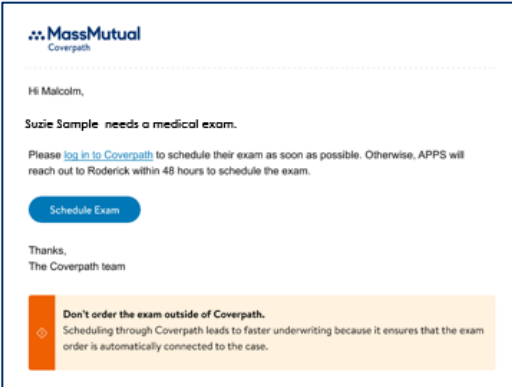
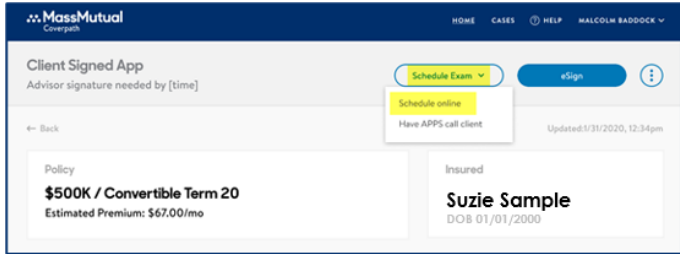
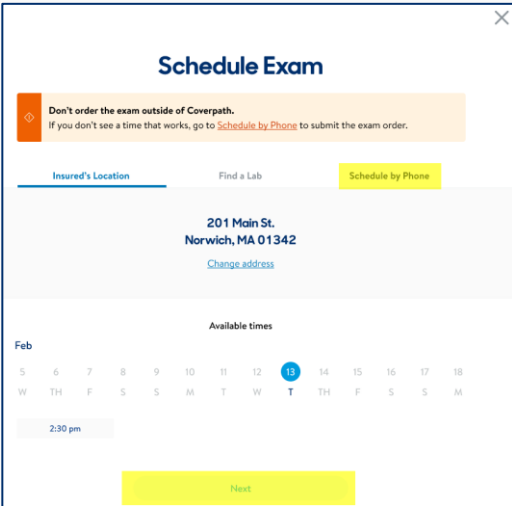


MassMutual: Scheduling Exams in Coverpath Reference Sheet

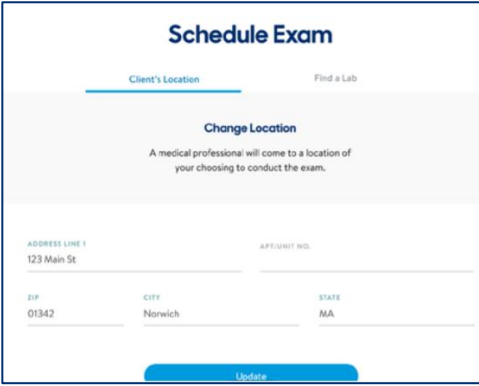
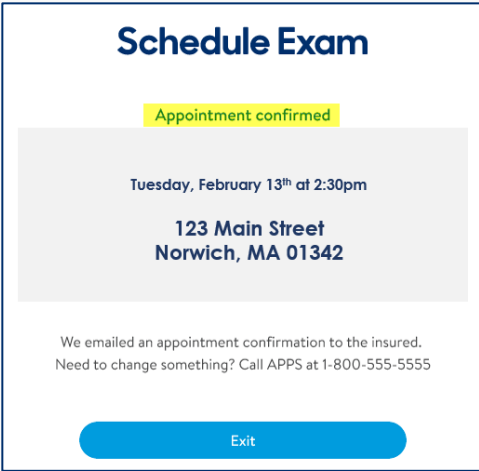
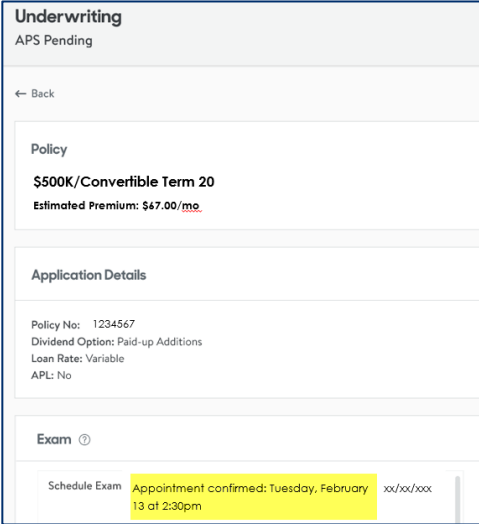
This document describes how to schedule exams in Coverpath if an application doesn't qualify for Express Path/Fluidless Underwriting.

Step	Screenshot
<p>1. When your client needs an exam, you and any case followers will receive an email letting you know the scheduling tool is available.</p>	
<p>2. From the “Schedule Exam” drop down, select “Schedule Online”.</p>	
<p>3. Select a day and time over the next two weeks and select “Next”.</p> <p>NOTE: For a different date or if there's no availability in the next two weeks, click “Schedule by Phone”, follow the prompt, and dial the number on the screen to finish scheduling.</p>	

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Scheduling Exams in Coverpath

Step	Screenshot
<p>4. If your client wants the examiner to meet at a different location than the address on the application, click "Change Location" which will open this screen.</p>	
<p>5. Once your date, time and location are selected your client will receive a confirmation via email and you will see the confirmation screen.</p>	
<p>6. You can also view the confirmation and track exam updates in your Coverpath Case Center.</p> <p>A confirmation email is sent to your client along with you and any case followers.</p>	

Scheduling Exams in Coverpath

Coverpath gives you the ability to select which paramedical exam vendor you would like your clients to use either ExamOne or APPS.

- Your Coverpath account defaults to ExamOne. The first time you log in, you will see a prompt confirming that ExamOne is selected.
- You can update your default vendor in your Account Settings.

ExamOne Process	APPS Process
<ol style="list-style-type: none">1. When your client eSigns their application, you will receive an email notification to schedule their exam in Coverpath.2. You can schedule the exam as soon as your client e-signs the application. If you do not want ExamOne contacting your client, you should schedule the exam as soon as you know the exam is needed.3. If ExamOne confirms an appointment with your client before you have an opportunity to schedule it, you will no longer have access to the scheduling calendar.	<ol style="list-style-type: none">1. When your client eSigns their application, you will receive an email notification to schedule their exam in Coverpath.2. You have 48 hours to schedule your exam before the vendor contacts your client to schedule the appointment.3. After the 48-hour window, APPS will begin reaching out to your client and the scheduling tool will no longer be available in your Coverpath.

Scheduling Exams in Coverpath

Frequently Asked Questions

Q: If I do not take any action in my account center to schedule an exam, what will happen?

- **For ExamOne:** The vendor may start to call within 4 hours of receiving the exam order (after eSign).
- **For APPS:** After 48 hours of no action on your part, the vendor will begin reaching out to your client to schedule.

Q: How can I reschedule the exam?

You will need to call the vendor. Contact:

- ExamOne at (866) 452-2663, extension 2.
- APPS at (516) 822-6230.

Q: What if I want to cancel the exam because I scheduled the exam myself outside of Coverpath? Is it the same process for both vendors?

For both vendors:

1. Click "Have (ExamOne/APPS) call client".
2. Contact support to cancel the order with the vendor.
3. Provide CCA with the lab slip once the advisor has it.

Caveat: The client may be contacted for scheduling if the vendor can't cancel the order right away for any reason.

Q: If I change the exam date over the phone with the vendor, will my account center update accordingly?

Yes, the new information appears as a status update in the Exam info card in your Client Case Center.

Q: Is there a way to cancel the Coverpath appointment in the platform?

No, you will need to call Support or call the exam vendor to cancel.

- For ExamOne, you can call as soon as the client signs "
- For APPS, you/your proxy needs to select "Schedule by phone" and call support to cancel. Support will then cancel with the vendor.

Q: When does the email notification generate to advisors and followers? Does it go to all case followers?

The email will be sent to you and any case follower(s) when an exam is available for scheduling. The email tells the advisor/followers how long they have to schedule before the vendor takes over. The email also includes an option to schedule in Coverpath, which brings them to the case in their Account Center.

Another email is sent when scheduling happens, confirming the time and location of the exam. This email is sent to the owner, insured, advisor and any case follower(s).

Q: What if I want an examiner that speaks a specific language or is a certain gender?

You or your proxy should click the "Have APPS call the client" option, or go through the "Schedule by phone" flow to send to APPS without a scheduled date. Then Call APPS to get their preferred examiner attached.

Q: What should I do if I don't see availability in the 2 weeks shown?

Follow the "Schedule by Phone" instructions regarding not seeing availability that works for your client.