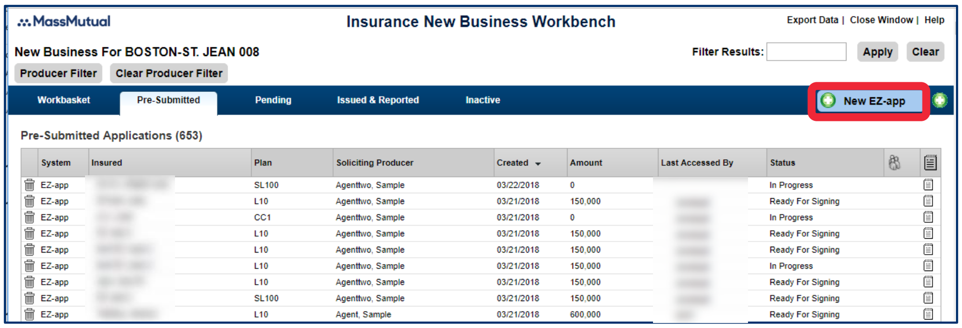
Complete an EZ-app via Workbench

Reference Sheet

Use this reference sheet as a guide for completing electronic applications in EZ-app via Insurance Workbench.

Once you have accessed the Insurance Workbench:

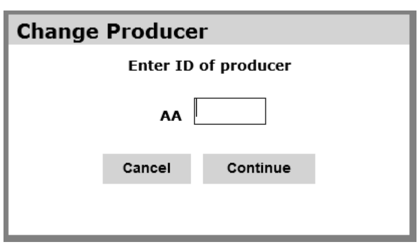


Click *New EZ-app* to start a new case.

Access an in progress case from the Pre-submitted tab.

Quick Tip: Advisors only may access EZ-app directly through direct access link: [*https://fieldnet.massmutual.com/ezapp/public/login.jsp*](https://fieldnet.massmutual.com/ezapp/public/login.jsp)

When a New Business Coordinator is completing the application for the Advisor, the Insurance Workbench will prompt you to enter the advisor ID.



Quick Tip: The system will validate the advisor number and the relationship to the person/agency entering the information.

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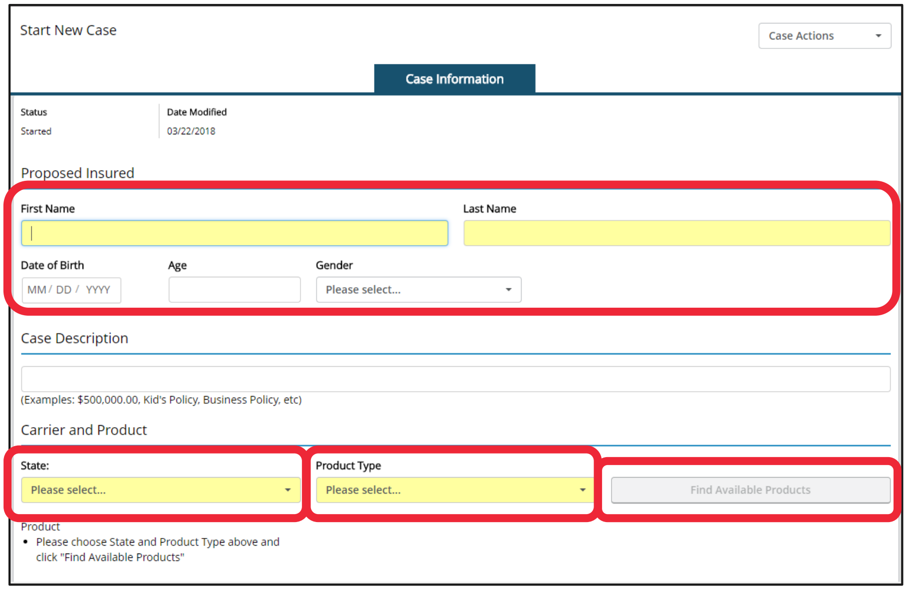
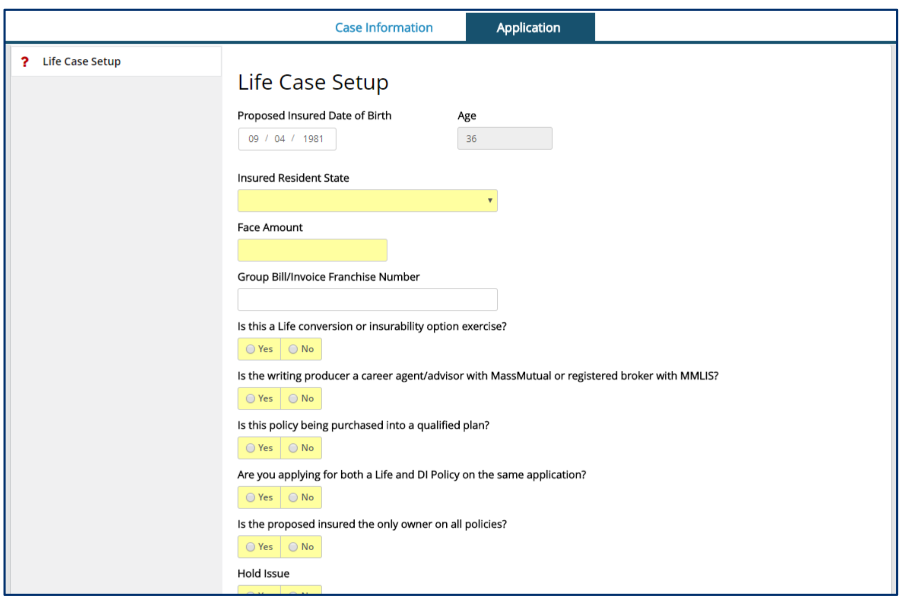
To begin a new case in EZ-app, the Case Information screen will request some basic information to help set up the case.



- **Enter** basic *Insured* information. For SWL cases, the proposed insured name entered on the case information screen shall equal the 1st proposed insured.
- **Select** the contract state and product type.
- **Select** *Product Type* (Whole Life, Universal, Term and Disability).
- **Click** *Find Available Products* and choose from the list displayed.

Quick Tip: If applying for a Concur case, always lead with Life. Fields highlighted in yellow are required.

Next on the Life Case Set-up screen, the system will begin to build your application, as you answer the following questions:



• Resident State	• Contract State
• Face Amount	• Part 1 Signature
• Hold Issue	• Quick Close
• Save Age	• Restricted File

Quick Tip: The Life Case Set-up screen will not appear if you are only applying for a DI case. For SWL cases, you will not be able to do a concur case.

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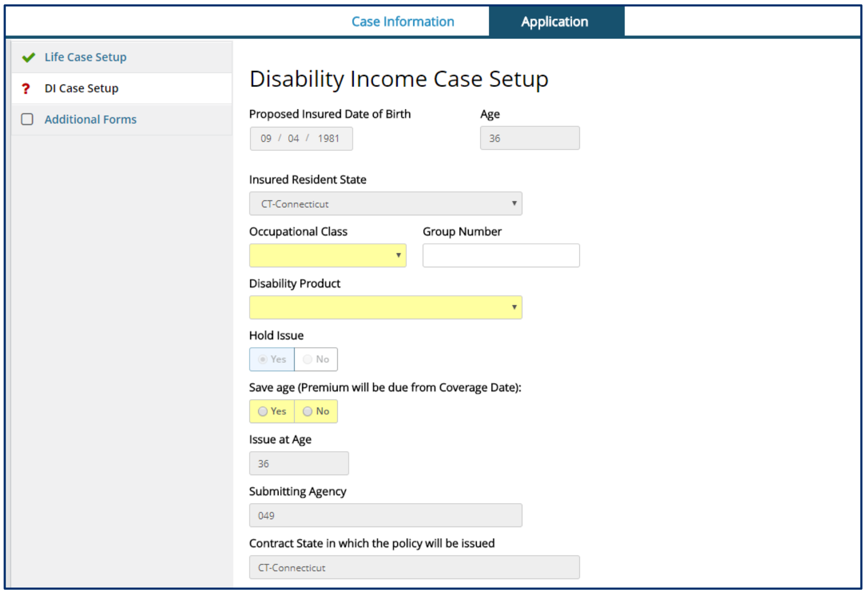
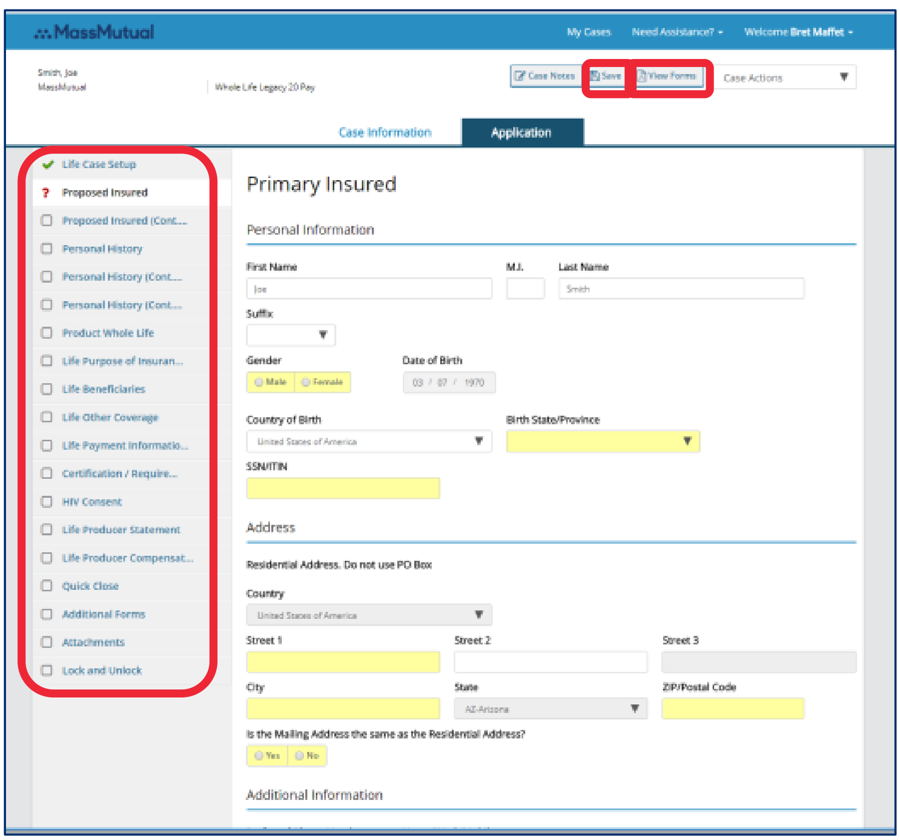
Next on the DI Case Set-up screen, the system will begin to build your application, as you answer the following questions:



• Resident State	• Contract State
• Occupational Case	• Part 1 Signature
• Hold Issue	• Quick Close
• Save Age	• Restricted File
• Submitting Agency	

Quick Tip: The DI Case Set-up screen will not appear if you are only applying for a Life case. If you are applying for a Concur case, information will pre-fill.

After completing the Case Set-up. Your application information is automatically saved in the pre-submitted tab of the Insurance Workbench. It is also saved in the My Cases tab for Advisors.



Quick Tips:

***Navigate** to any section of the application by clicking on the screens listed in the left hand navigation bar.*

- ***Red** question marks indicate that information is still required.*
- ***Green** check marks confirm the screen is filled out completely.*

***Click** the Save button at any time to save information entered to that point. The system will auto save information when clicking Next.*

***Click** the View Forms* button at any time to view a PDF version of the application.*

- *If forms are viewed or printed before green checkmarks confirm the screens are complete, the application may not include all of the required forms.*
- *The paper application package is not completely built until all screens are completed.*

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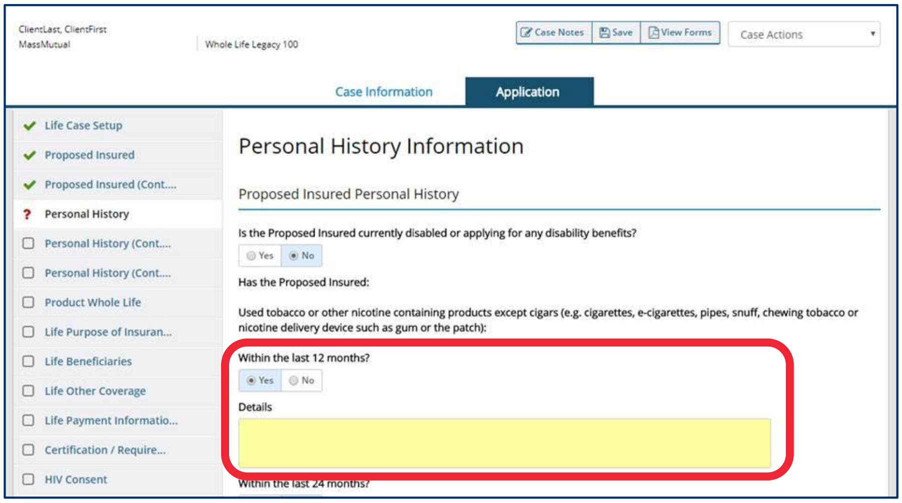
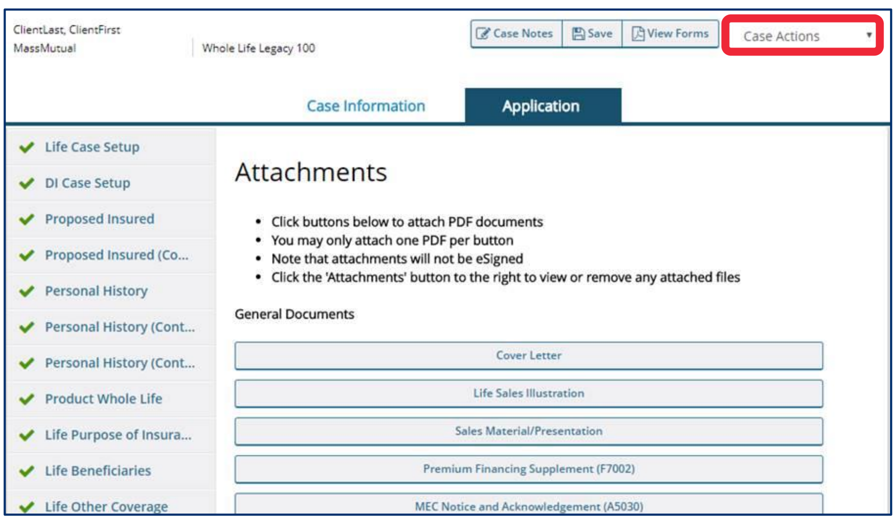
As the EZ-app screens are completed, you will notice:



- The on screen questions are reflexive.
- Additional fields will appear based on how application questions are answered.
- Navigation Bar will track your progress and indicate what is still needed.

Quick Tip: For SWL cases, there will be screens for insured 1 and insured 2.

Use the attachment screen to include additional documents to the application package before submission.



Quick Tips:

- *Only one image per document type can be attached.*
- *If you have images of the same type, combine before attaching.*
- *Only .tif or .pdf files can be attached.*
- *To remove a document that you have attached, navigate to the Case Actions menu at the top right of the screen and select the "Attachments" dropdown option. You will be able to view or delete attached documents from that screen.*

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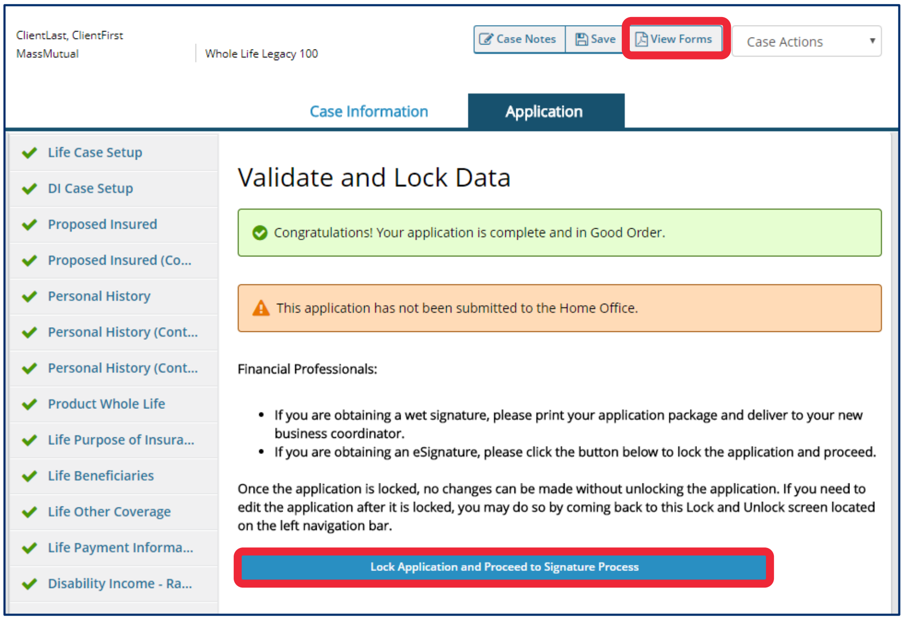
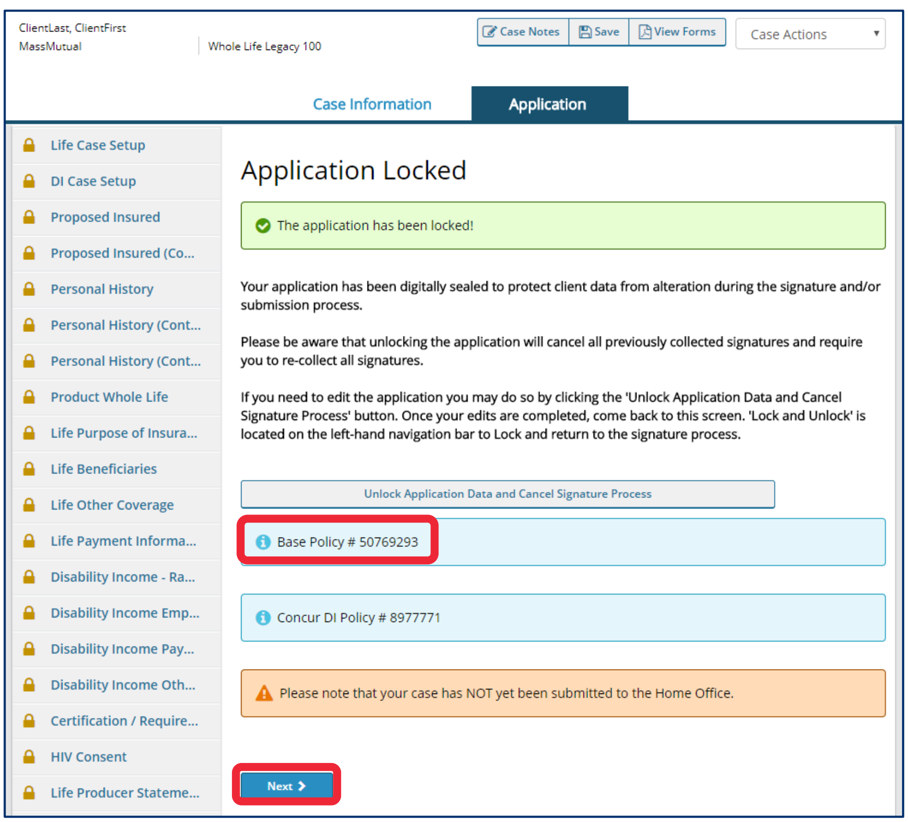
The application is ready for signatures when the Navigation Bar contains all green checkmarks and the Lock and Unlock screen displays a message that your application is in good order.



- **Click** *Lock Application and Proceed to Signature Process* for eSignature submission.
- **Click** *View Forms* and print a copy for wet signature submission.

Once the application has been locked, policy number(s) will be generated.



- **Click** *Next* to begin eSignature process.

Quick Tip: You will get multiple policy numbers for alternate/additional case submissions.