MetLife

PROCEDURE: Plan Service Center (PSC) User Access
Review Date: January 2013

To establish or modify PSC user ID access, please complete the PSC Authorization form and return to security@retirementpartner.com.

Part I of form: Plan Sponsor Contact
- Include information for the authorized plan contact submitting the request.

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

This portion of the form is duplicated three(3) times to allow for multiple user ID requests on one form.

If the plan has pay centers and/or divisions with different contacts, please complete one login form for **each** pay center and/or division.
- Include all contact information for the individual requesting the user ID.
- Indicate the user type of the individual requesting; plan employee or other (TPA, consultant, etc.)
- A) if no other selection is made, Inquiry Access will be granted by default.
- B 1-2) Indicate if the individual will be granted access to plan and participant, and compliance level data.
- C) indicate if the individual will be granted contribution processing access.
  - Note – full access to plan and participant data is required for Contribution Processing
- D) Indicate if the individual will be granted full or inquiry To Do List access
  - Full access allows the individual to view, update, and approved any To Do List items
  - Inquiry access allows the individual to view any To Do List items
- Complete the final section If the individual has an existing PSC user ID

Part III of form. PSC Client Administration Agreement

- Approval of an Authorized Plan Contact other than those listed in the login request section must approve via one of the options presented.
- Authorized plan Contact forwarded 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.

PSC Authorization _ existing 012013