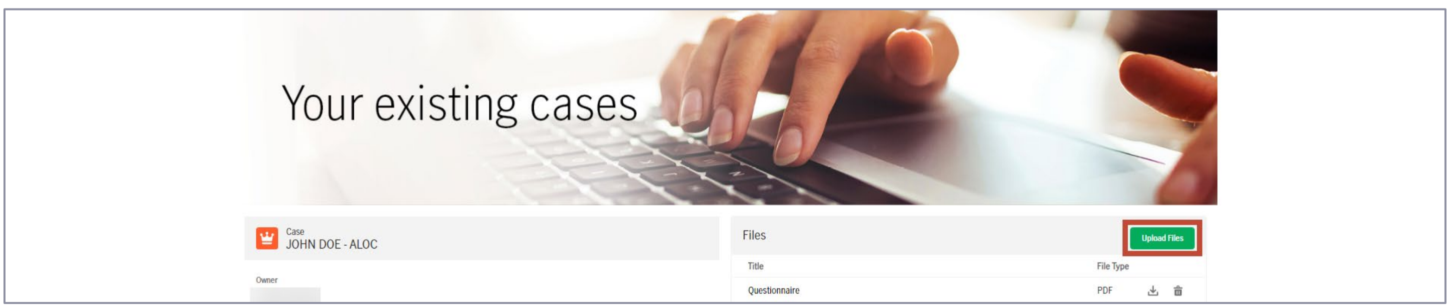
Step 3: Select the applicable case name. You may need to select **Load More** at the bottom of the screen to expand the list.



Step 4: Select **Upload Files** and attach your documents. Ensure each document is clearly labeled prior to uploading.



Please note: Uploaded documents are automatically indexed and sent to our processing teams. If during the application process, additional documents are required, the applicable Head Office team will email the advisor to confirm what documents are needed. The missing documentation MUST be uploaded through the Document Transfer Portal. Documents sent via email will be rejected.

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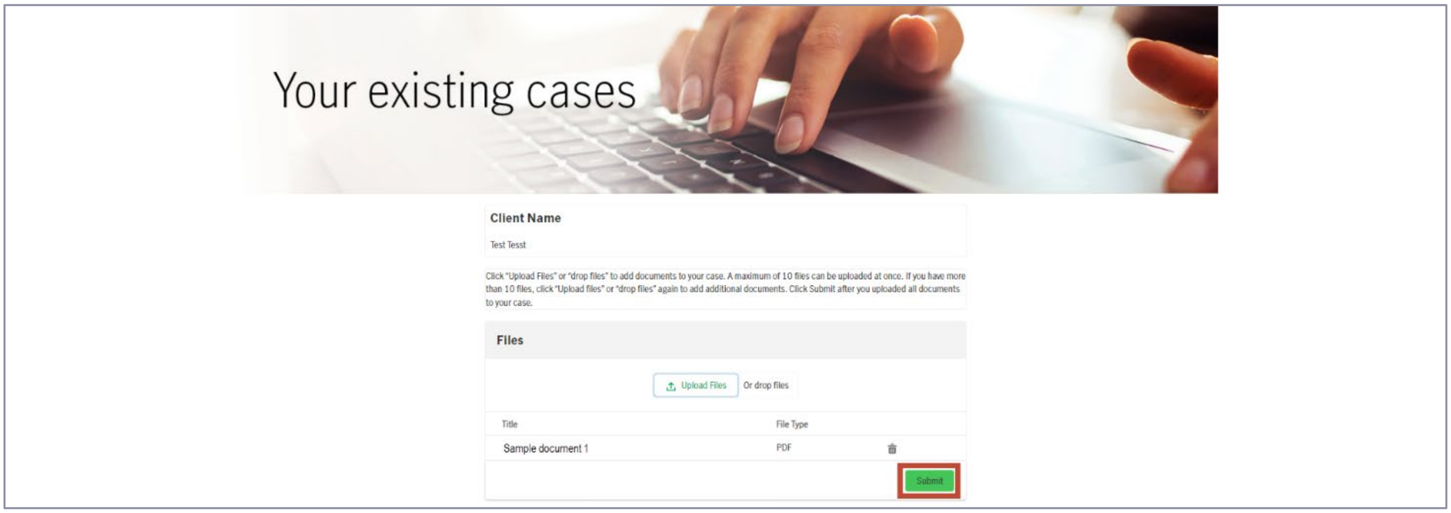
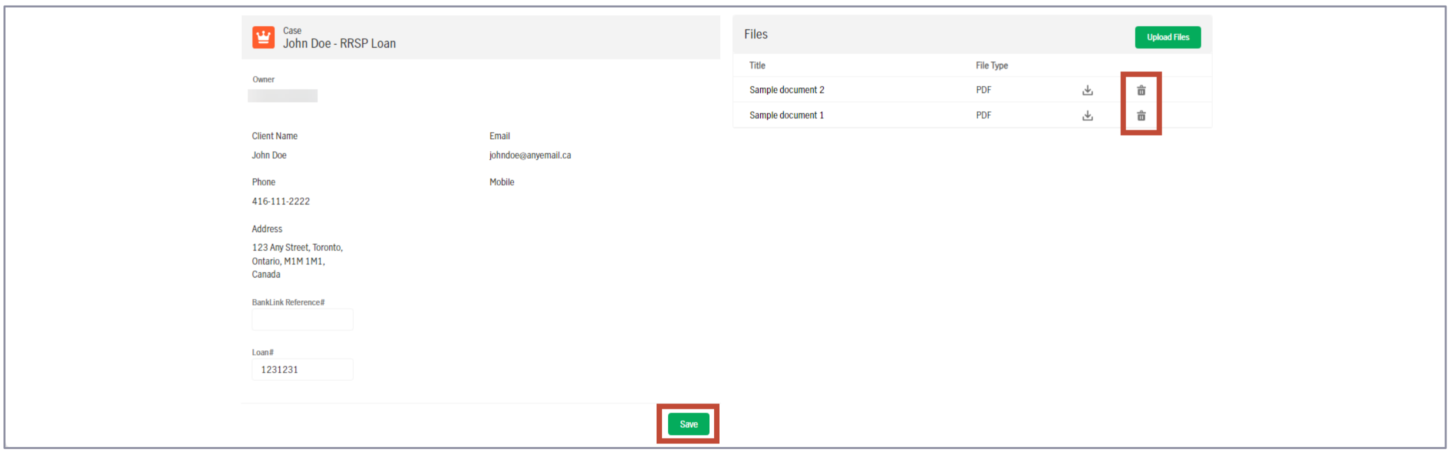
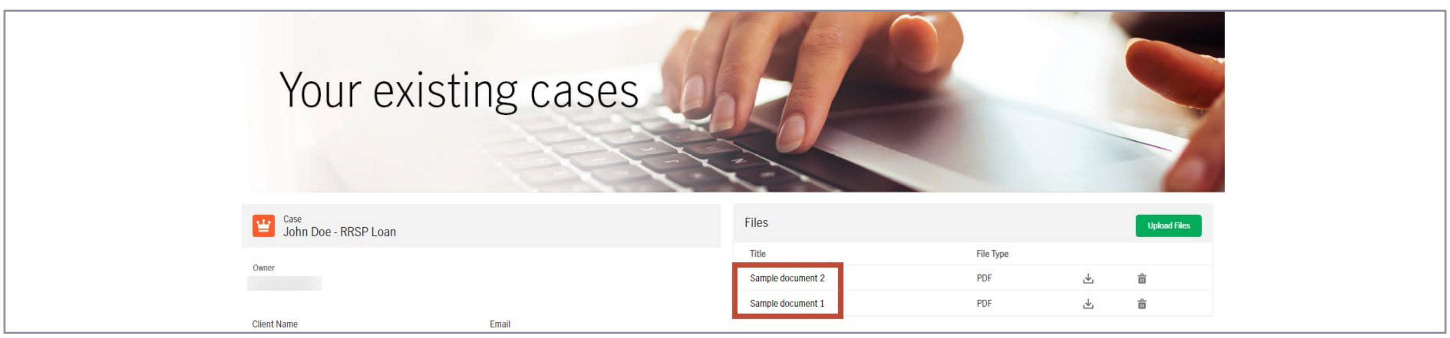
Step 5: Select **Submit** once you've uploaded the files. Once **Submit** is selected, this will notify our head office that documents have been uploaded and are ready for review.



Step 6: This will bring you back to the Case where you can see a consolidated list of all files uploaded. If you need to remove a document, select **the garbage can icon** next to the document name to delete that file.



Step 7: If you wish to preview the uploaded documents, select the file name. Marketing Assistants will need to download the document from the preview screen to view it.



Frequently asked questions

Is Manulife Bank Document Transfer Portal the same as the Manulife's Advisor Portal?
No. The Manulife Bank Document Transfer Portal is a different system than Manulife's Advisor Portal.

Where can I access the Document Transfer Portal?
Advisor Portal > Banking tab

How do I log into the Document Transfer Portal?
The Document Transfer Portal is accessible from both the public and secure Advisor Portal site under the Banking heading. Use your Manulife ID login to access the Document Transfer Portal. These are the same log in credentials as you would use to access the Advisor Portal.

Why is my Manulife ID and password required to log into the Document Transfer Portal?
The Document Transfer Portal is a secure document transfer tool. Because this tool is being used to transfer documents containing Personable Identifiable Information (or PII), advisor authentication is required to login.

Do I need to have an account with Salesforce to use the Document Transfer Portal?
No. Although the Document Transfer Portal is a Salesforce cloud, you do not require a Salesforce account to access the portal.

Can I send the link to the Document Transfer Portal to my clients for them to upload documents?
No. Only advisors contracted with Manulife Bank and their Marketing Assistants can have access to the Document Transfer Portal.

As an advisor, I would like to delegate access to a Marketing Assistant. What should I do?
Please follow the instructions in the Setting up delegate access in Advisor Portal document found in the Training Corner > Bank > Job aids.

Can I delegate another advisor to access my cases in the Document Transfer Portal?
No. An advisor can only delegate access to a Marketing Assistant to access their cases.

Which bank applications are supported by the document transfer portal?
The Document Transfer Portal is limited to submitting applications and client documentation for the following products only:

- Cash Surrender Value (CSV) Line of Credit
- Immediate Financing Arrangement (IFA)
- RRSP Loan
- Investment Loan
- Insured Retirement Program (IRP) Line of Credit
- Access Lines of Credit (ALOC) and Access Lines of Credit Plus (ALOC Plus)
- Advantage Account, Business Advantage Account, Registered Advantage Account (RSP), Tax-Free Advantage Account (TFSA), and Retirement Income Advantage Account (RRIF)
- Guaranteed Investment Certificate (GIC)
- Manulife One and Manulife Bank Select mortgage applications (update an existing case only).

I have more than one 10 documents to upload. Should I create a new case?
No. You can upload 10 documents at a time as many times as necessary. Creating a duplicate case for the same application may delay the process.