

Navigating the New Business Dashboard

At MassMutual Ascend, we focus on finding technology-driven solutions that make it easier for you to manage your business. The New Business Dashboard gives users a holistic view of their new business cases in a centralized location.

To view the New Business Dashboard, visit MMAscendConnect.com/login and log in, select “Business Management,” then “New Business Dashboard.”

1 Account Snapshot and New Business Status

- Print contract details
- View important information under Account Snapshot
- Review additional information on contracts Not In Good Order (NIGO) or with transfers
 - Download and upload outstanding documents
- View your new business status, including the following statuses:
 - Application Received
 - In Review
 - Not In Good Order or Not In Good Order Resolved*
 - Funds Pending or Transfer Paperwork Sent or Funds Received*
 - Policy Effective

2 New Business Contracts

- View all new business contracts, which automatically load based on their last activity date
- Filter by status, including NIGO status
- Search for policy number, client last name, agent number and other specific case information
- Select a new business contract to see all information, including account snapshot
- Export new business case information by selecting the export button in the upper right corner next to “My Account”

3 Additional Information

- See additional details, including contract, client, annuitant and agent information
- View full policy notes, deposit details and related documents when applicable

**Please note, these statuses are dynamic and will only appear when applicable*

Log in at MMAscendConnect.com/login for a comprehensive view of your business with the **New Business Dashboard**.

This content does not apply in the state of New York.

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