MetLife
ATTN: Account Management Team
Email: methome@retirementpartner.com or Fax: 303-801-6021

REQUEST TO ADD/CHANGE ELECTRONIC LOAN FILE FEED

Plan Name: ____

Plan Account Number: ____________ Effective Date of Change: __________

PLEASE COMPLETE A SEPARATE PAGE FOR EACH DIVISION IF SEPARATE FILE IS TO BE SENT TO EACH DIVISION

Applicant Information (check one): ☐ New Application OR ☐ Change

Divisional Information: Basis (check one) ☐ Division or ☐ Payroll Center
Value (i.e. 1, 2, 3, etc.): __________
Division/Payroll Center Name: _________________________
90 day overlap ☐ No (default) or ☐ Yes
Defined as the period of time where, if a participant changes divisions, both the old and new divisions receive changes associated with that participant loan.

Payroll days/dates (i.e. 15th and last day of month, every other Friday, etc.):

______________ ______________ ______________ ______________

Loan File Report Type (check one): ☐ Summary OR ☐ Detail

Summary Report includes: SSN, Employee ID, Name, LOA/Bankruptcy Information, Loan Status, Action Code and Total of all Payments Due.

Detail Report includes: SSN, Employee ID, Name, LOA/Bankruptcy Information, Loan Number and Status, Repayment Amount Listed by Loan Number, Total Loan Amount (Principal and Interest), First Due Date and Maturity Date, Final Payment Date, Loan Term and Principal Amount of Loan.

Weekend/Holiday Code (check one): ☐ Before OR ☐ After
If the day for a scheduled event falls on a weekend/holiday, this indicator tells the record-keeping system to run the event either the business day before or the business day after the weekend/holiday.

E-mail addresses as to where notification should be sent when file is available:

______________ ______________ ______________ ______________

Loan File Report Format (check one):
☐ Report (text file RT) ☐ Report (PDF file RP) ☐ Electronic File
All formats are sent electronically. The report format can be printed for manual input. The electronic format can be uploaded.

CAS/PSC Web Logon Directory for File to be Sent:

Contact Name: ____________________ Phone Number:____________________

CAS/PSC User ID: ____________________ E-mail Address: ____________________
This is the location where the file or report generated will be sent. The CAS Logon Directory location consists of a tilde followed by a 4 digit alpha-numeric combination.

Full File Each Time Report is Created (check one)? ☐ Yes ☐ No
Full File Report includes: all loans ever administered on ISIS regardless of loan status.
Abbreviated Report includes: only changes needed to update payroll file.
First file created will always be a Full Report regardless of option chosen.

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Plan Account Number: ____________

Report Sorted by (check one): ☐ Social Security Number ☐ Employee Name ☐ Employee ID

Base Date for Report (MM/DD/YYYY): ______________________________________

The base date should be the first payroll date for which the loan file is to be received. Base Date is the date used to calculate when the Scheduled Type should run. This field works in conjunction with the "Frequency" and "Lead Time Days" field to determine Run Date.

Frequency for Report to Run (check one): ☐ Daily ☐ Weekly ☐ Bi-Weekly ☐ Semi-Monthly ☐ Monthly

Lead Time to Receive Report: ____________ days

Number of lead time days entered determines the number of days prior to the Base Date that the file/report activity should be run.

Base Date, Frequency and Lead Time Days are used in conjunction with each other to determine the run date for the File/Report. The run date is calculated by subtracting the Lead Time Days from the Base Date to determine the day the File/Report will generate.

Example:

In the case of a Bi-Weekly payroll with a next payroll date of 14-Feb-2008, should a report be received five days prior to the payroll date to allow for processing of the report/file data, a base date of 14-Feb-2008 should be entered with a frequency of Bi-Weekly and a Lead Time Days of 5.

In the case of a Monthly payroll with a next payroll date of 01-Feb-2008, should a report be received seven days prior to the payroll date to allow for processing of the report/file data, a base date of 01-Feb-2008 would be entered with a frequency of Monthly and a Lead Time Days of seven.