

## Get ready for MMSD Portal access for Case Managers!

Your requests for improved digital capabilities to make it easier to do business with MassMutual Strategic Distributors (MMSD) have been heard! A major milestone in our technology roadmap, **we are thrilled to share the good news that we are ready to launch BGA Case Manager access for life and disability on the MMSD Portal!**

### Pending inventory reports

Although it has almost all of the same data as the reports some BGAs receive twice daily today, the report is much more user-friendly and will have the following functionality:

- It can be filtered by producer as well as other data elements.
- It can be sorted.
- It can be exported to Excel.
- There are separate reports for Life and DI pending cases.
- It captures not only formal submissions, but also formal informal/survey applications.

### Resources available to BGA Case Managers on the MMSD Portal

The BGA Case Manager role will be provided access to a pending inventory report for their Brokerage General Agency (refreshed hourly) as well as the information below:

#### New Business & Underwriting resources include:

- Links to life and disability illustration tools
- New business form links
- New business submission guidelines and processes
- Life contract state guidelines
- DI corporate state situs
- Life and disability underwriting guidelines
- Policy dating rules
- Life country classification codes
- Tele-CMI information
- Billing options



## Next steps

- **Complete the Portal Designee Form (FR3034)\* to designate an individual authorized to request or revoke access for Case Managers for the agency.** This individual can be the principal/signing officer or if another individual is designated, the principal/signing officer will act as backup. The principal or signing officer and the designed individual must sign this form.
- **When we receive information on the designated case manager** for the agency, MMSD Client Services will reach out to the individual(s) with instructions for getting access to the MMSD Portal for their Case Managers.
- **Designated case managers will have access to all pending inventory submitted by/through their agency. Access is not based on territories or producer assignments.**
- **The authorized individual will be notified** when the MMSD Portal is live and access has been granted. Portal activation instructions will be provided.
- **Only individuals at the BGA who are acting as a case manager** should be onboarded in that role and provided access to the portal at this time.
- **As further functionality is launched for new personas/roles**, the individual authorized will be responsible for requesting access for additional designated office personnel. New portal features and instructions will be communicated.

\* Form needs to be downloaded in order to complete the fillable fields.

## MMSD Portal resources

A job aid is being created and will be posted to the portal to help case managers utilize the pending inventory report.

## FURTHER INFO

- Contact your MMSD Life & DI Key Account Manager.
- Email [MMSD Client Services](#).

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