



## Tele-CMI

Convenient and Comfortable Interviews  
For Your Insurance Needs

Tele-CMI  
(Client Medical Interview)  
is a method of collecting  
information on your  
insurance application in a  
manner that is **convenient**  
and **comfortable** for you.

### Benefits of Tele-CMI

- You will be able to schedule a call for the day, time and location most convenient for you.
- The tele interview will be conducted by skilled MassMutual® home office representatives.
- Your voice signature simplifies the process with no need for additional paperwork.
- The call only takes about 25 minutes to complete.

## HERE'S WHAT YOU CAN EXPECT:



### Initial Contact

The MassMutual Personal History Interview Team will reach out to you in one of three ways.

- If there is a specific time provided on the application/cover letter, the Personal History Interview team will contact you at this specified time.
- If you have “opted in” for text messaging, the Personal History Interview Team will contact you via text to call in or schedule time to complete the Tele-CMI.
- If you have provided an email address, the Personal History Interview Team will contact you via email to call in or schedule time to complete the Tele-CMI.



### On the Call

- Your security is paramount so the call will begin with your authentication (i.e. verification on name, DOB, last four of SSN)
- Legal disclaimers will be read and agreed upon by you
- The tele interview will consist of the following:
  - a. Height/weight and other related questions
  - b. Family history

c. Medical questions including list of prescriptions

- Signature Ceremony (Voice Sign)
  - a. At the conclusion of the Tele-CMI questions, you will be able to “voice sign” the application.
  - b. If you choose to use voice sign, you will restate your name, and city/state in which you are signing.
  - c. If you choose **not to use** voice sign, a traditional (pen) signature will be required on part 2 of the application as a part of the policy delivery requirements upon issue.
- Post Tele-CMI Questions (Non-medical)
  - a. Once the Tele-CMI has been signed there are additional questions (non-medical) questions that you will be asked. These questions are essential for the underwriting review, but not a part of the policy – thus they are asked after your pen or voice signature has been obtained.
- Your financial professional will receive an email when the Tele-CMI has been completed.



### Post Call

- Once the call has been completed, the information will be sent to the Underwriter for review.
- Your advisor will reach out to you regarding any “next steps” or will answer any questions you may have.



Proper preparation will help us complete the interview as quickly and easily as possible. Thank you for applying for MassMutual insurance. We look forward to our upcoming conversation.

**Use the space provided below to prepare for your call:**

<b>Name/Address of Primary Care Provider</b>
<b>Medical History</b>
<b>Medication</b>