***Empower Institutional Documentation***

FUNCTIONAL PROCESS: PartnerLink: Third Party Administrator (TPA) Access

PROCEDURE: PartnerLink TPA User Authorization Setup

DATE: January 2023

Overview

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

Procedure

1. Establishing the PartnerLink TPA user access
2. PartnerLink TPA Authorization Form

1. PartnerLink User Access level

* 1. PartnerLink is the primary tool used by MetLife employees and Plan Financial Professionals and TPA’s 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. TPA:
          1. Full or Inquiry plan and participant data access
          2. Full or Inquiry To Do List access
          3. Full or Inquiry online transactions access
  3. All PartnerLink access requests must be approved based on the user role.
     1. TPA: Approved by Authorized Plan Sponsor Contact

2. Part 1: Plan Sponsor Contact

1. Complete information for the authorized plan contact submitting the request.

3. Part 2: PartnerLink TPA Login Request

a. This section should be completed by the Plan Sponsor requesting access for a TPA. **A plan number and plan name listing must be submitted for any request (update existing or new).** If the plan has pay centers and/or divisions with different contacts, please complete one login request for each pay center and/or division.

1. Select the appropriate access level for the TPA, full or inquiry.
2. Include all contact information for the individual requesting the user ID.
3. If the request is to modify a current user id, details of the change must be provided (i.e. a new plan listing).
4. If the request is to terminate a user id, the current PartnerLink user id (PL ID) must be provided.

4. Part 3: Client Administration Agreement

a. Approval of an Authorized Plan Contact, other than those listed in the login section, must approve.

1. Authorized Plan contact must forward completed form to MetLife Plandocgroup@MetLife.com
2. MetLife will review and confirm the request.
3. MetLife will forward the completed form to Empower PSC/PL Security team at security@retirementpartner.com.
4. PSC/PL Security Team will setup user access.

4. Part IV: Plan Listing

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

1. List all Plan Numbers and Plan Names to which the requestor requires 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

Table

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