

Advisor360°: Advisor IDs Reference Sheet

This reference sheet explains how to view business across your practice. Advisor360° is driven by Advisor ID(s) and a concept called Business Units.

<p>What is an Advisor ID?</p>	<p>An Advisor ID is a code used on a policy, contract or account that identifies the advisor or registered representative for servicing and access, as well as commission information, for example splits. Some examples of Advisor ID's are:</p> <ul style="list-style-type: none"> • MassMutual ID • MMLIS split codes – S code • National Financial RR2 numbers • Product Sponsor Codes
<p>What is a Business Unit?</p>	<p>A Business Unit is a grouping of individuals (e.g. Sales Manager Unit or Team) defined by the MassMutual hierarchy. A Business Unit drives certain CRM functionality, such as:</p> <ul style="list-style-type: none"> • Visibility into CRM activities not associated with a household • Selecting the appropriate CRM owner and assigning activities • Access to Workflow templates • Access to Mail Merge templates • Custom field labels • Custom drop-down list values
<p>Hierarchy structure</p>	<p>The hierarchy structure aligns with the existing proxy or advisor teaming structure within your firm.</p> <p>Note: This is established by your Agency Security Administrator (ASA).</p>
<p>Exceptions in "Track My Cases"</p>	<p>For MMLIS business, only the primary advisor or any assistants and/or staff who has access to the primary advisor in an informal split arrangement, will be able to see and respond to a work item in "Track My Cases." This is applicable to all categories reflected in the Cases tab (ex. New Accounts, Account Maintenance, Compliance, etc.).</p> <p>To confirm who is the primary on the split, follow the instructions below to access the MMLIS Split Code application on FieldNet. The primary is the first advisor listed on the split.</p> <p>Tip: If you are an AE and have proxy, you will be able to view all cases.</p>

Advisor ID & Hierarchy in Advisor360° Reference Sheet

Split Codes for Registered Reps

To view a complete listing of your split codes, you may download your split code listing from the MMLIS Split Code application on FieldNet.

- To do this complete the following steps:
 - Log into the MMLIS Split Code application on FieldNet
 - Click on the View Existing Split Codes option
 Alternatively, you can access MMLIS Workbench and run your current Book of Business report. The second tab of the report will show all your existing split codes.

Tip: Keep the split code listing nearby to quickly locate your codes.

All Advisors: Advisor360° Licensing Tile

To see a listing of your Advisor ID(s), complete the following steps:

1. In Advisor360°, click on the Practice360° tab,
2. Choose the **+** new application option and open the Compliance Tab from the dropdown.
3. On the Licensing tile, click on the Advisor IDs option at the bottom of the tile. Here you will see your listing of Advisor ID(s) as shown in the example below:

Advisor IDs				Request for Split ID Number ID Termination Form
* Primary Advisor on the Split ID				
ID	ADVISORS LISTED ON ID	%	PPS CUSTOM ELECTION	
FV#	Belinda Leticia - Synthetic*	100.00	Transaction Charge	
S1047	Belinda Leticia - Synthetic*	100.00	Transaction Charge	
SYFV#	Belinda Leticia - Synthetic*	100.00	Transaction Charge	

Select the correct Advisor ID

When you are completing tasks and functions that require you to choose an Advisor ID from a dropdown, you must make sure you select the **correct** Advisor ID(s). This will ensure the desired information is displayed and/or the correct ownership is assigned.

Examples of tasks/functions are:

- Submitting business via the Client Account Wizard (CAW) and/or the Procedures Wizard (PW)
- Setting up advisor contact information in Investor360°
- Global account name customization
- Quarterly Statement Setup
- 1-Click Review
- Filtering
- Various Advisor360° Dashboard Widgets

Support Structure

If you need further assistance, please reach out to your firm's Practice Development Specialist (PDS) or in-firm support model.