MetLife

PROCEDURE: PSC Compliance Services Only Election Form
Review Date: June 2013

To add or modify Compliance Services for a Full Service plan already in existence on the FASCore recordkeeping system. Please complete the PSC Compliance Services Only Plan Access Request form and return to security@retirementpartner.com

NOTE: This form is used for Compliance Services Only plans . Please use the standard PSC User Access Request form to establish or modify PSC access for any other plan.

NOTE: This form is only used to manage PSC access on a Compliance Services Only plan already established in the recordkeeping system. If the Compliance Services Only plan has not yet been established, complete the Compliance Services Only Election form.

Part I of form: Plan Sponsor Contact
- Include Plan Sponsor Contact information from Section 1/Part I

Part II of form: Plan Service Center (PSC) Login Request

Complete this section for each PSC Login ID request for the Compliance Services Only plan.

This form will accommodate request for 3 separate PSC User IDs. Additional pages may be included as needed.

- Include all contact information for the individual requesting the User ID.

Part III of form: Plan Authorization

- Plan sponsor contact completes this section authorizing Compliance services be established, and User IDs provisioned for the noted individuals.
- Plan Sponsor Contact forward completed form to FASCore PSC Security team security@retirementpartner.com

Process:

- FASCore PSC Security team will image the form for long term storage.
- PSC Security team will setup user access based on the fields indicated within the form.
- Once setup is complete PSC Security team will send a confirmation email to the individual(s) noted in section II within 5 business days from receipt in good order.
  - Email will contain the User ID and login URL for PSC access.
  - Email will cc: the requesting contact for their records.
- A separate email will be sent to the individual(s) noted in section II containing the PSC User ID password within 5 business days.