

# Track Applications in EZ-app

## Reference Sheet

Use this document as a guide to track the status of life insurance applications and navigate the 'My Cases' section of EZ-app.

## Why is it Important to Track Applications?

Tracking the life insurance application allows you to:

- Access real-time information to keep prospects informed and at ease
- When using the eSignature email method, track when the prospect signs the application to ensure it occurs within the required timeframe
- Access application information if your New Business Coordinator is unavailable

For Training Use Only. Not for Use with the General Public.

© 2018 Massachusetts Mutual Life Insurance Company (MassMutual), Springfield, MA 01111-0001.

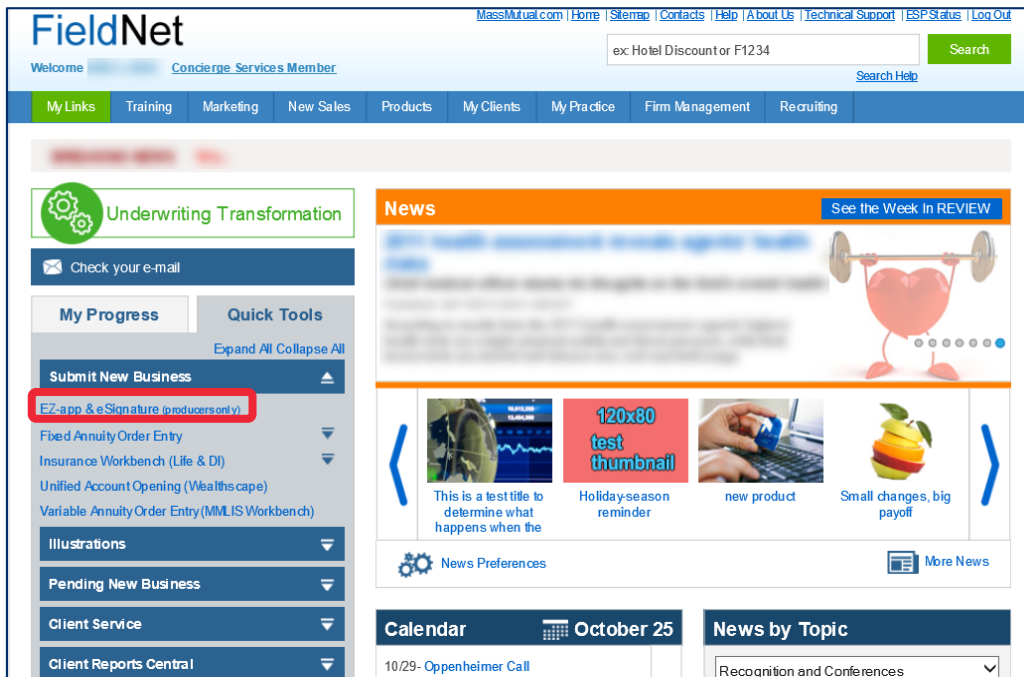
All rights reserved. [www.massmutual.com](http://www.massmutual.com).

APPL158rg7\_41 12/26/18

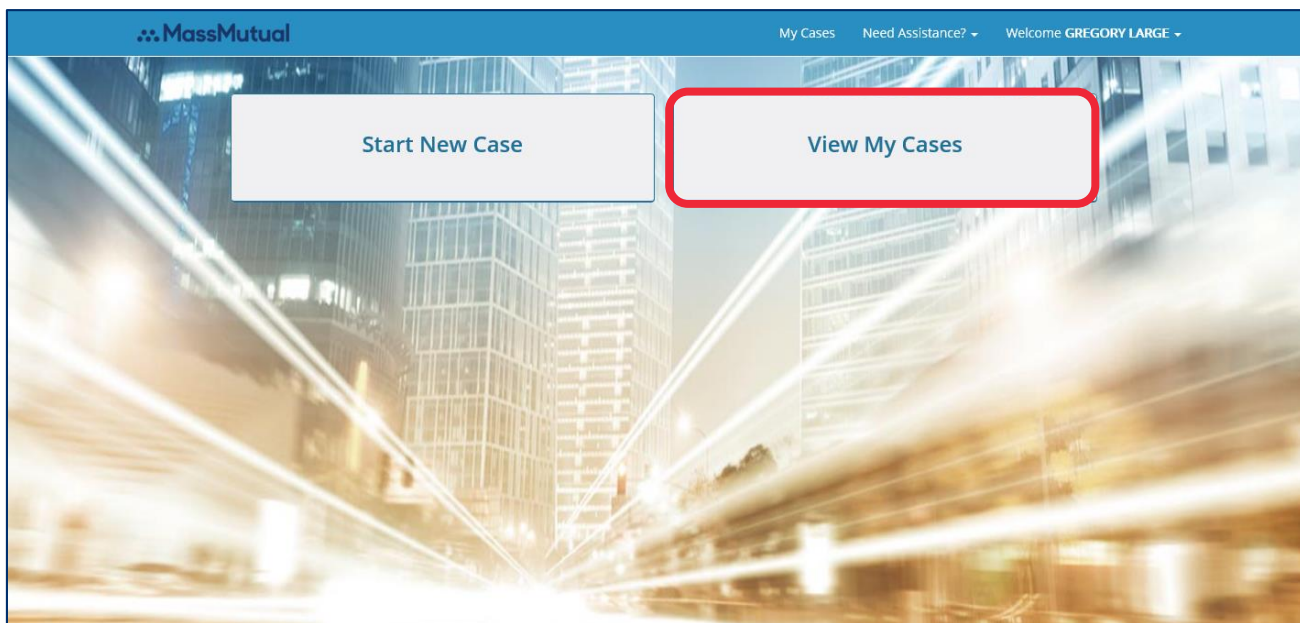
CRN202012-241235

## Track Applications in EZ-app

# Track Applications in EZ-App



1. From FieldNet, click **EZ-app & eSignature**. Login to EZ-app using your username and password.



2. From the EZ-app landing page, click **View My Cases**.

# Track Applications in EZ-app

## My Cases

MassMutual My Cases Need Assistance? Welcome

My Cases Start New Case Search All

Case Actions All Case Activity

Alerts 2

Name	Status	Carrier	Product	Date Modified	View Forms	Case Actions
[Redacted]	Awaiting Agent e-Signature	MassMutual	Vantage Term 25	11/7/2018	[View Forms]	Case Actions
Face Amount: \$2,000,000 [Case Details]						
[Redacted]	Awaiting Consumer e-Signature	MassMutual	Vantage Term 25	11/7/2018	[View Forms]	Case Actions
1,000,000 term [Redacted] Face Amount: \$1,000,000 [Case Details]						

Page 1 of 1 Go to page:

Cases 53

The My Cases screen is a repository for all pre and post submit applications. The information stays in the system for 120 days after the last time touched.

In My Cases there are two sections; **Alerts** and **Cases**.

Alert messages appear if a case needs immediate attention. You can view the alert message by right clicking the warning triangle.

# Track Applications in EZ-app

## My Cases Cont.

The screenshot displays the 'My Cases' interface. At the top, there's a navigation bar with 'MassMutual', 'My Cases', 'Need Assistance?', and 'Welcome GREGORY LARGE'. Below this, a 'My Cases' header includes a 'Start New Case' button and a search bar. The main content area shows a table of cases with the following columns: Name, Status, Carrier, Product, Date Modified, View Forms, and Case Actions. Red annotations (circles and boxes) identify these columns and their data in the table rows. The table lists four cases, each with a 'Case Details' button and a 'Case Actions' dropdown menu.

1	2	3	4	5	6	7
Name	Status	Carrier	Product	Date Modified	View Forms	Case Actions
Testster, Jane	Started	MassMutual	Whole Life Legacy 10 Pay	10/23/2018		Case Actions
Testster, Jane	Started	MassMutual	Whole Life Legacy 10 Pay	10/23/2018		Case Actions
IssueAgeSix, TestNY	Started	MassMutual	Universal Life Guard	10/23/2018		Case Actions
	Started	MassMutual		10/23/2018		Case Actions

On the My Cases screen you are able to see:

1. **Name:** The proposed insured of a particular case.
2. **Status:** The current standing of the case. See [View My Cases Tab Statuses](#) for status definitions. You can also click on the info icon for status definitions.
3. **Carrier:** the Company offering the product. This will always be MassMutual.
4. **Product:** The type of policy for which the proposed insured is applying.
5. **Date Modified:** The last time the application was edited.
6. **View Forms:** Clicking the PDF icon will display the application package.
7. **Case Actions:** This drop down menu allows you to open, delete, duplicate, import and export the select case.

# Track Applications in EZ-app

## My Cases Cont.

The screenshot displays the 'My Cases' interface in the EZ-app. At the top, there is a blue header with the MassMutual logo, 'My Cases', 'Need Assistance?', and 'Welcome GREGORY LARGE'. Below the header, there is a 'My Cases' section with a 'Start New Case' button and a search bar. The main content area shows a list of cases with the following columns: Name, Status, Carrier, Product, Date Modified, View Forms, and Case Actions. The first case is for 'Tester, Jane' with a status of 'Started', carrier 'MassMutual', and product 'Whole Life Legacy 10 Pay'. The date modified is '10/23/2018'. The 'View Forms' column contains a PDF icon, and the 'Case Actions' column contains a dropdown menu. Three red callouts are present: 1 points to the client name 'Tester, Jane'; 2 points to the 'Case Details' button; 3 points to the PDF icon in the 'View Forms' column.

Name	Status	Carrier	Product	Date Modified	View Forms	Case Actions
Tester, Jane Face Amount: \$50,000 Case Details	Started	MassMutual	Whole Life Legacy 10 Pay	10/23/2018	PDF icon	Case Actions
Tester, Jane Jane A. Tester Whole Life Face Amount: \$500,000 Case Details	Started	MassMutual	Whole Life Legacy 10 Pay	10/23/2018	PDF icon	Case Actions
IssueAgeSix, TestNY Duplicated Case Face Amount: \$400,000 Case Details	Started	MassMutual	Universal Life Guard	10/23/2018	PDF icon	Case Actions
Case Details	Started	MassMutual		10/23/2018	PDF icon	Case Actions

1. Click on the client's name to access the Case Information and Application tabs for that particular case.
2. To view details about a specific case, click **Case Details** under the client's name. The case details screen contains useful tracking information.
3. To view a PDF of the application package, click the **PDF icon**.

# Track Applications in EZ-app

## Case Details

MassMutual My Cases Need Assistance? Welcome

Back to My Cases

### Case Details

View Forms Case Actions

**1** e-Signer Status: No e-Signature records exist

**2** Activity History:

Date/Time	Activity
10/23/2018 9:29 AM	Case has been Submitted to Mass Mutual
10/23/2018 9:29 AM	Case e-Submitted
10/23/2018 9:26 AM	Case locked
10/23/2018 9:21 AM	Case started
10/23/2018 9:21 AM	Case unlocked

**Case Summary:**

Insured Name	[REDACTED]
Insured Date of Birth	[REDACTED]
Phone Number	[REDACTED]
Address	[REDACTED]
Carrier	MassMutual
State	NY
Product Type	Universal Life
Product Name	Universal Life Navigator
Face Amount	\$400,000

1. **e-Signer Status** tracks the status and details when using electronic signature via email.
2. **Activity History** tracks and log activities and actions performed on the case
3. Click on **View Forms** to view a PDF version of the application package.

## 'View My Cases' Tab Statuses

Status	Definition
Application e-Submitted	The e-Submission process is complete and the application has been electronically submitted for processing. For additional information, contact the carrier.
Awaiting Agent e-Signature	All client e-Signatures have been collected, the application is now ready for the agent to sign.
Awaiting Consumer e-Signature	One or more consumer e-Signatures are outstanding and required.
Consumer Declined to e-Sign	One or more consumers have declined to e-Sign. The client should be contacted to determine why the e-Signature process was terminated.
e-Signature Link Expired	The e-Signature process is time sensitive, and one or more e-Signature links have expired. New emails should be sent to those individuals whose links have expired.
e-Submitted with Wet Signatures	The application has been electronically submitted to the carrier without signatures. The application must be printed and wet signatures must be collected from all required parties.

## Track Applications in EZ-app

Status	Definition
Locked – Ready to Sign	All required information has been collected. The application has been locked and it is ready to be signed. A signature method must now be selected.
Started	An application has been started. Additional required information must be collected before the application can be signed and submitted to the carrier.