

Inforce Policy Status Notifications and Policy Statements on Repsource

This guide explains how to use the online system that provides you with Inforce Policy Status Notifications and Policy Statements through your Repsource Secure Inbox.

About these notices

Manulife wants to keep you informed about the status of your life insurance policies for products such as InnoVision, Security UL, Business Term, Family Term, Performax, Signet and 10-Year Term. We do this by delivering the status change notifications and policy statements directly to your Repsource Secure Inbox where you can read, print, save, sort or search through them online.

We'll even let you know when you have a notice or statement waiting for you, if you have selected the "E-mail Notification" option in your Repsource User Profile.

Still receiving inforce policy status information or statements by mail?

If you are still receiving the small green and white status cards for your Performax, Signet or 10-year Term insurance policies or the 8 1/2 by 11 InnoVision, Security UL, Business Term or Family Term notices or statements and you are a registered Repsource user, please contact the Repsource Administrator at dtsc@manulife.com to change your Repsource Profile so that you receive your notices online instead. If you would like to register for Repsource go to www.manulife.ca/repsource.

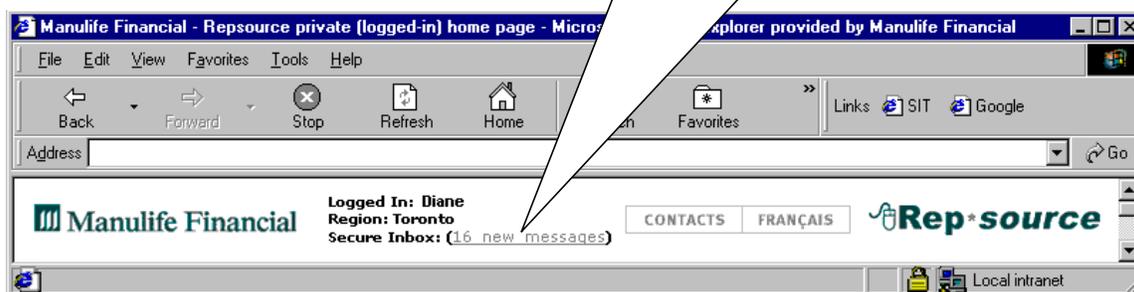
Adobe 6.0 or higher Required

To use the multi-print function, you will need to have Adobe 6.0 reader or higher installed on your computer. To install the free software go to www.adobe.com and download Adobe 6.0 or 7.0 Reader.

1. Login to Repsource

- Each day you can check your Secure Inbox for New Messages by logging in to Repsource.
- You may also set your Repsource profile options to receive e-mail notifications only when there are new items in your Secure Inbox. You can set your options to be notified once a day or once a week. Only one e-mail message will be sent (either daily or weekly) and it will be sent only if you have new unread items in your Secure Inbox.
- The e-mail notification will contain a link to your Secure Inbox on Repsource so you will be able to access it directly from the e-mail. Note that you will need to login to Repsource since access to the Inbox is secure.

Once you've signed in to Repsource, the new message counter indicates whether there are any new items in your Secure Inbox. This counter indicates the total number of all types of unread items in your Secure Inbox.



2. Checking your Secure Inbox

Your Secure Inbox contains links to the various types of messages that are sent from Manulife. It also presents the count of how many items are unread so you can quickly and easily identify what is new.

Whenever you want to step back a page, click on the BACK button.

Secure Inbox Microsoft Internet Explorer provided by Manulife Financial

Back Forward Stop Refresh Home Search Favorites Media Print Mail

SnagIt

Secure Inbox **Welcome John Brown**

HELP

Personal information
Messages
[Send a new message](#)
[See messages](#)

Compensation
[Compensation statements](#)

Online notices
[Customer inquiry notifications](#)

Individual insurance
Notices
[New business notification](#)
[Client call notifications](#)
[Inforce notices \(5\)](#)
[Policy statements \(2\)](#) **new**

Your Requests
[Client listings](#)
[Inforce illustrations](#)
[Policy statements](#)

Click on the link to view the list of Individual Insurance inforce notices that Manulife has sent to you.

Click on the link to view the list of Individual Insurance policy statements that you requested through Internet Workbench Inquiry.

Click on the link to view the list of Individual Insurance policy statements that Manulife has sent to you.

[Return to OnTrack](#) | [Privacy policy](#)

3. Summary List

The Inforce Notifications link brings you to a list of all the insurance policy status notifications that you have received. Notifications will be deleted from your Secure Inbox after 30 days unless you choose to explicitly "Remove" them before that day.

The "Assignee" column is an optional feature that allows you to delegate Inforce Notifications within your office to anyone who is authorized to work on that policy. When new notifications are delivered, this field will default to the last person who was assigned based on the selling code. This section provides a quick overview of how this list works.

Prints all selected items.

Removes all selected items.

Use "Sort By" to select how you want to sort the list: You may sort by Date, Advisor, Client, Product, Face Amount or Assignee.

Use the SCAN option to reduce the list to items that contain a specific word.

Click on "Assigned to Me" to filter the list down to show only the items that are assigned to you. Click on "Show All" to return to viewing all the items in the list.

Click on the date to view the complete details for the inforce notification.

The red swiggle beside a date indicates a PDF notification.

Click on the link to change the name of the person who is working on notifications for this particular selling code.

Use the arrow icons to page through the list or to jump to the first or last page of the list. The item counter indicates the total number of items.

Use the Checkboxes to select multiple items to either print OR remove from your Secure Inbox

Once selected, click on the "PRINT" or "REMOVE" buttons.

<input type="checkbox"/>	Date	Type	Advisor	Policy #	Client	Product	Face Amt	Assignee
<input type="checkbox"/>	06/12/2004	AUTOMATIC PREMIUM	Brown, John	3334525-4	CLIE	LIFE INC GTD 10 AT 6	5,000	Green, June
<input type="checkbox"/>	06/12/2004	LOAN RE				ITY BUILDER	10,000	Green, June
<input type="checkbox"/>	06/12/2004	NEW LOA				ND UP AT 65	5,000	Green, June
<input type="checkbox"/>	06/12/2004	PREMIUM				C - HEALTHSTYLE	500,000	Green, June
<input type="checkbox"/>	06/12/2004	Loan Pay				on Life Univers	10,000,000	Green, June
<input type="checkbox"/>	06/12/2004	Loan Pay				on Life Univers	10,000,000	Green, June
<input type="checkbox"/>	06/12/2004	Loan Payment Confirm	Brown, John	7088031	GOLDIE BUR	Dominon Life Univers	10,000,000	Green, June
<input type="checkbox"/>	06/12/2004	Loan Payment Con	Brown, John	7088032	WELCH	Dominon Life Univers	10,000,000	Green, June

4. Viewing Details

When you click on the date link on the Inforce notices or Policy statements list page, you will be presented with the detailed contents of the inforce policy status notification or statement. The online help link at the bottom of the page contains an explanation of the various fields on the form.

At the top of the page, the policy number and the type of status notice is presented along with information about the servicing advisor and branch. The rest of the information is separated into sections: General policy information, policy details, dividend details, policy loan information, beneficiary information and finally, remarks about the status notice. When you click on the PRINT button, the notice is formatted to print to a single 8.5x11 page in black ink.

- Click to generate a printable format of the Notification
- Formats and displays in a browser window to preview before printing.

Click here when you want to return to the main list.

The top line of the notification displays the policy number and the type of status update.

Print All **Return to Summary List**

Save All

Save 3330158-7 : LOAN REPAYMENT

Policy 3330158-7 : LOAN REPAYMENT **Date:** 12/06/2004
Advisor Name: Nlnblueadv1 **Code:** 200003 **Branch:** 1052

General Policy Information

Policy #: 3330158-7	Address: ADFLJGLD8FJGUFEY	Insured Sur Name: CUEN
Policy Year Date: 28AUG92	354 854654 854 H AVE	Birth Date: 13JUN68
Maturity Date:	LDFJBUVER B C	Age At Issue: 24
	V52 1 C 3	Sex: F

Policy Status Details

Premium	Plan or Rider	Manual - YR. ISS.	Amount	Other Details
100.30	SECURITY BUILDER	756	10000.00	
16.33	DISAB PREM WAIVER53803	75682		
	ACCIDENTAL DEATH 60070	75682	10000.00	
85.90	31075	75292	80000.00	
		SPEC COLL.	0	
208.53		DUE MONTH AUG MODE ANNUALLY		

5. Printing a Hard Copy

When you click on **PRINT**, a second browser window will pop up and display the printer-friendly format of the inforce notification or statement. Use the Print button or the Adobe print button to send the printout to your preferred network printer or local printer. If you have selected multiple notifications from the list view, select Print All to print, each notification will print on a separate page.

Select Print All to create a hard copy of all selected notifications or statements for your files.

Print All Return to Summary List

7088031 7088032 3333054-7

Print button for individual PDF notifications or statements.

Universal Life
Policy Loan Payment Confirmation
Date prepared: February 20, 2004

Policy number	7088031	This is a life insurance policy.
Policy owner(s)	GOLDIE BURGESS LTD	
To keep you up to date	We're confirming that a payment was applied to your policy loan effective on February 20, 2004	

6. Saving a Copy to your Computer

When you click on **PRINT**, a second browser window will pop up and display the printer-friendly format of the inforce notification or statement. Use the Save All or Adobe Save a Copy button to save the notification or statement to your computer.

