Manulife

Terminating a member

Introduction

This quick how-to video tutorial guides the viewer on terminating a member from their group retirement plan.

Onscreen

Upbeat music plays in the background and the Manulife logo appears on top of the left side of the screen.

Onscreen

A video of a person typing in the laptop appears on the screen. After a few seconds, the clip slides halfway to the right side, and a navy blue background along with the text "Terminating a member" slides to the left side of the screen.

Onscreen

The background changes from navy blue to green. A laptop image slides from the left side to the right side of the screen. The text on the left side, "Do you have members leaving the Group Retirement plan?" appears on the left side of the screen. The current text fades out, and another text, "Use our easy online feature to submit a termination request!" fades in the same area as the previous text.

Onscreen

The background changes from green to navy blue. A laptop image slides to the left side of the screen. Inside the laptop screen is the home page for the Group Retirement Savings Plan (RSP). A transaction icon pops out along with the text "Select Transactions." on the right side of the screen. A cursor icon appears on the screen, and hovers over the navigation bar on the left side of the laptop's screen. The Transactions button scales up, surrounded by coral strokes, then the mouse clicks the button.

Onscreen

The laptop's screen loads to the Transactions page, and the text "Choose Terminate a member." along with the Terminate a member icon, pops out at the right side of the screen. The mouse icon hovers on the Terminate a member button under Terminations section as the section scales up with coral strokes.

Onscreen

The laptop's screen loads to the Submit a termination request page, and the text "Search for the member." along with the search icon, pops out at the right side of the screen. A cursor will appear, and the current page scrolls down. The section for "Please enter the Member's name:" will scale up with coral strokes. The textboxes for Last name, First name, and Member number are filled as the mouse hovers and clicks the Search button. The current section scales back, and a section for "Here's a list of the membership matches found across all of your plans:" will appear below the current section. Inside the latest section are the last name, first name, date, and member number inputted in the previous section. The section scales up with coral strokes, and the mouse clicks the inputted last name.

Onscreen

The laptop's screen loads to another page, and a text "Tell us the reason the member is leaving the plan." along with an icon of a person holding a pen and appears on the right side of the screen. The section for Specify a reason for terminations, scales up with coral strokes as the mouse hovers and clicks the first option, "Termination of employment." The current section scales back, and the section for Termination date, Policy, Member number, and Last contribution details, scales up with coral strokes. The current section's textboxes are filled one by one. The current section scales back, and the mouse hovers and clicks the Continue button.

Onscreen

The laptop's screen loads to the Member Contact Information page and the text "Confirm the member's contact information.", along with a verify icon, pops out on the right side of the screen. The cursor clicks the Continue button.

Onscreen

The laptop screen loads to the Termination Request Details page, and the text "Select Submit." appears along with a finger pressing icon on the right side of the screen as the page scrolls down and the cursor clicks the Submit button.

Onscreen

The current text slides and exits to the right, and the laptop loads to another page and slides to the right side of the screen. A green background slides from the left side of the screen and occupies almost half of the background. A thumbs up icon will pop out on the left side of the screen, and the text "You're done!" will also pop out. The current page inside the laptop's screen will load to the Member Information page.

Onscreen

The laptop's screen loads to the Transactions page, and the text on the right side changes to "If you want to track the status of member terminations, go to See terminations.". The icon also changes to an information icon. The current page scrolls down, and the section for Recent terminations scales up with coral strokes as the mouse hovers over the See terminations button.

Onscreen

The current scene will fade out while only the navy blue background remains on the screen. The text "Just a few easy steps" will appear at the center of the screen. A mouse will also appear, and the text "and the member is terminated!" is surrounded by a green rectangular stroke.

Onscreen

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.

⫼ Manulife