MassMutual: Coverpath Policy Migration

Enhancing the Digital Experience Reference Sheet

This reference sheet outlines the high-level changes that will occur as policies move to Coverpath and will be helpful to advisors who are new to Coverpath. If you require greater detail about the changes, please refer to the Coverpath Help Center Migrated Policies topic.

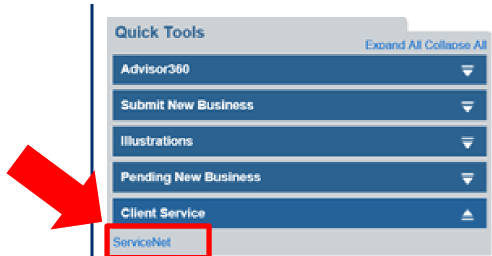
Admin Platform Migration Initiative

As part of a multi-year initiative to consolidate administrative systems, a number of MassMutual life insurance policies are moving to Coverpath.

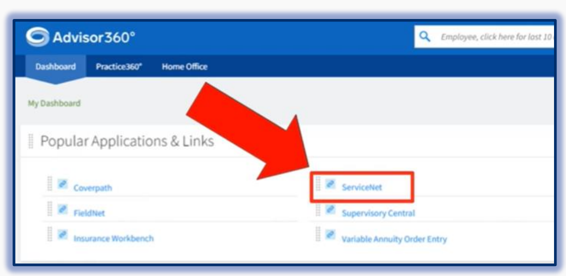
Accessing Self-service Functionality

As a best practice, use the ServiceNet 2.0 platform to access migrated inforce policy information

FieldNet
Quick Tools



Advisor360° Dashboard
Popular Applications & Links

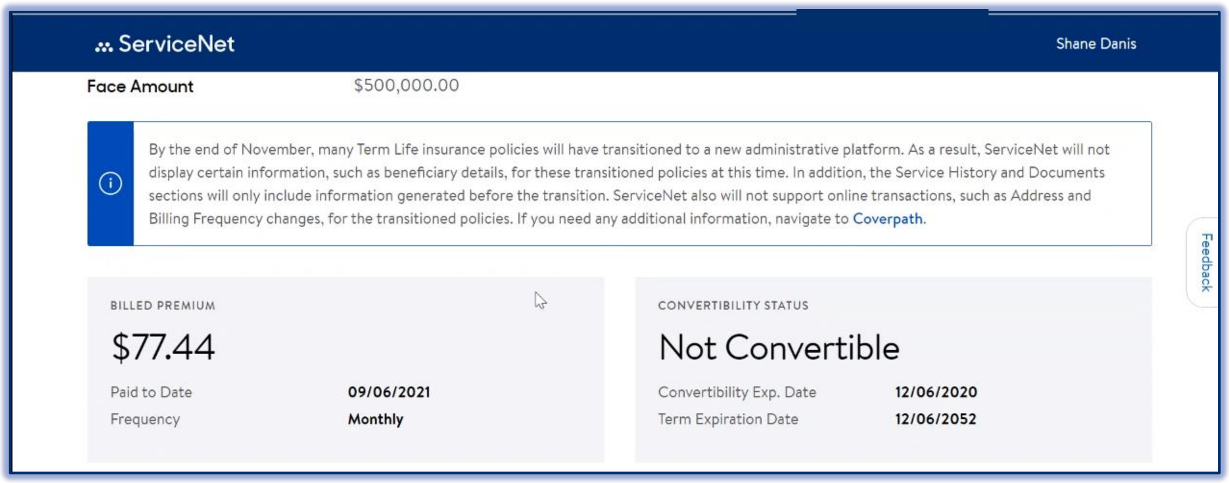


Note: The Client360° Insurance Tab will automatically route users to the Coverpath Advisor Case Center if the policy was migrated to, or sold through, the Coverpath platform.

Policy Details (for Term only)

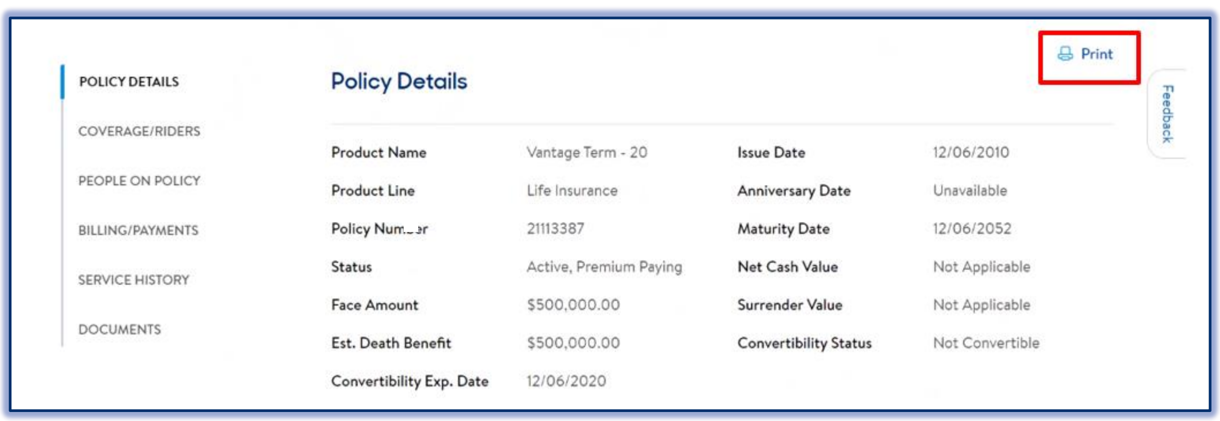
Inforce policy information is read-only and readily available on ServiceNet 2.0 for the majority of migrated term business.

Platform messaging will provide an overview of available information and a link to the Advisor Case Center on Coverpath, when applicable.



Printing (for Term only)

SeviceNet 2.0 print capabilities are available for the majority of migrated term policies and are approved for advisor and client use.



Note!

For Whole Life pilot policies only, advisors that go to ServiceNet will be routed to the Advisor Case Center on Coverpath.

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Servicing Transactions

The self-service steps for the most common requests are summarized below.

Submit completed servicing forms via email to: supportmm@massmutual.com

Service Request	Self-service Steps

• **Direct bill payment options**	Options include:
	• **One time online payment** (submit via massmutual.com)
	• **Mail a paper check to**:
	  ○ MassMutual Financial Group
	  ○ BOX 371368
	  ○ Pittsburgh, PA 15250-7368
	• **Change to PAPP** by completing the Pre-Authorized Payment Plan (PAPP) form
	• **Wire transfer to:**
	  ○ Account Name: C.M. Life Insurance Company
	  ○ Account Number: 550384124
	  ○ Bank Routing Number: JPMorgan Chase
	  ○ Bank Name: 021000021
	• **Update or sign-up for Home Banking (Bill Pay)**
	  ○ Payee: MassMutual
	  ○ Account Number: 10<policy number>
	• **Phone Payment** (can be requested one time)
	  ○ Policyowner support 866.618.7797

• **Address changes**
• **Email changes**
• **Name changes for an owner, insured or payor**
	• Click here for procedures.
	• Either form can be used.
	  ○ MM Service Request Form (print only).
	  ○ F6070: Change Request Form (fillable).

Update beneficiary	• Click here for procedures.
	• Beneficiary change forms include:
	  ○ Entity Owner & Beneficiary Change Request (print only).
	  ○ Individual Owner & Beneficiary Change (print only).
	  ○ Beneficiary Change Request (print only).
	• The owner will receive a confirmation letter once complete.

Billing frequency change	• Click here for PAPP procedures. • MM (PAPP)Payment Plan Pre-Authorization Form (print only). NOTE: For direct billing requests, contact Digital Customer Care.
• **Premium history** • **Policy verification letter** • **Service tracking history**	• Contact Digital Customer Care.

Submit completed servicing forms via email to: supportmm@massmutual.com

Inforce Illustrations (for Term)

Coverpath	Digital Customer Care
Basic illustrations, including face amount decrease are available on Coverpath.	On-demand illustrations for other scenarios are available upon request.

Inforce Illustrations (for Whole Life)

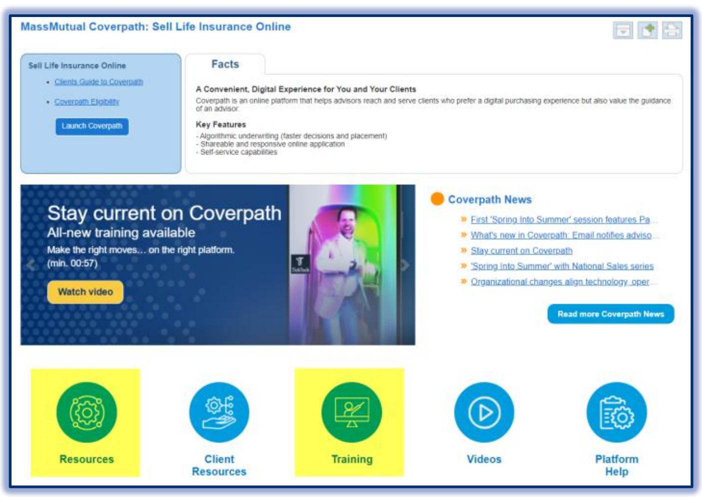
Coverpath	Digital Customer Care
Inforce illustrations for current face amount are available on Coverpath.	On-demand illustrations for other scenarios are available upon request.

Advisor Changes and Reassignments

Advisors that have both issued and migrated policies on Coverpath will call Digital Customer Care for assistance for all inquiries including policy commissions and advisor changes.

Self-help through FieldNet

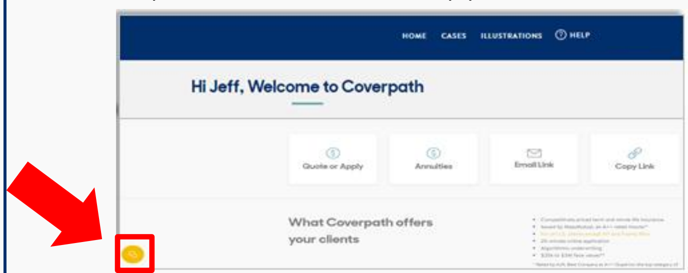
Go to the Coverpath page on FieldNet to access additional resources and training.



Live Support

There is a dedicated service team for Coverpath policies. Contact Digital Customer Care and Advisor Services for policy specific questions and issues.

Method	Coverpath

Advisor Support	• Phone - 866.957.5347, Monday-Friday from 8AM – 8PM ET
	• Email:
	  o General inquires – support@coverpath.com
	  o Migrated policies – supportmm@massmutual.com
	• In-platform chat; live support, not bots!
	

Policyowner Support	• Phone - 866.618.7797, Monday-Friday from 8AM – 8PM ET • Email – Help@coverpath.com

Additional Training Resources

- Billing Payment Options & Servicing
- MassMutual Coverpath Learning Path
- Coverpath Help Center: Migrated Policies
    - Migrated Policies: Notifications, Policy Detail & Servicing
    - Migrated Policies: Client Experience
    - FAQs