

FASCore Documentation

FUNCTIONAL PROCESS: Plan Support Services

PROCEDURE: Request duplicate statement or plan summary

DATE: May 2008

Overview

These procedures provide instructions for requesting a duplicate statement or plan summary.

Procedure

- I. Contact the MetHome Plans Services team at 800-856-7772 (option 2)
 - A. Duplicate Participant Statements
 1. As participant statements can be printed through Plan Service Center, a request to the MetHome team should only be made if it is a statement prior to what is available on PSC or a request for an entire plan
 2. Provide the applicable quarter-end date, plan number and Participant name and SSN, if applicable.
 3. Advise this is to be sent via regular mail or overnight mail
 4. Confirm mailing address
 - B. Request duplicate Plan Summary Report
 1. Provide the plan name, number and applicable quarter-end date.
 2. Advise if this is to be sent via regular mail or overnight mail
 3. Confirm mailing address
- II. Service standards
 - A. Statements – 5 business days from date of request – not valid for two weeks prior to quarter-end or four weeks after quarter-end.
 - B. Plan Summary– 5 business days from date of request – not valid for two weeks prior to quarter-end or four weeks after quarter-end.