

EZ-app

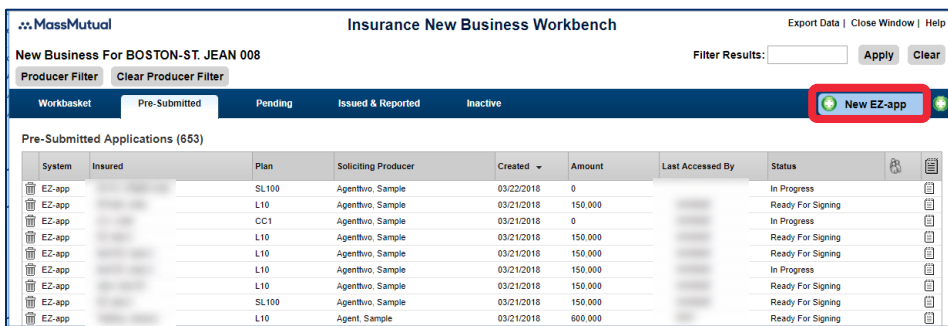
Completing Electronic Application

Description

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

To take advantage of all the benefits of EZ-app via Salesforce, refer to [Submit Business](#) reference sheet.

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: Producers only may access EZ-app directly through direct access link:

<https://fieldnet.massmutual.com/eza/pp/public/login.jsp>

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

Change Producer

Enter ID of producer

AA

Quick Tip: The system will validate the producer 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.

Quick Tip: Contract state = Owner's resident state

- **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 Producers.

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:

ClientLast, ClientFirst
MassMutual | Whole Life Legacy 100

Case Notes Save View Forms Case Actions

Case Information Application

Life Case Setup
Proposed Insured
Proposed Insured (Cont....
Personal History
Personal History (Cont....
Personal History (Cont....
Product Whole Life
Life Purpose of Insuran...
Life Beneficiaries
Life Other Coverage
Life Payment Informatio...
Certification / Require...
HIV Consent

Personal History Information

Proposed Insured Personal History

Is the Proposed Insured currently disabled or applying for any disability benefits?
 Yes No

Has the Proposed Insured:
Used tobacco or other nicotine containing products except cigars (e.g. cigarettes, e-cigarettes, pipes, snuff, chewing tobacco or nicotine delivery device such as gum or the patch):
Within the last 12 months?
 Yes No

Details

Within the last 24 months?

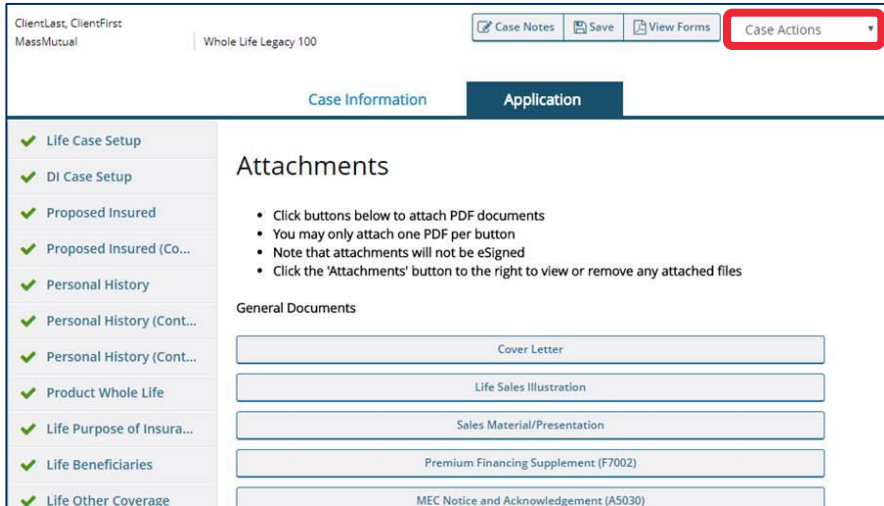
- The on screen questions are reflexive.
- Additional fields will appear based on how application questions are answered.
- Navigation Bar will track your progress and indicate what is still needed.

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

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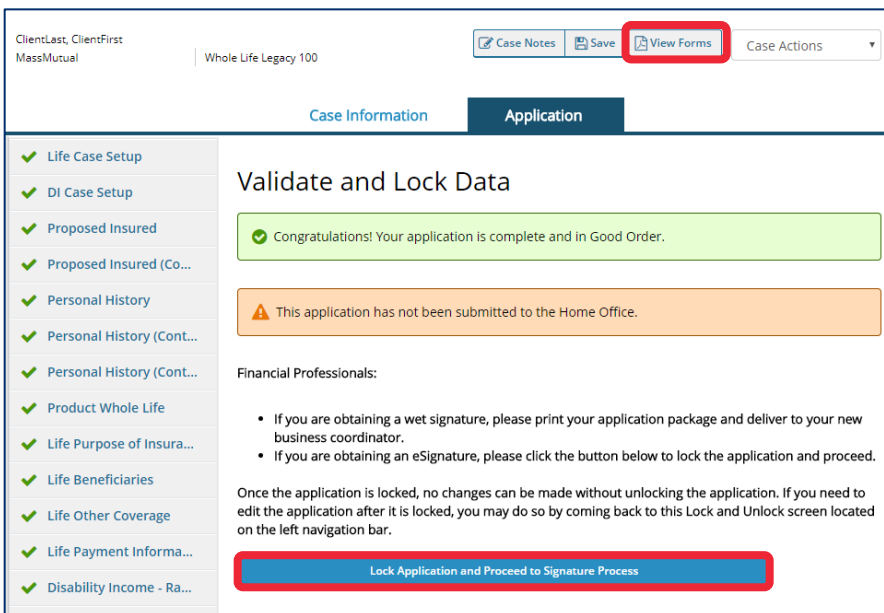
Use the attachment screen to include additional documents to the application package before submission.



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.

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.

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

The screenshot shows the 'Application' tab in the MassMutual interface. The main heading is 'Application Locked'. A green notification box states: 'The application has been locked!'. Below this, a text block explains: 'Your application has been digitally sealed to protect client data from alteration during the signature and/or submission process. Please be aware that unlocking the application will cancel all previously collected signatures and require you to re-collect all signatures. If you need to edit the application you may do so by clicking the 'Unlock Application Data and Cancel Signature Process' button. Once your edits are completed, come back to this screen. 'Lock and Unlock' is located on the left-hand navigation bar to Lock and return to the signature process.' There are two policy number fields: 'Base Policy # 50769293' and 'Concur DI Policy # 8977771'. A warning box states: 'Please note that your case has NOT yet been submitted to the Home Office.' At the bottom, there is a 'Next >' button.

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

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

Please see eSignature Quick Reference Sheets for information and tips on how to utilize the EZ-app eSignature options.

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