Setting up delegate access in Advisor Portal

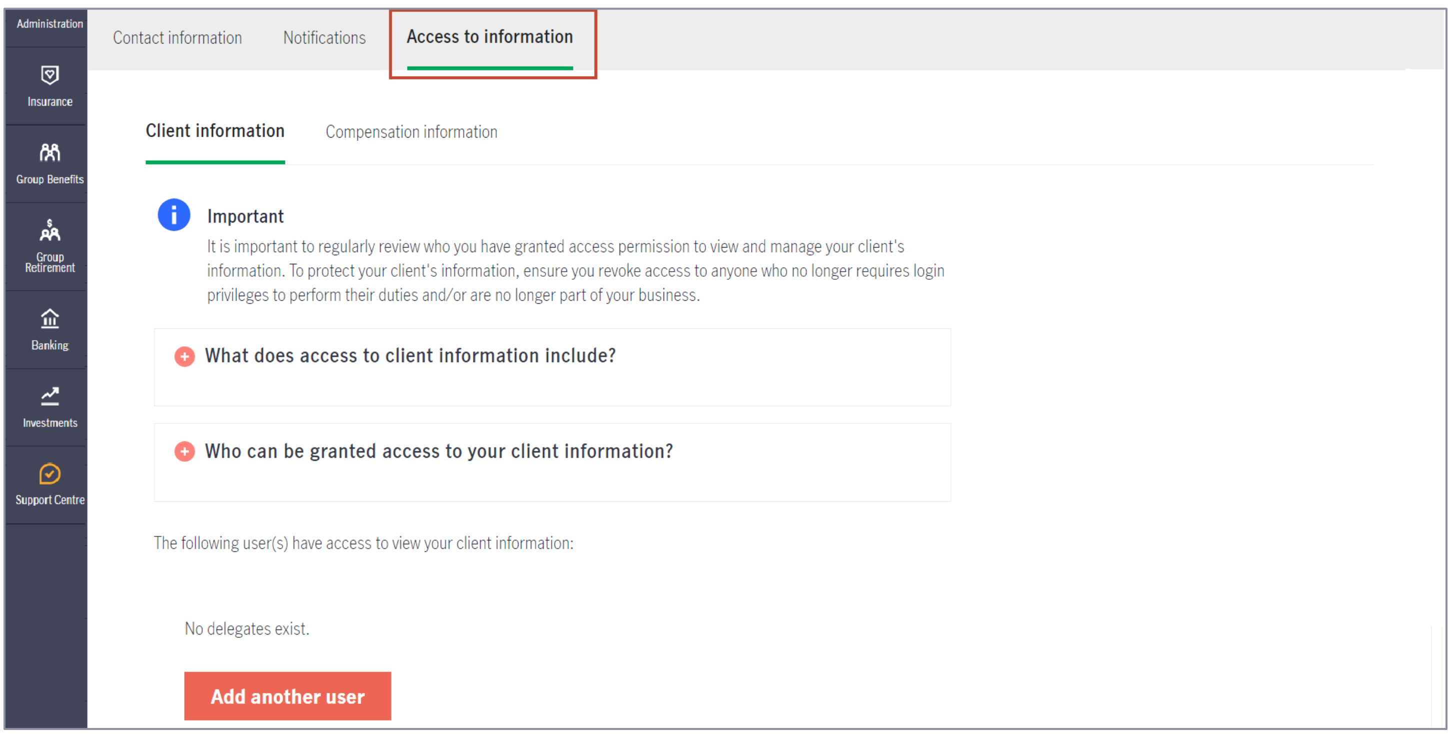
With Advisor Portal secure, you have the flexibility to control the information you and any delegates will see. This can be done by changing your settings within your Advisor Portal Profile.

Before you begin

Only users with an active Advisor Portal profile can be granted access. Ensure the person you are granting access to has successfully registered for Advisor Portal before proceeding.

Step 1: From the top utility bar, select **Profile**, then **Preferences** from the options displayed.

Step 2: Select the **Access to information** tab.



Client information

Access to client information means user(s) will be able to view and manage details such as client inquiries, statements, and notifications.

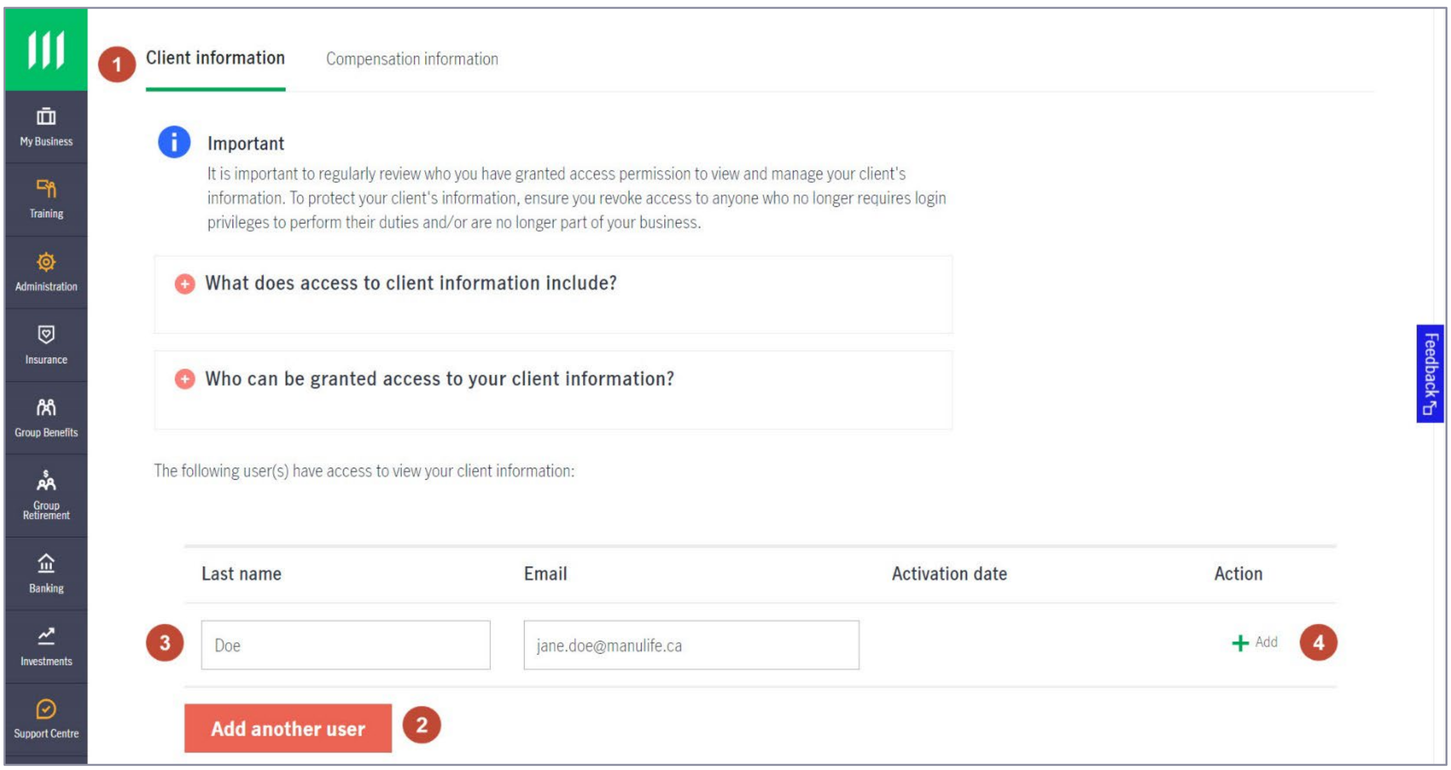
To grant access to Client information:

Step 1: Select the **Client information** tab.

Step 2: Select the **Add another user** button.

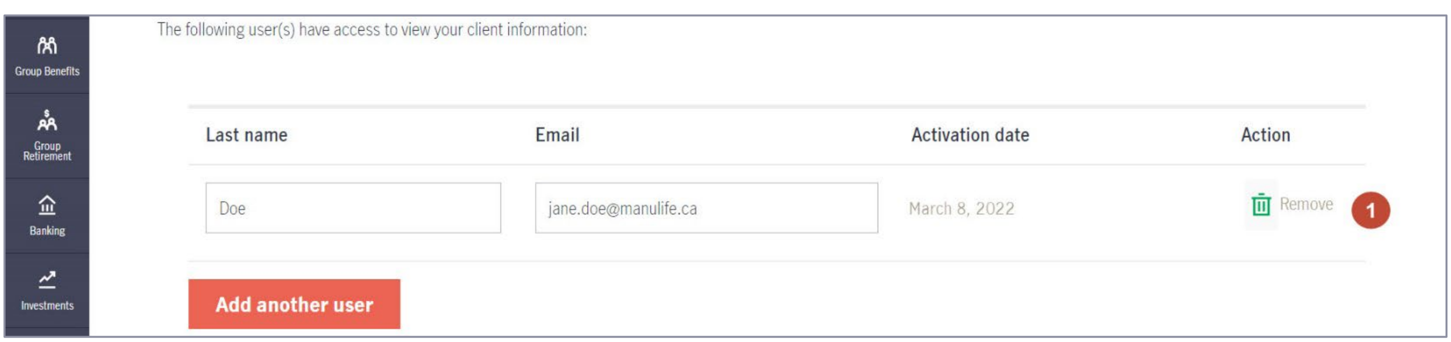
Step 3: Enter the user(s) **Last name** and **Email address** that is linked to their Advisor Portal profile.

Step 4: Select the **Add** button.



To remove access to Client information:

Step 1: Select the **Remove** button and the user(s) profile will be removed from your preferences.



Compensation information

Access to compensation information means user(s) will be able to view compensation statements and have access to Fasat.

To grant access to Compensation information:

Step 1: Select the **Compensation information** tab.

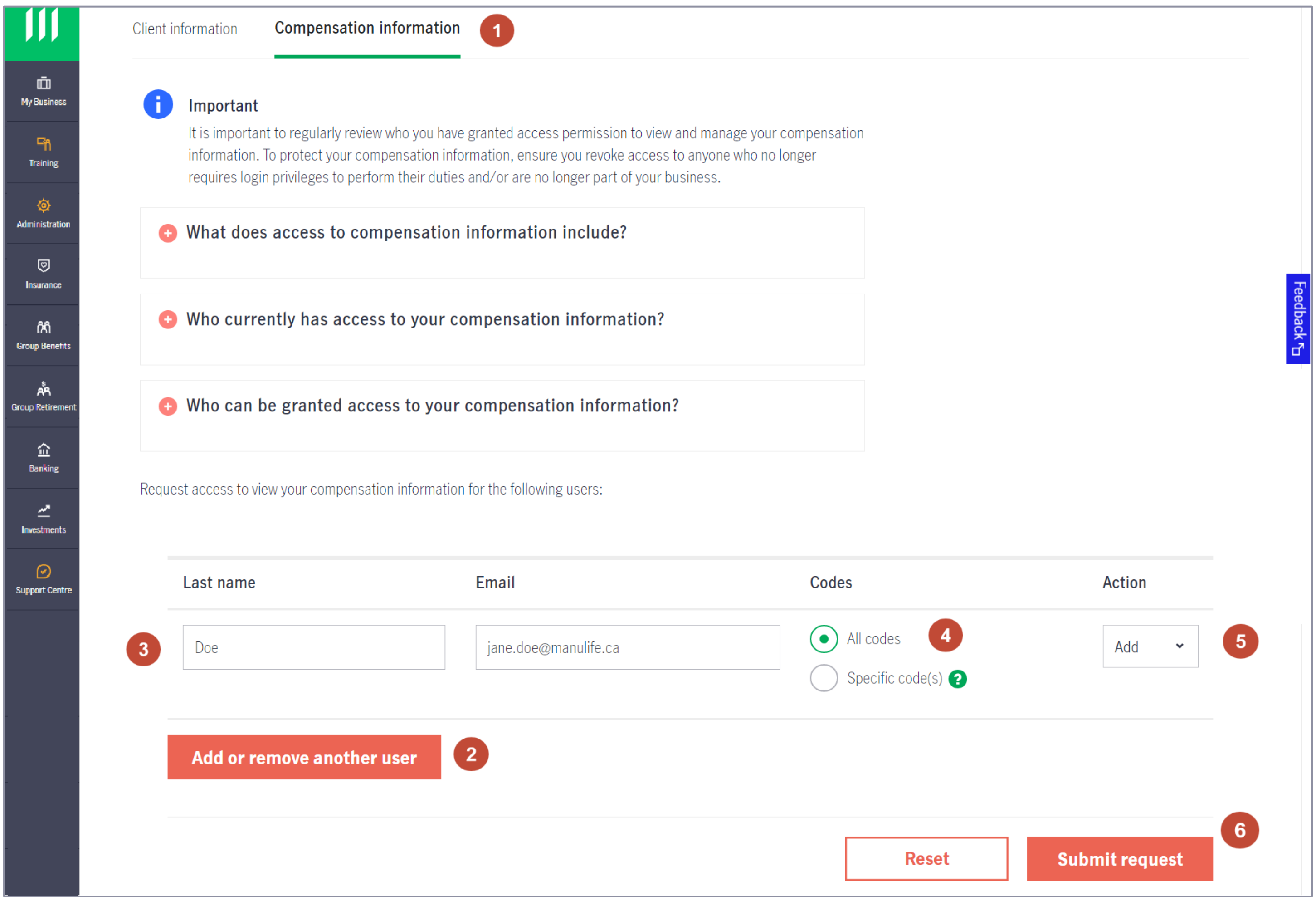
Step 2: Select the **Add or remove another user** button.

Step 3: Enter the user(s) **Last name** and **Email address** that is linked to their Advisor Portal profile.

Step 4: Select if they will have access to **All codes** or **Specific code(s).** When entering Specific codes, please separate specific code(s) with the correct formatting, e.g., Code 1, Code 2, Code 3.

Step 5: Select **Add** from the **Action** drop-down menu.

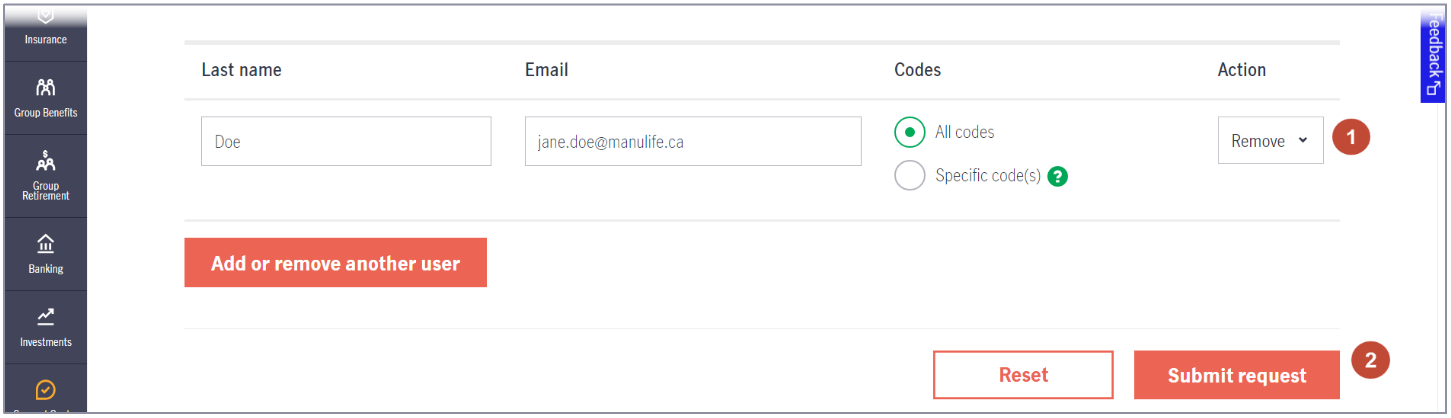
Step 6: Select the **Submit Request** button.



To remove access to Compensation information:

Step 1: Select **Remove** from the **Action** drop-down menu.

Step 2: Select the **Submit Request** button.

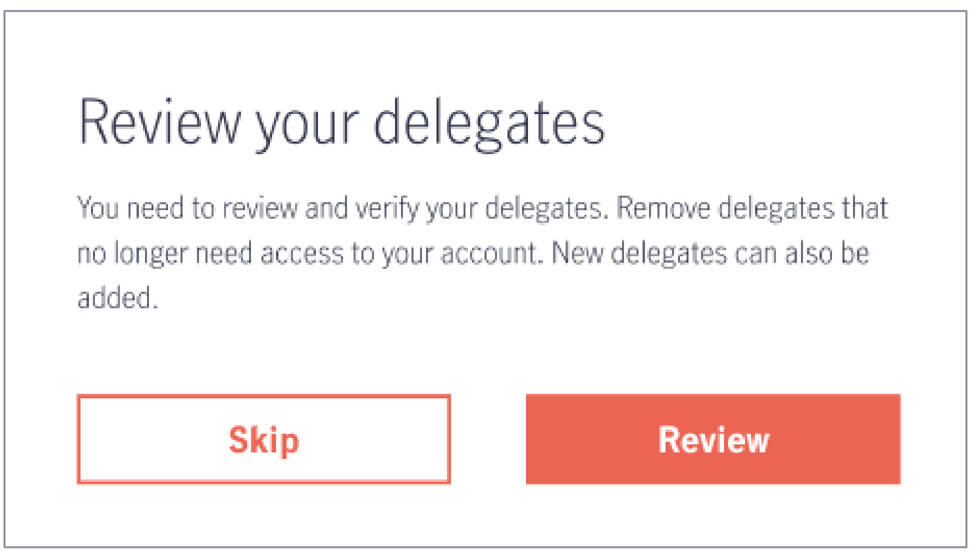


Annual audit

On an annual basis you are asked to ensure your delegates are accurate. Manulife has established a scheduled date for your review on an individual basis, and a pop-up message will appear after logging into Advisor Portal.

Step 1: Select **Review.** This will take you to Preferences within your profile. You will **only** receive this prompt if you have existing delegates under your profile.

Note: You can select **Skip**; however, you can only do this once.



Step 2: Follow the steps to add or remove delegates. If no changes are needed, no further action is required, and you can navigate away from the page to exit the preferences screen.