

Plan Service Center

Online Resource for Plan Administration


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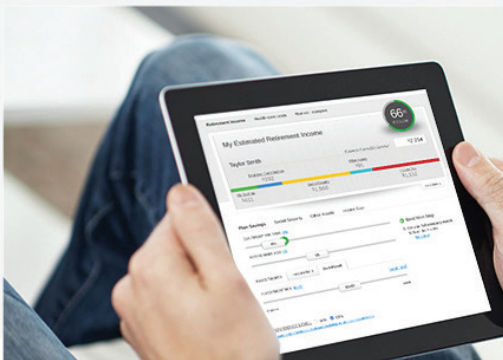
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The Plan Service Center (PSC)

The Plan Service Center (PSC) is a secure website that offers plan sponsors a unique combination of simplicity, sophistication, and performance. The site provides an access point to an intuitive web experience, and features and functionality that will continue to evolve as employee's needs change.

The PSC supports plan sponsor's day-to-day tasks, such as accessing plan information, updating employee information, and processing plan contributions — while simplifying ongoing responsibilities, such as year-end reporting. Navigation and content for each category were developed with plan sponsor's workflow in mind. It is our goal to make plan administration seamless.


PLAN SERVICE CENTER



New Look, New Features.


We've added new resources to help your employees along their retirement journey.

[Read more >](#)

Plan Sponsor Login


[Forgot Password?](#)

Remember me




Keep retirement planning top of mind with employees.

[LEARN MORE](#)



MetLife's 15 Annual Benefit Trends Study.

[READ REPORT](#)



Maximum Benefits and Contribution Limits for 2018.

[VIEW LIMITS](#)

Explore the Plan Service Center

Landing page

Upon successful login, plan administrators will be alerted to any important bulletins, such as market closures. After viewing the bulletin, plan sponsors will be routed to the Plan Summary page.

1 Summary

The Summary page provides a quick view of the Plan Metrics Dashboard to access key data including lifetime income score, participation rate, and investment strategies data.

2 Search functionality

If employees have access to multiple plans, they can search by plan name or number. An autocomplete feature will appear by entering five characters, allowing individuals to select from a list. The search capability is always available, no matter where individuals are on the site.

3 Additional navigation features

At the top and bottom of the page, plan sponsors can see links to some of the most frequently accessed areas of the PSC. From the top of the page, plan administrators can access the **Contact Us**, **My Profile**, and **Logout** links. At the bottom of the page reside the links to **Privacy** policies and **Legal** notices.

MetLife | PLAN SERVICE CENTER

Refresh my access | Contact us | My profile | Logout

Select plan ABC Company::1009583-01

Welcome POLLY
Last login: 06/06/2018 04:34 PM ET

Plan ▾ Employees ▾ Compliance ▾ Reports ▾ Resource center ▾ File sharing

Home / Plan / Overview / Summary

ABC Company - 1009583-01

To-do's Notifications File sharing Reports

Plan analytics

Lifetime income score: my plan data	Participation rate: my plan data	Contributions: my plan data
<p>78% of goal</p> <p>Median income goal achieved by participants as of Mar 2018</p> <p>Important information and disclosure</p>	<p>Participating vs not participating</p> <p>Dec 2017 Mar 2018</p>	<p>6.1%</p> <p>Avg contribution rate for Mar 2018</p> <p>Dec 2017 Mar 2018</p>

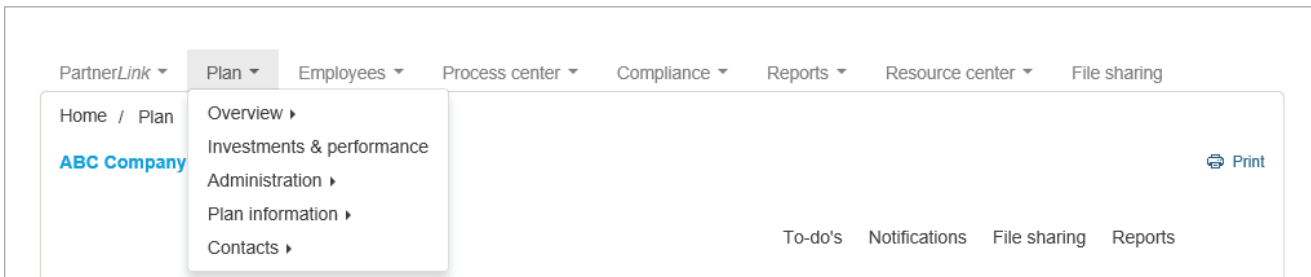
Plan information & status	As of 06/05/2018
Participants with a balance	Not available
Participant assets	Not available

Funds	
Fund balances	Not available

Plan information

The PSC provides a centralized storehouse of the latest information on organization's retirement plan. It consolidates — in a single user-friendly interface — to ensure smooth administration of all plan activities, from participant enrollment to account distributions.

Plan sponsors can review summary information, access detailed plan and participant information, and perform additional analysis using reporting tools that allow them to customize their view of information to fit their needs. Because employers can complete most administrative functions online, they can dramatically streamline any previously paper-based processes, resulting in higher efficiency, greater accuracy, and more time to focus on their business. **Plan** tab categories include: Overview, Investments & performance, Administration, Plan Information, and Contacts.



Overview

The Overview section provides key information related to the plan. The **Summary** provides plan analytics, based on the latest market close and balance history for the past three quarters. The **Lifetime Income Score** shows how likely participants are to reach their retirement goals. The **Participation Rate** chart creates immediate awareness of the health of the plan based on employee participation. The **Contributions** section displays average contribution rate in the plan. The Investment Strategy bar is specific to your plan and allows plan sponsors to identify how their participants are choosing to invest.

Investments

The Investments section provides a view of investment information using a collapse/expand capability that allows plan sponsors to focus on specific sections of the page or all sections simultaneously. View graphs and tables for employees' plan's investment options or download investment overviews and online prospectuses.

Administration

In this section, plan administrators can manage key tasks via the **To Do List, Update, or Verify Vesting** for participants, **User ID Security Management**, and **Upload Employee Data File** via the Payroll Data Interchange (PDI) file or Simple Payroll Upload.

Plan Information

The Plan Information section includes **Required Notices, Plan Documents, Order Participant Data Extract** and **Plan Audit Requests, Fee Disclosure Documents** and **Plan Documents**. PSC functionality also allows employers to upload their own fiduciary documents.

Contacts

Here plan sponsors will find information regarding **Plan Contacts, Divisional Contacts** (when applicable) and **MetLife Contacts**. General **Contact Us** information is always available in the top-right corner of their browser page.

Participant information

Managing the ongoing changes in participant information ranks as one of the key challenges of plan administration. Each employee is unique, and employee information changes constantly. An employer's ability to access, enter, and update information as it evolves allows them to provide their participants with the highest possible level of service — while improving the overall efficiency and accuracy of their administrative processes.

The PSC assists plan administrators keep participant information current through the organization of such details as enrollment status, eligibility, marital status, and employee identification. Plan sponsors can make changes online, and those changes trigger the corresponding updates to the recordkeeping system. Updating participant information throughout the year can simplify year-end tax and compliance reporting. **Employees** tab categories include: Search Employee, Add Employee, and Forms.

The screenshot displays the PSC interface with the 'Employees' menu open. The navigation bar includes 'PartnerLink', 'Plan', 'Employees', 'Process center', 'Compliance', 'Reports', 'Resource center', and 'File sharing'. The breadcrumb trail shows 'Home / Employees / Search employee'. The main content area features a search bar with a dropdown menu for 'Search employee by:' set to 'Name', a text input field containing 'e.g. smith or smith, john', and a 'Go' button. A 'Print' button is visible in the top right corner. The search results area is currently empty, with a '+ Recently viewed' link at the bottom right.

Search an employee

The Search Employee section allows plan sponsors to search for a specific employee by SSN, last name, or employer ID, add an employee, and view all of the basic information MetLife has for that employee.

Forms

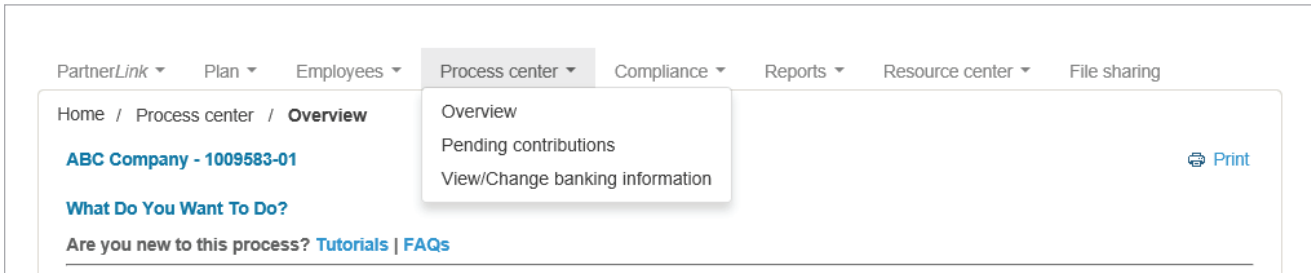
The Forms page provides streamlined access to all participant forms available for each plan. These forms are automatically updated whenever a change is made to the plan.

Participant Account Emulation (PAE) is a distinctive PSC feature that enables individuals to see information from the participant's point of view. By adopting a participant perspective, individuals can more easily understand participant questions with greater accuracy and ensure that they take the specific actions to help address participant concerns. PAE, titled PARTICIPANT WEBSITE, is available once individuals have selected an employee and are in the employee's record.

Online processing center

Timely, accurate processing sets the tone for every other facet of plan administration. The PSC allows plan sponsors to remit contributions by uploading a file, entering the information online, or copying a prior remittance.

By allowing plan administrators to copy previous remittances or portions of previous remittances, the PSC streamlines repetitive contribution-processing tasks. Rather than repeating the same entries for each payroll cycle, work from previous submissions can be used and make point-and-click changes where needed. **Process Center** tab categories include: Overview, Pending Contributions, and View/Change Banking Information.



Overview

This section allows plan sponsors to view current contributions made by their participants.

Pending Contributions

Here plan administrators will find any pending contributions for their plan.

View/Change Banking Information

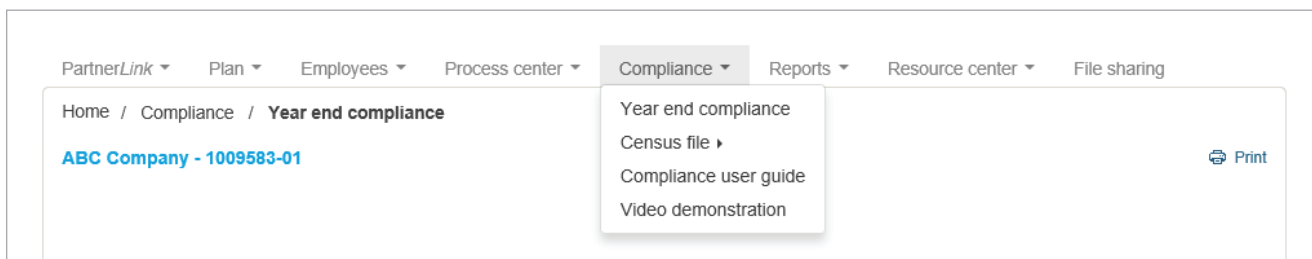
This is where employees can view or change their banking information for drafting purposes.

Compliance support services

In addition to enrolling participants and processing contributions, plan sponsors have the responsibility to ensure their plan's compliance with regulatory agencies. The more readily plan sponsors can access the needed information, the greater the level of reporting accuracy.

The PSC dramatically simplifies the process of collecting, organizing, and preparing the required information for the Department of Labor (DOL) and the IRS — allowing plan sponsors to potentially prepare much of the required paperwork for year-end testing and compliance requirements online, if applicable.

The PSC gives employers the tools to collect the needed information as an ongoing part of their processes, improving the quality and accuracy of their compliance submission at the end of each plan year. **Compliance** tab categories include: Year End Compliance, Census File, Compliance User Guide, and Video Demonstration.



Year-End Compliance

Here, plan sponsors can complete the required compliance services documentation, such as the Ownership and 5500 Questionnaire, online. The 5500 will be sent electronically from the PSC to the DOL when complete.

Census File

In this section, plan sponsors can streamline the exchange of information by ordering a report that contains year-to-date plan census information. Use this report as a template for the year-end census requirement for compliance services. Simply review it for accuracy, provide any items previously not included and submit it via the census upload process.

Compliance User Guide

Access detailed documentation on the PSC's compliance capabilities and procedures to ensure timely, accurate completion of employer's year-end reporting and ongoing data collection.

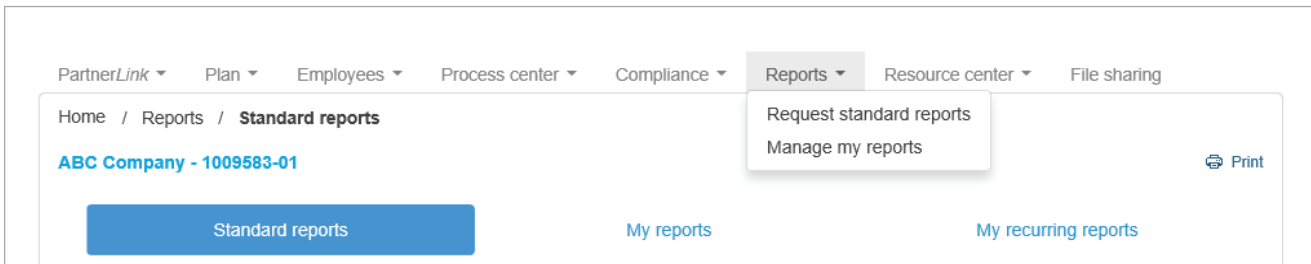
Video Demonstration

Brief tutorials have been developed to assist plan sponsors with completing the year-end requirements for compliance.

Reports

The PSC features a comprehensive library of reports on employer's retirement plan and participants. Plan sponsors can tailor individual reports to fit their specific informational needs, as well as create recurring reports — thereby adapting their view of the presented information to fit the way they work.

By analyzing the information available, employers can highlight the trends among their participants and closely monitor plan performance. Also available are the reports to assist in year-end processing, as well as the day-to-day management. All reports are built on the latest plan and participant information, informing employers of any changes that might affect plan administration. **Reports** tab categories include: Request Standard Reports and Manage My Reports.



Request Standard Reports

Select Request Standard Reports to view individual reports. Standard reports are organized into key categories. Within each category, a list of reports and corresponding descriptions are shown, as well as convenient links to samples and overview documents.

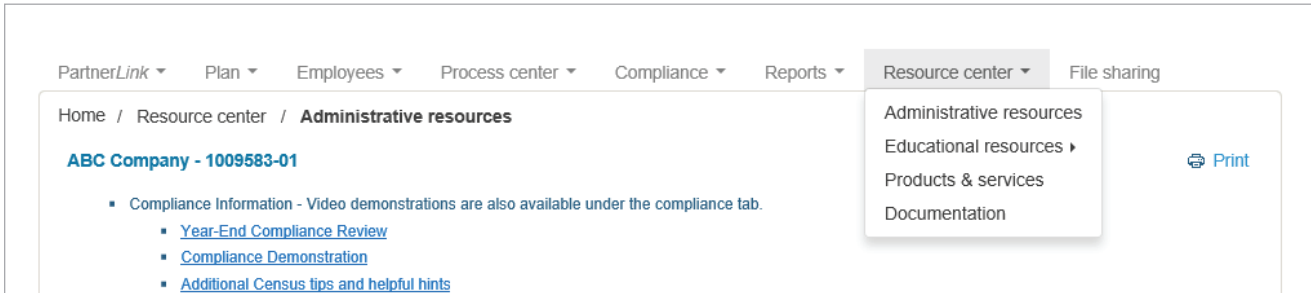
Manage My Reports

Select Manage My Reports to view the real-time status of all reporting requests that have been submitted.

Plan sponsors can schedule delivery of reports to match their recurring deadlines. Specify the exact range of information to be covered, as well as the reporting time frame and other information, to correspond to employer's requirements. An email notification will be prompted when a report is ready.

Resource Center

The Resource Center is a feature of the Plan Service Center (PSC), which offers helpful tools and educational materials. **Resource Center** tab categories include: Administrative Resources, Educational Resources, Products & Services, and Documentation.



Administrative Resources

This section includes:

- Compliance information
- MetLife & FASCore Recordkeeping Flyer
- A downloadable copy of this Plan Service Center Overview Guide
- Administrative Facts at a Glance
- PSC Reports guide so plan sponsors can locate and request reports that meet their needs.

Educational Resources

This section includes:

- Education Tools
- Fee disclosures that include white papers and other resources.

Products & Services

Here individuals can review our Executive Summary to learn more about MetLife and the innovative products and services we can provide.

Documentation

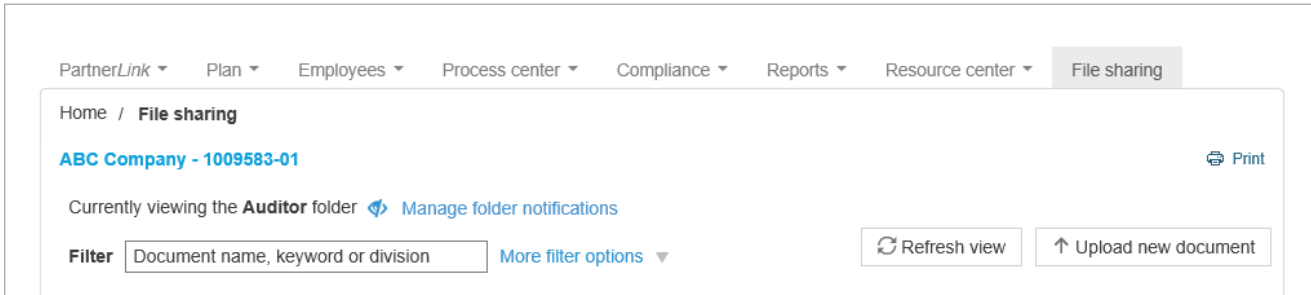
This section includes:

- Letters and worksheets
- Demonstrations
- Procedures

The File Sharing is a new feature in Plan Service Center (PSC), which allows plan sponsors to upload employee census data to create accurate reporting for plan specific reports and retirement projections available on the participants' retirement plan account.

File Sharing

File sharing is a feature of the Plan Service Center (PSC) that help streamline daily administration for plan sponsors. The **File Sharing** tab categories include: Daily Administration, Document Repository, and Recordkeeping Communications.



Daily Administration

These folders are used to share documents for a short period of time. An expiration date must be provided when documents are uploaded and documents can be deleted if you have the appropriate access. To check a documents expiration date, select the view documents information option from the Actions menu. An expiration date three years into the future is the furthest date into the future that can be selected.

Document Repository

This section includes:

- Reports – PSC reports can be run and shared among PSC users vs. the need for multiple users to run separate reports
- Audit files – Audit files and supporting documentation can be saved to the auditor file for access by all parties that need access to this information. Users can request email updates when new files are posted in the folder.
- Meeting minutes/agendas

Recordkeeping Communications

Here plan sponsors are able to select email notifications from the file sharing page. As a default the notifications will be turned off. Plan sponsors will need to opt in for email notifications.

This section also includes the following folders:

- Loans – late loan letters
- Participant contribution limits – excess deferral letter
- Payroll alerts – misdirected cash
- Payroll confirmations – remittance confirmations

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