

Access Management Dashboard: Administrator User Guide

At MassMutual Ascend, data security is a top priority. We created the Access Management Dashboard so you always know who has access to business information and can manage accordingly.

As an administrator, you can make changes to user access, commission access and more at any time from the User Access tab. Every six months, you are required to review which users have been assigned access on the Confirm Access tab and remove users who should no longer have access. This helps us ensure users have appropriate access.

Please note, this guide is for administrator use only. Other user views will vary.



Dashboard overview and My Access tab

To visit the dashboard, select your name, then Access Management Dashboard.

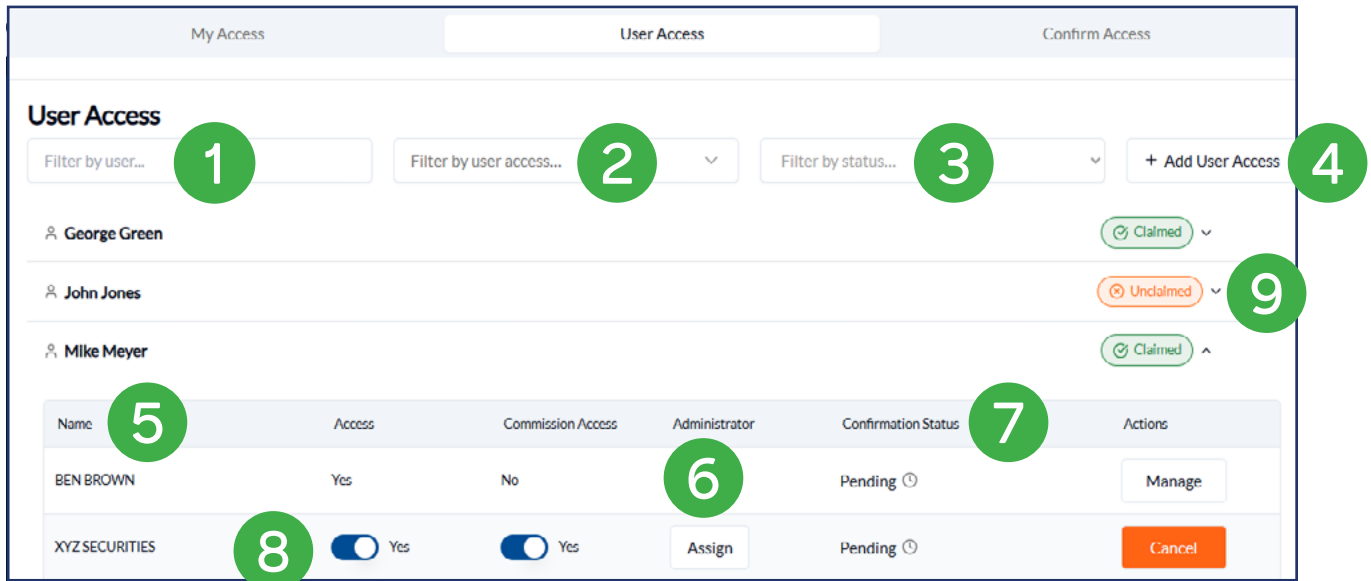
The screenshot shows the 'Access Management Dashboard' interface. It includes a sidebar with 'My Access', 'User Access', and 'Confirm Access' tabs. The main content area is divided into sections: 'Current Confirmation Window' (Feb 1 - Mar 15, 2026) with a progress bar for 3 items requiring confirmation; 'Administrator Access' with a list of users (ABC INVESTMENTS, BEN BROWN, JOHN SMITH); and 'My Access' which contains a table of user access records. A 'Create New User' button is located in the top right corner.

Name	Access Type	Administrator	Date Granted	Confirmation Status
ANNUITY AGENCY	Read Only	JENNIFER JONES	6/6/2024	Confirmed ✓
ABC INVESTMENTS	Administrator	MassMutual Ascend	6/6/2024	Pending ⌚
BEN BROWN	Administrator	MassMutual Ascend	6/6/2024	Pending ⌚
JOHN SMITH	Administrator	MassMutual Ascend	6/6/2024	Pending ⌚
XYZ SECURITIES	Administrator	MassMutual Ascend	6/6/2024	Pending ⌚

On the Access Management Dashboard, you can:

- 1 Navigate to the My Access, User Access, and Confirm Access tabs via the sidebar
- 2 Quickly view the current confirmation window, outstanding user confirmations, and total number of user confirmations you are required to complete
- 3 Easily view who you can create and manage user access on behalf of
- 4 Select Create New User to create a MassMutual Ascend account for and grant access to a new user
- 5 Use the My Access Tab to review your access, the administrator(s) responsible for granting and confirming your access, when it was granted and your confirmation status

User Access tab



On the User Access tab, you can:

- 1 Filter by user to find a specific user
- 2 Filter by user access to view which users have access
- 3 Filter by status to view users based on their confirmation status
- 4 Assign an existing user new access
- 5 View and manage each user's access, commission access and administrator access
- 6 Assign administrator access to other users
- 7 View each user's confirmation status
- 8 Update user access
- 9 See if a user has claimed access and click to resend confirmation email for users who have not

Confirm Access tab

Confirm Access
As an administrator, you are required to review and confirm access to information for the following users by the expire date

George Green Pending ⓘ ▾

John Jones Pending ⓘ ▾

Mike Meyer Pending ⓘ ▲

2 Confirm All Remove All

1 Name	Access	Commission Access	Administrator	Confirmation Status	Expire Date	Actions
BLN BROWN	Yes	No	No	Pending ⓘ	3/15/2026	Confirm Remove
XYZ SECURITIES	Yes	Yes	No	Pending ⓘ	3/15/2026	Confirm Remove 3
JOHN SMITH	Yes	Yes	No	Pending ⓘ	3/15/2026	Confirm Remove

During a confirmation window, you'll use the Confirm Access tab to:

- 1** View each user's access, commission access and administrator access
- 2** Easily confirm or remove all access a user is assigned to
- 3** Confirm or remove user access

Please note: Association updates made under the User Access and Confirm Access tabs will go into effect the following day.