Business Edge℠ User Management Guide for firm managers and delegates

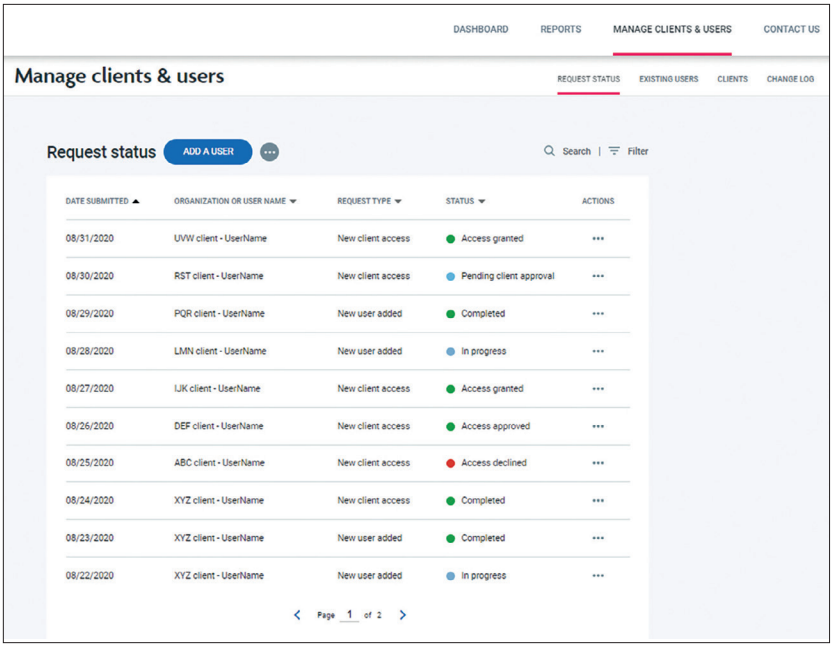
Provide access to firm employees to better serve your TIAA clients' accounts

To help run your firm more effectively and securely, you can add and manage users and clients through Business Edge. This will allow you to establish credentials and entitlements for each individual user at your firm. Thus ensuring that each user has the appropriate level of access to the information they need on Business Edge and PlanFocus to support your clients seamlessly and efficiently. Additionally, you can request access to clients who currently are not accessible through Business Edge.

Manage clients & users tab

To get started, select the *Manage clients & users* tab. This will take you to a simple dashboard that will allow you to:

- Add a new user or request access to a client
- Review the status of all users at your firm
- Take action on a specific request



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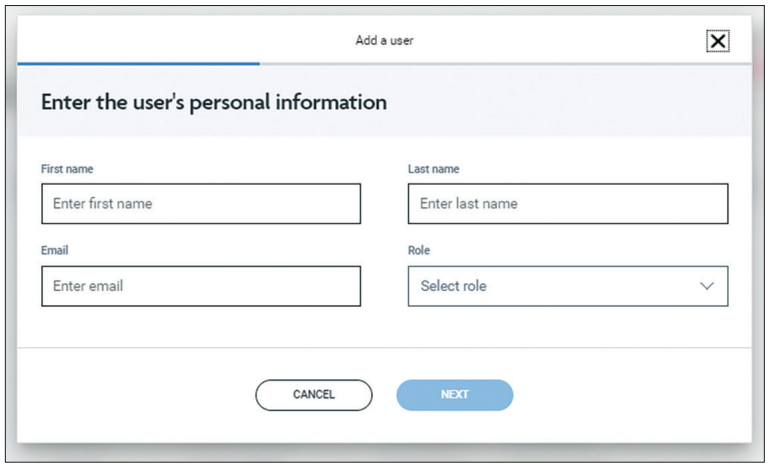
Adding a new user at your firm

Setting up a new user is simple and quick:

1 Enter the name and email address of the new user and select their role at your firm.



2 Select which clients this user can access, and for certain roles, whether they should be able to view full Social Security numbers and whether they are an authorized 3(38) investment manager.

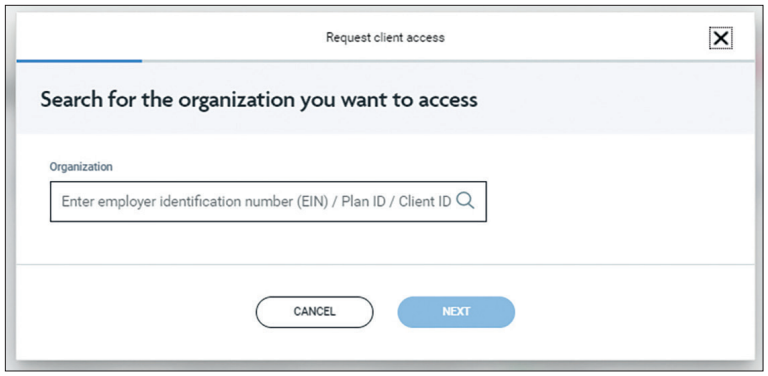
3 Once you have added the new user, they will receive an email inviting them to register.

Please note, it is important to review users on a periodic basis, especially after someone leaves your firm or has changed their job function. Plan sponsors will have access to a corresponding *Manage firms* tab in PlanFocus and retain full transparency with respect to all users.

Requesting access to a client

You can only access plan and participant data on Business Edge and PlanFocus if a client grants you access.

1 To do so, simply click on “Request client access” from either the *Request status* page or the *Clients* tab and complete some basic information. You will need the Federal Employer Identification Number (EIN), Client ID or Plan ID in order to initiate the request.



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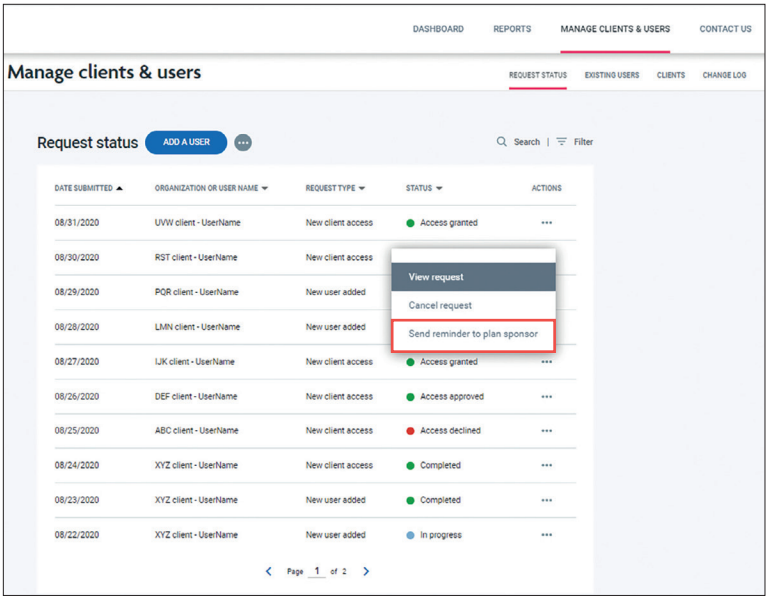
2 Enter information about you and your firm, including the type of services you are providing.

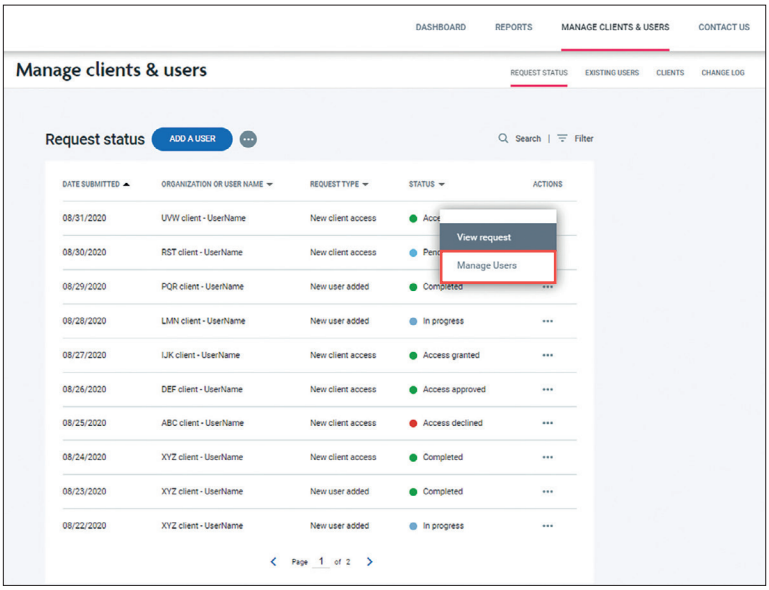
3 Select the type of access you will need such as plan and investment changes, contribution and enrollments, distribution and loans, and compliance and fee management, and whether you need access to participant balances or compensation data.

4 When you click on the "Submit" button, an email will be sent to the plan sponsor. The plan sponsor will need to approve the request in order for you to gain access to their data on PlanFocus and Business Edge.

If you don't hear back from the plan sponsor in a timely manner, you can send a follow-up email from the "Actions" drop-down menu within the *Request status* tab by selecting 'Send reminder to plan sponsor.'



Once access has been approved by the plan sponsor, you can add users at your firm to access this client's data by selecting *Manage users* from the "Actions" drop-down menu from either the *Request status* tab or from the *Clients* tab.



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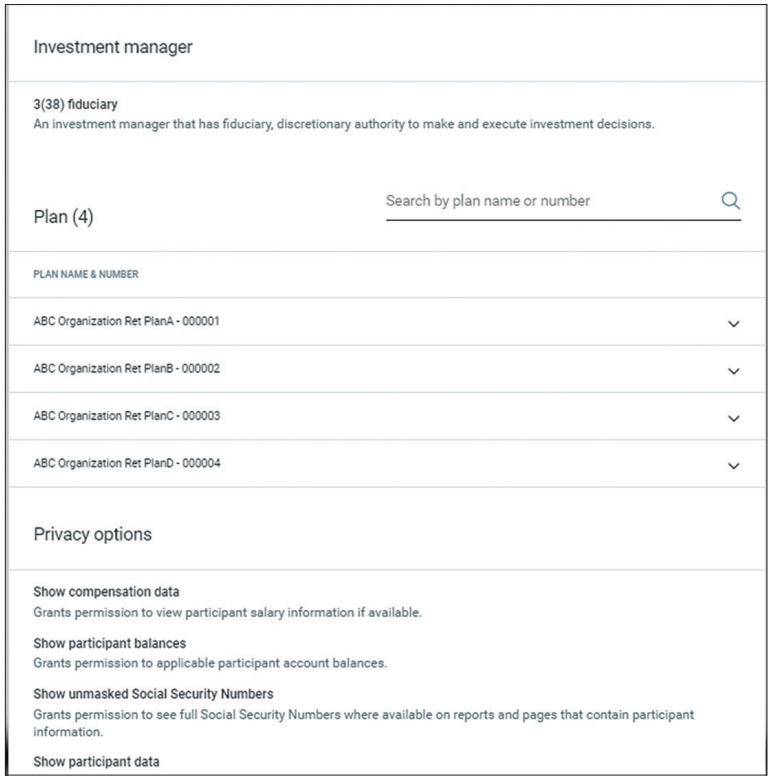
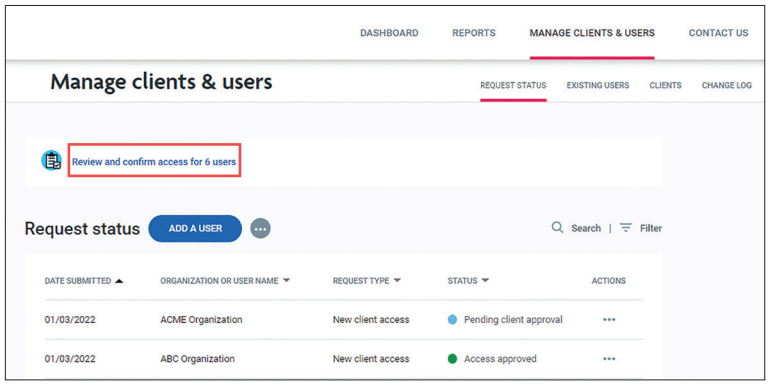
View client access

The *Clients* tab provides detailed information about your clients. Click on *View client profile* for details of what type of information you can view or *Manage users* to view a list of assigned users.



Review user access

You will be asked to verify Business Edge users within your firm on an annual basis. A “Review and confirm access” message will appear at the top of the ‘Manage clients & users’ page when it is time to do so. Click on this link and review each user on the list to confirm continued access.



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FAQs

Q: Who can add new users?

A: The firm manager, and any named delegate, can add and manage users as well as request access to a client. They can specify 3(38) consultant user access and whether or not a user can view Social Security numbers.

Q: What is a delegate?

A: A delegate, like the firm manager, can add, deactivate (disable access for a short time), delete and reactivate users within the firm. Only the firm manager can add or manage a delegate. There is no limit to the number of delegates a firm manager can assign.

Q: What are my responsibilities beyond managing users?

A: The firm manager will be able to handle updates for all of their users across all the firm's clients moving forward. They will be able to easily add and remove users, manage user assignments to various clients in just a few quick steps and request access to new clients. They will have access to consolidated reporting within Business Edge across all firm clients as well as the ability to navigate to PlanFocus for additional details.

Q: Why did I lose access to Business Edge?

A: Each year, your TIAA client will be asked to review and affirm your level of access to Business Edge and PlanFocus. Once they have done so, your firm's designated firm manager or delegate will need to confirm individual users within your firm. Failure to confirm your firm-wide access or individual access will result in loss of access.

Q: What happens when an employee's book of business changes?

A: You can easily modify an existing user's access level by clicking on the "Actions" drop-down menu next to their name within the *Existing user* tab. Then click on the *Manage clients* link. This will open a window where you can edit their client assignments.

Q: What is the difference between the *Request status* and the *Existing user* tab?

A: The *Request status* tab lists the names and status of those users and clients where you have taken action. The *Existing user* tab contains a list of existing employees and their current user status.

Q: What happens when a user leaves the firm?

A: To delete a user, go to the *Existing user* tab, find the name of the user, and click on the "Actions" drop-down menu and select *Delete User*. For employees who may be leaving for a short period, i.e., medical leave, you can disable or deactivate them through this same process.

Q: I have been using Business Edge for some time, why do I see more data than before?

A: With this enhancement, access levels and roles are now assigned at the firm level. As a result, you may see more data.

Q: Can I manage my email preferences within Business Edge?

A: Yes, you can manage your email preference within Business Edge by clicking on your initials icon in the top right-hand corner of the page. Click on "Manage profile" within the drop-down menu and then the *Preferences* tab to manage your email alert subscriptions.

Please feel free to contact your TIAA Consultant Relations Representative with any feedback you have along the way. Also, for TIAA Business Edge technical assistance, you can call the Administrator Telephone Center at **888-842-7782**, weekdays, 8 a.m. to 5 p.m. (ET).

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