

## Frequently Asked Questions

This FAQ addresses questions about the Modernization of Forms.

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### SECTION 1: Updated form design standards & guidelines

**Q:** Do the standards apply to all forms?

**A:** To answer, we must first define “form.” A form is a document with the primary purpose to collect, as opposed to convey, information. The standards for forms apply to all documents with this purpose.

**Q:** Who developed the Standards & Guidelines?

**A:** Our Design team, leveraging industry Best Practices, developed the Form Design Standards & Guidelines. Management, the Forms Standards Committee and Legal approved these Standards & Guidelines.

**Q:** Who can apply the Form Design Standards & Guidelines to my forms and when should it be done?

**A:** Submit a [Work Order](#) and our team will apply the Form Design Standards & Guidelines to your form. If you are a self-service Client and have this capability, you should make sure your forms comply with the Form Design Standards & Guidelines as the need for other revisions arise. It is not required that forms be modified solely to apply the standards, but if your workload permits, it is encouraged you use the opportunity to align your forms to the standards.

**Q:** Where can I find a copy of the Form Design Standards & Guidelines?

**A:** The current file is located on the [eForms website](#). If you are unable to locate, please reach out to Form Services.

**Q:** What is the deadline I need to meet in order to convert my forms?

**A:** You should convert your forms in compliance with the Form Design Standards & Guidelines as you request revisions.

**Q:** Who is paying for the conversion?

**A:** For 2015, The SCC Program has identified funding for an initial set of forms. Once funding is depleted, your LOB will be charged for the conversion.

**Q:** Are there Standards & Guidelines for other types of documentation (*i.e., Endorsements, Letters, Policies, etc.*)?

**A:** Yes. Form Services and the SCC team develop templates each quarter for other types of documentation as needed. These templates are located on the [U.S. Standards & Guidelines website](#). Please consult the Decision Tree to choose a template that best suits your needs.

**Q:** I cannot locate a template to fit my need. Can you create one?

**A:** Yes. We deploy templates on a premeditated schedule because of the work effort required to design, test and deploy. However, please send an email, along with your proposed document, to [SCCsupport@metlife.com](mailto:SCCsupport@metlife.com). The Quality Assurance and Content & Design Teams work together to provide recommendations on how to best align your document to the U.S. Standards and Guidelines.

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### SECTION 2: Convert all forms into the New Look (*Standardized*)

**Q:** I dislike how some of the standard items appear on my form. Am I allowed to change it?

**A:** No. If you disagree with a standard as it applies to your form, please send a Work Request, found on the [eForms website](#). Include your revised form highlighting the Standard deviation you feel is required. We can provide alternative solutions based on challenges we have already faced or catalogue your exceptions for consideration in future Standards updates.

**Q:** I want to comply with Form Design Standards & Guidelines, but my business has specific needs. What should I do?

**A:** Please send us a [Work Request](#) if you believe you have business needs that differ from the standards. Include your form and highlight areas that may be a deviation from the Standards. Please make sure to include the business reasons that support your need. We can provide alternative solutions based on

challenges we have faced in other lines of business, or catalogue your exceptions for consideration in future Standards updates.

**Q:** I see you have added color. What if my print budget does not allow for color printing?

**A:** The U.S. Standards & Guidelines allow for greyscale versions of our design features that appear in blue for documents that do not have color capabilities. Your printer may automatically convert these blue features to greyscale when printed. If not, send a [Work Request](#) and we can provide you with the versions you require.

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### **SECTION 3: Convert all forms to new look and platform** *(Modernized)*

**Q:** What is LiveCycle?

**A:** LiveCycle is an Adobe software program used by Form Services to create your forms. LiveCycle enables the creation of intelligent and dynamic forms, most notably the ability to leverage common form fragments across multiple forms as well as other improvements in functionality that are not available in Word or InDesign.

**Q:** I am a Self-Service Client and my team works in Documaker and Word. Do I have to convert my forms to LiveCycle?

**A:** You do not have to convert your forms to LiveCycle. However, please keep in mind that your forms will not be compatible with any planned upgrades going forward. If you choose to keep your forms in Word or InDesign, you will still need to align your forms to current Standards when implementing any changes – [Please see our Form Standards & Guidelines for further details.](#)

**Q:** I usually maintain my own forms, but I would like to make sure my forms stay current. Who can help me convert my forms to LiveCycle?

**A:** Form Services will be happy to help. Please submit a [Work Request](#) for Design services for form conversion.

**Q:** I submitted my form through Form Services for work. When it was returned, it looked completely different. What happened?

**A:** As of [February 12, 2015](#), Form Services has revised their Design Standards & Guidelines. All BAU (Business as Usual) work submitted to Form Services will convert automatically to the current Design Standards & Guidelines.

**Q:** How long will it take to convert my form to the new Standards and platform?

**A:** The average time your form will be in Form Services for conversion is approximately 10-14 business days. During this time, Form Services will update your form to the current standards and platform, Adobe LiveCycle. In addition, we perform an internal QC of your form to ensure all requested changes are complete.

**Q:** Is there a benefit for converting my form?

**A:** Yes. Your form will be able to take advantage of future LiveCycle updates developed by Form Services. These updates will allow Form Services to revise multiple forms at one time and decrease the turnaround time for form requests and changes.

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### **SECTION 4: Exception procedure**

**Q:** My form is a filed form and I do not have time to update. What can I do?

**A:** Form Services developed an Exception Procedure. First, please consult with Legal and Compliance as alterations to filed forms may require re-filing with regulatory agencies. If you need an exception, present your need to your Vice President or the SCC Vice President, Sharon Waters. You may submit your request via email. Please include the form(s) recommended for exception, business reason(s) for the exception request and the date that you will complete your updated form (self-service clients only) or submit to Form Services for redesign. Please note that the date can be no more than 30 days from your “Go Live” date. For example, if we grant an exception on a form with a Go Live date of 6/1/2015, you will need to submit your form back to Form Services on, or before, 7/1/2015 for conversion.