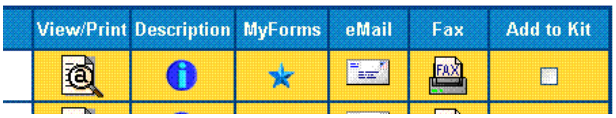
How to Use eForms

About eForms

eForms is your source for electronic forms and other documents from all lines of business in the MetLife Enterprise. You can search for forms using several search criteria. These include searching by form **name**, **number**, **form properties** (such as states forms are used in, form types and categories), and **groups of forms** with a similar purpose. A producer-focused search finds forms needed to sell a particular product, or provide service, in a certain state **without needing to know form numbers**.

Once located, forms can be **viewed, printed, faxed, or emailed**. These **Action Options** are shown with a **yellow background** on the page.

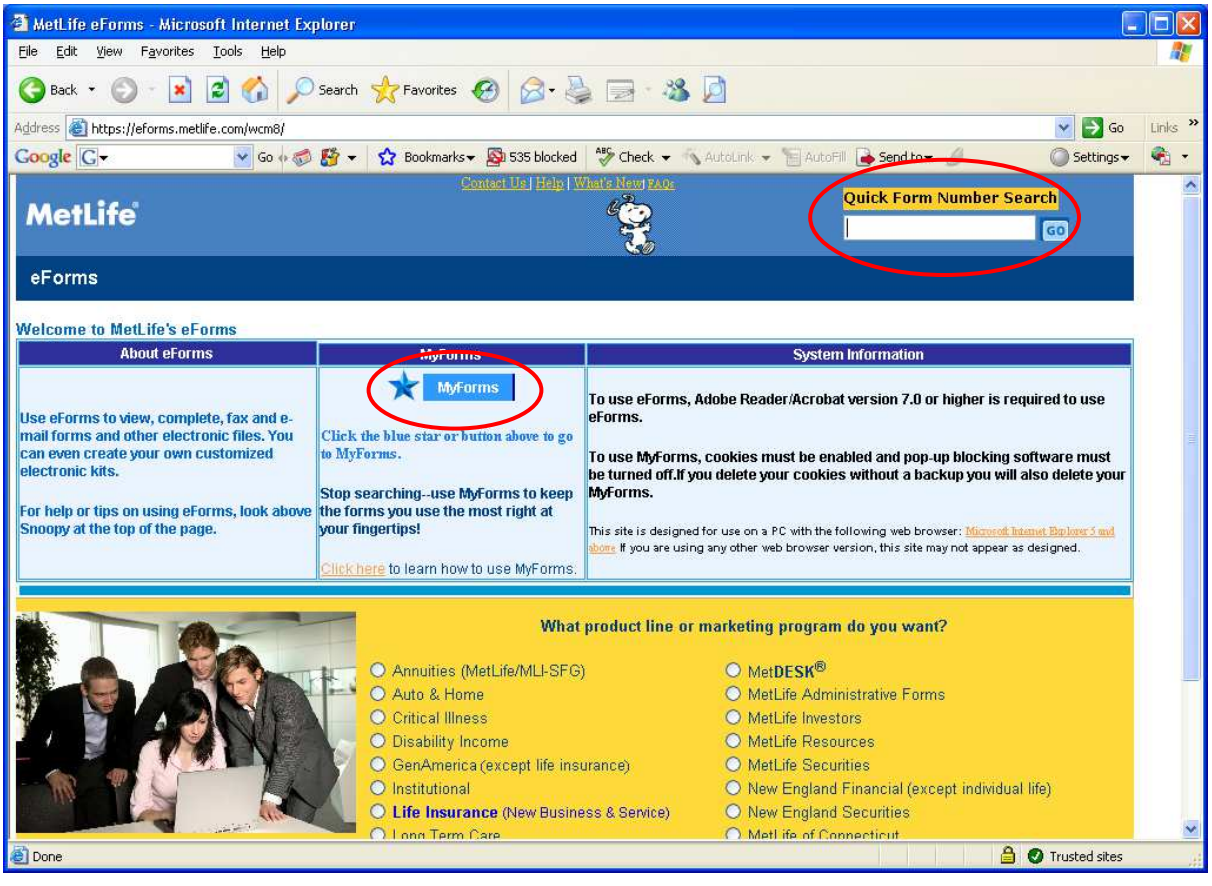


You can create your own **customized electronic kits**, and can save your most frequently used forms to *MyForms*, a feature that allows **quick retrieval without searching**.

Using eForms: An Overview

Forms in eForms are generally associated with a product line or line of business (life insurance, annuity, auto & home, etc.). Administrative and some lower volume product forms are associated to their carrier (MetLife, GenAmerica, etc.). Accordingly, the first question we ask on the eForms home page is "what product line do you want."

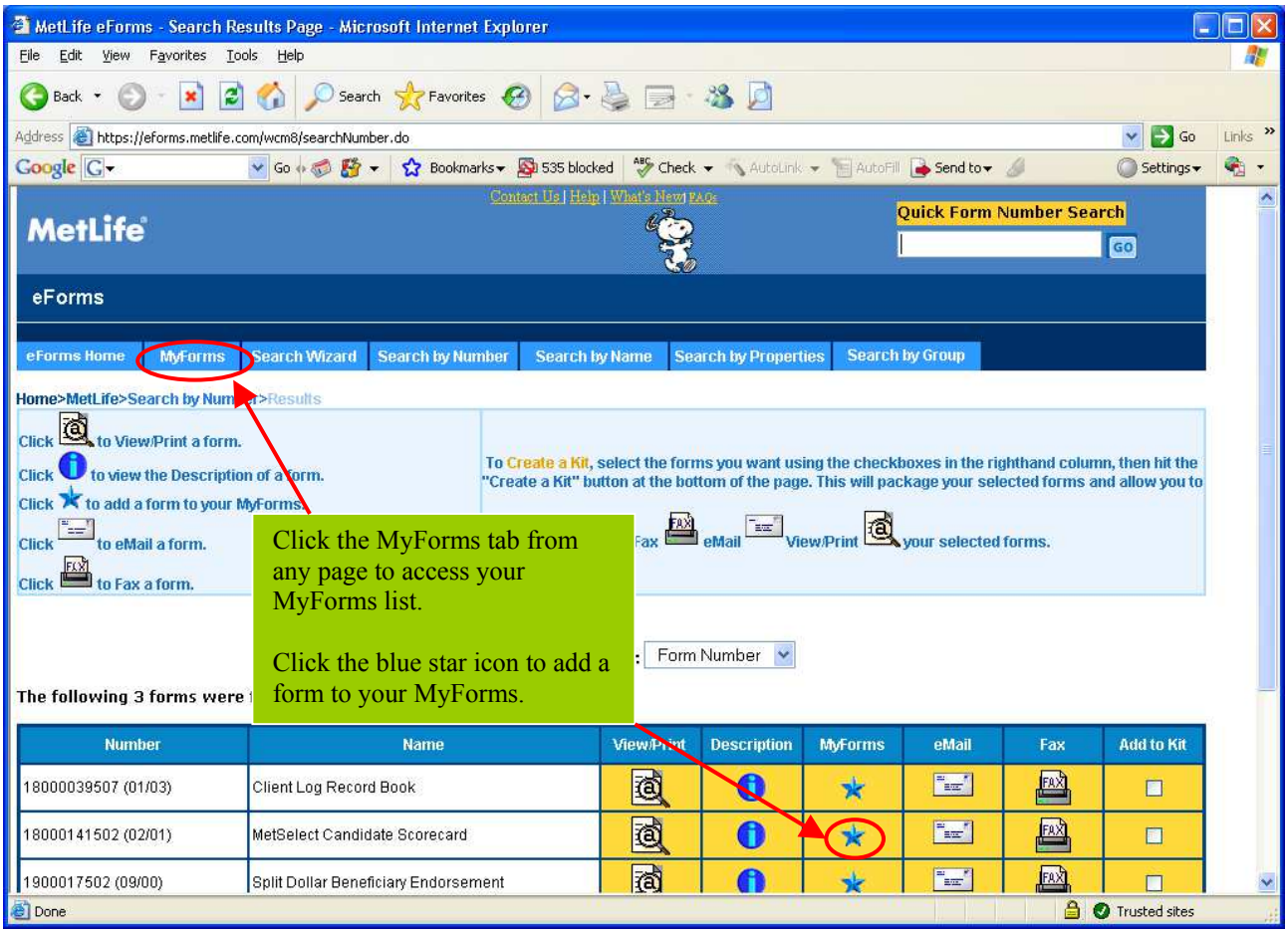
There are two exceptions to the general rule. The first is *MyForms*, and the second is the **Quick Form Search**. These features help you find forms you are familiar with quickly and easily, without repetitive searching or drill-downs.



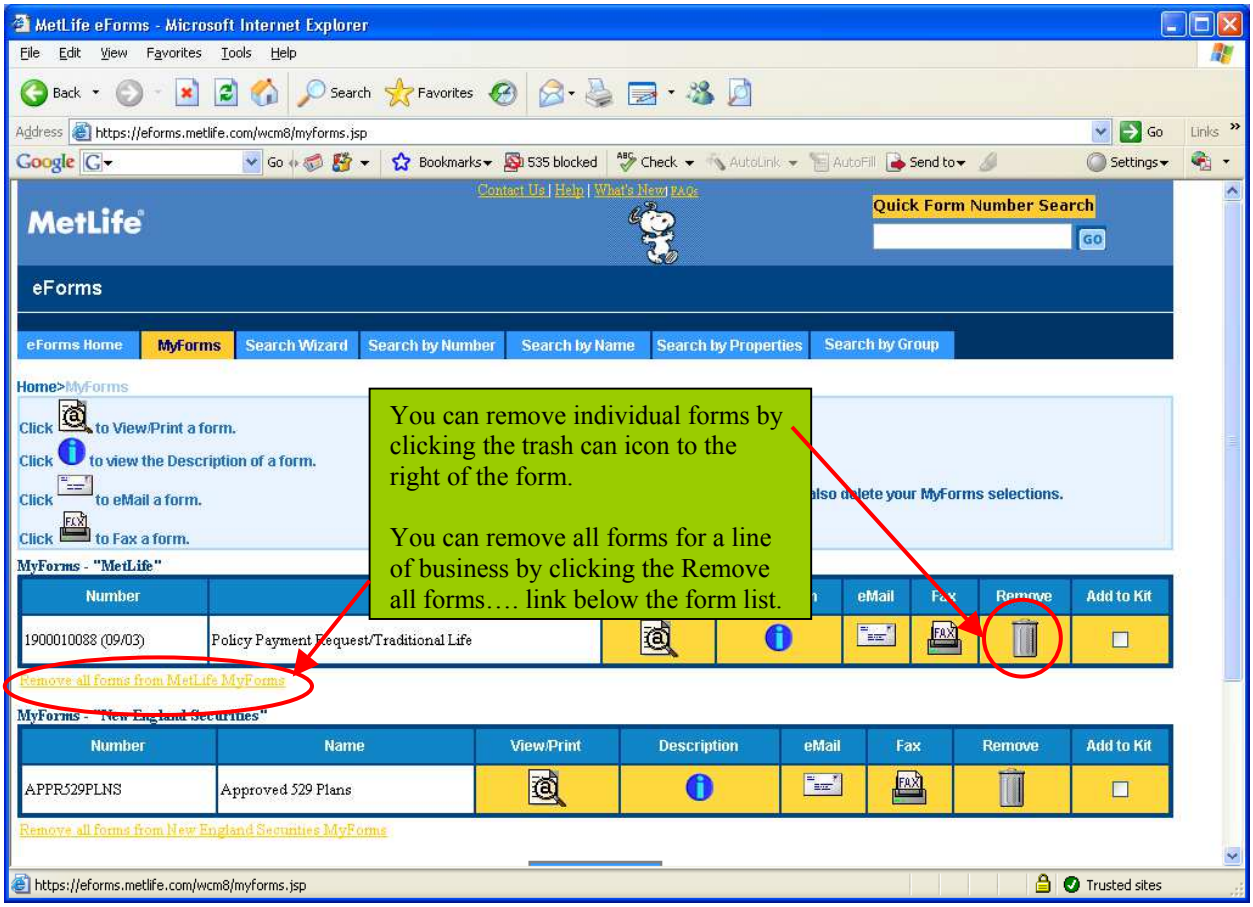
How to Use *MyForms*

The *MyForms* feature in eForms allows you to **create and maintain** a folder containing **just the forms you most frequently use**, separated by franchise or product line. *MyForms* is available from any page in eForms.

To add a form to your *MyForms*, first find the form you want to add. There is no restriction on how you search for the form. When you have the form you want listed, **click the blue star** to add it to your *MyForms*. The blue star is to the right of the form description icon in the six action options that are available for each form returned.



Once you have added a form to your *MyForms*, you can easily go to it by clicking the *MyForms* tab from any page in eForms. A listing of your *MyForms* will be displayed, organized by product line. You can remove forms from your *MyForms* by clicking the **Remove** icon for the form you no longer want: you can also remove all forms you have saved for a given product line by clicking the **Remove All Forms** link at the bottom of the product line forms listing.



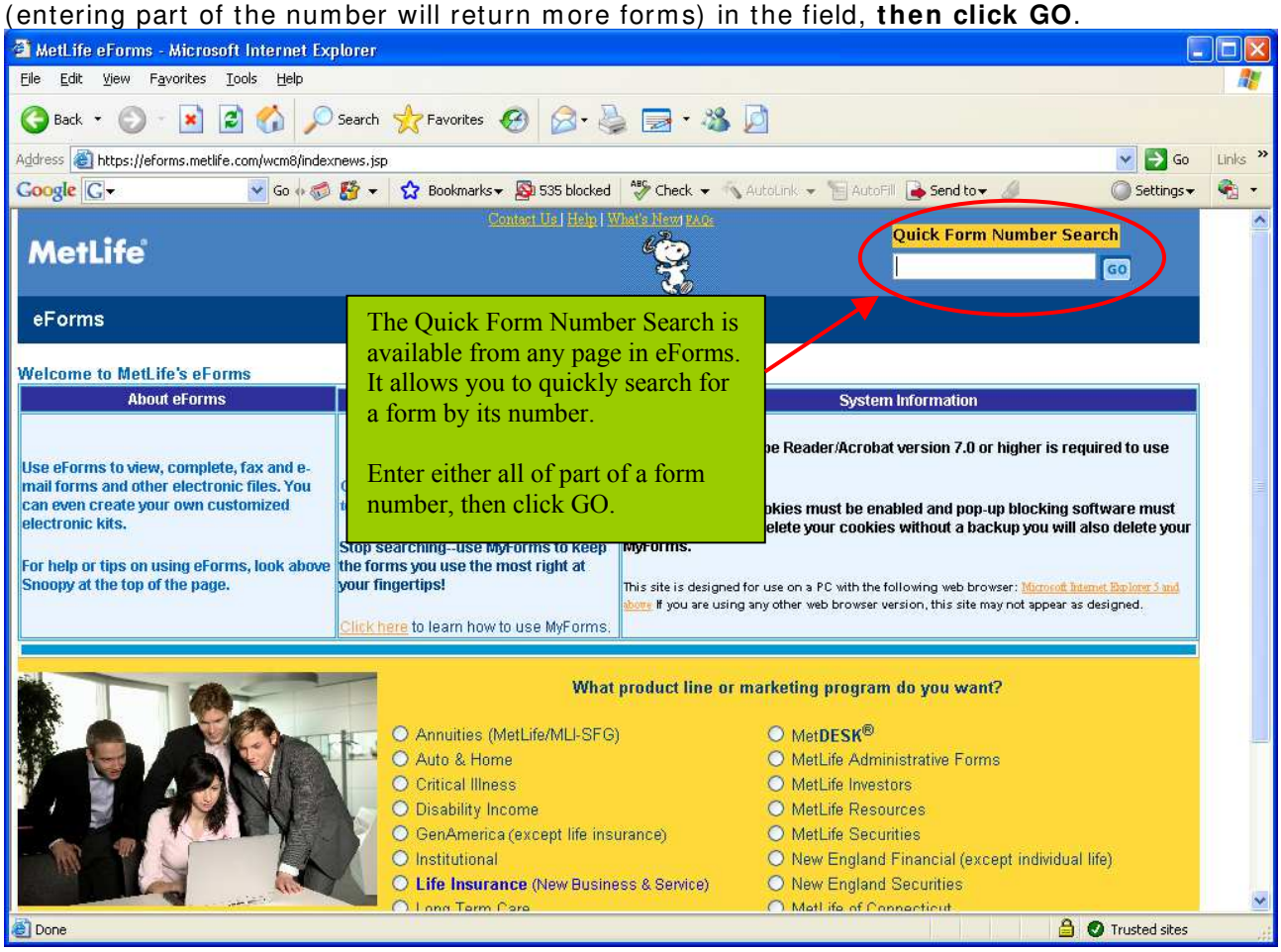
<u>Important Note:</u> *MyForms* does not store copies of the actual forms on your computer. It stores the information about the form you've saved in a "cookie" that is stored on your computer: the cookie retrieves your form from eForms when you connect to the site and select your form. You must have cookies enabled to use *MyForms*. In addition, if you delete your cookies without backing them up you will lose your *MyForms*.

Any form that you have saved in *MyForms* will be automatically updated if a new version comes out, or if the form is obsolete and not replaced. However, in cases where new forms are released but are not immediately available in all states, you will need to check with your marketing area and update your selections when the new form is available in your state.

How to Use the Quick Form Number Search

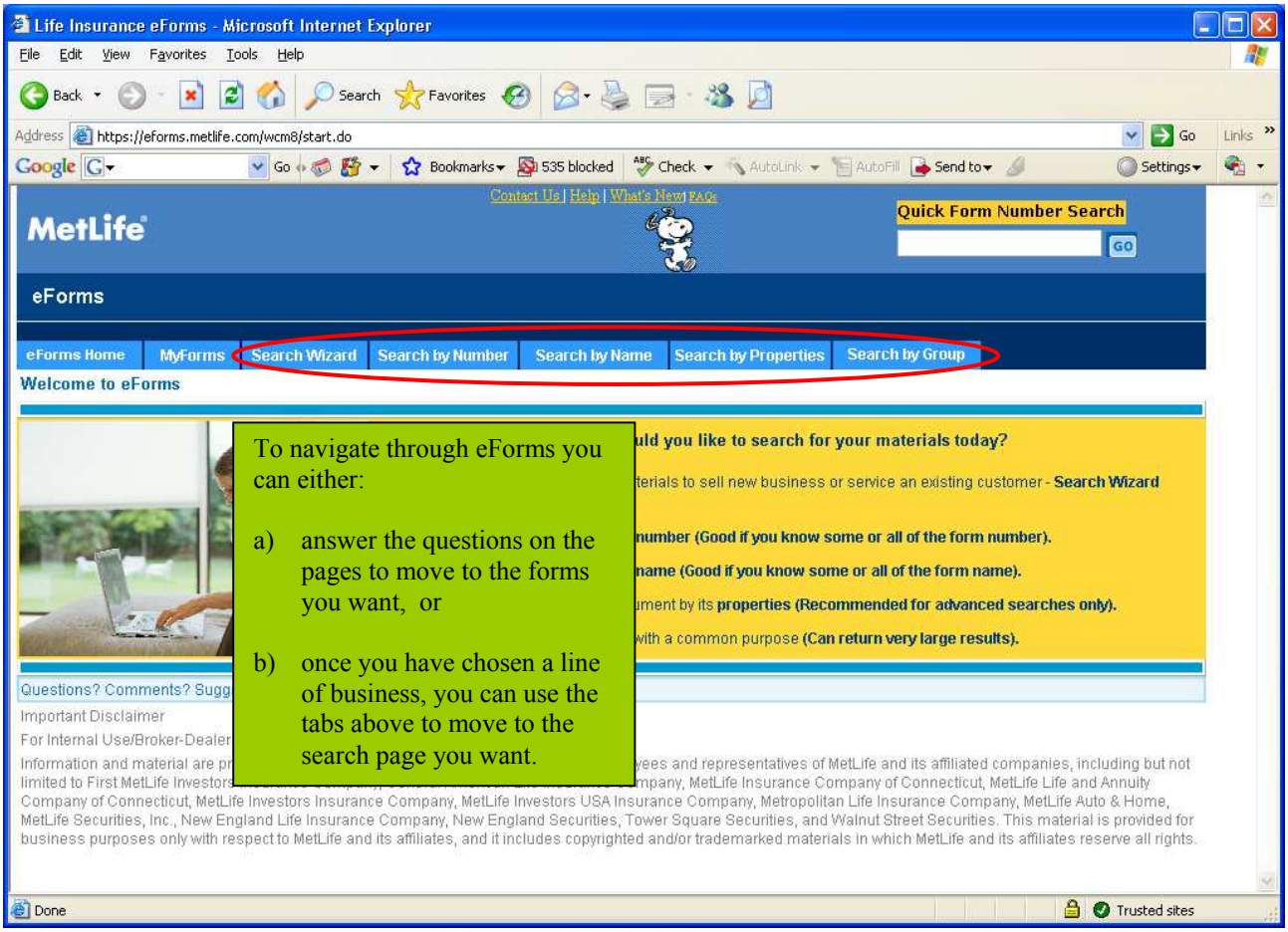
The **Quick Form Number Search** feature is available from any page in eForms. It allows you to quickly search for a form by its form number.

To use the **Quick Form Number Search**, enter either **all or part** of the form **number** (entering part of the number will return more forms) in the field, **then click GO**.



Navigating eForms

There are two ways to navigate the eForms site. The first is to answer the questions on the pages to move to the forms you want. Alternatively, once you've chosen a line of business from the eForms home page you can click the tab of the page you want to move directly to that page.



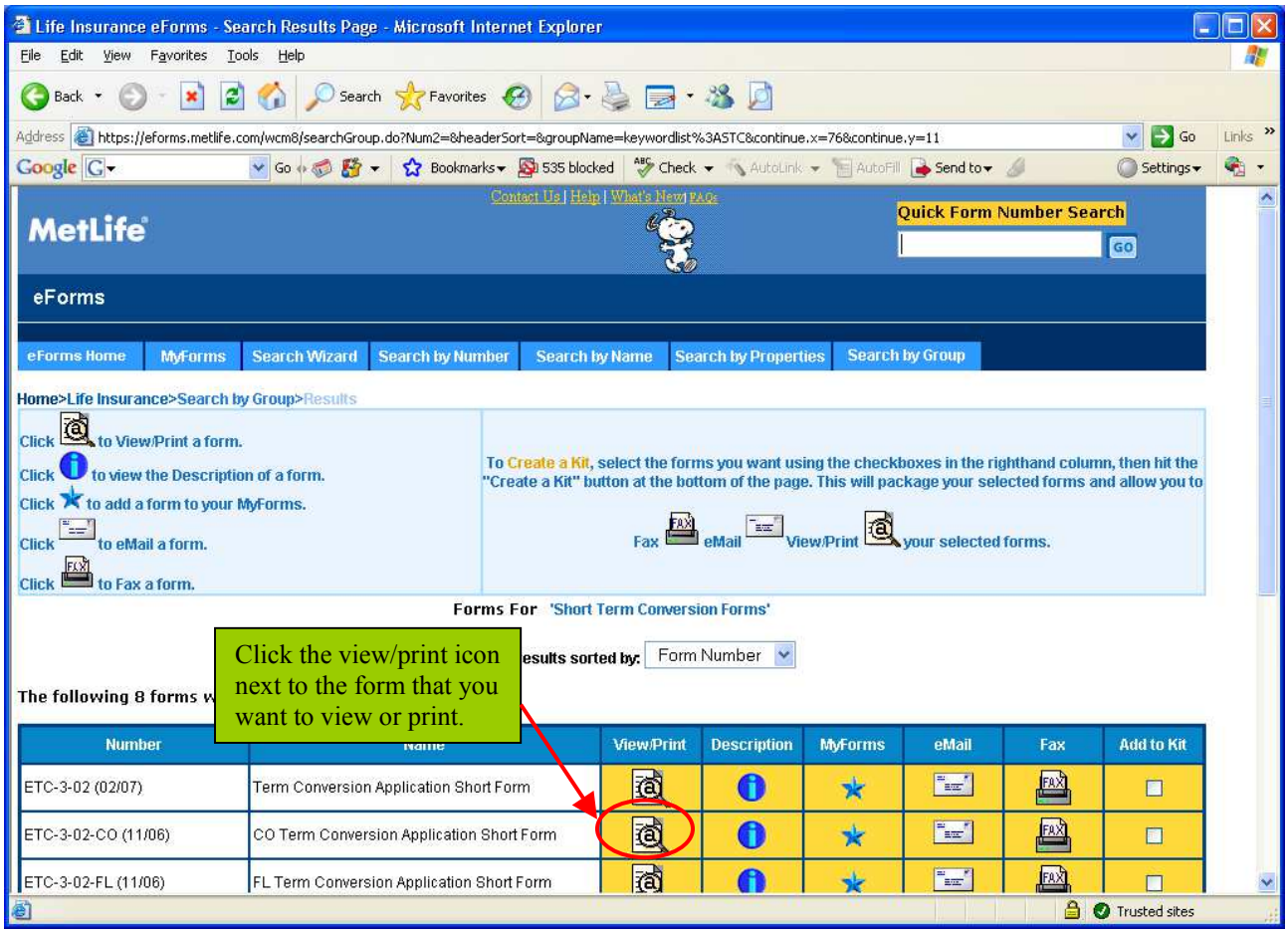
How to Find Your Forms

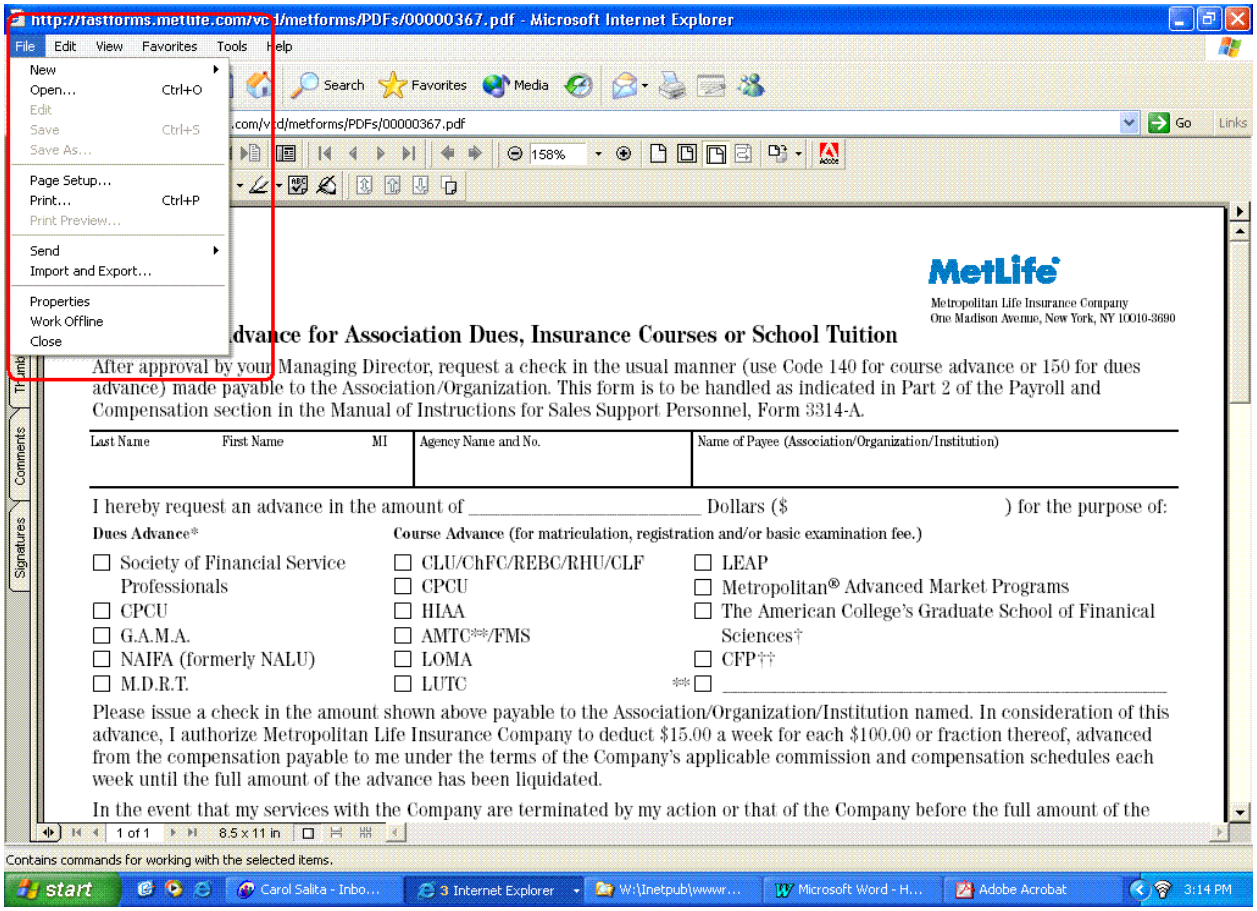
Once you have selected a line of business, you will proceed to a page asking you how you want to search for your materials. An explanation of each search is provided, along with a tip of the best use for each search. When you make your selection, you will proceed to another page where you can enter the details of your search request and submit them to retrieve your forms.

How to View and Print Your Forms

When you have identified a form you want to view or print, click the **View/ Print** icon (it's the first of the six **Action Options** to the right of the form name). The form will open either in the same browser window or a new one, depending on your browser settings. Once you see the form you can click the **Print** icon above your browser window (do NOT select **Print** from the File menu) to print your form and choose how many copies you want. If the Print

menu selection and icon is **grayed out**, the form is **only available for viewing** and it **not** allowed to be printed.
If your printer supports duplex printing (printing on both sides of the paper) **this option is strongly recommended to facilitate savings.**

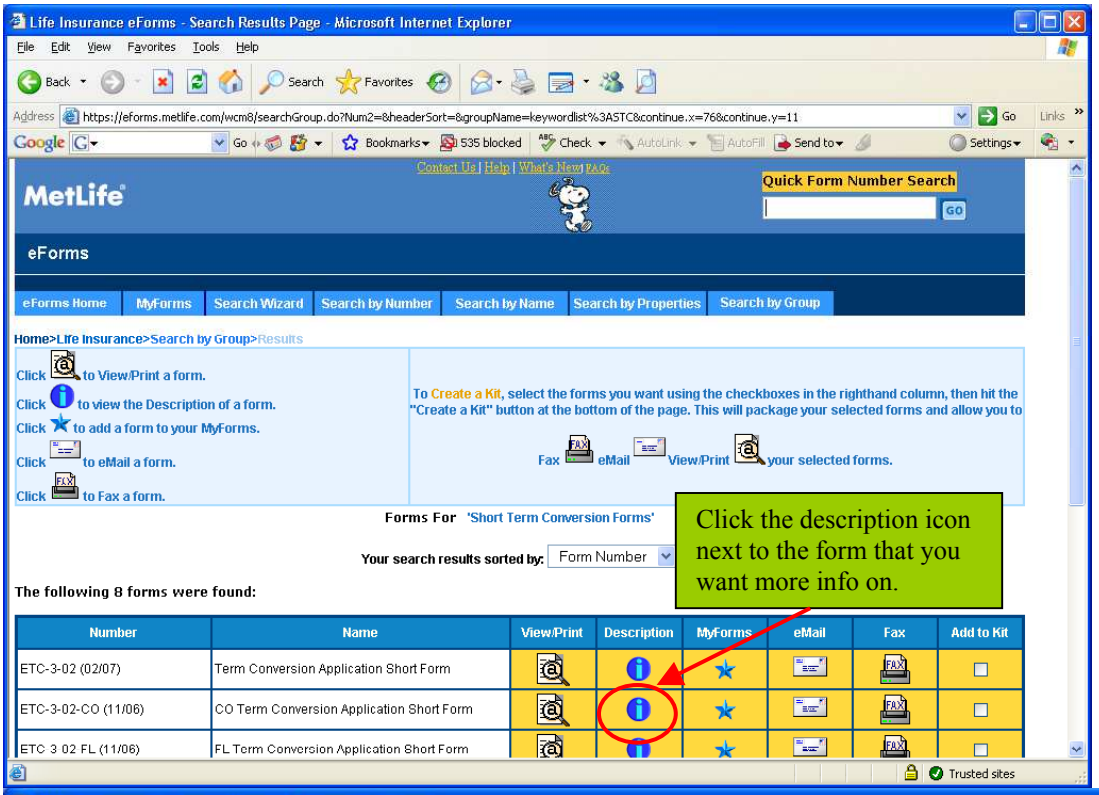


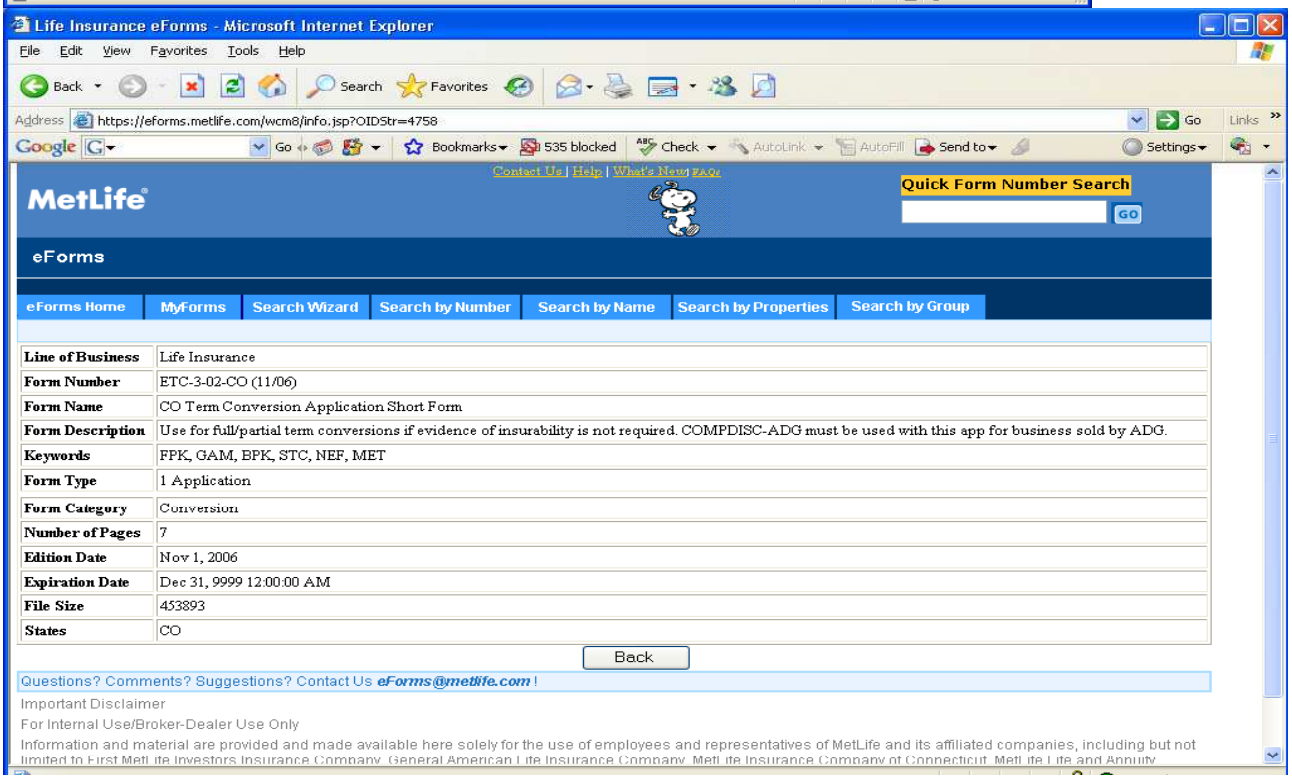


<u>Special Printing Notice:</u> When printing life insurance applications it is important to remember not to select a "shrink to fit" or "fit to page" setting. This setting may make the barcode unreadable and delay processing of your application.

How to View the Description of a Form

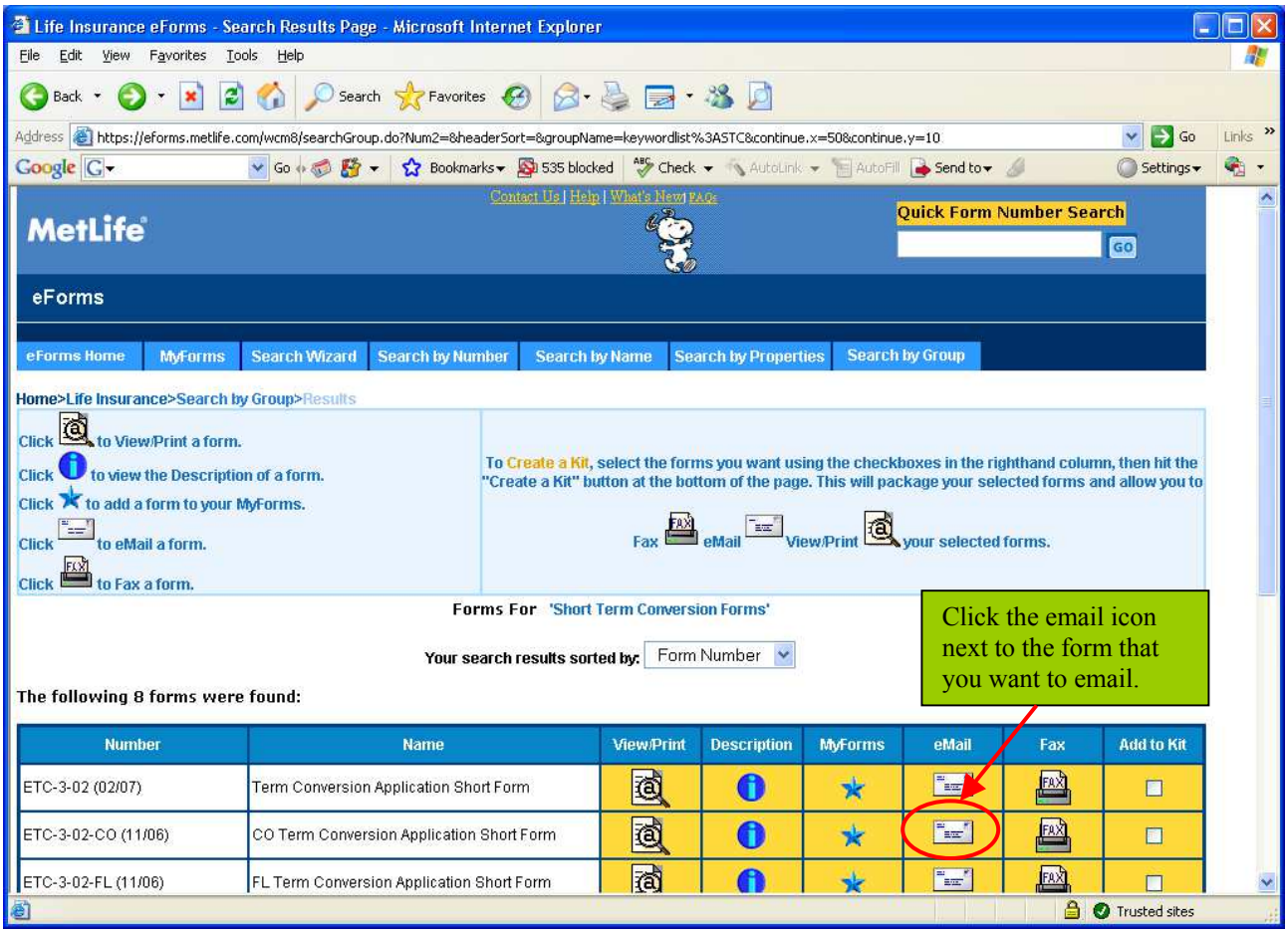
The second **Action Option** after the view/print icon is the form's **description** icon . Clicking this icon will provide you with information about the form, including the states the form is valid in and other important information you need to use the form correctly.



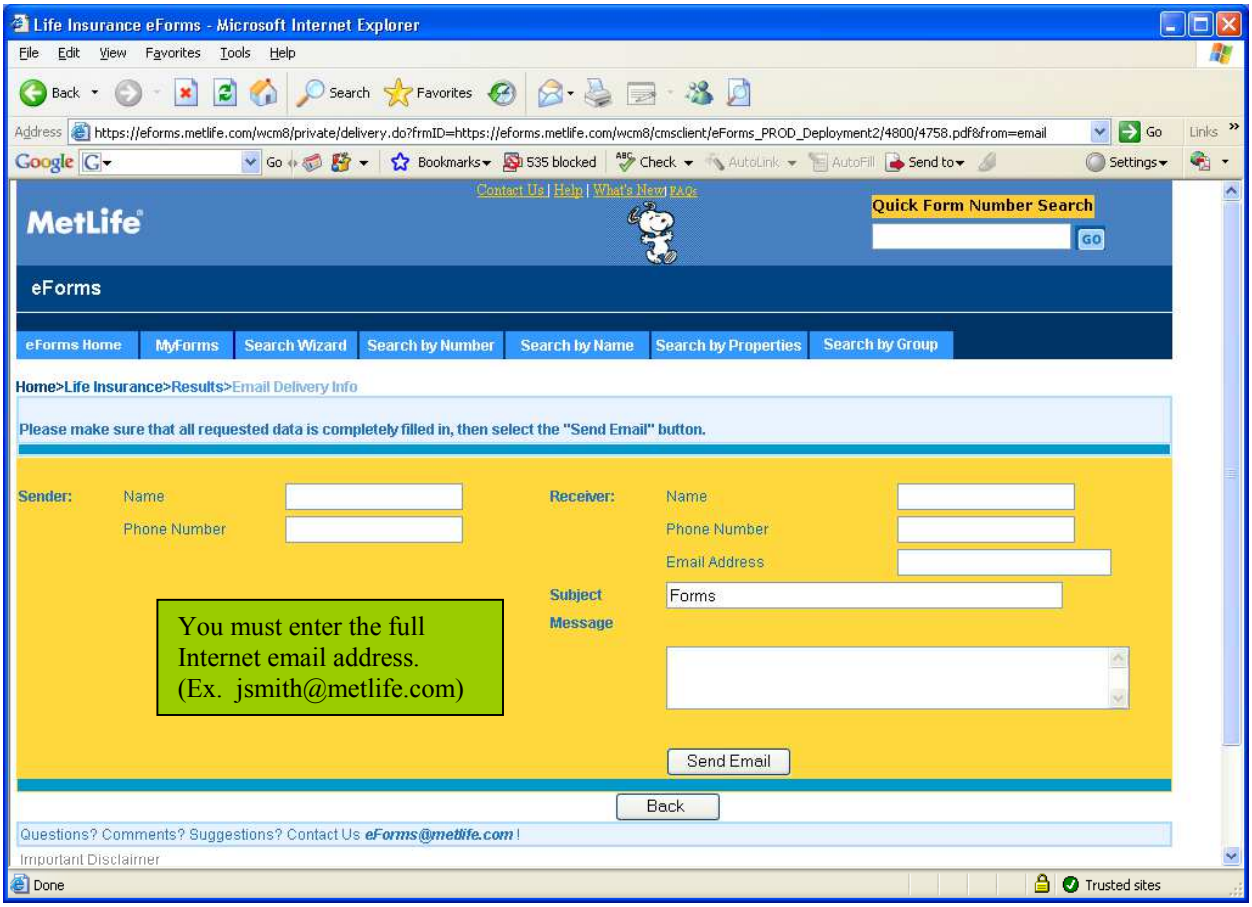


How to eMail a Form

To email a form, **click the eMail icon** in the **Action Options** (it's immediately to the right of the *MyForms* icon). A page will display asking for name, phone and email address information. Complete the requested information and click the **Send Email** button.



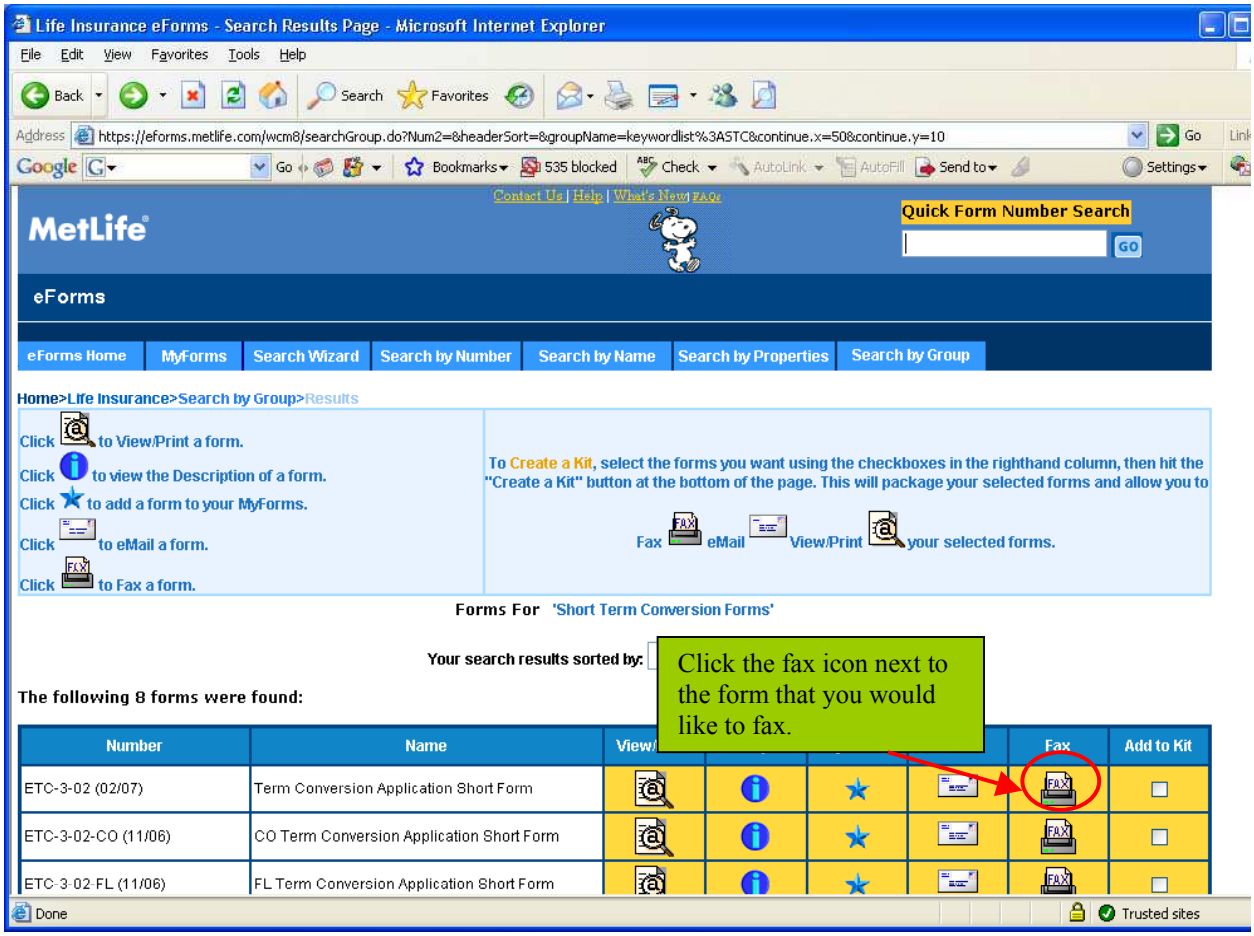
Note: A login screen may pop-up. Your user id and password for eForms emailing and faxing is the same as your portal id and password. This is the same user id and password that you use for ePay Statements, Associate Information Center, or Empire Time. If you have problems with your id and password, or don't know your user id or password, please contact the MetLife HelpDesk at 1-800-ASK-MET2.



Note that email addresses must be the full Internet address (i.e., jsmith@metlife.com). The forms will be e-mailed as an **attachment** to the email. Only one attachment will be created regardless of the number of forms selected. Whenever possible forms should be e-mailed rather than faxed. **Please be aware that Internet Service Providers (ISP) have different standards on accepting emails with attachments, including limiting the size of attachments or even not accepting them at all. If your email does not go through you should check with the recipient's ISP to determine what the problem is.**

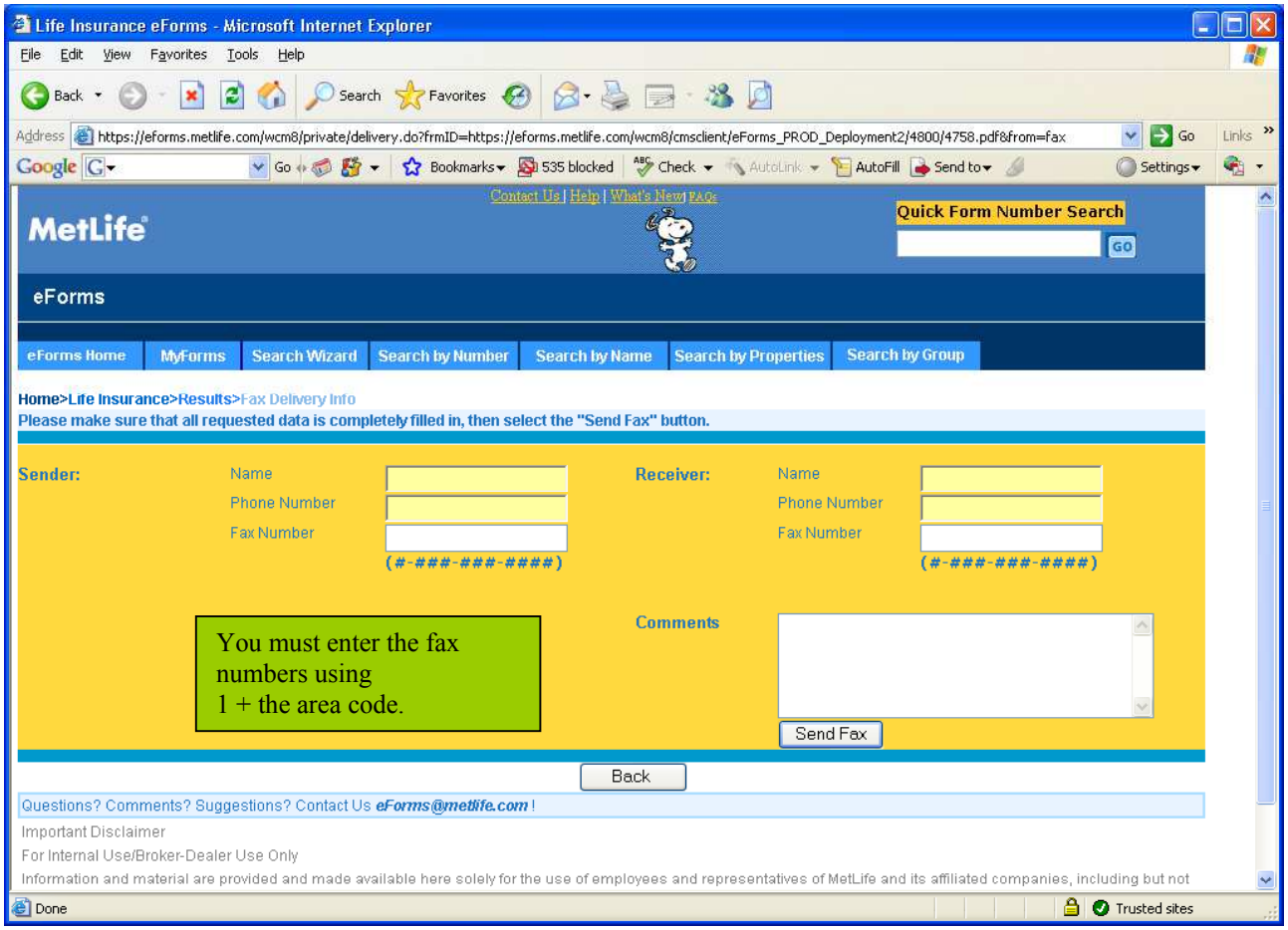
How to Fax a Form

To fax a form, **click the Fax icon** in the **Action Options** (it's next to the eMail icon).



Note: A login screen may pop-up. Your user id and password for eForms emailing, faxing and shopping cart is the same as your portal id and password. This is the same user id and password that you use for ePay Statements, Associate Information Center, or Empire Time. If you have problems with your id and password, or don't know your user id or password, please contact the MetLife HelpDesk at 1-800-ASK-MET2.

A page will display with sender and recipient information including, fax numbers. **NOTE: You must enter the fax number including 1 + the area code.** This is necessary because eForms does **not** fax through your telephone line, it uses an external fax server which is most likely not local to where you are faxing to. **Also, we recommend that forms should be e-mailed whenever possible, rather than faxed.** This is because the **quality** of the forms transmitted is **much better** with e-mail; also, the forms are received much **quicker** and at **less cost**.


Life Insurance eForms - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://eforms.metlife.com/wcm8/private/delivery.do?frmID=https://eforms.metlife.com/wcm8/cmsclient/eForms_PROD_Deployment2/4800/4758.pdf&from=fax
Go Links
Google Go Bookmarks 535 blocked Check AutoLink AutoFill Send to Settings
Contact Us | Help | What's New | FAQs
MetLife
Quick Form Number Search
GO
eForms
eForms Home
MyForms
Search Wizard
Search by Number
Search by Name
Search by Properties
Search by Group
Home>Life Insurance>Results>Fax Delivery Info
Please make sure that all requested data is completely filled in, then select the "Send Fax" button.
Sender:
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Receiver:
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Phone Number
Fax Number
(#-###-###-####)
You must enter the fax numbers using 1 + the area code.
Comments
Send Fax
Back
Questions? Comments? Suggestions? Contact Us eForms@metlife.com !
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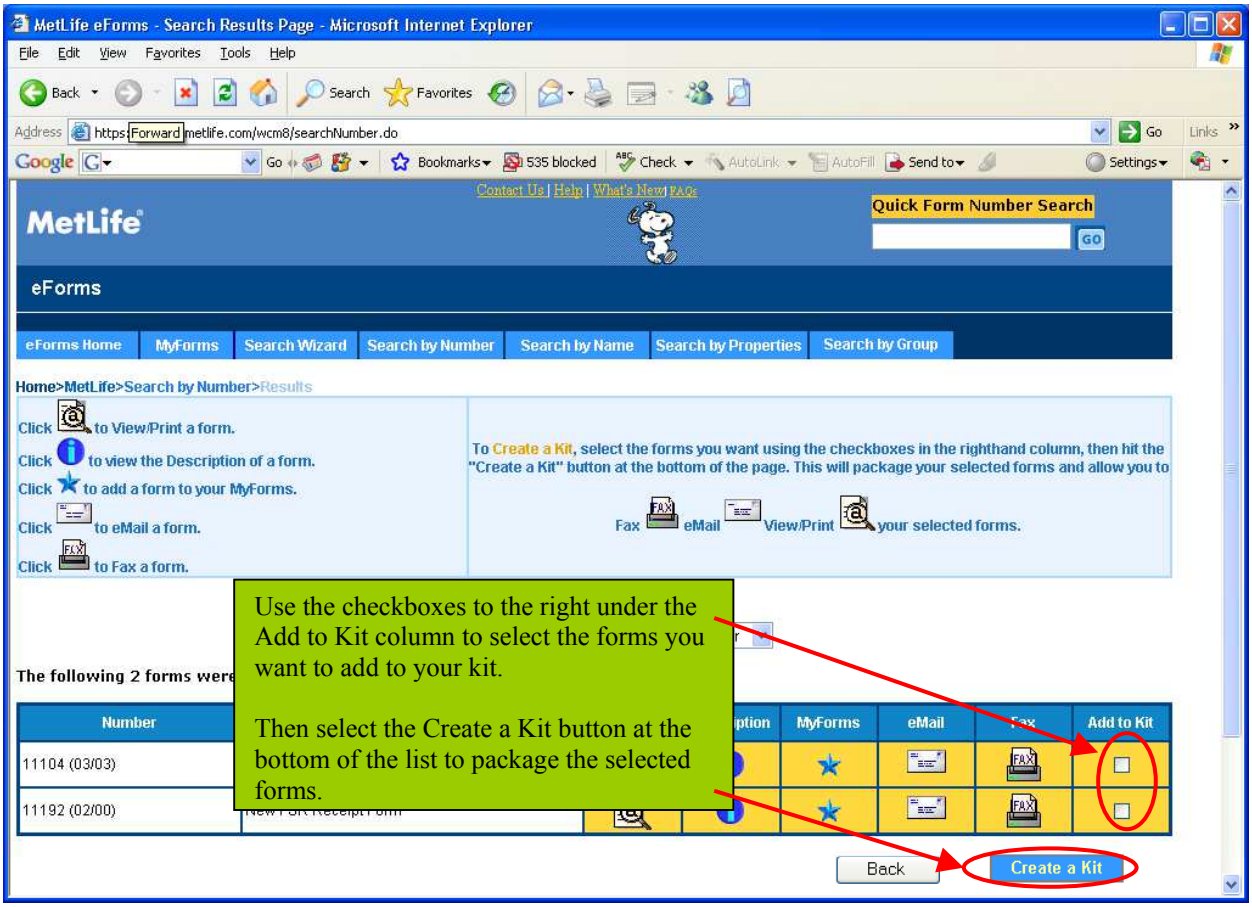
For Internal Use/Broker-Dealer Use Only
Information and material are provided and made available here solely for the use of employees and representatives of MetLife and its affiliated companies, including but not
Done
Trusted sites

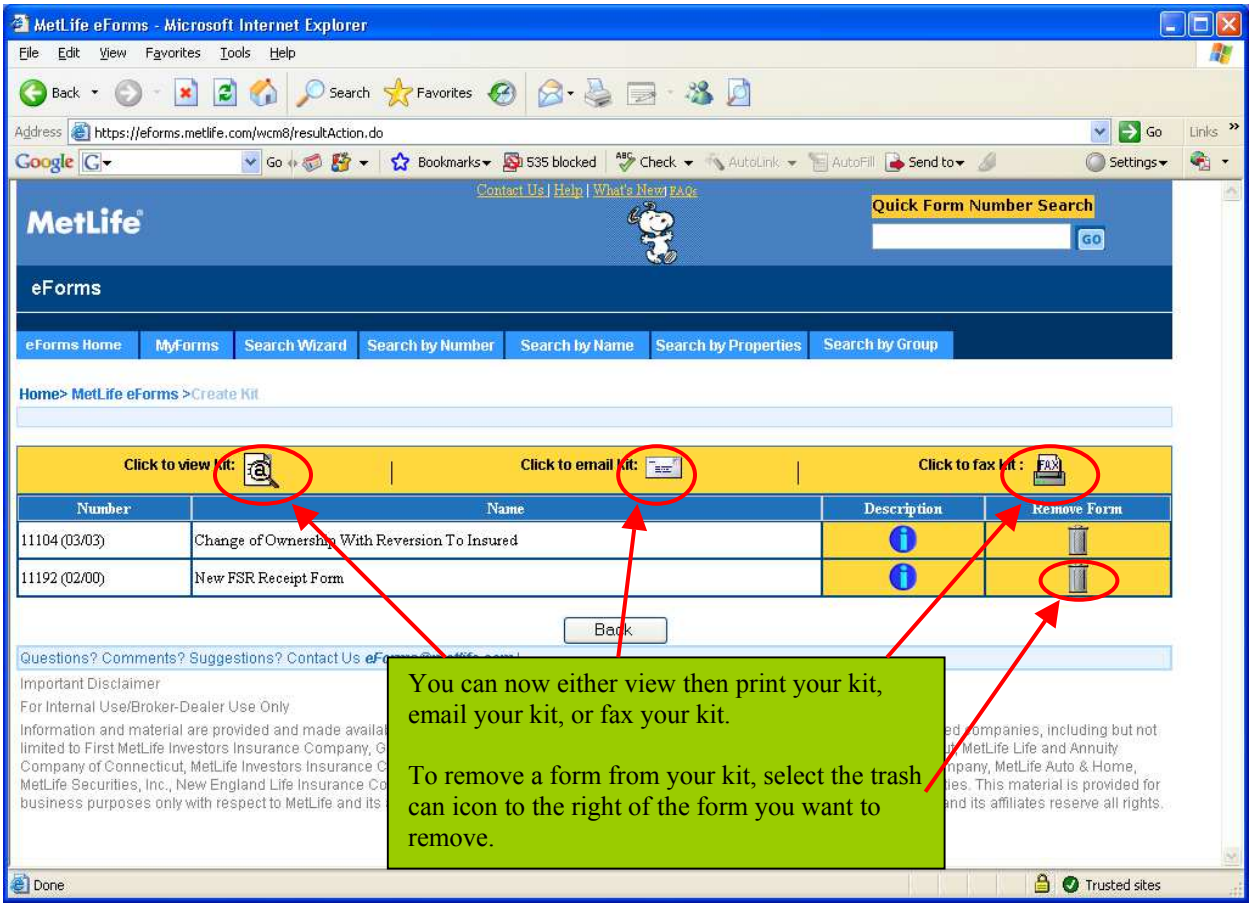
Creating Electronic Kits

To view **more than one form** at a time, or to **create a customized electronic package** of forms, choose the forms you want by clicking the **Add to Kit** checkbox in **the Action Options** for each form you want included in the package. If the checkbox is checked, the form is selected to be **included** in the package; if the box is not checked, the forms will **not** be included.



When you have finished making your selections, click the **Create a Kit**

button at the bottom of the list of forms. You will be asked to verify your selections. Once you have confirmed your selections, you will be able to **view or print** your kit, **eMail** it, or **Fax** it to the recipient.


MetLife eForms - Microsoft Internet Explorer
https://eforms.metlife.com/wcm8/resultAction.do
Contact Us | Help | What's New | FAQs
MetLife
Quick Form Number Search
GO
eForms
eForms Home
MyForms
Search Wizard
Search by Number
Search by Name
Search by Properties
Search by Group
Home> MetLife eForms >Create Kit
Click to view kit:
Click to email kit:
Click to fax kit :
Number
Name
Description
Remove Form
11104 (03/03)
Change of Ownership With Reversion To Insured
11192 (02/00)
New FSR Receipt Form
Back
Questions? Comments? Suggestions? Contact Us
Important Disclaimer
For Internal Use/Broker-Dealer Use Only
Done
Trusted sites
You can now either view then print your kit, email your kit, or fax your kit.
To remove a form from your kit, select the trash can icon to the right of the form you want to remove.

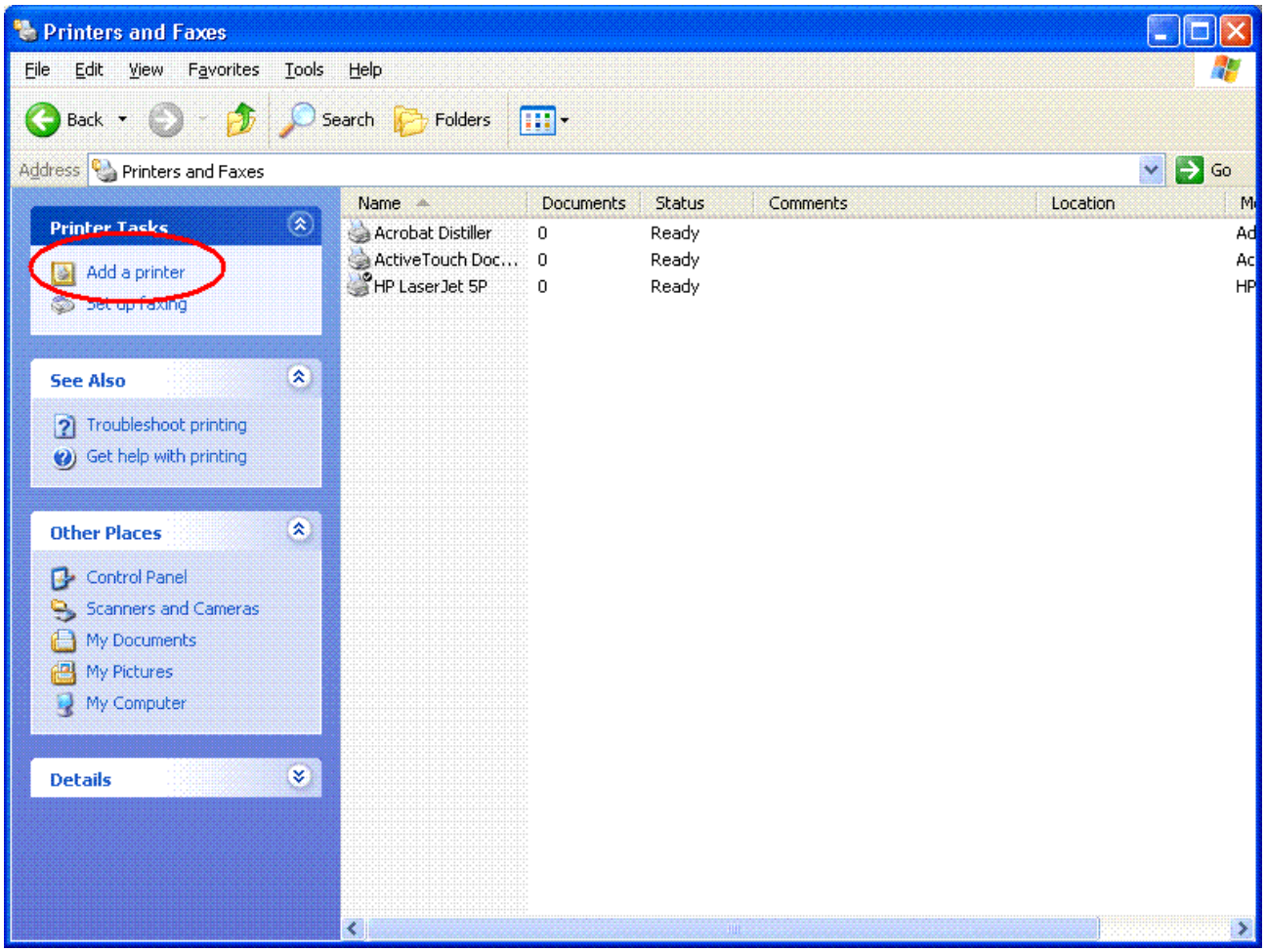
Troubleshooting

1) Error Message: Page Displays File Does Not Begin with % PDF

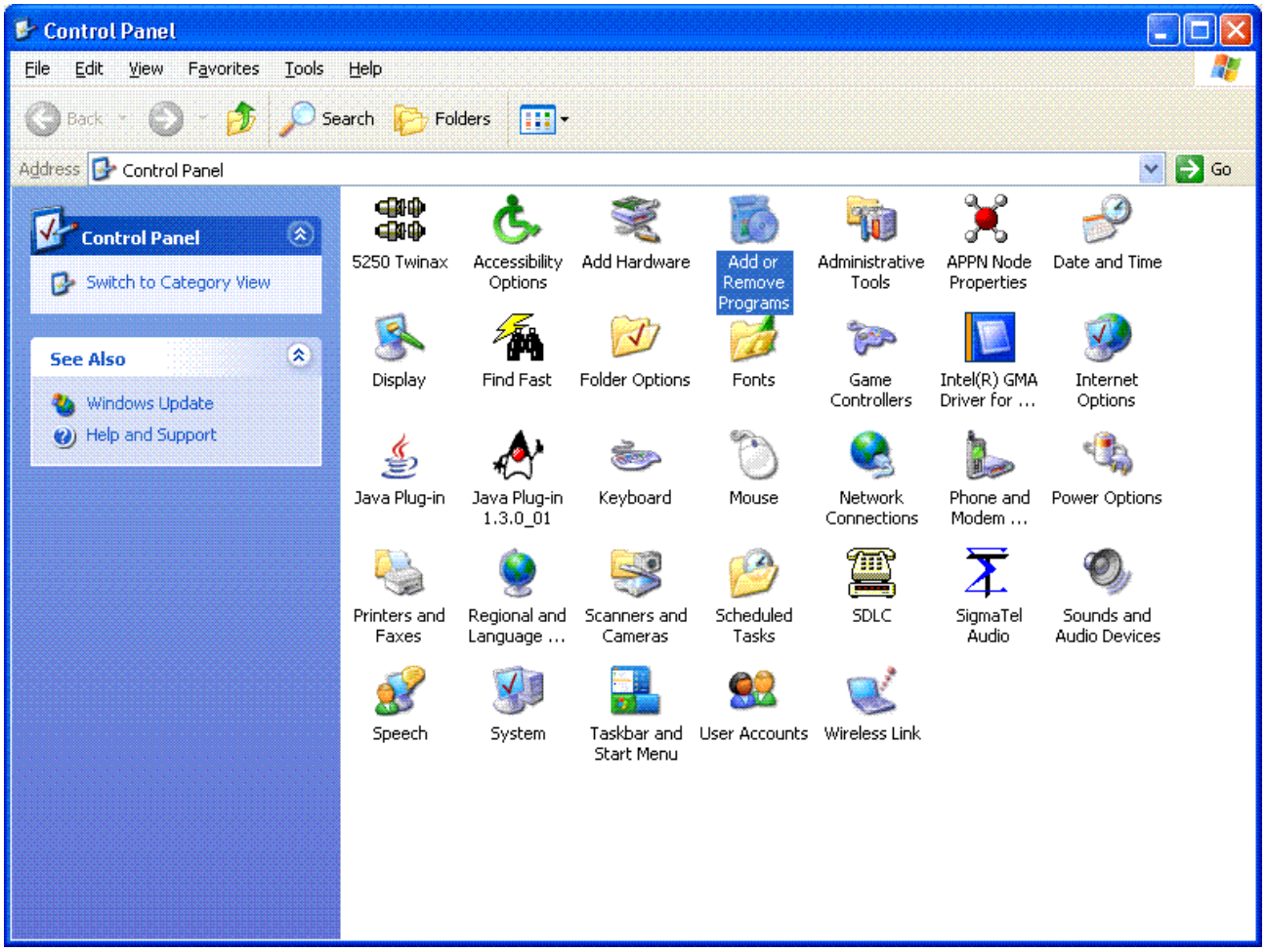
Problem: Adobe Acrobat or Reader is incorrectly installed.

Solution: Uninstall and reinstall Adobe Acrobat or Reader.

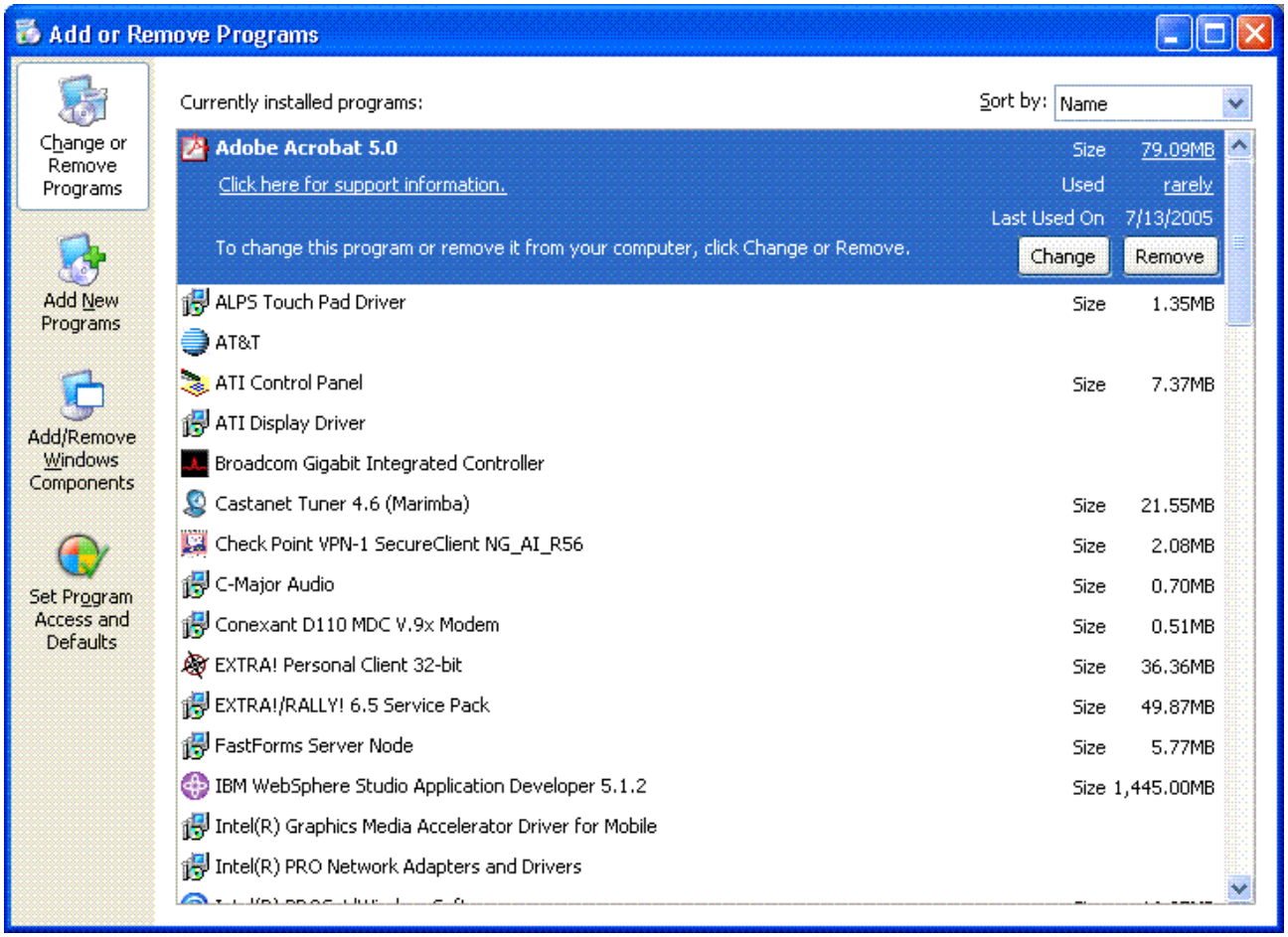
Procedure: First, you must have administrative rights for your computer. You can tell if you have administrative rights by going to Control Panel|Printers and Faxes. If the Add Printer option is grayed out you don't have the necessary rights and will need an administrator to perform this procedure. If you are able to add a printer you do have administrative rights and can proceed.



Next, go to Control Panel|Add/Remove Programs.



Locate Adobe Acrobat in the list of installed programs and uninstall it.

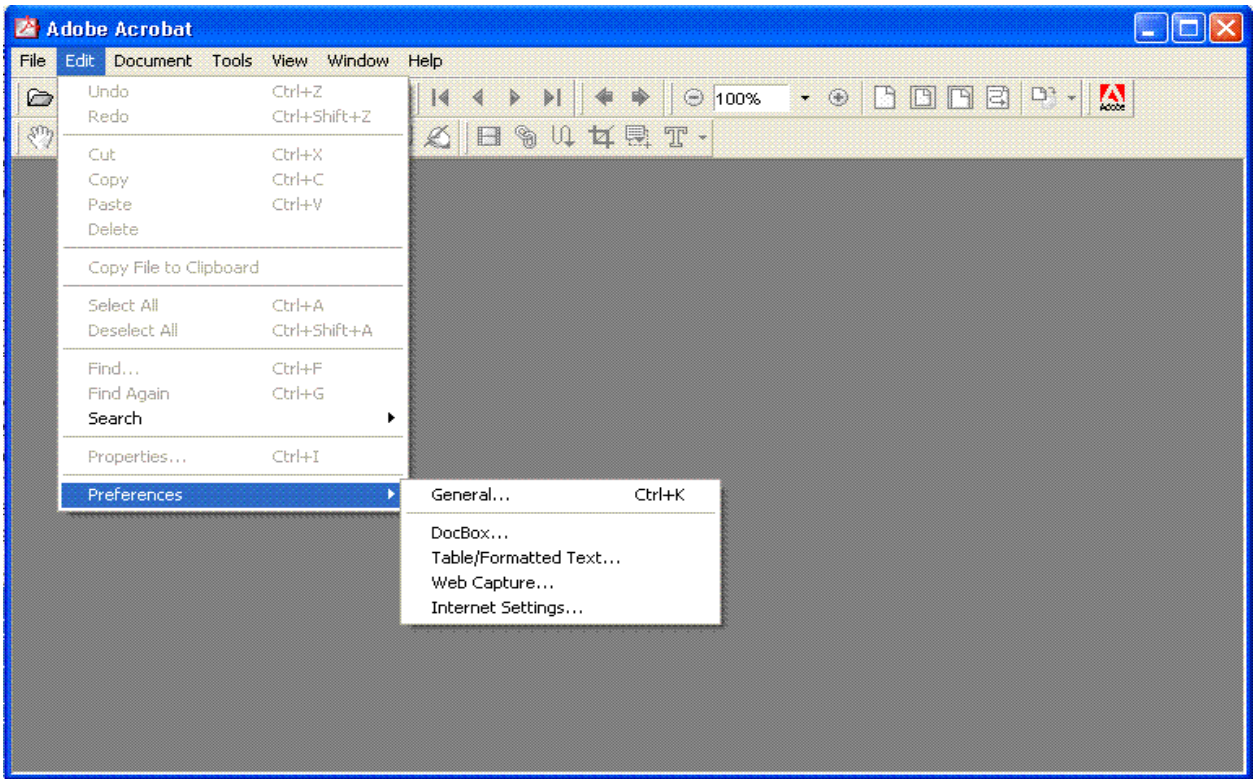


If you have both the free Adobe Reader program and Adobe Acrobat installed you will need to uninstall both. Once Adobe has been successfully removed you can reinstall the program either from your installation CD or by proceeding to the Adobe website (http://www.adobe.com) and installing the free Adobe Reader. This procedure is required by Adobe to install the software correctly; you can't just install the program on top of an already installed program.

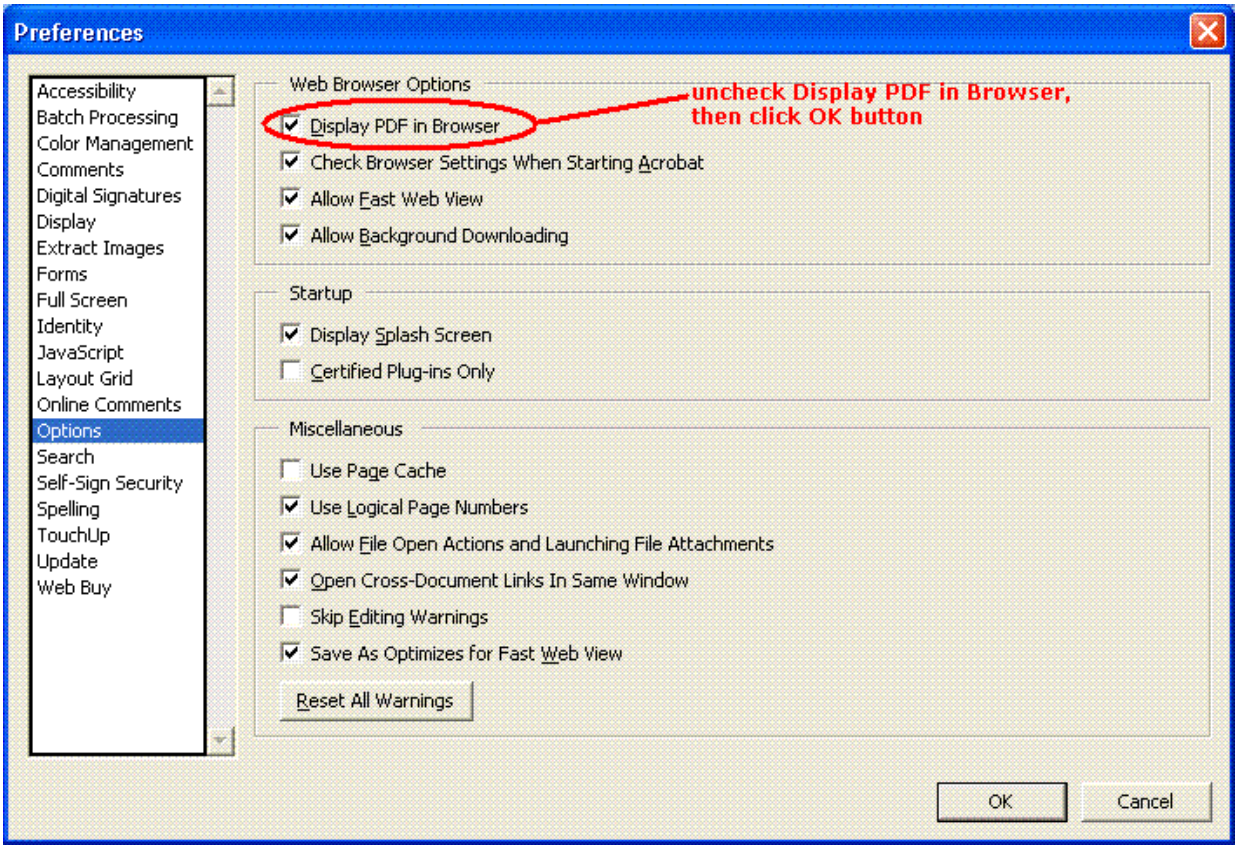
2) Problem: After a form is viewed, clicking the Back button returns you back to the search selection screen, forcing you to reenter your search criteria all over again.

Issue: This isn't really an error, but instead is how Adobe is set up to work with your browser.

Solution: Change how your forms are displayed in Adobe. Open Adobe Acrobat or Reader and select Preferences – General from the Edit menu.



On the left side of the dialog box, click Options. Then uncheck Display PDF in Browser, then click OK and close Adobe.



Now when you click on a form to view/print it, Adobe will open in a separate window with your form. After you've viewed or printed your form, close Adobe and you'll be right back in eForms where you were. This will work any time you open a PDF file in Internet Explorer, not just in eForms.