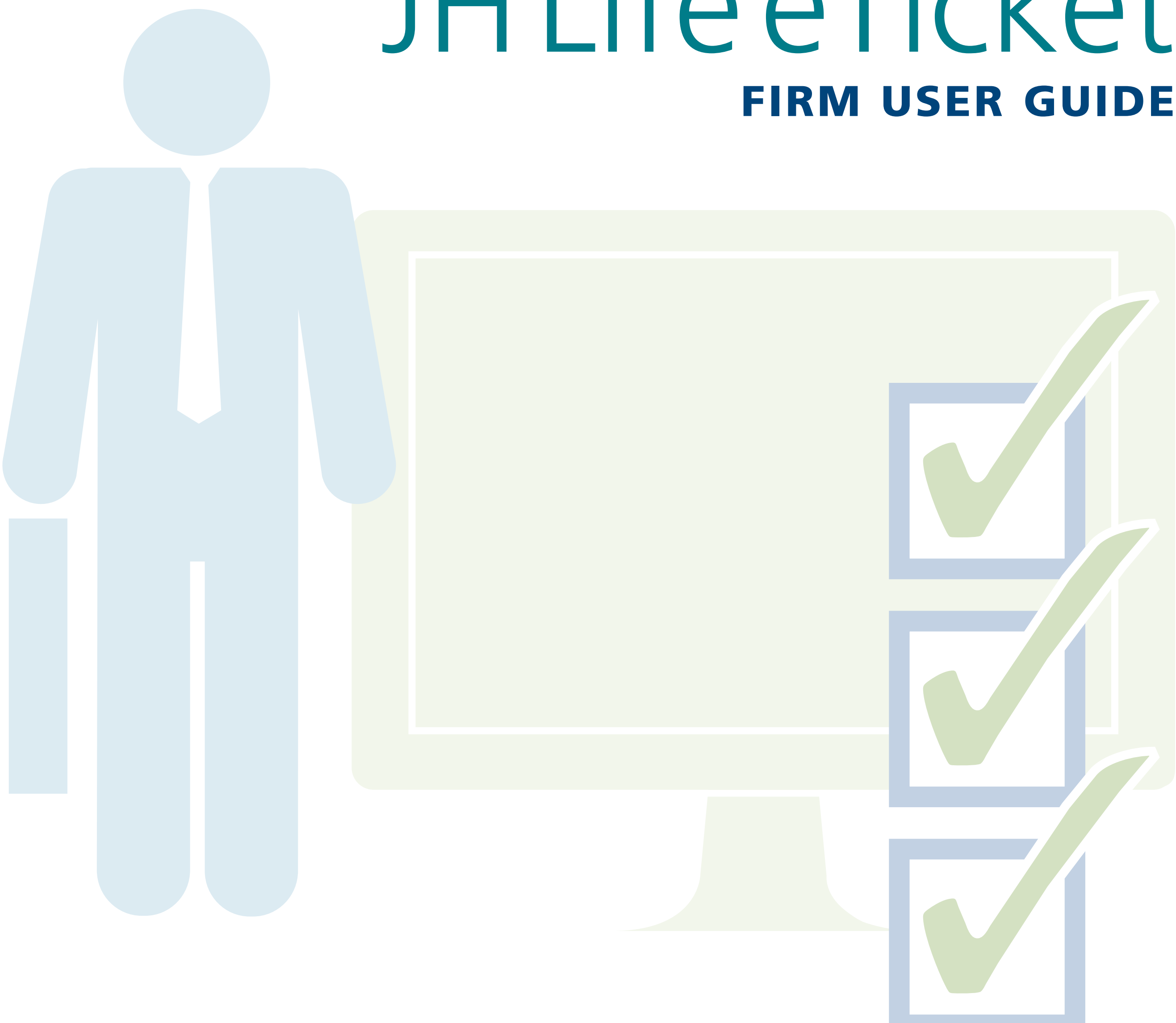
LIFE

NEW BUSINESS

JH Life eTicket

FIRM USER GUIDE



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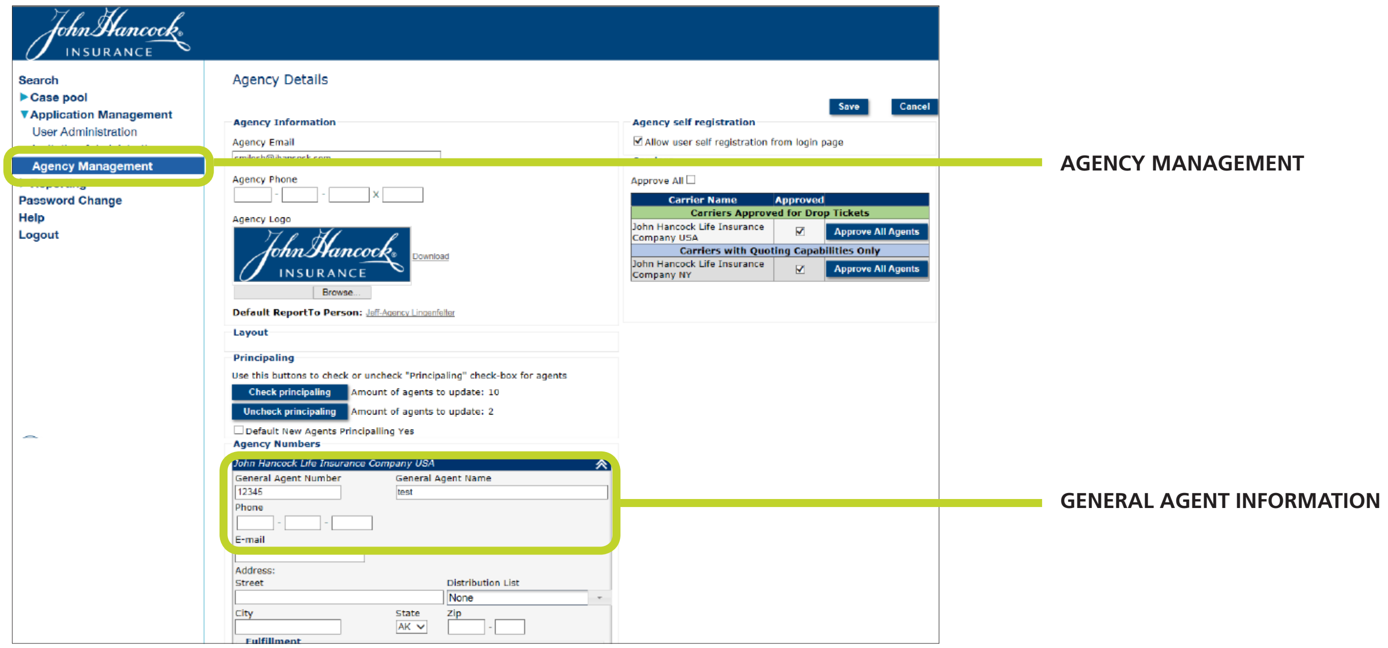
LIFE-6842 6/17

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

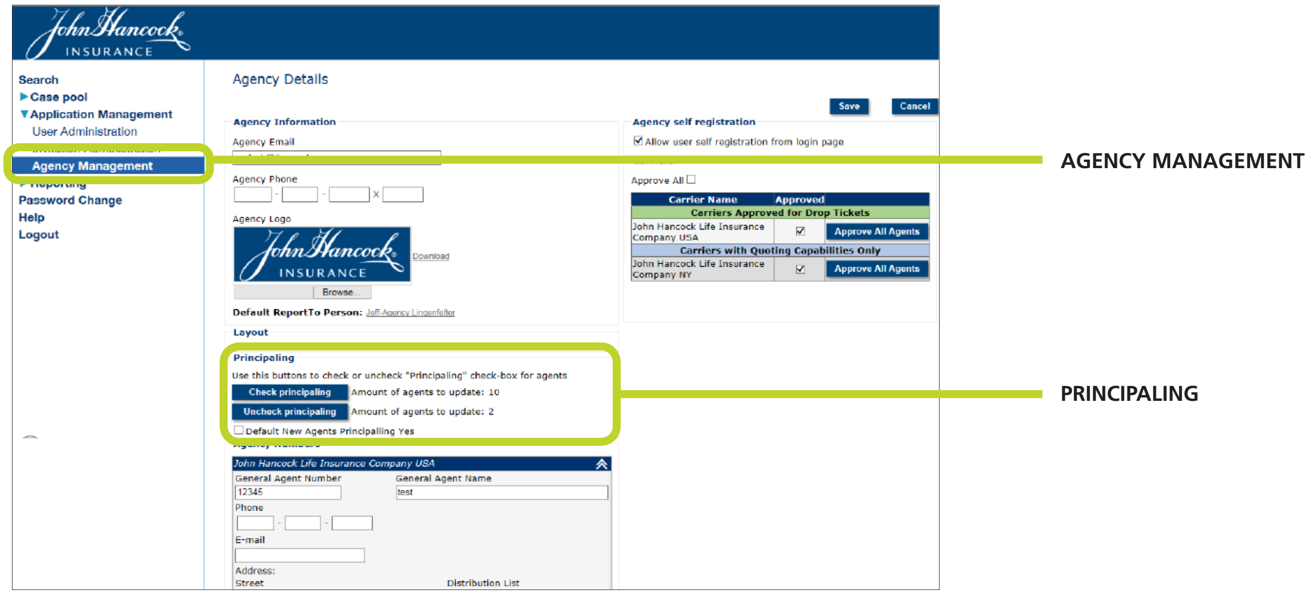
Before submitting business via JH Life eTicket, confirm the information displayed on the "Agency Management" page. **IT IS IMPORTANT TO UPDATE YOUR "GENERAL AGENT NUMBER" TO MATCH YOUR JOHN HANCOCK APPOINTMENT NUMBER.** You will need this number to view your cases on APPSLive.com.



Principaling

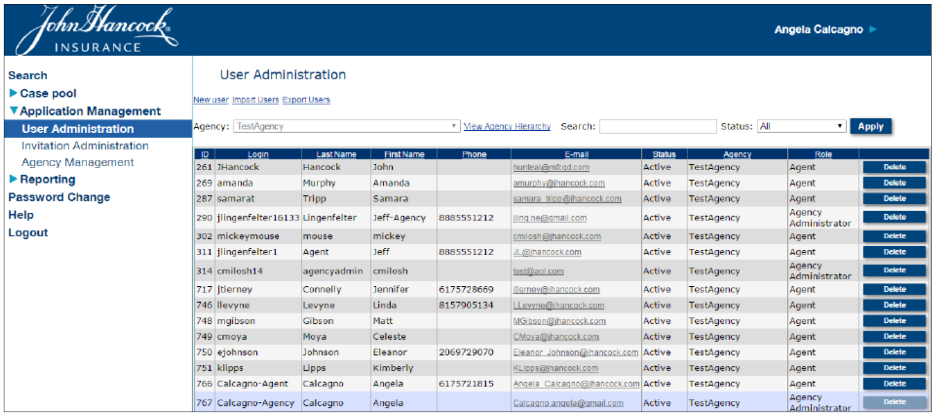
You can also set up the "principaling" feature from the "Agency Management" page. Principaling allows you to review the Ticket before it is submitted to John Hancock. It is important to note that if this feature is selected, nothing will happen with the submission (i.e., telephone interview with the 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.



User Administration

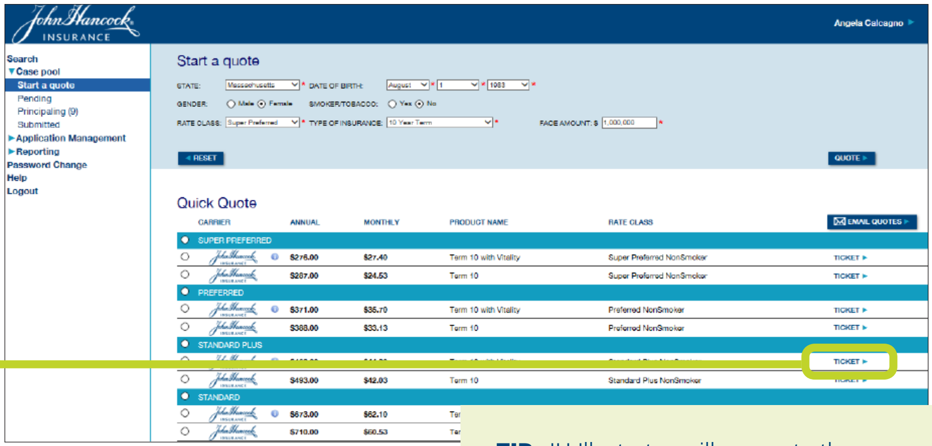
Use this page to pre-register your agents, and/or add, delete, and modify other users. You can also reset a user's password from this page.



Submitting a ticket

Step 1: Run a Quote

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

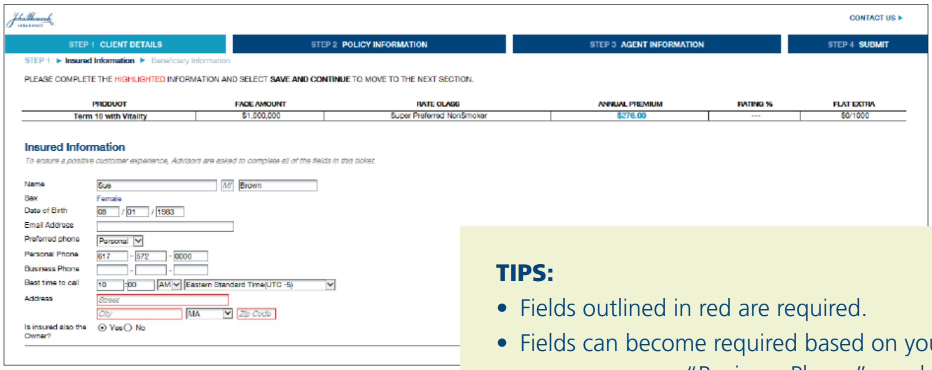


TICKET BUTTON

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.

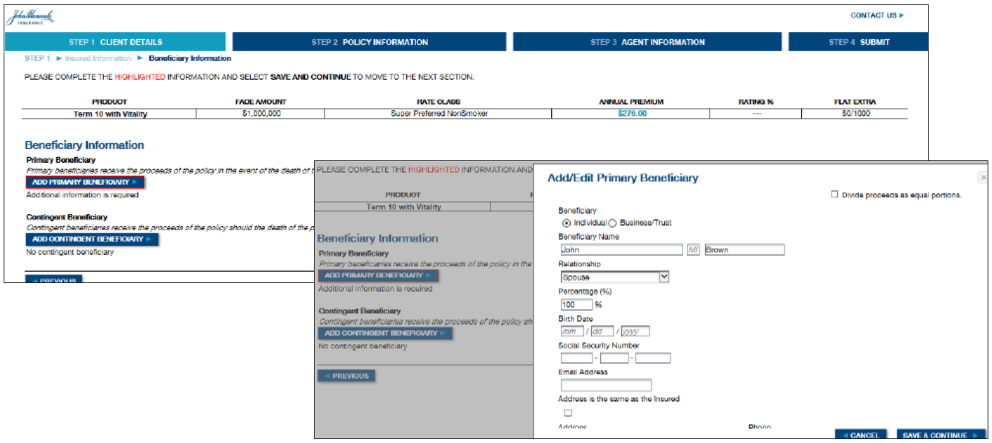


TIPS:

- 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".

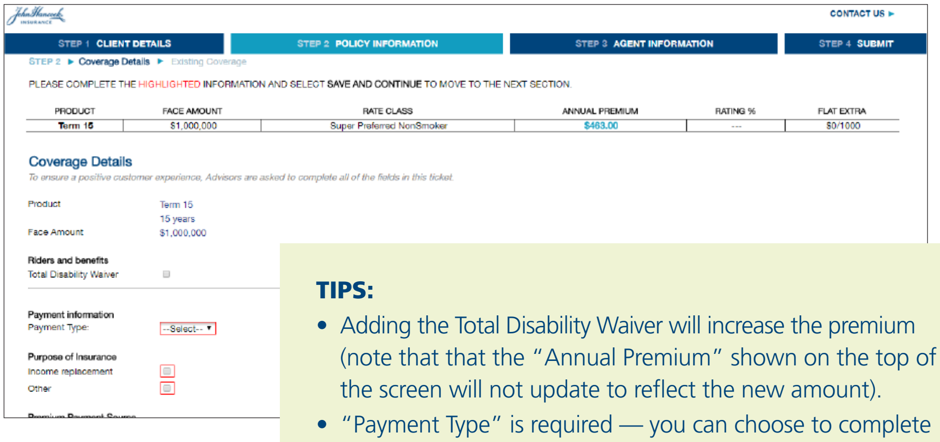
Step 3: Beneficiaries

Provide the beneficiary information. Only one primary beneficiary is needed to proceed and his/her social security number is not required.



Step 4: Adding a Rider

If adding a Rider, choose from the options provided, then select payment method, purpose of insurance, and premium payment source.

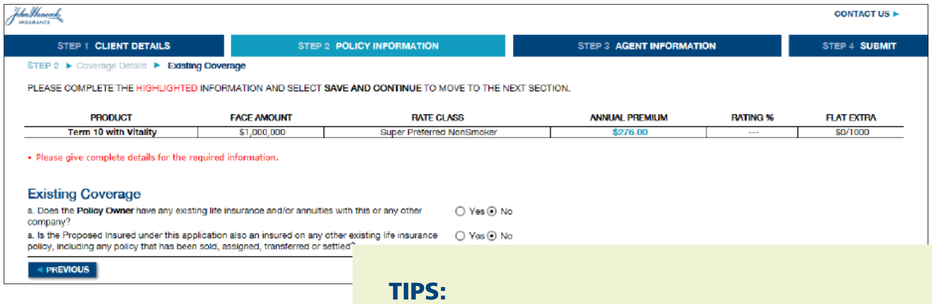


TIPS:

- Adding the Total Disability Waiver will increase the premium (note that that the "Annual Premium" shown on the top of the screen will not update to reflect the new amount).
- "Payment Type" is required — you can choose to complete the Pre-Authorized Checking section now, or the Insured can complete it during the telephone interview.

Step 5: Existing Coverage

Provide details about any existing coverage.



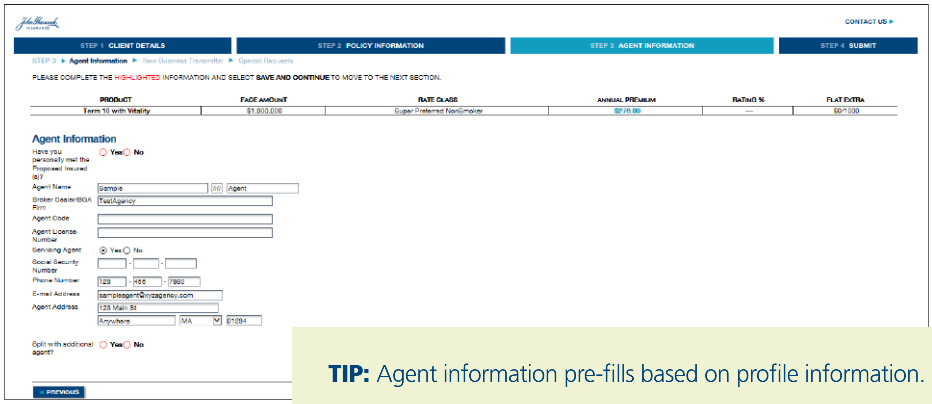
TIPS:

Replacement questions are reflexive according to:

- NAIC vs. non-NAIC state
- Owner or proposed insured with existing insurance

Step 6: Agent Information

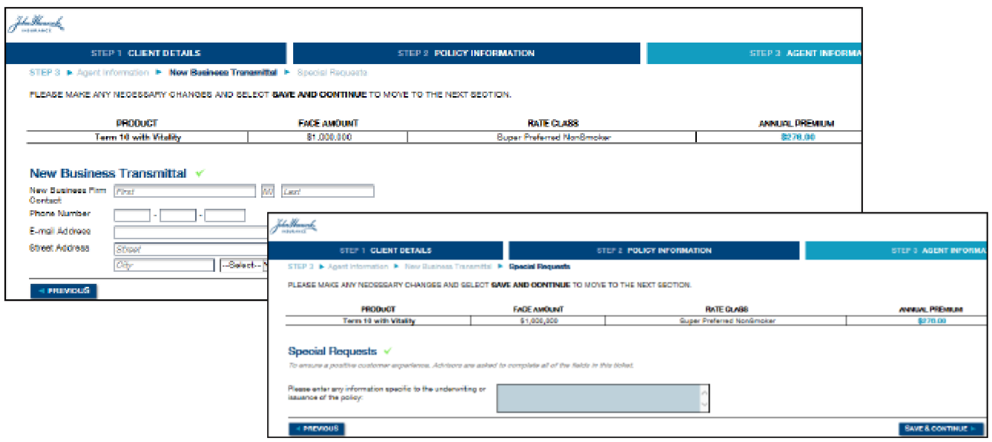
Enter the agent's information.



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

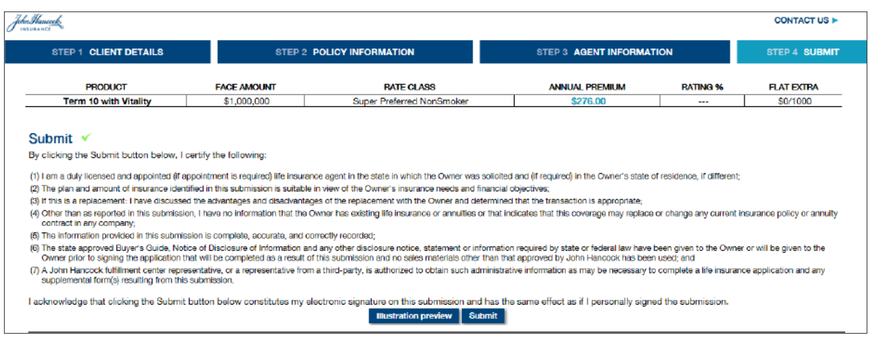
Step 7: Additional Info

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).



Step 8: The Ticket

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



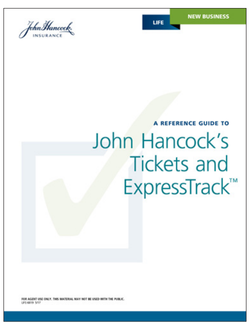
TIPS:

- 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.