***Empower Institutional Documentation***

FUNCTIONAL PROCESS: PartnerLink: MetLife Employee Access

PROCEDURE: PartnerLink User Authorization Setup

DATE: January 2023

Overview

These procedures describe the process for establishing, modifying, or terminating PartnerLink User ID access for MetLife Employees. Use the appropriate alternate forms for Brokers/Advisors and Third Party Administrators. See Appendix A for User Access Roles.

Procedure

1. Establishing the PartnerLink user access
2. PartnerLink User Access Request Form

1. PartnerLink User Access level

* 1. PartnerLink is the primary tool used by MetLife employees and Plan Financial Professionals for obtaining information to the plans record kept by Empower Institutional. This includes:
		+ 1. Plan and participant data
			2. Providing plan compliance information
			3. Ordering/downloading plan file and reports
			4. Accessing information regarding compensation
	2. A full plan listing must be provided with each user access request. All MetLife PartnerLink users are setup with the appropriate access levels based on their roles.
		+ 1. MetLife Employees:
				1. Inquiry user access
				2. Inquiry To Do List access
	3. Some circumstances will allow a MetLife Employee to have Global PartnerLink access.
	4. All PartnerLink access requests must be approved based on the user role.
		1. MetLife Employees: Approved by Kathleen Smith at ksmith14@metlife.com. If Kathleen Smith is not available, then requests can also be approved by Greg Babineau at gbabineau@metlife.com and/or Jeff Cahill at jcahill@metlife.com as her backup.

2. Part II: PartnerLink Login Request

a. This section should be completed by the MetLife employee requesting access to PartnerLink. A plan number and plan name listing must be submitted for plan specific access.

1. If the request is to modify a current user id, details of the change must be provided (i.e. a new plan listing).
2. If the request is to terminate a user id, the current PartnerLink user id (PL ID) must be provided.
3. One request form can accommodate a request for up to two individuals.

3. Part III: PartnerLink Client Administration Agreement

a. This section must be electronically authorized by the Workplace Sales Director.

1. Upon approval, the request should be forwarded via email to the MetHome plan support team at MetHome@retirementpartner.com.
2. Empower Institutional will accept electronic signature for authorization. A list of the authorized signors can be found under [MetLife Authorized PartnerLink Approvers](https://plan-metlife.retirementpartner.com/static/InstMetCR/html/EducationalResources/procedures/MetLifeAuthorizedPartnerlinkApprovers_APR2022.xlsx).
3. The identified users listed on the request form will receive an email notification when their PartnerLink authorization request has been completed.

4. Part IV: Plan Listing

a. This section must be completed in order to obtain access to specific plans.

1. List all Empower Institutional Plan Numbers and Plan Names to which the requestor requires inquiry access.

5. Confirmation Notices

a. Upon receipt of the completed PartnerLink Authorization Request form, the Plan Technical Support Security department will send an email notice to the requestor indicating the request is being processed. This notice will also include the PartnerLink website URL.

1. Once the request has been completed, a second email notice will be sent to the requestor with their new PartnerLink user id and temporary password.

Appendix A – User Access Roles

