Manulife Bank Document Transfer Portal

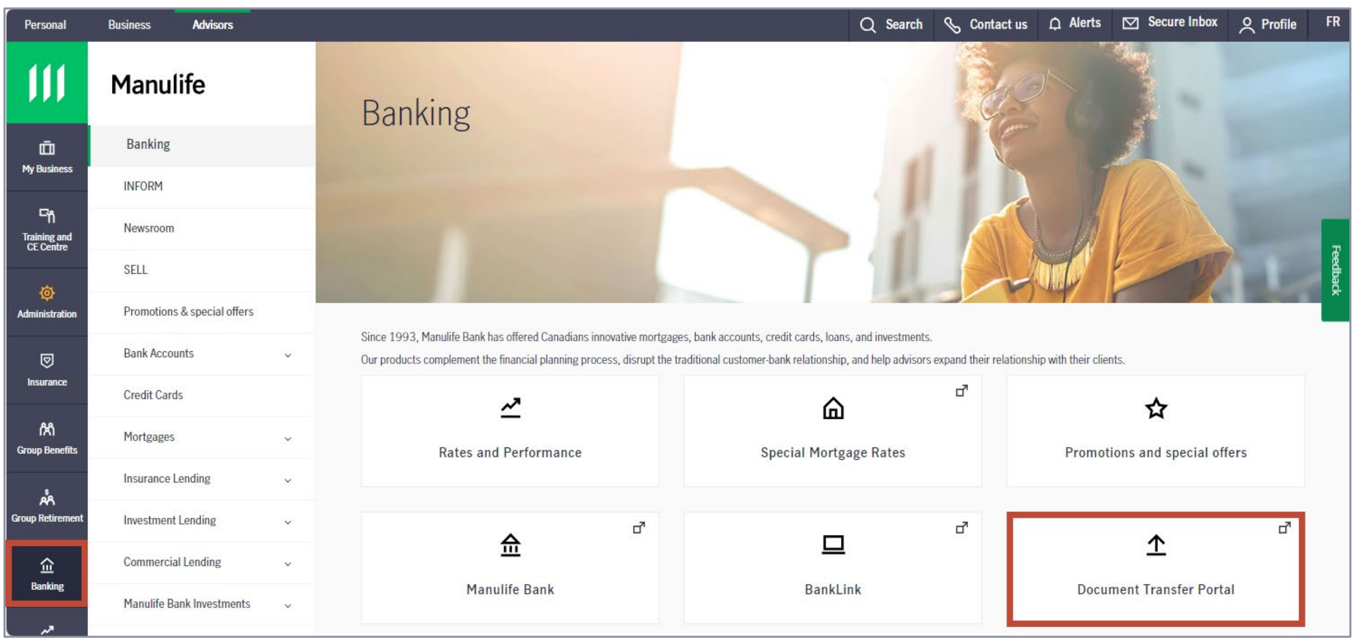
The Manulife Bank Document Transfer Portal allows you to securely submit your clients' lending documents for underwriting and processing.

With the Document Transfer Portal, you can submit client documentation for the following lending 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)

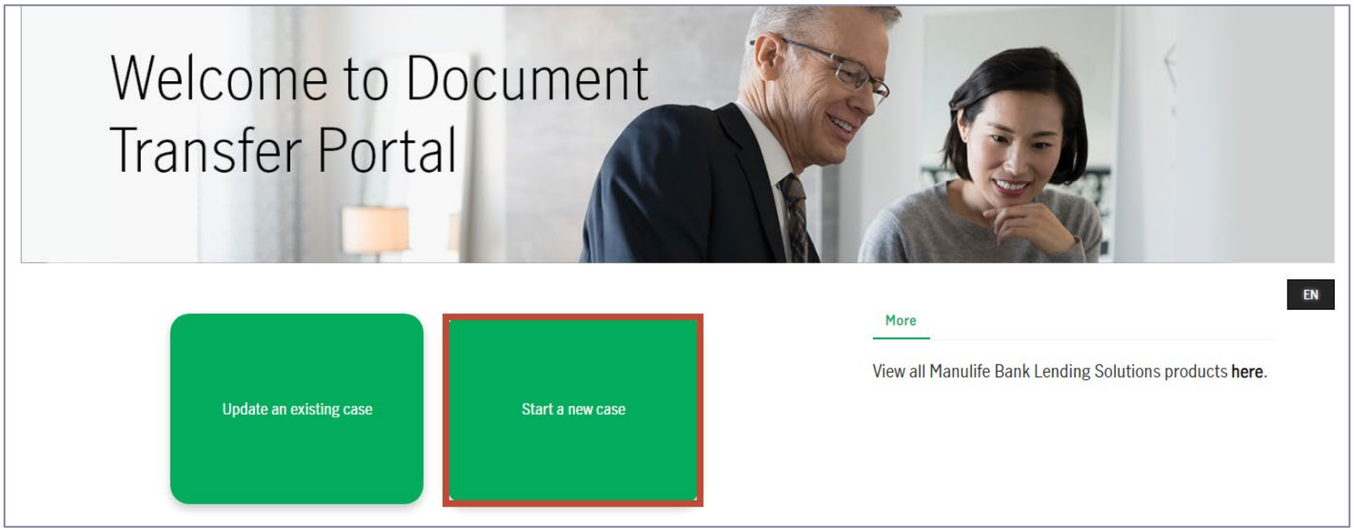
The Document Transfer Portal is accessible from both the public and secure pages within Advisor Portal, under the Banking category. You will need your Advisor Manulife ID to access.

- 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.

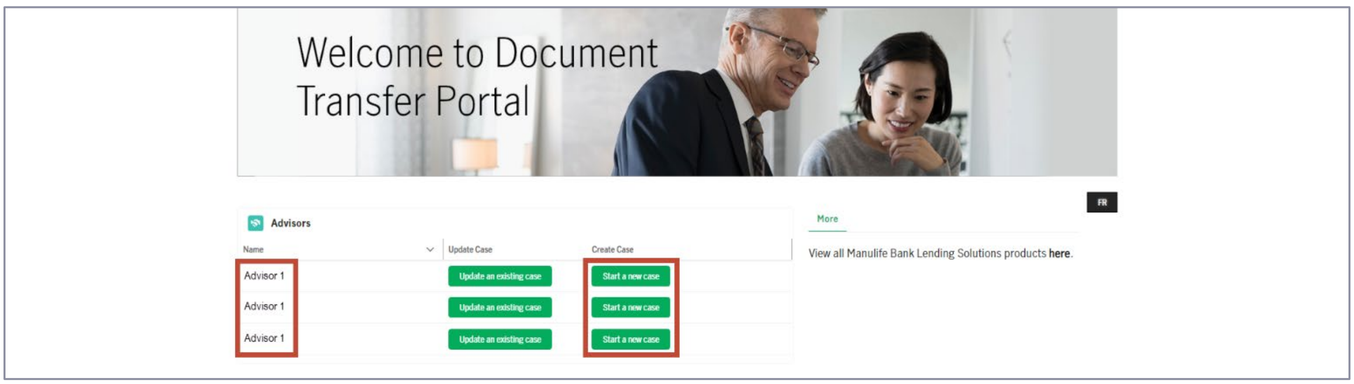


Create a new case

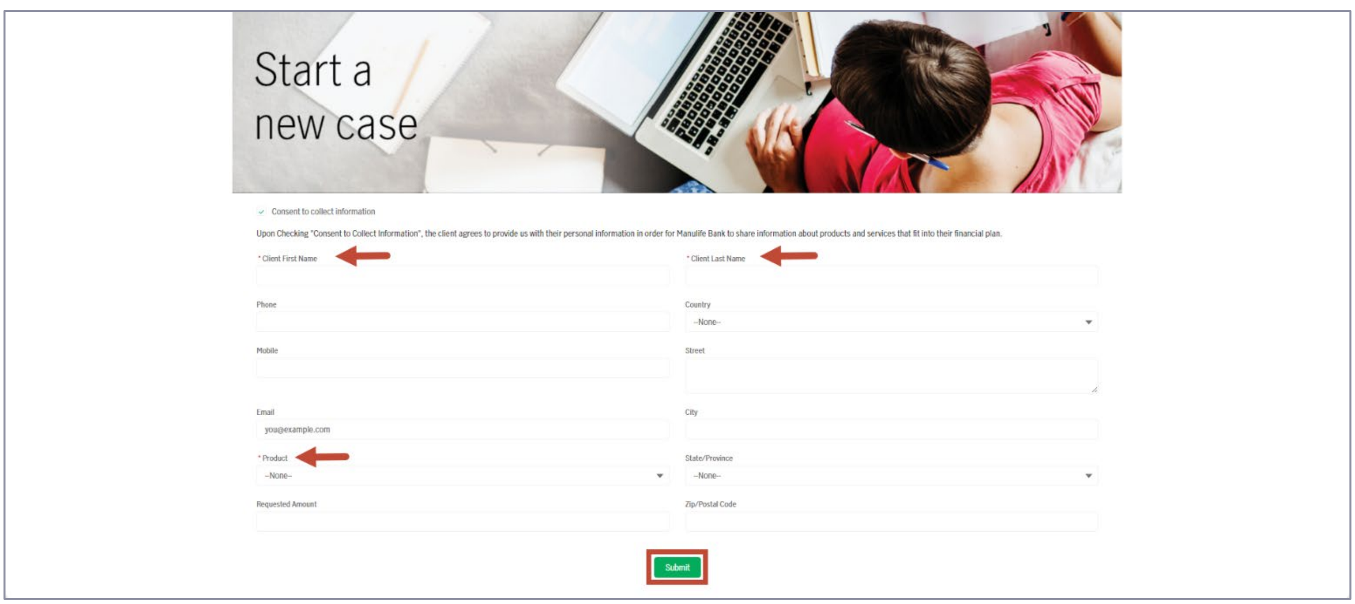
Step 1: For **Advisors**, the first step is to create a client record. Click **Start a new case**.



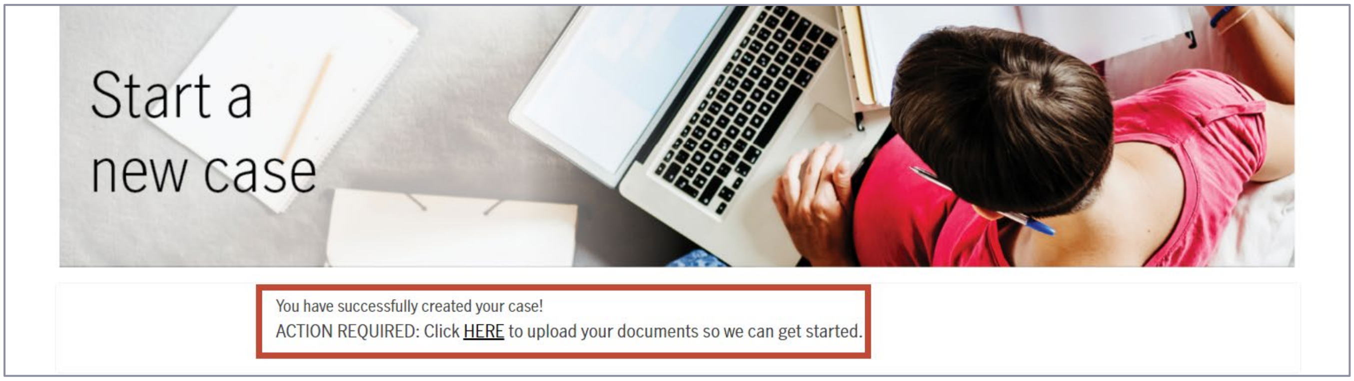
Marketing Assistants who are linked to an Advisor's profile, will be able to view the advisor's name. If the MA assists more than one Advisor, there will be a list of advisors. Choose the right advisor and click on Start a new case.



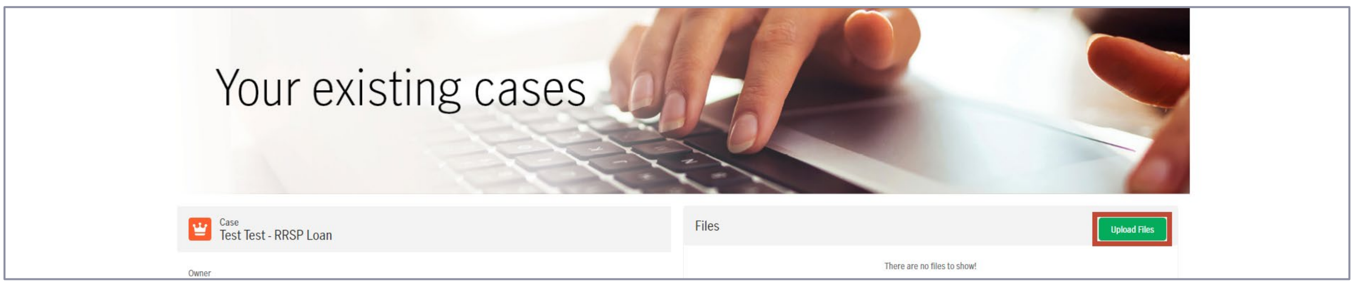
Step 2: Complete the required fields as indicated by the asterisk. Although the other fields are not mandatory, please add additional client information, if available, at the time of creating the case and click **Submit.**



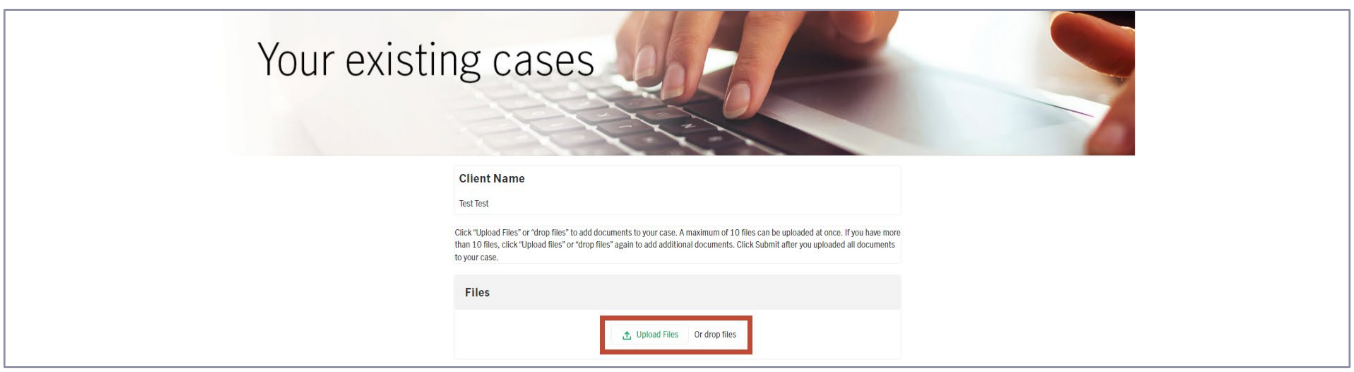
Step 3: Now that you've created the case, you are ready to upload your documents by selecting the link on screen.



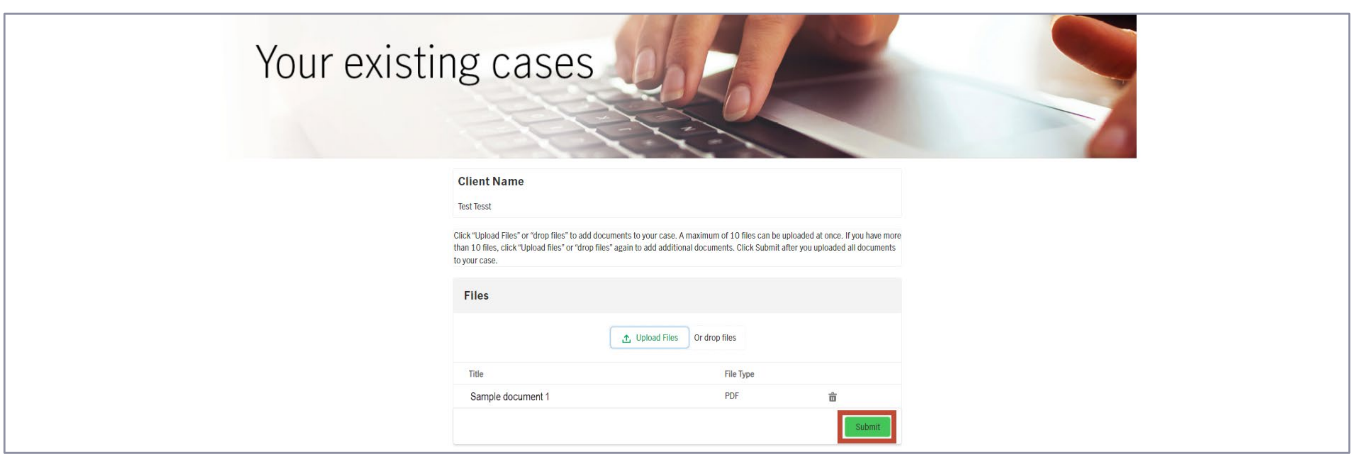
Step 4: Select **Upload Files**.



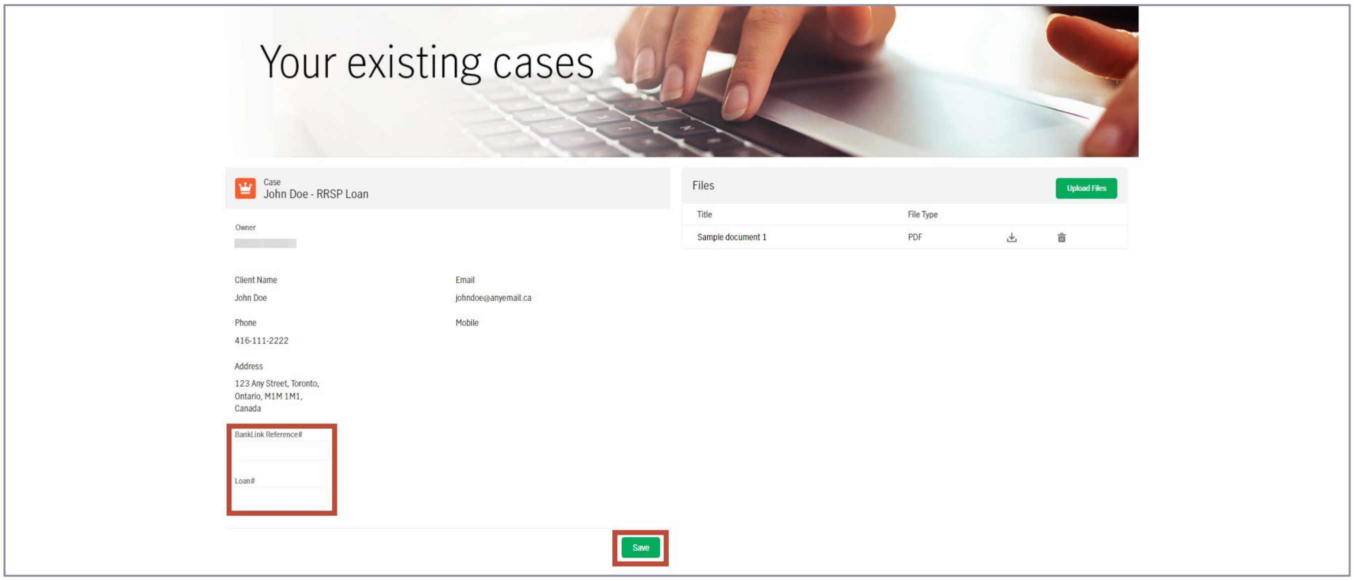
Step 5: Then you can **Upload Files** or use the **Drop File** feature. It's recommended to have all of your files saved to the same location on your computer and upload at once.



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.



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**.

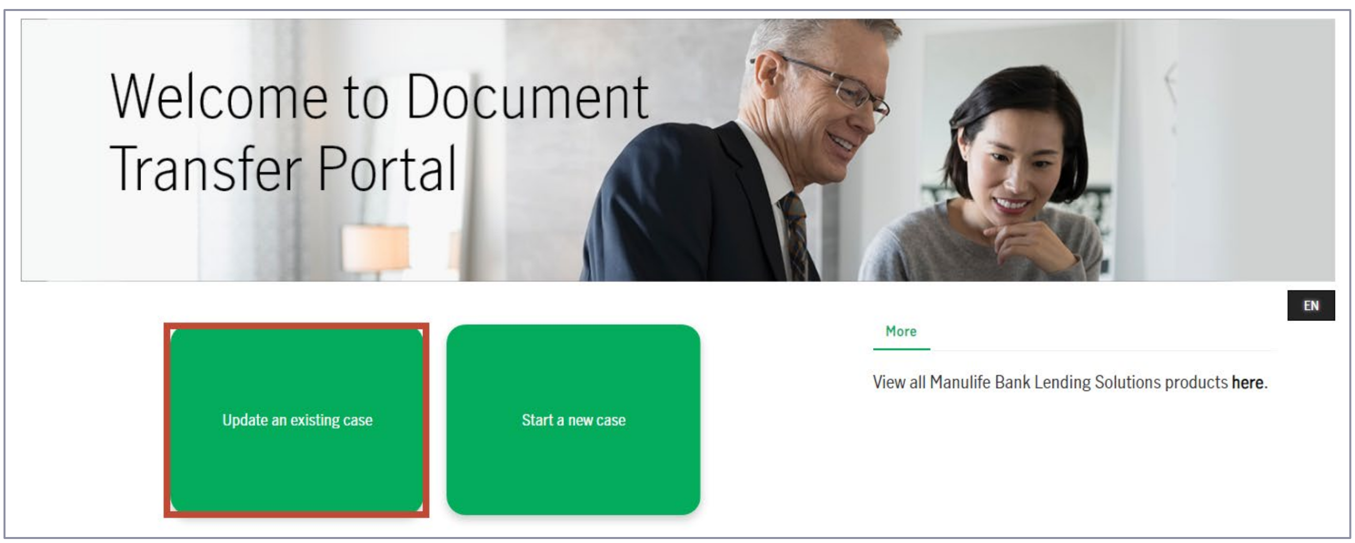


Please note: The portal allows for 10 documents (all document types accepted) to be uploaded at one time. If you have more than 10 documents, please upload the first 10, save the case, then update an existing case and add the remaining documents.

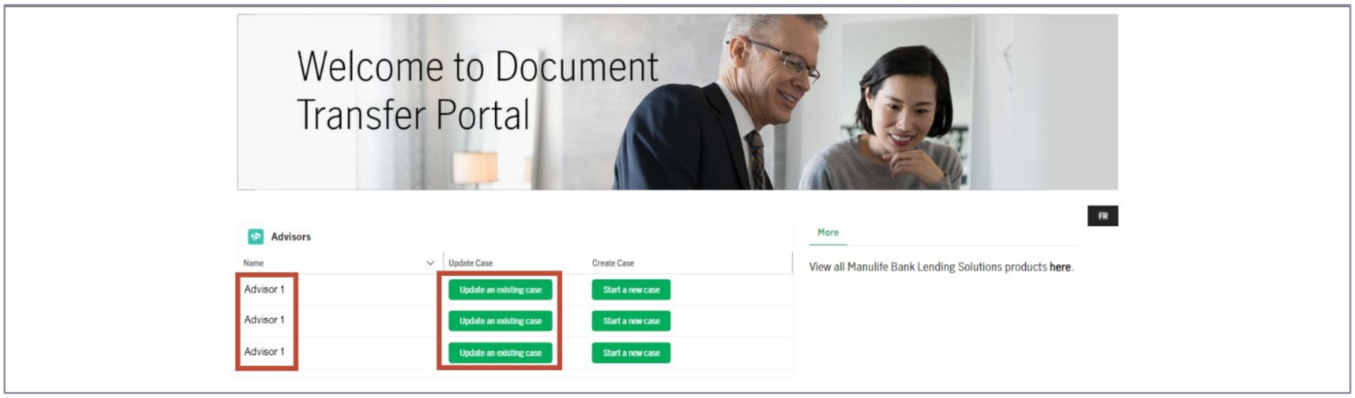
Update an existing case (for applications in-flight)

Once a case is in-flight, you have the option to upload applications and/or client documentation.

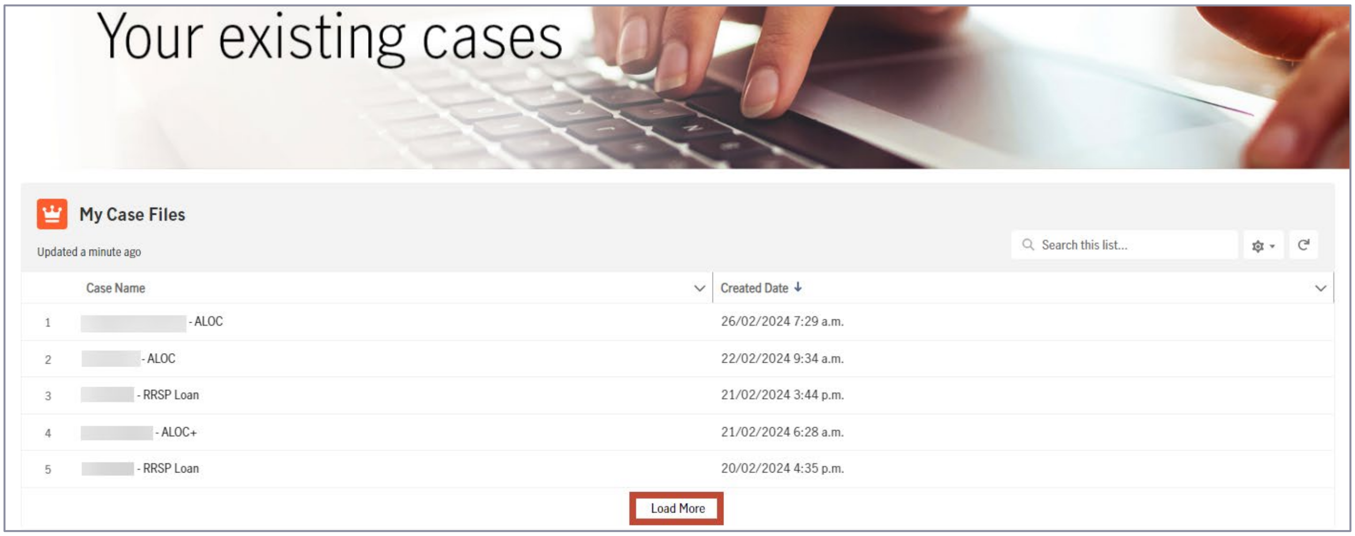
Step 1: Once logged into the **Document Transfer Portal,** click **Update an existing case**. A list of cases you created will appear in the list.



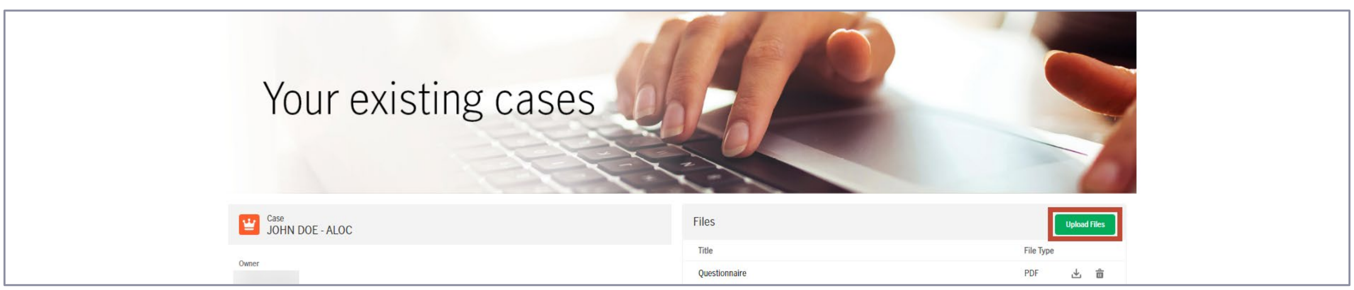
For Marketing Assistants updating a case on behalf of an advisor, find the advisor's name and click on *Update an existing* case.



Step 2: Click the applicable case name. You may need to click **Load More** at the bottom of the screen to expand the list.



Step 3: Select **Upload Files** and attach your documents. Ensure each document is clearly labeled prior to uploading.



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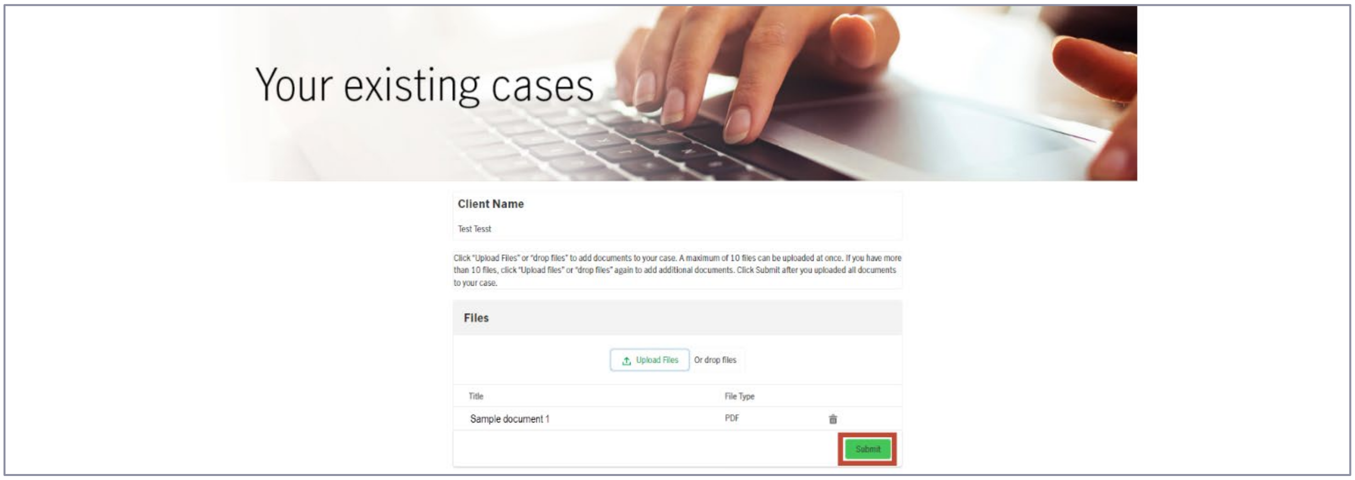
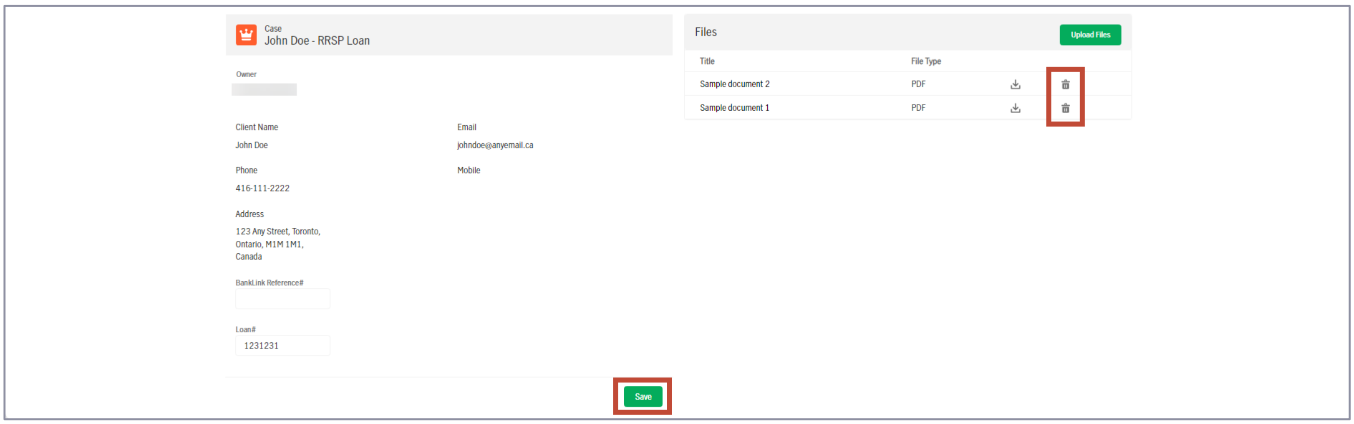
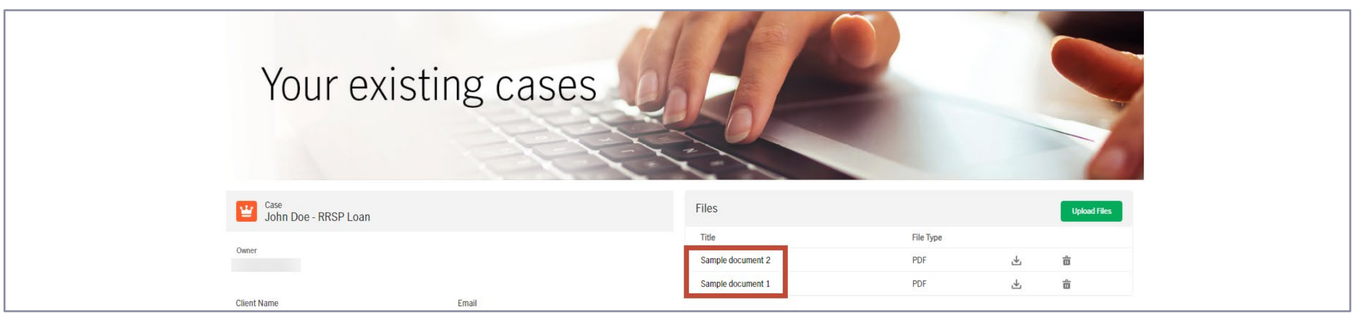
Step 4: Click **Submit** once you've uploaded the files. Once **Submit** is selected, this will notify our head office that documents have been uploaded and are ready for review.



Step 5: 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, click **the garbage can icon** next to the document name to delete that file.



Step 6: 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.



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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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

I can't find the link to the Document Transfer Portal. Who can I contact to get it?
The link to the Document Transfer Portal is accessible from Advisor Portal under the Banking tab. If you are unable to access, please contact the Advisor Support Centre at 1-800-567-9170 or advisorbank@manulife.com.

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.

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.

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.

Can I use the portal to submit other Bank applications?
No. Currently 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)

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.

I am a Marketing Assistant, and I cannot see the advisor's name listed in the document Transfer Portal home page. What should I do?
Make sure you have an active Advisor Portal profile and then contact DTSC at 1800-667-4266 or DTSC@manulife.ca to have your profile linked to the Advisor's.

I have received an error message showing an error code. What should I do?
Call the number indicated in the error message (Advisor Support Centre) or advisorbank@manulife.com and provide the error code to help us resolve the issue.

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.