

Submitting A Contribution File for Your Group Retirement Plan(s)

Introduction

This quick how-to video tutorial guides the viewer on submitting their contribution file for their group retirement plan.

Onscreen

The Manulife logo animates in while an upbeat music starts to fade in. This scene will transition to a footage of a worm's eye view of buildings.

Onscreen

A dark navy blue text background slides in from the left side of the screen as the footage of the buildings moves to the right. The text "Submitting a Contribution file for your Group Retirement Plan(s)" appears on the dark navy-blue background. A thin white line draws under the text "Submitting a Contribution File for your Group Retirement Plan(s)". Below the thin white line, a note and an icon animate in. The note displays the text, "A contribution file is recommended if your plan has more than 25 members.". Then transitions to the next scene.

Onscreen

The previous scene zooms out as it becomes the laptop's screen display. The laptop zooms out to the right side of the screen. The text "See how easy it is to submit a contribution file" appears on the left side of the screen. The previous text fades out as the text "with Manulife's contribution remittance template!" fades in while the screen on the laptop pops out multiple webpages related to contribution file.

Onscreen

A new scene slides in from the left side of the screen. On the right side of the screen displays an icon and text stating, "Prepare the contribution file using Manulife's template." Below this text is a note indicating, "You can find a blank template on the support page in the secure sponsor site.". A laptop on the left shows an Excel file of the Manulife's contribution template then a sample of filled contribution template fades in afterwards. A coral text background appears on top of the Excel file stating, "Save your completed file on your computer."

Onscreen

The previous scene moves up as the next scene slides in from the bottom of the screen. The new scene displays the "Now you're ready to submit a contribution file." text on a green background. After a few seconds, this scene slides to the right as the next scene appears.

Onscreen

The laptop displays the home page of the Group Retirement Plan website. An icon and the "On the secure sponsor site, go to Transactions" text appears beside the laptop.

On the laptop, a mouse hovers to the "Transactions" button of the homepage. The "Transactions" button pops up from the laptop screen and a coral outline appears around it. The mouse clicks on the "Transactions" button and the webpage changes to the Transactions webpage.

The text "and select Submit a contribution file." fade in below the text "On the secure sponsor site, go to Transactions".

The mouse then scrolls to the Contribution File section of the webpage and clicks "Submit a Contribution file".

Onscreen

The webpage changes to “Submit a contribution” page. The mouse then hovers to the “Contribution period” section. This section pops up on the screen as it shows the starting and ending dates of the user’s contribution period.

An icon and the “Specify the contribution period” text appears beside the laptop.

The icon and the text change as the mouse scrolls down to the “Contribution path and file name” section of the page. This section pops up and a coral outline highlights around the popped-up section. The mouse then hovers to the box wherein the user can drag and drop or upload the needed file/s.

The mouse hovers below the “Contribution path and file name” section of the page. A check box stating, “Check here if the contribution file is for a bonus contribution (e.g. company bonus)” is highlighted with a coral outline.

The text beside the laptop shows, “Upload your file.” and below the “Upload your file.” appears a note stating, “Let us know if this is a bonus contribution by checking the box.”

The mouse then hovers and clicks the “Continue” button below as the text “Click Continue.” appears beside the laptop.

Onscreen

The webpage changes to “Provide contribution payment”. As the “Review your contribution summary.” text and icon appear beside the laptop.

On the laptop, the mouse hovers to the “Select a payment method.” section as it is highlighted with a coral outline.

The text “Select a payment method.” and icon appear on the right side of the laptop.

The previous text and icon change to “Click Continue.” as the mouse hovers down to the “Continue” button and clicks it.

Onscreen

The webpage changes to “Submit a contribution.” page. A coral outline highlights the “Submit a contribution” section as an icon and the text “Verify the information.” appear beside the laptop.

The text changes to “If you need to make any corrections, click on Back”. The mouse then hovers to the “Back” button below the “Submit” button of the webpage.

The icon and text change to “Click Submit.”. Then, the mouse hovers and clicks the “Submit” button.

Onscreen

The laptop slides to the right side of the screen as the webpage changes to “You’re done!” page. A text “You’re done!” and a thumbs up icon on a green text background slide in from the left side of the screen.

The icon and text change to “Make note of the reference number provided in the confirmation message you receive or print the confirmation page and keep it for your records.” as the webpage scrolls up showing the “Important Reminders” section of the webpage.

Onscreen

A new scene fades in. The screen displays the first line of text stating, “Just a few easy steps” and the second line of text appears after, saying, “and your contribution file is submitted!”. A green outline encircles the “and your contribution file is submitted” as the mouse hovers just below the text and the green outline.

A few seconds after, the Manulife logo zooms in to the scene. A disclaimer fades in at the bottom part of the screen. The disclaimer states, “The Manufacturers Life Insurance Company (Manulife) Group Retirement products and services are offered by The Manufacturers Life Insurance Company (Manulife). Manulife, Stylized M Design and Manulife & Stylized M Design are trademarks of the Manufacturers Life Insurance Company and are used by it, and its affiliates under license. 2023 The Manufacturers Life Insurance Company. All rights reserved. Manulife, PO Box 396, Waterloo, ON N2J 4A9.”. The scene fades out as well as the background music.



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