

JH Life eTicket

FIRM USER GUIDE



JH Life eTicket allows you — and your producers — to quickly and easily initiate an application for John Hancock Term and John Hancock Term with Vitality. Please contact your John Hancock salesperson for information on adding JH Life eTicket custom link directly to your firm’s website; the eTicket can also be accessed from John Hancock’s producer website.

General information

Agency Details

Before submitting business via JH Life eTicket, confirm the information displayed on the “Agency Management” page. **IT IS IMPORTANT TO UPDATE YOUR “GENERAL AGENT NUMBER” TO MATCH YOUR JOHN HANCOCK APPOINTMENT NUMBER.** You will need this number to view your cases on APPSLive.com.

The screenshot shows the John Hancock Agency Management interface. On the left is a navigation menu with 'Agency Management' highlighted. The main content area is titled 'Agency Details' and contains several sections: 'Agency Information' with fields for Agency Email and Agency Phone; 'Agency self registration' with a checked box for 'Allow user self registration from login page' and a table of carriers; 'Default Report To Person' set to 'Self-Agency L1 user/filter'; 'Layout' section; 'Principalling' section with 'Check principalling' and 'Uncheck principalling' buttons; and 'Agency Numbers' section with a pop-up window for 'John Hancock Life Insurance Company USA' containing fields for General Agent Number (12345), General Agent Name (test), Phone, and E-mail. A yellow callout line points from the 'AGENCY MANAGEMENT' label to the 'Agency Management' menu item. Another yellow callout line points from the 'GENERAL AGENT INFORMATION' label to the 'Agency Numbers' pop-up window.

Carrier Name	Approved
Carriers Approved for Drop Tickets	
John Hancock Life Insurance Company USA	<input checked="" type="checkbox"/> Approve All Agents
Carriers with Quoting Capabilities Only	
John Hancock Life Insurance Company US	<input checked="" type="checkbox"/> Approve All Agents

John Hancock Life Insurance Company USA	
General Agent Number	General Agent Name
12345	test
Phone	
E-mail	

Principaling

You can also set up the “principaling” feature from the “Agency Management” page. Principaling allows you to review the Ticket before it is submitted to John Hancock. It is important to note that if this feature is selected, nothing will happen with the submission (i.e., telephone interview with the client, setting up the case in our New Business system, etc.) until you’ve reviewed each screen within the eTicket and hit “submit.”

You can set up principaling for all of your agents, or on an individual basis.

The screenshot shows the 'Agency Management' page in the John Hancock system. The 'Agency Management' menu item is highlighted in the left sidebar. The main content area is titled 'Agency Details' and includes sections for 'Agency Information', 'Agency self registration', and 'Principaling'. The 'Principaling' section contains the following text and controls:

Use this buttons to check or uncheck "Principaling" check-box for agents

- Check principaling Amount of agents to update: 10
- Uncheck principaling Amount of agents to update: 2
- Default New Agents Principaling Yes

Yellow callout boxes highlight the 'Agency Management' menu item and the 'Principaling' section. A yellow line points from the 'Principaling' section to the label 'PRINCIPALING' on the right. Another yellow line points from the 'Agency self registration' section to the label 'AGENCY MANAGEMENT' on the right.

User Administration

Use this page to pre-register your agents, and/or add, delete, and modify other users.

You can also reset a user’s password from this page.

The screenshot shows the 'User Administration' page in the John Hancock system. The page title is 'User Administration' and the user 'Angela Calcagno' is logged in. The page includes a search bar and a table of users. The table has the following columns: ID, Login, Last Name, First Name, Phone, E-mail, Status, Agency, Role, and Delete. The table contains 15 rows of user data.

ID	Login	Last Name	First Name	Phone	E-mail	Status	Agency	Role	Delete
251	hancock	Hancock	John		john.hancock@hancock.com	Active	TestAgency	Agent	Delete
269	amanda	Murphy	Amanda		amanda.murphy@hancock.com	Active	TestAgency	Agent	Delete
287	samarat	Tripp	Samara		samara.tripp@hancock.com	Active	TestAgency	Agent	Delete
290	jlingenfelter16133	Lingenfelter	Jeff	8885551212	lina.ne@gmail.com	Active	TestAgency	Agency Administrator	Delete
302	mickeymouse	mouse	mickey		cmisan@hancock.com	Active	TestAgency	Agent	Delete
311	jlingenfelter1	Agent	Jeff	8885551212	jl@hancock.com	Active	TestAgency	Agent	Delete
314	cmilosh14	agencyadmin	cmilosh		cmilosh@aol.com	Active	TestAgency	Agency administrator	Delete
717	jterney	Connolly	Jennifer	6175728659	btorney@hancock.com	Active	TestAgency	Agent	Delete
746	llewyne	Levyne	Linda	8157905134	llewyne@hancock.com	Active	TestAgency	Agent	Delete
748	mgibson	Gibson	Matt		MGibson@hancock.com	Active	TestAgency	Agent	Delete
749	cmoya	Moya	Celeste		CMoya@hancock.com	Active	TestAgency	Agent	Delete
750	ejohnson	Johnson	Eleanor	2069729070	Eleanor.Johnson@hancock.com	Active	TestAgency	Agent	Delete
751	klipps	Lipps	Kimberly		KLipps@hancock.com	Active	TestAgency	Agent	Delete
766	Calcagno-Agent	Calcagno	Angela	6175721815	Angela_Calcagno@hancock.com	Active	TestAgency	Agent	Delete
767	Calcagno-Agency	Calcagno	Angela		Calcagno.angela@gmail.com	Active	TestAgency	Agency Administrator	Delete

Submitting a ticket

Step 1: Run a Quote

Run a quote and click the "Ticket" button next to the product you're applying for.

TICKET BUTTON

The screenshot shows the 'Start a quote' page on the John Hancock Insurance website. At the top, there are dropdown menus for 'STATE' (Massachusetts), 'DATE OF BIRTH' (August 1, 1983), 'GENDER' (Male), and 'SMOKER/TOBACCO' (No). Below these are fields for 'RATE CLASS' (Super Preferred), 'TYPE OF INSURANCE' (10 Year Term), and 'FACE AMOUNT' (\$1,000,000). A 'QUOTE' button is visible. Below this is a 'Quick Quote' table with columns: 'CARRIER', 'ANNUAL', 'MONTHLY', 'PRODUCT NAME', 'RATE CLASS', and 'TICKET'. The table lists several products, with the 'STANDARD PLUS' product highlighted in blue and its 'TICKET' button circled in yellow. A yellow line points from the text 'TICKET BUTTON' to this button.

TIP: JH Illustrator will generate the illustration and it will be included in the documents to be eSigned by the client.

Step 2: Client Information

Enter the client's information.

The screenshot shows the 'Client Information' form in the 'STEP 1 - CLIENT DETAILS' section. The form is titled 'Insured Information' and includes a table with columns: 'PRODUCT', 'FACE AMOUNT', 'RATE CLASS', 'ANNUAL PREMIUM', 'RATING %', and 'FLAT EXTRA'. Below the table is the 'Insured Information' section, which contains several fields: 'Name' (Last, First, Middle, Suffix), 'Sex' (Male, Female), 'Date of Birth' (Month, Day, Year), 'Email Address', 'Personal Address', 'Personal Phone' (Area Code, Number), 'Business Phone' (Area Code, Number), 'Best time to call' (Hour, Minute, AM/PM, Time Zone), 'Address' (Street, City, State, Zip), and 'Is insured also the Owner?' (Yes, No). The 'Insured Information' section is highlighted in red.

TIPS:

- Fields outlined in red are required.
- Fields can become required based on your responses, e.g., "Business Phone" would be required once entered as the preferred phone selection.
- If you answer "No" to "Is insured also the Owner," an Owner screen will appear after you click "Save and Continue".

Step 6: Agent Information

Enter the agent's information.

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$270.00	---	\$0/1000

Agent Information

Have you personally met the Proposed Insured? Yes No

Agent Name: [Text] Agent:

Enter Description: [Text]

Agent Code: [Text]

Agent License Number: [Text]

Serving Agent: Yes No

Social Security Number: [Text]

Phone Number: [Text]

Email Address: [Text]

Agent Address: [Text]

Split with additional agent? Yes No

[PREVIOUS](#)

TIP: Agent information pre-fills based on profile information.

Step 7: Additional Info

Use the “New Business Transmittal” and “Special Requests” screens to enter any additional information about your submission (these screens do not have any required fields).

New Business Transmittal

New Business Firm: [Text]

Contact: [Text]

Phone Number: [Text]

E-Mail Address: [Text]

Street Address: [Text]

City: [Text]

[PREVIOUS](#)

Special Requests

Please enter any information specific to the underwriting or issuance of the policy: [Text Area]

[PREVIOUS](#) [SAVE & CONTINUE](#)

Step 8: The Ticket

Submit ticket. You must review and accept the illustration before you can submit your case.

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$270.00	---	\$0/1000

Submit

By clicking the Submit button below, I certify the following:

- I am a duly licensed and appointed (if appointment is required) life insurance agent in the state in which the Owner was solicited and (if required) in the Owner's state of residence, if different;
- The plan and amount of insurance identified in this submission is suitable in view of the Owner's insurance needs and financial objectives;
- If this is a replacement, I have discussed the advantages and disadvantages of the replacement with the Owner and determined that the transaction is appropriate;
- Other than as reported in this submission, I have no information that the Owner has existing life insurance or annuities or that indicates that this coverage may replace or change any current insurance policy or annuity contract in any company;
- The information provided in this submission is complete, accurate, and correctly recorded;
- This state approved Buyer's Guide, Notice of Disclosure of Information and any other disclosure notice, statement or information required by state or federal law have been given to the Owner or will be given to the Owner prior to signing the application that will be completed as a result of this submission and no sales materials other than that approved by John Hancock has been used; and
- A John Hancock fulfillment center representative, or a representative from a third-party, is authorized to obtain such administrative information as may be necessary to complete a life insurance application and any supplemental form(s) resulting from this submission.

I acknowledge that clicking the Submit button below constitutes my electronic signature on this submission and has the same effect as if I personally signed the submission.

[Illustration preview](#) [Submit](#)

TIPS:

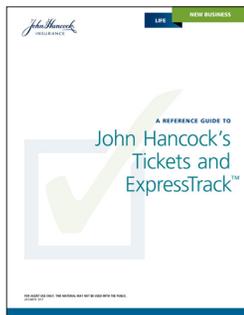
- This is the final screen prior to submission.
- Once submitted, the agent will receive an email confirmation, as will the firm contact listed in the firm profile.
- A notice will also go to the John Hancock representative to start the interview process and John Hancock will receive a copy of the ticket to set up on our New Business platform.
- Provide the client with our *Preparing For Your Telephone Interview* flyer.
- Upon receipt of the ticket, John Hancock will set up the submission in our New Business system so progress can be tracked via your usual case status tools.

Resources



Preparing For Your Telephone Interview (LIFE-6828)

This client-approved flyer will help proposed insureds prepare for their tele-interview.



A Reference Guide to John Hancock's Tickets and ExpressTrack (LIFE-6819)

Refer to this guide for a comprehensive overview of our new ticket processes and John Hancock ExpressTrack™, as well as find answers to some frequently asked questions.

For more information, contact your John Hancock salesperson or National Sales Support at 888-266-7498, option 2.

For Agent Use Only. This material may not be used with the public.

Insurance policies and/or associated riders and features may not be available in all states. Some riders may have additional fees and expenses associated with them.

Insurance products are issued by John Hancock Life Insurance Company (U.S.A.), Boston, MA 02210 (not licensed in New York) and John Hancock Life Insurance Company of New York, Valhalla, NY 10595.

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