

Important Information on the new Individual Disability Insurance Application

Forms will now be unbundled so that you can choose only those forms needed for your particular sale. For most states, these changes significantly reduce the size of our application packages.

The screenshot displays the MetLife eForms website interface. At the top, there are three tabs: "Individual Product Forms", "Group Product Forms", and "Administrative Forms". Below these is the "MetLife eForms" logo. A main navigation bar includes "Home", "MyForms", "MySearches", "Insurance", "Investments", "Financial Planning", and "Life Advice". Under "Insurance", there are sub-links for "Life", "Disability Income", "Long-Term Care", and "Auto and Home".

A "What's New" section features a spiderweb icon and a link to "Archived What's New articles". Below this is a banner with the text "Helping to accelerate your business" and a cartoon character.

The "About the MetLife eForms Website" section provides instructions on how to use the site, including links for "Simple Search", "Smart Search", "Form Services Guide", and "Work Request".

On the right side, there is a search interface with two sections: "Simple Search" and "Smart Search". The "Simple Search" section includes dropdown menus for "What do you want to do today?" (set to "Sell an Individual Policy"), "Choose an application:" (set to "Standard Application"), "Select the state the insured or applicant lives in:" (set to "Alabama"), and "What product do you want to sell?" (set to "Income Guard"). There are "Reset All" and "Submit" buttons. The "Smart Search" section is currently collapsed.

On May 17, 2013 eForms will be presenting unbundled packs from the Disability Insurance Smart Search. Required Forms will be presented pre-selected with the Additional Forms You May Need displayed as unchecked. This new forms return will allow users to select (or unselect) specific forms needed for a sale. The IDI-FORMSGUIDE, which instructs users on which forms are needed and when, will be presented as Instructions.

Your Search Results:

Please select the form(s) you want from the Results table below. Use the Selected Item Actions for Viewing, Emailing, etc. Hover over the Item Action to view instructions.

Selected Item Actions						
View/Print	Email	Fax	Add to MyForms	Get eApp/SmartForms	Revise Search	New Search

▼ Informational Forms:					
<input type="checkbox"/> All	Form Number	Edition Date	Form Name	File Type	Description
<input checked="" type="checkbox"/>	IDI-FORMSGUIDE	04/13	A Guide to Individual Disability Insurance New Business Forms		A guide that describes each new business form; when it applies; if there are state variations and if it should be left with the client or returned with the application.

▼ Required Forms:					
<input type="checkbox"/> All	Form Number	Edition Date	Form Name	File Type	Description
<input checked="" type="checkbox"/>	DI-APP-SUBM-CKL	04/13	DI Submission Checklist		Submission Checklist. Required with the Disability Income Insurance application.
<input checked="" type="checkbox"/>	IDIAPP12-01-AL	01/12	Application for Individual Disability Income Insurance - AL		AL application. For use when applying for Disability Income Insurance.
<input checked="" type="checkbox"/>	IDIAPP12-02-NW	05/13	Individual Disability Health Questionnaire Supplement - Nationwide		Nationwide medical supplement. Required with the Disability Income Insurance application.
<input checked="" type="checkbox"/>	COMPDISC-IDI	11/11	Compensation Disclosure - Disability		This form is used to disclose to the client that the Producer will be compensated for the sale of Individual Disability policies. It provides an overview of producer compensation. The form must be provided to the client at point of sale.

View/Print	Email	Fax	Add to MyForms	Get eApp/SmartForms	Revise Search	New Search
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These unbundled forms, or components can be put together as a “pack” electronically by using View/Print, or can become a fillable ‘pack’ by using the Get eApp/SmartForms button. eApp allows you to cross-fill all of the forms in the “pack” and save and email the “pack” with data filled in.

Please note that the old DI-APP-PACKs are not available via eApp.

We hope that these changes will help to streamline the process, reduce paper, and be green.