

JH Life eTicket

PRODUCER USER GUIDE



JH Life eTicket allows you to quickly and easily initiate an application for John Hancock Term and John Hancock Term with Vitality. It is available directly from your firm’s website or John Hancock’s producer website, and you will need a User ID and Password to access the tool. Please contact your firm for additional details.

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

CARRIER	ANNUAL	MONTHLY	PRODUCT NAME	RATE CLASS	
SUPER PREFERRED					
	\$216.00	\$27.45	Term 10 with Vitality	Super Preferred NonSmoker	TICKET
	\$207.00	\$24.52	Term 10	Super Preferred NonSmoker	TICKET
PREFERRED					
	\$211.00	\$36.12	Term 10 with Vitality	Preferred NonSmoker	TICKET
	\$308.00	\$33.13	Term 10	Preferred NonSmoker	TICKET
STANDARD PLUS					
	\$493.00	\$42.02	Term 10	Standard Plus NonSmoker	TICKET
STANDARD					
	\$673.00	\$52.10	Ter		
	\$710.00	\$50.53	Ter		

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.

PLEASE COMPLETE THE HIGHLIGHTED INFORMATION AND SELECT **SAVE AND CONTINUE** TO MOVE TO THE NEXT SECTION.

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATERO %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$276.00	---	\$67,000

Insured Information
To ensure a positive customer experience, Applicants are asked to complete all of the fields in this block.

Name: Sub Brown

Sex: Male Female

Date of Birth: MM / DD / YYYY

Email Address:

Preferred phone:

Personal phone:

Business Phone:

Best time to call:

Address:

City: State: ZIP CODE:

Is insured also the Owner? Yes No

- 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.

The screenshot displays the 'Beneficiary Information' section of the application. It includes a table with the following data:

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$276.00	---	\$0/1000

Below the table, there are sections for 'Primary Beneficiary' and 'Contingent Beneficiary'. A pop-up window titled 'Add/Edit Primary Beneficiary' is open, showing fields for Beneficiary Name (John Brown), Relationship (Spouse), Percentage (%), Birth Date (MM/DD/YYYY), Social Security Number, and Email Address.

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.

The screenshot displays the 'Coverage Details' section of the application. It includes a table with the following data:

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 15	\$1,000,000	Super Preferred NonSmoker	\$483.00	---	\$0/1000

Below the table, there are sections for 'Coverage Details', 'Riders and benefits' (Total Disability Waiver), 'Payment information' (Payment Type: --Select--), and 'Purpose of insurance' (Income replacement, Other).

TIPS:

- Adding the Total Disability Waiver will increase the premium (note 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.

The screenshot displays the 'Existing Coverage' section of the application. It includes a table with the following data:

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$276.00	---	\$0/1000

Below the table, there are sections for 'Existing Coverage' questions:

a. Does the Policy Owner have any existing life insurance and/or annuities with this or any other company? Yes No

b. Is the Proposed Insured under this application also insured on any other existing life insurance policy, including any policy that has been sold, assigned, transferred or settled? Yes No

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.

PRODUCT	FACE AMOUNT	RATE CLASS	ANNUAL PREMIUM	RATING %	FLAT EXTRA
Term 10 with Vitality	\$1,000,000	Super Preferred NonSmoker	\$276.00	---	\$0/1000

Agent Information

Have you personally met the Proposed Insured? Yes No

Agent Name: [Text] Agent: [Text]

Enter Description: [Text]

Agent Code: [Text]

Agent License Number: [Text]

Serving Agent: Yes No

Social Security Number: [Text]

Phone Number: [Text]

E-mail 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 the 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	\$276.00	---	\$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;
- The 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:

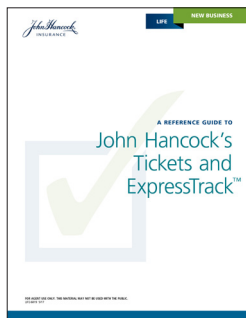
- This is the final screen prior to submission.
- Once submitted, you will receive an email confirmation, as will the firm contact listed in the firm profile.
- A notice will also go to the John Hancock representative to start the interview process and John Hancock will receive a copy of the ticket to 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 pending 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 firm.

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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