



Plan Administrator Quick Reference Guide

Did you know that you can perform most of these tasks right on the Plan Administrator Secure Site, and transmit the information to Manulife without ever having to fill out a paper form and mail it in?

It's fast and convenient, plus you can work from any internet connection.

Go to manulife.ca and select **SIGN IN > FOR BUSINESS > PLAN ADMINISTRATOR**. Follow the simple onscreen prompts to register/sign in to your account.

I NEED TO...	I SHOULD SIGN IN AND...
<ul style="list-style-type: none">■ Enrol a new employee	Click Add a member to begin the enrolment. Complete each section of the enrolment form. New member information will be updated the next business day.
<ul style="list-style-type: none">■ Change an employee's name■ Change an employee's beneficiary/ies■ Add benefits (i.e., changing from single to family)■ Add or change dependants	Search for the plan member using the Member search function. Select the member, then choose the action required from the left hand navigation if available.

I NEED TO...	I SHOULD SIGN IN AND...
<ul style="list-style-type: none"> ■ Terminate an employee's coverage ■ Change an employee's class ■ Report a salary change ■ Report a leave, absence, or layoff ■ Report a maternity leave ■ Report a retirement 	<p>Search for the member using the Member search function. Select the plan member, then choose the action required from the left hand navigation.</p>
<ul style="list-style-type: none"> ■ Request a plan change (e.g., add/change a benefit) 	<p>Contact your Manulife representative.</p>
<ul style="list-style-type: none"> ■ Pay my bill 	<p>If you haven't already, sign up for pre-authorized debit to have your payment automatically come out of your account each month. To register for this service, complete the Premium Pre-Authorized Debit form available under Plan documents > Find forms or brochures > Administrative Forms > Miscellaneous Forms.</p> <p>If you are paying by cheque, include your policy and account(s) numbers on your cheque and mail it to Manulife at PO Box 187, Stn Waterloo, Waterloo ON N2J 3Z9.</p>
<ul style="list-style-type: none"> ■ Check on a member's coverage 	<p>Use Member search to find the employee and select them from the results to view their coverage.</p> <p>Or</p> <p>Contact Manulife at 1 866-318-2727.</p>
<ul style="list-style-type: none"> ■ Request forms 	<p>Find all of the most up-to-date forms under Plan Documents > Find Forms and Brochures.</p> <p>For added convenience, your plan members can download their own claim forms from the Plan Member Secure Site.</p>

