

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.

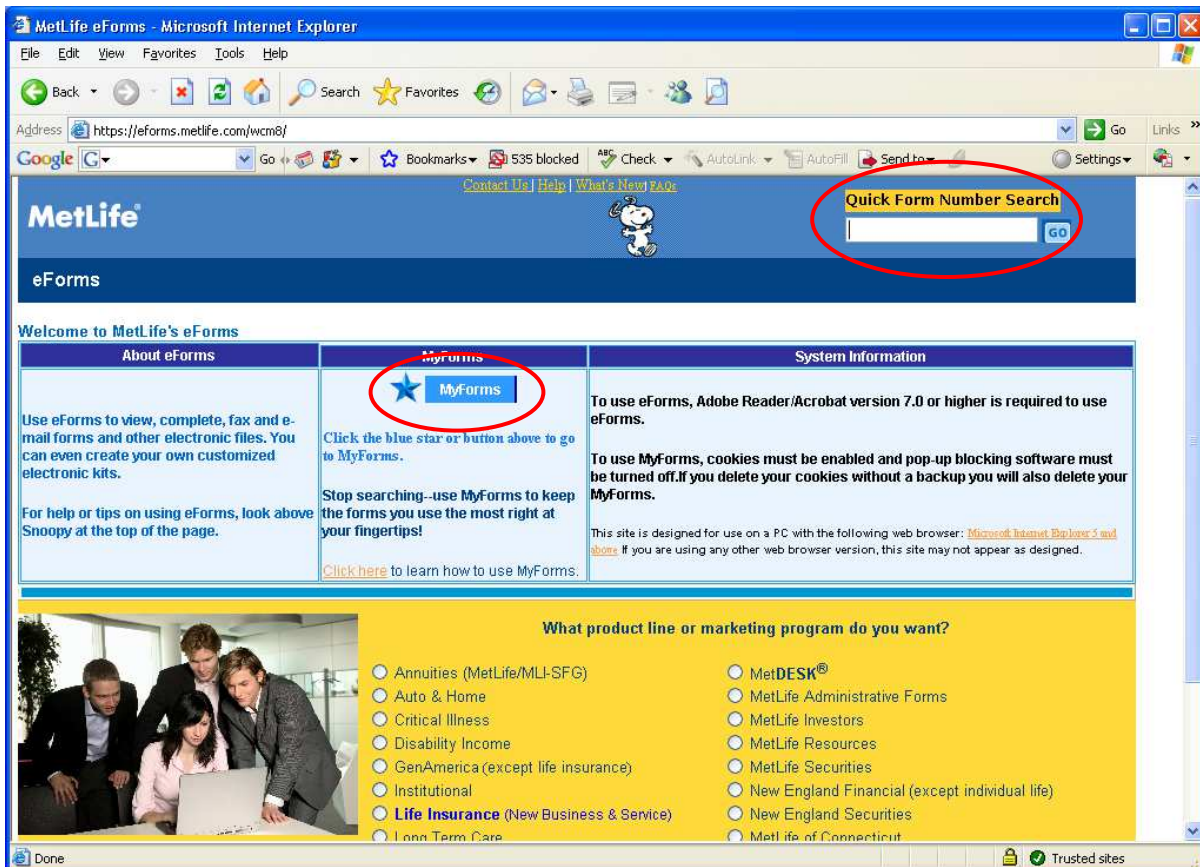


You can create your own **customized electronic kits**, and can save your most frequently used forms to *MyForms*, a feature that allows **quick retrieval without searching**.

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.”

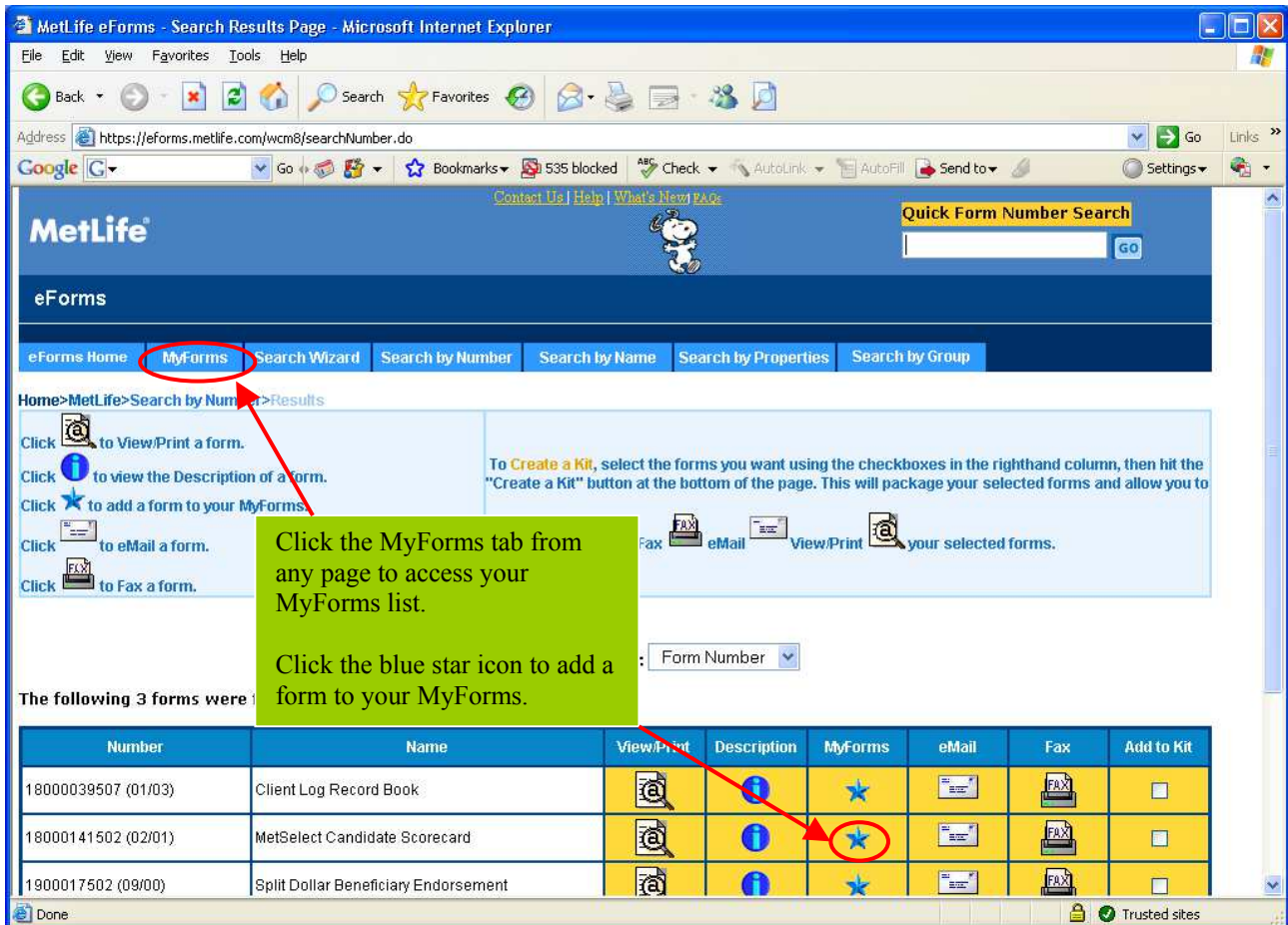
There are two exceptions to the general rule. The first is *MyForms*, and the second is the **Quick Form Search**. These features help you find forms you are familiar with quickly and easily, without repetitive searching or drill-downs.




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.



| Number | Name | View/Print | Description | MyForms | eMail | Fax | Add to Kit |
|---------------------|--------------------------------------|------------|-------------|---------|-------|-----|--------------------------|
| 18000039507 (01/03) | Client Log Record Book | | | | | | <input type="checkbox"/> |
| 18000141502 (02/01) | MetSelect Candidate Scorecard | | | | | | <input type="checkbox"/> |
| 1900017502 (09/00) | Split Dollar Beneficiary Endorsement | | | | | | <input type="checkbox"/> |

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.

MetLife eForms - Microsoft Internet Explorer

Address: https://eforms.metlife.com/wcm8/myforms.jsp

MetLife eForms

Quick Form Number Search

eForms Home | **MyForms** | Search Wizard | Search by Number | Search by Name | Search by Properties | Search by Group

Home > MyForms

Click to View/Print a form.
 Click to view the Description of a form.
 Click to eMail a form.
 Click to Fax a form.

MyForms - "MetLife"

| Number | Name | View/Print | Description | eMail | Fax | Remove | Add to Kit |
|--------------------|---|------------|-------------|-------|-----|--------|--------------------------|
| 1900010088 (09/03) | Policy Payment Request/Traditional Life | | | | | | <input type="checkbox"/> |

[Remove all forms from MetLife MyForms](#)

MyForms - "New England Securities"

| Number | Name | View/Print | Description | eMail | Fax | Remove | Add to Kit |
|-------------|--------------------|------------|-------------|-------|-----|--------|--------------------------|
| APPR529PLNS | Approved 529 Plans | | | | | | <input type="checkbox"/> |

[Remove all forms from New England Securities MyForms](#)

https://eforms.metlife.com/wcm8/myforms.jsp

Important Note: *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**.

MetLife eForms - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://eforms.metlife.com/wcm8/indexnews.jsp>

Quick Form Number Search

GO

The Quick Form Number Search is available from any page in eForms. It allows you to quickly search for a form by its number. Enter either all of part of a form number, then click GO.

Welcome to MetLife's eForms

About eForms

Use eForms to view, complete, fax and e-mail forms and other electronic files. You can even create your own customized electronic Kits.

For help or tips on using eForms, look above Snoopy at the top of the page.

System Information

Adobe Reader/Acrobat version 7.0 or higher is required to use

Cookies must be enabled and pop-up blocking software must delete your cookies without a backup you will also delete your

Stop searching—use MyForms to keep the forms you use the most right at your fingertips!

Click here to learn how to use MyForms.

This site is designed for use on a PC with the following web browser: [Microsoft Internet Explorer 5 and above](#). If you are using any other web browser version, this site may not appear as designed.

What product line or marketing program do you want?

- Annuities (MetLife/MLI-SFG)
- Auto & Home
- Critical Illness
- Disability Income
- GenAmerica (except life insurance)
- Institutional
- Life Insurance (New Business & Service)
- Long Term Care
- MetDESK®
- MetLife Administrative Forms
- MetLife Investors
- MetLife Resources
- MetLife Securities
- New England Financial (except individual life)
- New England Securities
- MetLife of Connecticut

Done Trusted sites

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.

To navigate through eForms you can either:

- answer the questions on the pages to move to the forms you want, or
- once you have chosen a line of business, you can use the tabs above to move to the search page you want.

Would you like to search for your materials today?

Materials to sell new business or service an existing customer - **Search Wizard**

number (Good if you know some or all of the form number).

name (Good if you know some or all of the form name).

ment by its **properties** (Recommended for advanced searches only).


with a common purpose (Can return very large results).

Questions? Comments? Sugg
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For Internal Use/Broker-Dealer
Information and material are pr
limited to First MetLife Investo
ees and representatives of MetLife and its affiliated companies, including but not
company, MetLife Insurance Company of Connecticut, MetLife Life and Annuity
Company of Connecticut, MetLife Investors Insurance Company, MetLife Investors USA Insurance Company, Metropolitan Life Insurance Company, MetLife Auto & Home,
MetLife Securities, Inc., New England Life Insurance Company, New England Securities, Tower Square Securities, and Walnut Street Securities. This material is provided for
business purposes only with respect to MetLife and its affiliates, and it includes copyrighted and/or trademarked materials in which MetLife and its affiliates reserve all rights.

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.**

Life Insurance eForms - Search Results Page - Microsoft Internet Explorer

Address: <https://eforms.metlife.com/wcm8/searchGroup.do?Num2=&headerSort=&groupName=keywordlist%3ASTC&continue.x=76&continue.y=11>

MetLife eForms

Quick Form Number Search

Home > Life Insurance > Search by Group > Results

Click to View/Print a form.
Click to view the Description of a form.
Click to add a form to your MyForms.
Click to eMail a form.
Click to Fax a form.

To **Create a Kit**, select the forms you want using the checkboxes in the righthand column, then hit the "Create a Kit" button at the bottom of the page. This will package your selected forms and allow you to

Fax eMail View/Print your selected forms.

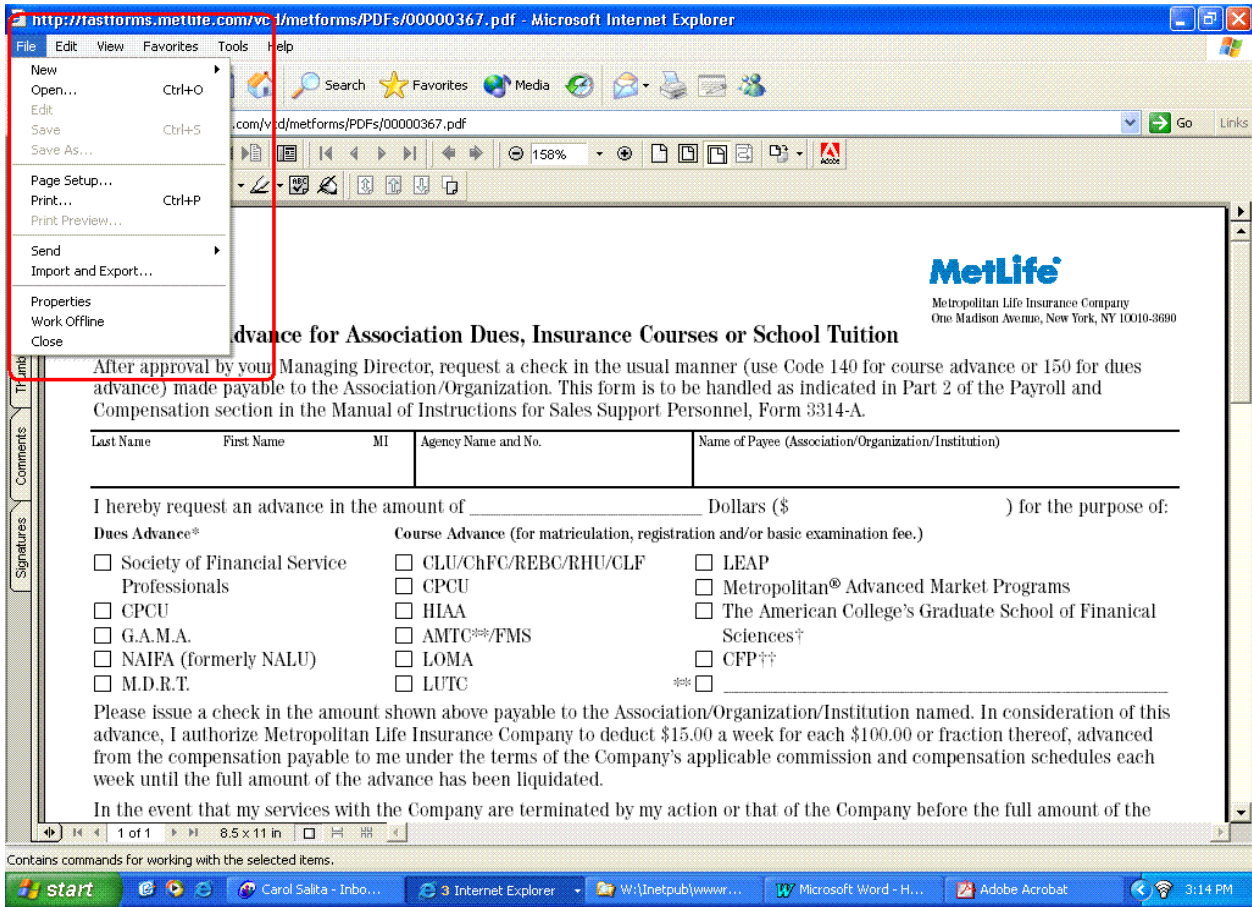
Forms For 'Short Term Conversion Forms'

results sorted by: Form Number

The following 8 forms w


| Number | Name | View/Print | Description | MyForms | eMail | Fax | Add to Kit |
|---------------------|---|------------|-------------|---------|-------|-----|--------------------------|
| ETC-3-02 (02/07) | Term Conversion Application Short Form | | | | | | <input type="checkbox"/> |
| ETC-3-02-CO (11/06) | CO Term Conversion Application Short Form | | | | | | <input type="checkbox"/> |
| ETC-3-02-FL (11/06) | FL Term Conversion Application Short Form | | | | | | <input type="checkbox"/> |

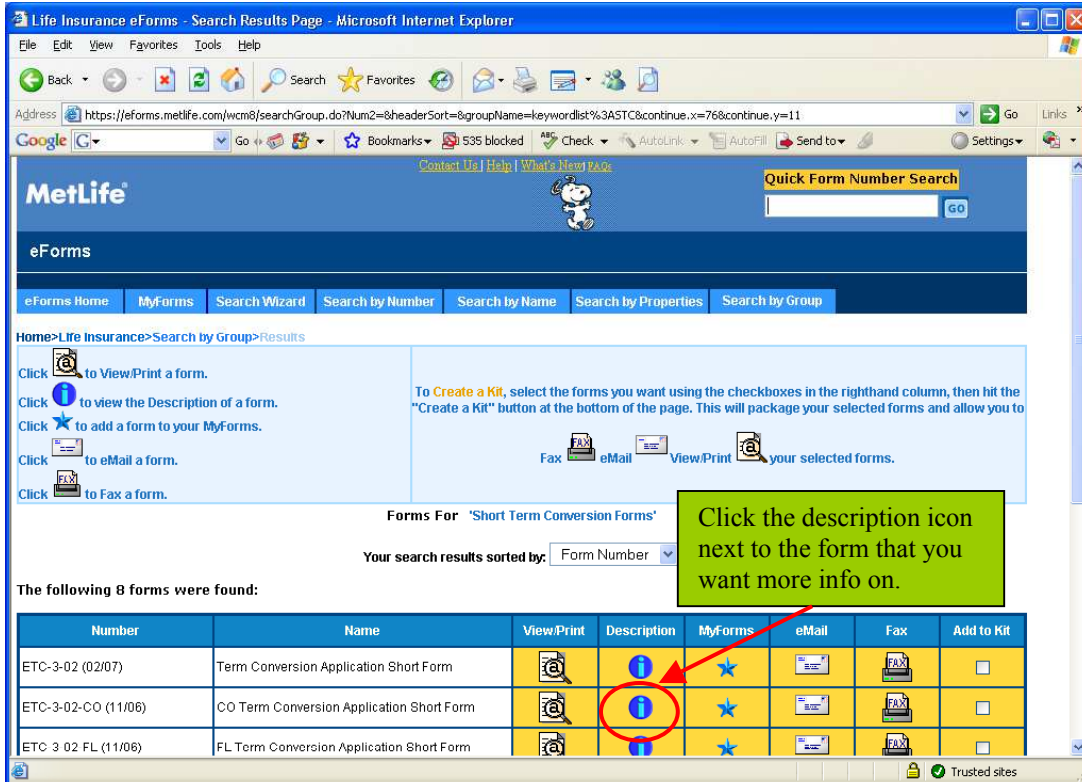
Trusted sites



Special Printing Notice: 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.



Life Insurance eForms - Search Results Page - Microsoft Internet Explorer






Address: https://eforms.metlife.com/wcm8/searchGroup.do?Num2=&headerSort=&groupName=keyWordlist%3ASTC&continue.x=76&continue.y=11

MetLife eForms

Quick Form Number Search

eForms Home | MyForms | Search Wizard | Search by Number | Search by Name | Search by Properties | Search by Group

Home > Life Insurance > Search by Group > Results
















Click  to View/Print a form.
 Click  to view the Description of a form.
 Click  to add a form to your MyForms.
 Click  to eMail a form.
 Click  to Fax a form.

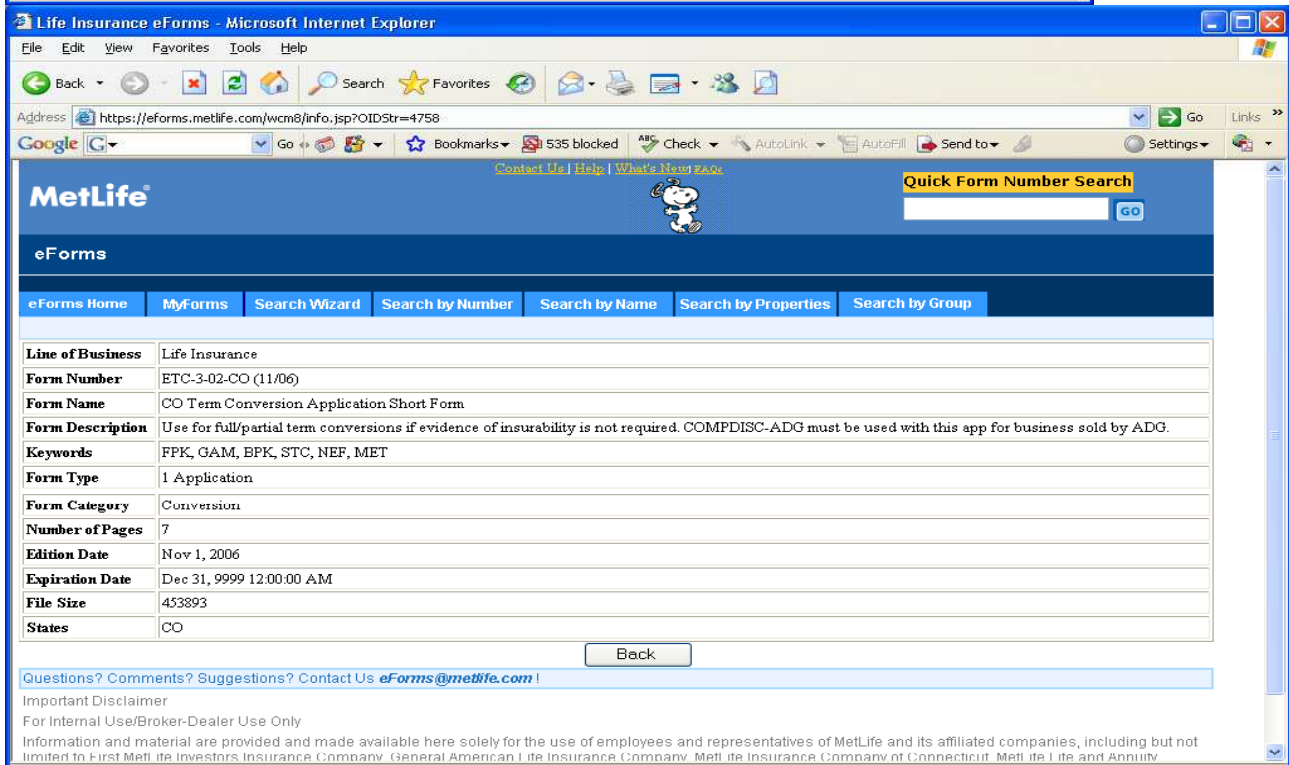
To Create a Kit, select the forms you want using the checkboxes in the righthand column, then hit the "Create a Kit" button at the bottom of the page. This will package your selected forms and allow you to Fax, eMail, View/Print your selected forms.

Forms For 'Short Term Conversion Forms'

Your search results sorted by: Form Number

The following 8 forms were found:

| Number | Name | View/Print | Description | My-Forms | eMail | Fax | Add to Kit |
|---------------------|---|---|---|---|--|---|--------------------------|
| ETC-3-02 (02/07) | Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-CO (11/06) | CO Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-FL (11/06) | FL Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |



Life Insurance eForms - Microsoft Internet Explorer

Address: https://eforms.metlife.com/wcm8/info.jsp?OIDStr=4758

MetLife eForms

Quick Form Number Search

eForms Home | MyForms | Search Wizard | Search by Number | Search by Name | Search by Properties | Search by Group


| | |
|-------------------------|--|
| Line of Business | Life Insurance |
| Form Number | ETC-3-02-CO (11/06) |
| Form Name | CO Term Conversion Application Short Form |
| Form Description | Use for full/partial term conversions if evidence of insurability is not required. COMPDISC-ADG must be used with this app for business sold by ADG. |
| Keywords | FPK, GAM, BPK, STC, NEF, MET |
| Form Type | 1 Application |
| Form Category | Conversion |
| Number of Pages | 7 |
| Edition Date | Nov 1, 2006 |
| Expiration Date | Dec 31, 9999 12:00:00 AM |
| File Size | 453893 |
| States | CO |

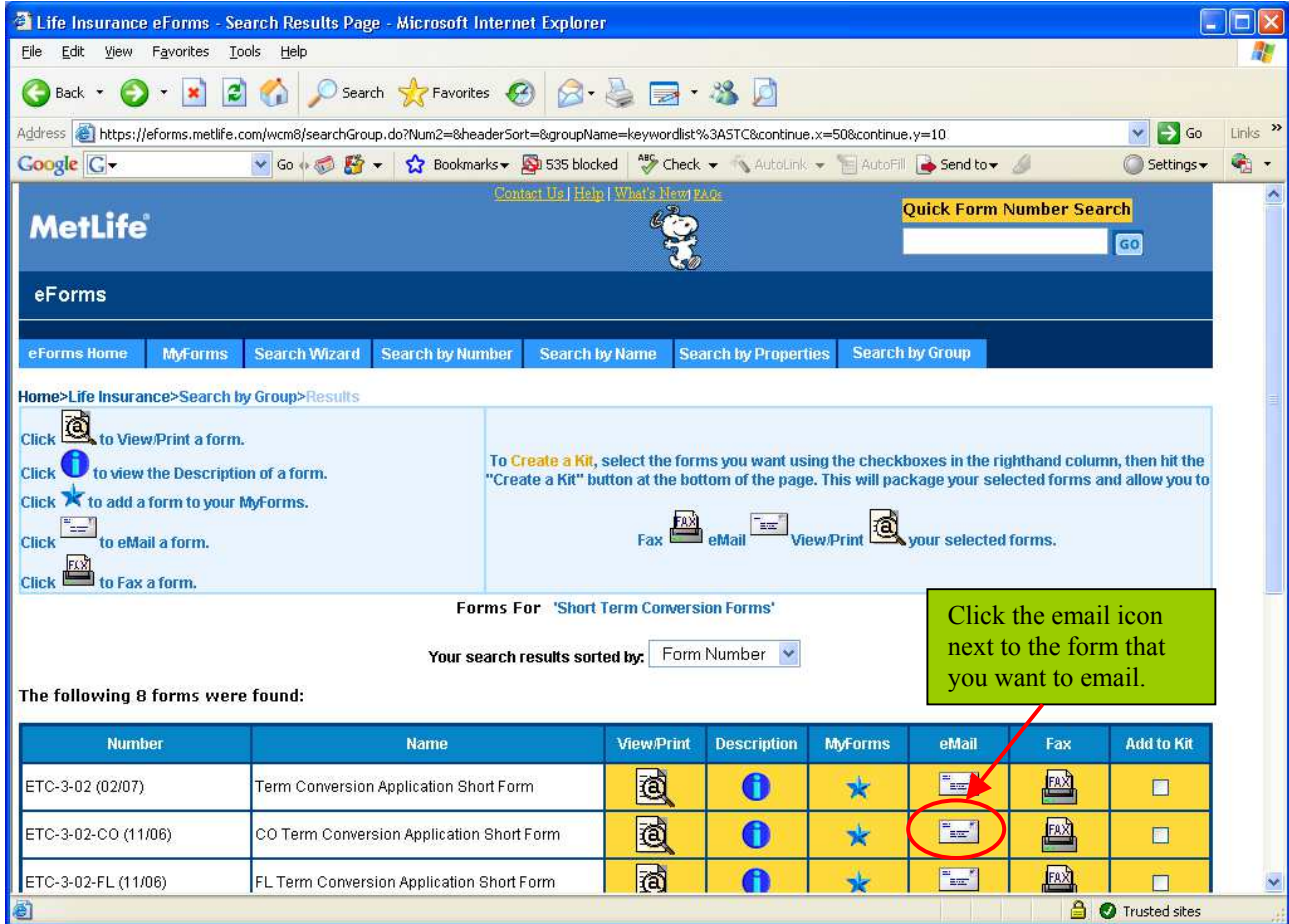
Back

Questions? Comments? Suggestions? Contact Us eForms@metlife.com!

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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.



Life Insurance eForms - Search Results Page - Microsoft Internet Explorer






Address: <https://eforms.metlife.com/wcm8/searchGroup.do?Num2=8&headerSort=8&groupName=keywordlist%3ASTC&continue.x=50&continue.y=10>




MetLife eForms

Quick Form Number Search

eForms Home MyForms Search Wizard Search by Number Search by Name Search by Properties Search by Group

Home>Life Insurance>Search by Group>Results
















Click  to View/Print a form.
Click  to view the Description of a form.
Click  to add a form to your MyForms.
Click  to eMail a form.
Click  to Fax a form.

To Create a Kit, select the forms you want using the checkboxes in the righthand column, then hit the "Create a Kit" button at the bottom of the page. This will package your selected forms and allow you to Fax  eMail  View/Print  your selected forms.

Forms For "Short Term Conversion Forms"

Your search results sorted by: Form Number

The following 8 forms were found:

| Number | Name | View/Print | Description | MyForms | eMail | Fax | Add to Kit |
|---------------------|---|---|---|---|---|---|--------------------------|
| ETC-3-02 (02/07) | Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-CO (11/06) | CO Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-FL (11/06) | FL Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |

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.

Life Insurance eForms - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://eforms.metlife.com/wcm8/private/delivery.do?frmID=https://eforms.metlife.com/wcm8/cmsclient/eForms_PROD_Deployment2/4800/4758.pdf&from=email

Google Go

Contact Us | Help | What's New Page

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>Email Delivery Info

Please make sure that all requested data is completely filled in, then select the "Send Email" button.

Sender: Name
Phone Number

Receiver: Name
Phone Number
Email Address

Subject: Forms

Message

You must enter the full Internet email address.
(Ex. jsmith@metlife.com)

Send Email

Back

Questions? Comments? Suggestions? Contact Us eForms@metlife.com!

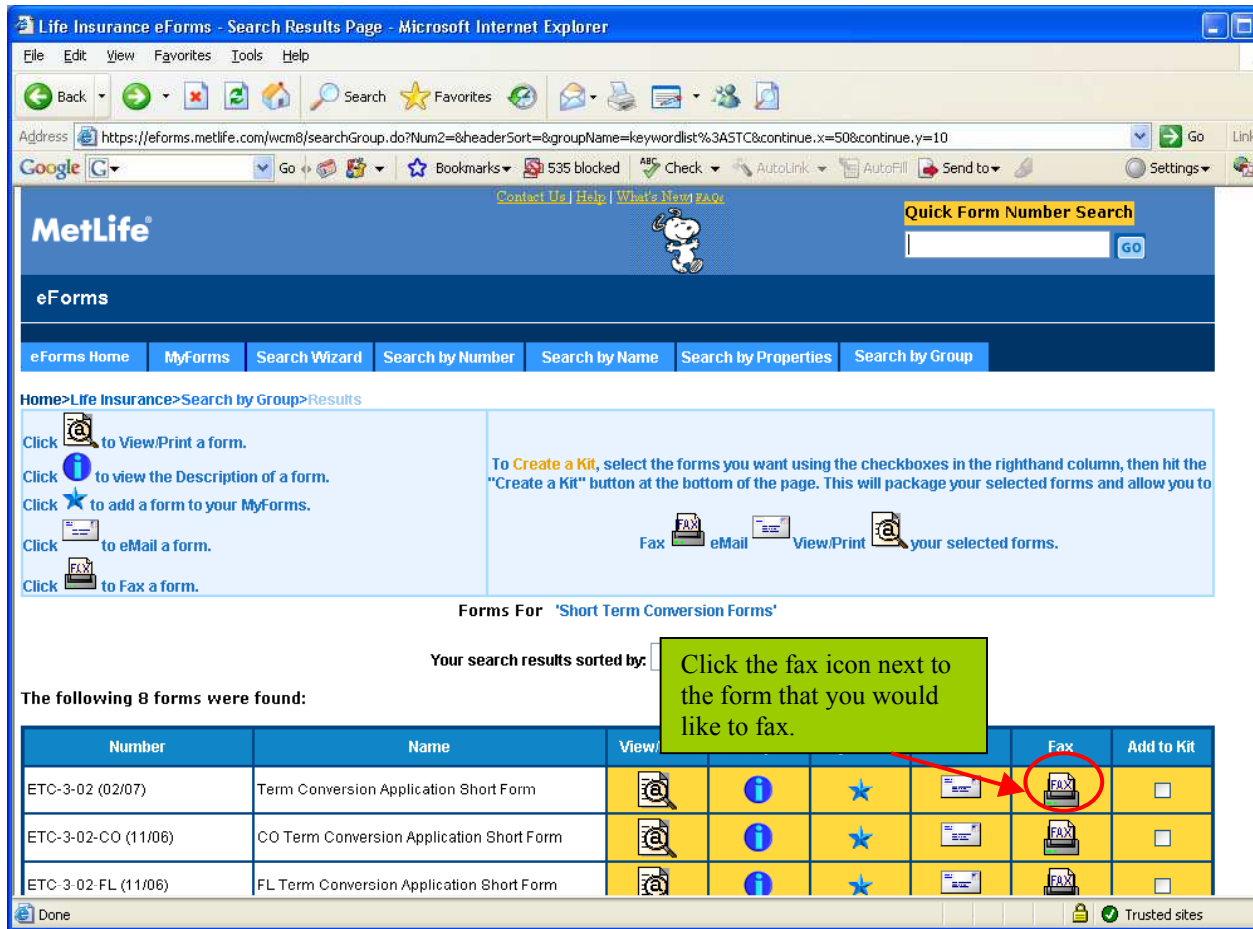
Important Disclaimer

Done Trusted sites

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).








Life Insurance eForms - Search Results Page - Microsoft Internet Explorer




Address: <https://eforms.metlife.com/wcm8/searchGroup.do?Num2=&headerSort=&groupName=keywordlist%3ASTC&continue.x=50&continue.y=10>

MetLife eForms

Quick Form Number Search

Home > Life Insurance > Search by Group > Results
















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Forms For "Short Term Conversion Forms"

Your search results sorted by:

The following 8 forms were found:

| Number | Name | View | Description | MyForms | eMail | Fax | Add to Kit |
|---------------------|---|---|---|---|---|---|--------------------------|
| ETC-3-02 (02/07) | Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-CO (11/06) | CO Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |
| ETC-3-02-FL (11/06) | FL Term Conversion Application Short Form |  |  |  |  |  | <input type="checkbox"/> |

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

Address https://eforms.metlife.com/wcm8/private/delivery.do?frmID=https://eforms.metlife.com/wcm8/cmsclient/eForms_PROD_Deployment2/4800/4758.pdf&from=fax

Google

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MetLife

Quick Form Number Search

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: | Name <input type="text"/> | Receiver: | Name <input type="text"/> |
| | Phone Number <input type="text"/> | | Phone Number <input type="text"/> |
| | Fax Number <input type="text"/> | | Fax Number <input type="text"/> |
| | (#-###-###-####) | | (#-###-###-####) |

You must enter the fax numbers using 1 + the area code.


Comments

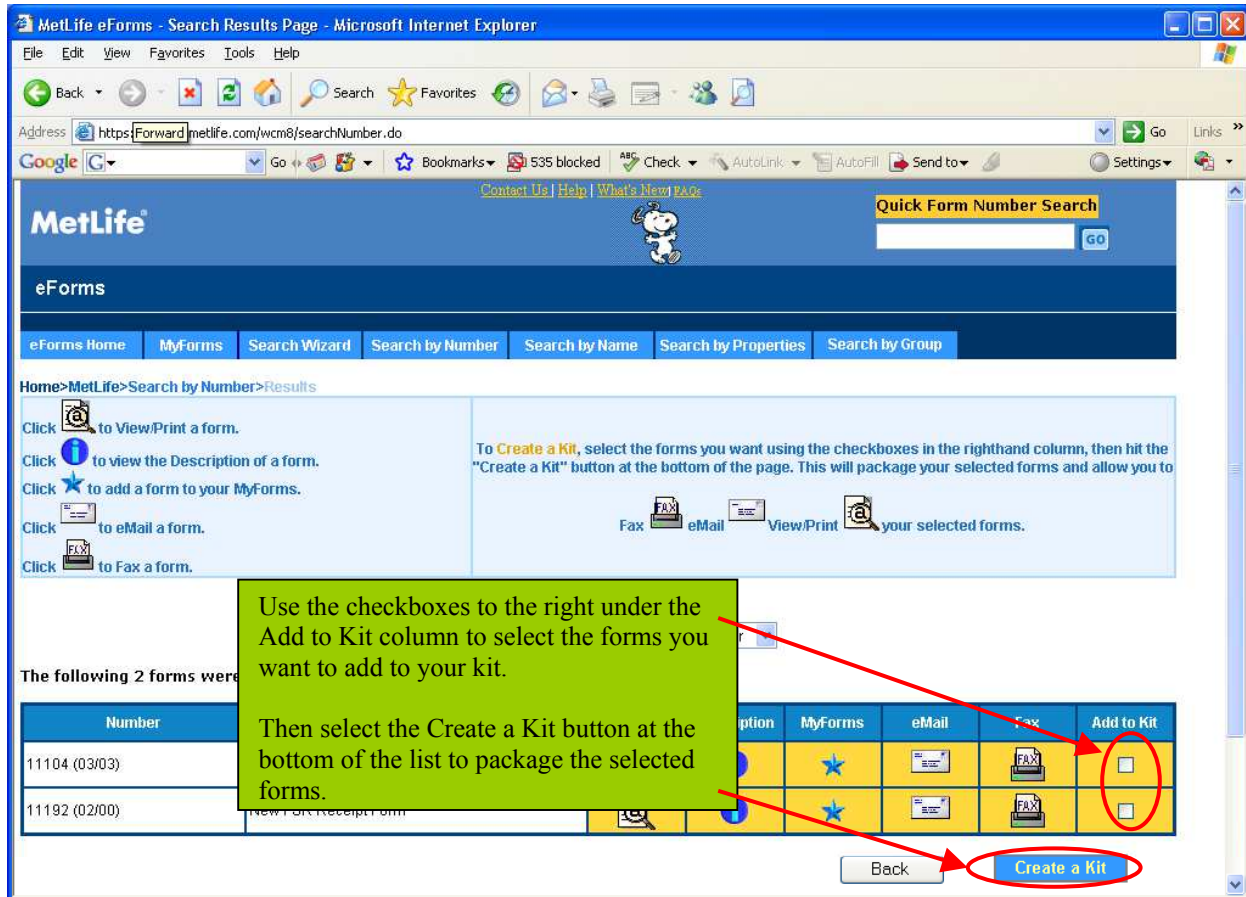
Questions? Comments? Suggestions? Contact Us eForms@metlife.com !

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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

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.



MetLife eForms - Search Results Page - Microsoft Internet Explorer






Address: <https://Forward.metlife.com/wcm8/searchNumber.do>

MetLife Quick Form Number Search

eForms







eForms Home | MyForms | Search Wizard | Search by Number | Search by Name | Search by Properties | Search by Group

Home>MetLife>Search by Number>Results


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The following 2 forms were found:

| Number | Description | MyForms | eMail | Fax | Add to Kit |
|---------------|-----------------------|---|---|---|--------------------------|
| 11104 (03/03) | |  |  |  | <input type="checkbox"/> |
| 11192 (02/00) | New York Receipt Form |  |  |  | <input type="checkbox"/> |

Back **Create a Kit**

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.

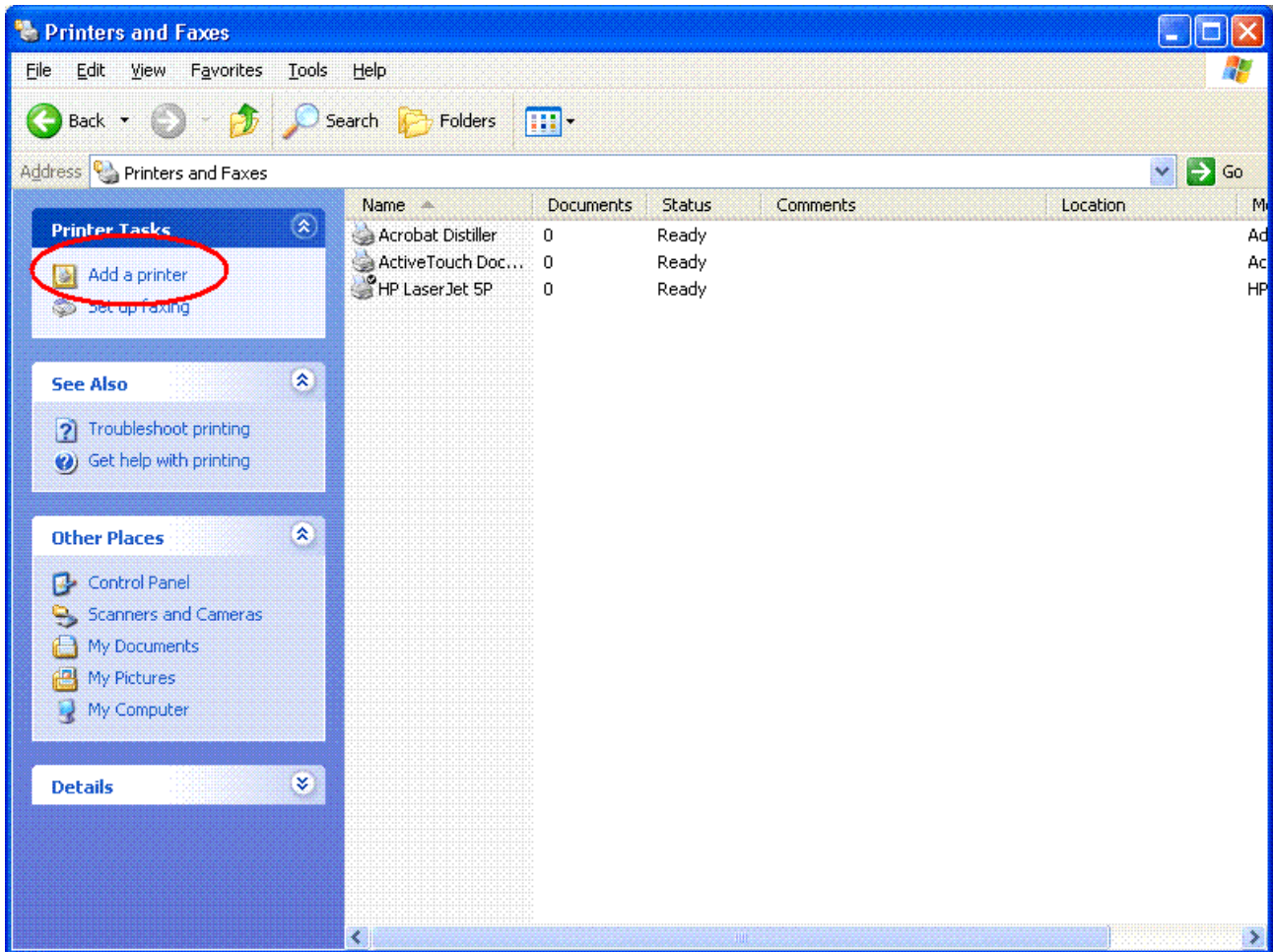
Troubleshooting

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

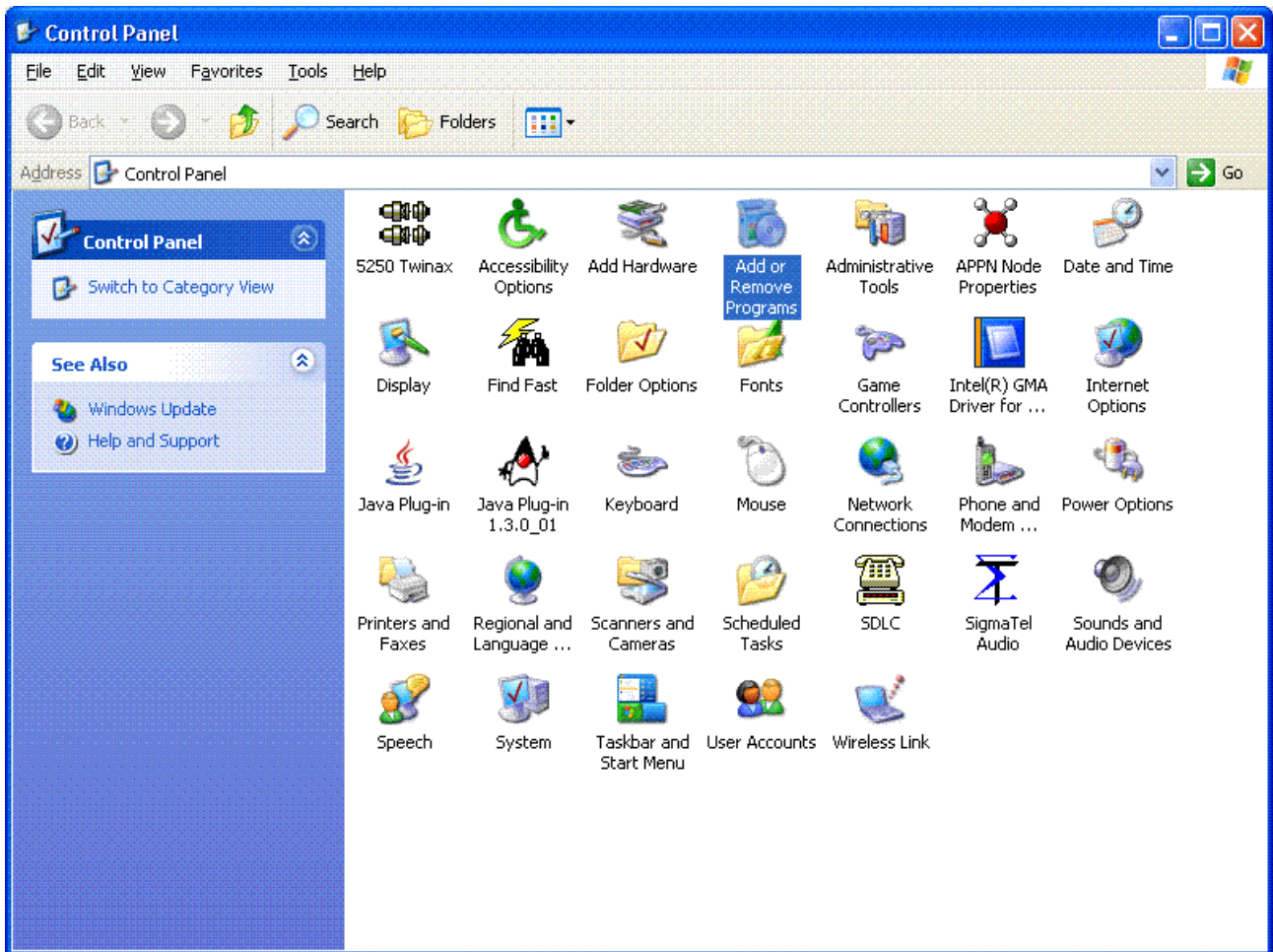
Problem: Adobe Acrobat or Reader is incorrectly installed.

Solution: Uninstall and reinstall Adobe Acrobat or Reader.

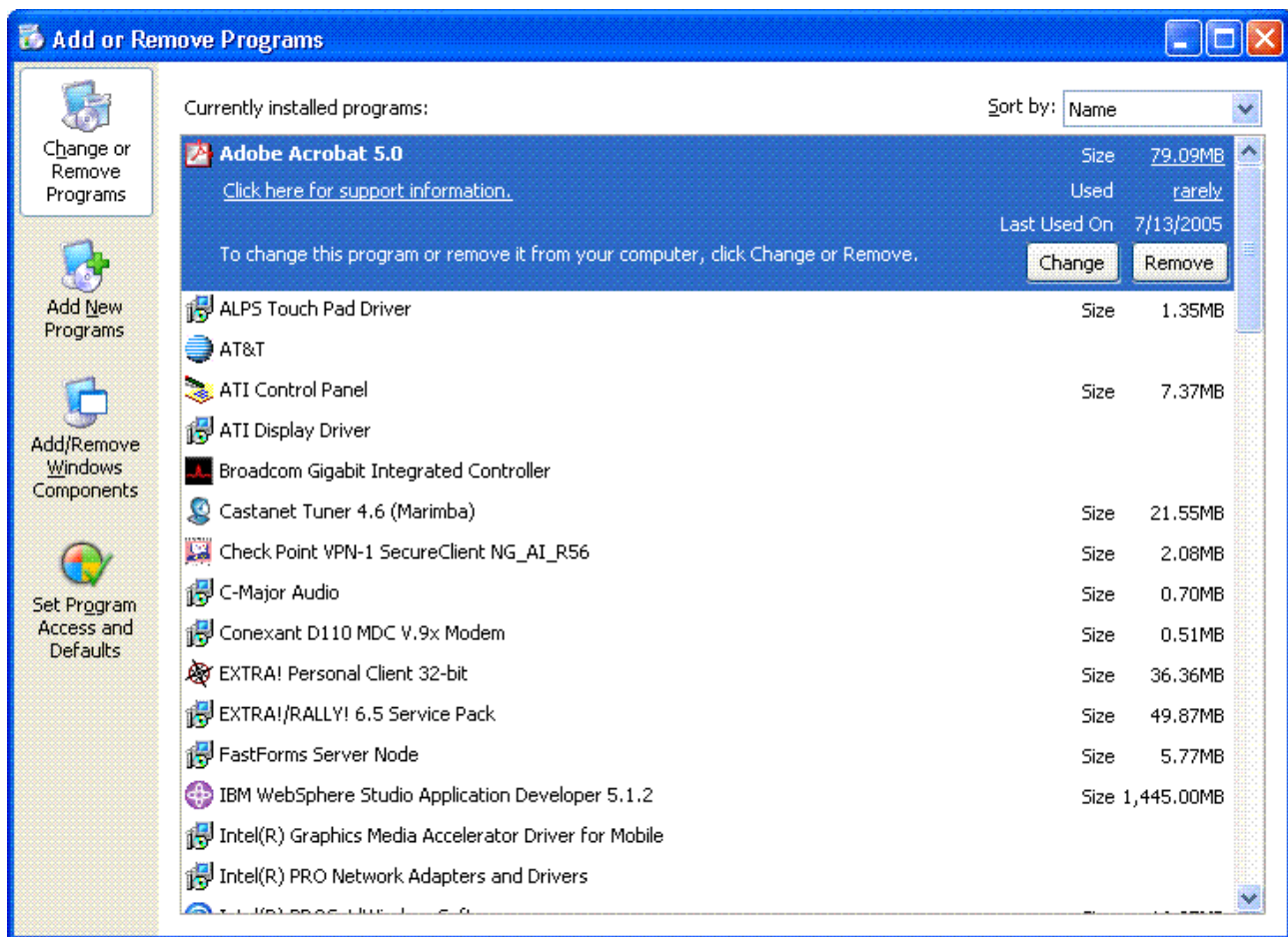
Procedure: First, you must have administrative rights for your computer. You can tell if you have administrative rights by going to Control Panel|Printers and Faxes. If the Add Printer option is grayed out you don't have the necessary rights and will need an administrator to perform this procedure. If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

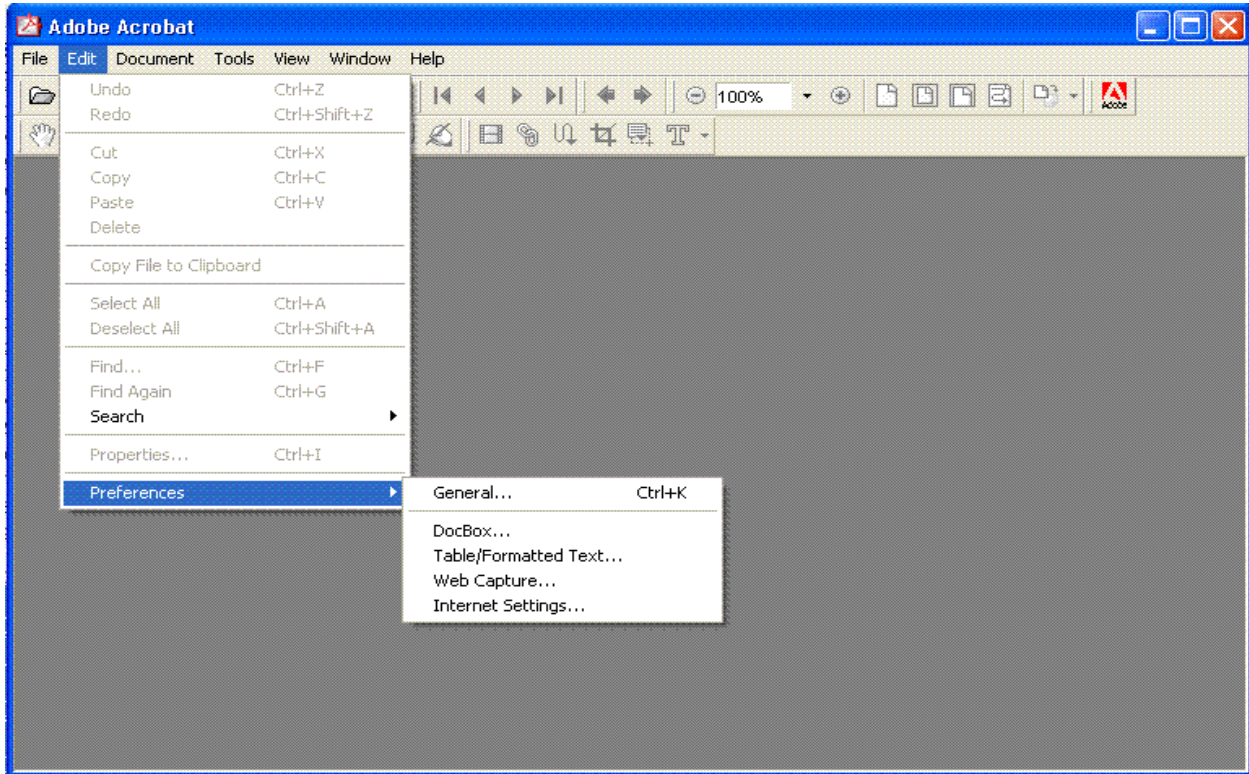


If you have both the free Adobe Reader program and Adobe Acrobat installed you will need to uninstall both. Once Adobe has been successfully removed you can reinstall the program either from your installation CD or by proceeding to the Adobe website (<http://www.adobe.com>) and installing the free Adobe 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.

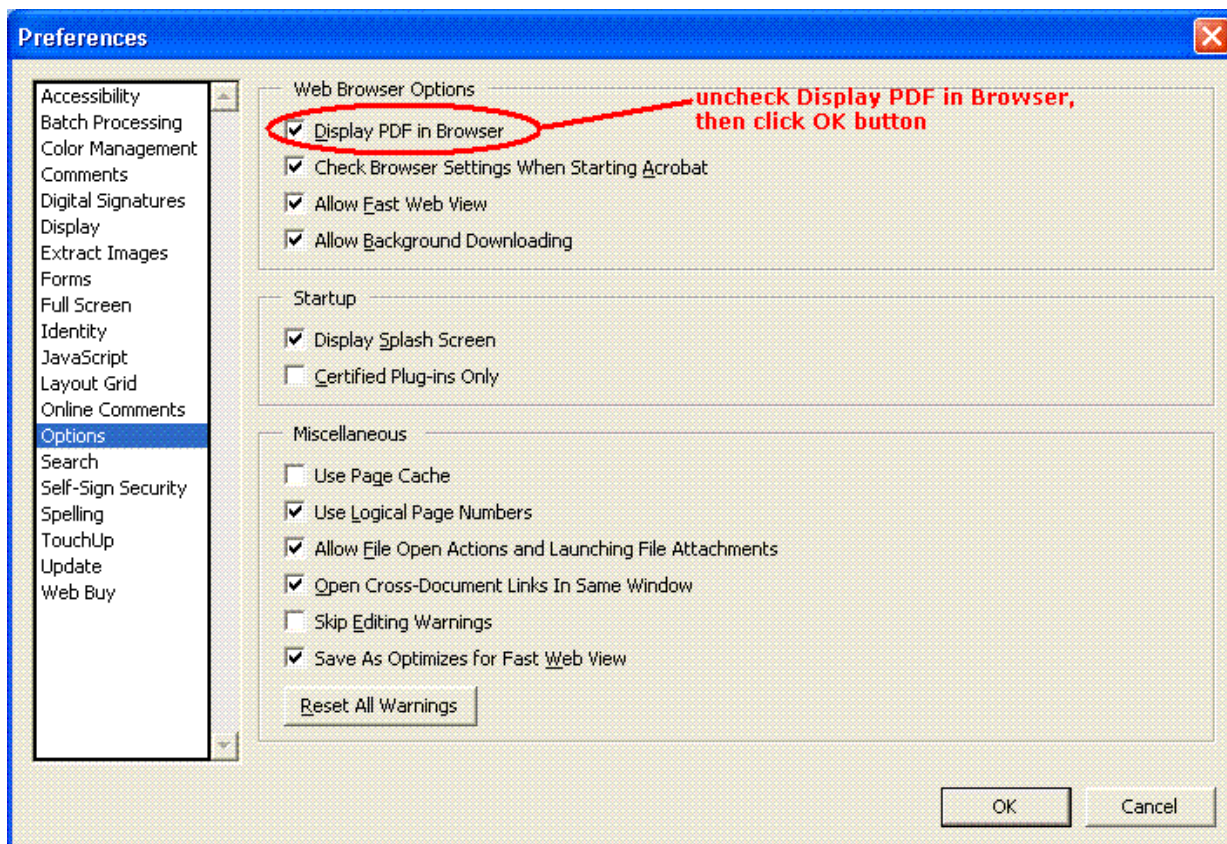
2) Problem: After a form is viewed, clicking the Back button returns you back to the search selection screen, forcing you to reenter your search criteria all over again.

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.