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MMLIS Variable Annuity Order Entry

Navigation and Access Guide for Workbench

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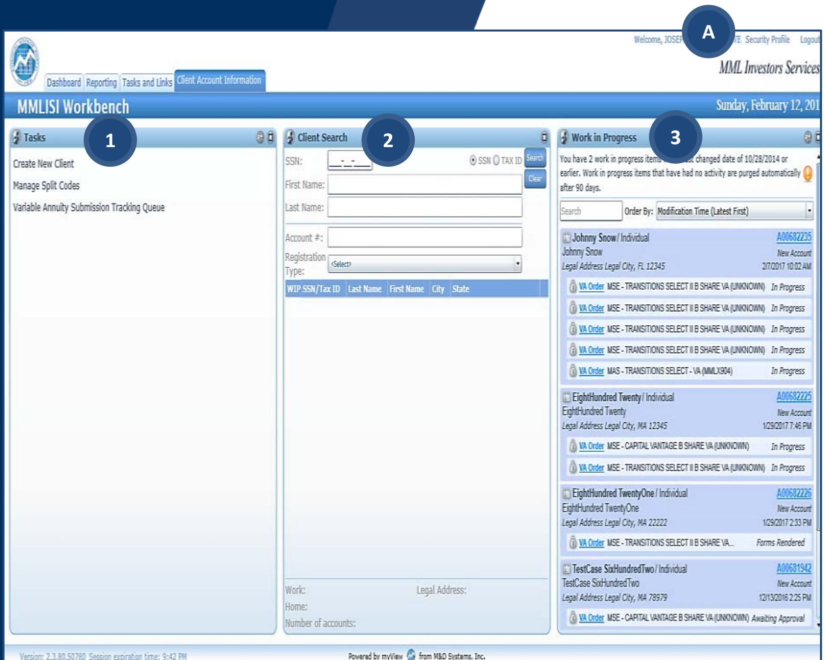

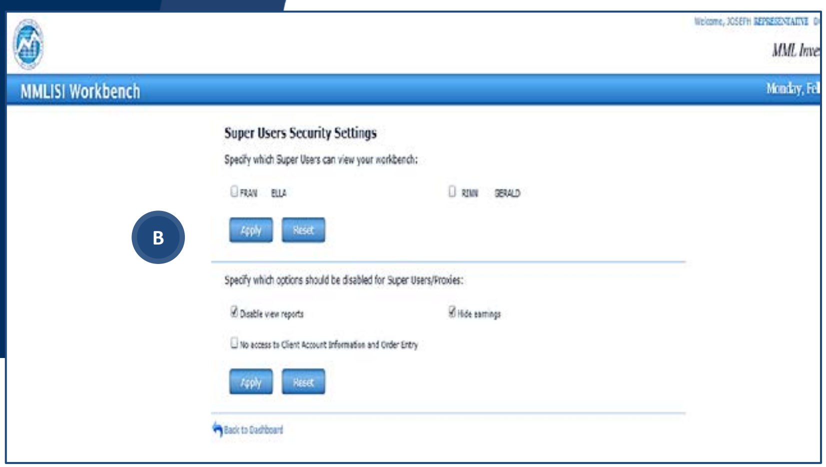

Use the Client Information tab to create and maintain client accounts for Variable Annuities, Direct Mutual Funds, and Variable Life products. New accounts and account maintenance updates are processed in real time.

DELEGATE ACCESS TO SUPPORT STAFF (AE#'s) FOR THE WORKBENCH:

A CLICK SECURITY PROFILE FOR SUPER USERS SECURITY SETTINGS

- The support staff will show in Super Users Security Settings for advisors to then give access.

NOTE: All support staff must be fingerprinted or registered prior to giving access and the original request must be submitted by the Agency Security Administrator.

B SET SUPER USER ACCESS OPTIONS IN WORKBENCH

Customize the access rights for support staff. Access rights cannot be specified per user. All access options selected will apply to all support staff.

Determine access to :

- Client Account Information and Order Entry Tool
- Earnings (Commission Statements)
- Reporting Tab

NOTE: Advisors must approve all submitted business.

CLIENT ACCOUNT INFORMATION TAB IN WORKBENCH:

1 TASKS

Select your preferred action under the Tasks tab:

- Create New Client – Create a new client for directly held business, such as a Variable Annuity or Mutual Fund
- Manage Split Codes – Access the split code application on FieldNet.
- VA Submission Tracking Queue – Check the Status of a VA Order transaction.

2 CLIENT SEARCH

Create a new registration for existing clients or complete a maintenance item. Search for client by:

- First or Last Name
- Social Security number
- Account Number
- Registration Type
- Tax ID

Entity Accounts: When searching for an entity (i.e. trust):

- The TIN Radio button must be selected when searching for an entity account.
- Use the entity's name and/or TIN – not the trustee's information

3 WORK IN PROGRESS (WIP)

If a new client account is missing information after having been entered into the system, the account can be updated for up to 90 days*. Work can be saved for up to 90 days to allow for completion of records.

*NOTE: Depending on the Status of a VA Order, edits to an order may create a new order ID and will require signed paperwork on the new order.

5/2017