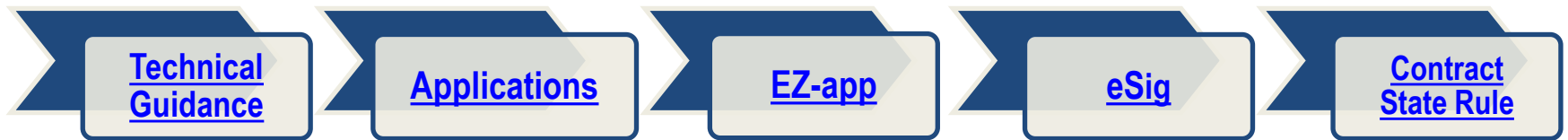


EZ-app Training Materials



Technical Guidance

[Settings for Apple Products](#)

[Settings for Apple iOS 7](#)

[Settings for Apple iOS8](#)

[EZ-app Technology Considerations for Your Practice.
What's the Right Device?](#)



Applications

[A1000](#)

[A1500](#)

[A2000](#)



A1000

[A1000 Annotated Application](#)

[A1000 Packages](#)

[A1000 Supplements](#)

[Connecting A1000 to EZ-app](#)

[Completing the Product Section for Alternate & Additional Policies](#)

[Key Differences in Respond ADE when using A1000](#)



A1500

[A1500 Annotated Application](#)

[CareChoice One: Application Lifecycle Reference Sheet](#)

[CareChoice One: New Business Reference Sheet](#)



A2000

[A2000 Annotated Application](#)

[Business Overhead Expense Supplement](#)

[A2000 Packages](#)

[Connecting A2000 to EZ-app \(Non-DI Pilot\)](#)

[Connecting A2000 to EZ-app \(DI Pilot\)](#)

[Key Differences in Respond ADE when using A2000](#)

[Connecting the A2000 to DI App Capture](#)



EZ-app

[EZ-app Tour](#)

[EZ-app My Cases \(eLearning\)](#)

[Entering Beneficiary Information](#)

[Creating & Submitting for Producers](#)

[Creating & Submitting for NBC's](#)

[Creating & Submitting CareChoice One Cases](#)

[Completing the Electronic Application](#)

[Completing the Product Screen for CareChoice One](#)

[Conversions](#)

[Entering Alternate & Additional Policies](#)

[Error Message Reference Sheet](#)



EZ-app

[LTCR](#)

[View My Cases/Direct Access](#)

[Entering Owner Information](#)

[Payments/TLIR](#)

[Entering Producer Statement Information](#)

[Reg 60](#)

[1035 Exchange/Replacements](#)

[EZ-app Tips](#)

[Entering Non-Med Information](#)



eSignature

[Collecting eSignature via Email](#)

[eSignature Email Video](#)

[Collecting eSignature Face-to-Face \(Laptop\)](#)

[eSignature Face-to-Face \(Laptop\) Video](#)

[Collecting eSignature Face-to-Face \(Tablet\)](#)

[eSignature Face-to-Face \(Tablet\) Video](#)



Contract State Rules

Rule: Contract state is determined by the residential* state of the owner. The rule will apply to all life and disability products even those not supported in EZ-app.

*The following will apply based on Owner type:

- Entity = Contract state is state in which the Entity has the legal address
- Trust = Contract state is the Situs state of the Trust
- Owners outside U.S. = Contract state where Owner signs the application

Alternative (requires Situs form) : You can use the state where the owner

- Has a second home or
- Works

The signature state must match to the state included in the address noted above.

Note: The alternative option above will not be available in the following states – the contract state must be the owners primary residential state or the system will create a hard stop.

Massachusetts	New York	South Carolina
Minnesota	Texas	Idaho
Mississippi	North Carolina	Utah





We'll help you get there.®