

# TeleApp Instructions

## for Producers



Using TeleApp can speed up the underwriting process, reduce call-backs to customers for additional information and help you deliver a policy sooner.

### Five Steps to Complete the TeleApp

1. **Complete** the Application for Individual Disability Insurance.
2. **Have your client sign** the application agreement and other required forms and authorizations.
3. **Call LifePlans — The Standard's TeleApp vendor** —at 844.276.1330 to schedule the interview while your client is still with you (or on the telephone).

The LifePlans representative will confirm the state of the application and ask your client for basic information. (The state of application is the state in which your client lives.) The representative will then schedule the interview with your client, providing an overview of what to expect in the interview.

4. **Add the time and date** of the scheduled interview, along with the referral number LifePlans will give you, to your Producer Information Report.
5. **Submit** the completed application packet, requirements and Producer Information Report to your master general agent or Securian managing partner.

### Scheduling the Telephone Interview Post-Application

If you choose not to schedule the telephone interview with your client present, submit the completed application packet, requirements and Producer Information Report to your master general agent or Securian managing partner. The TeleApp will then be ordered and LifePlans will contact your customer to schedule the interview.

### Prepare Your Client

To ensure your client is prepared for the interview, please review the questions listed on the reverse of this flyer. Also provide your client a copy of the flyer [Telephone Interview - What to Expect](#). This flyer is available at [www.standard.com/di](http://www.standard.com/di) under *Find Marketing Materials*.

### Questions?

Please contact your master general agent or Securian managing partner.



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continued on reverse

## Individual Disability Insurance

### Review Interview Questions With Your Client

In addition to employment and lifestyle questions, your client will be asked a series of medical questions.

**Be sure your client is prepared to provide names and addresses of all medical professionals and facilities. The interviewer will ask about diagnoses, dates, treatments, etc. Below are examples of questions asked:**

- Date you last saw your primary medical provider or other health care practitioner, including reason seen, treatment provided or prescribed, and results.
- Have you within the last three years taken any prescription or nonprescription medicine or supplement?

*Have you been diagnosed, treated, given advice or tested positive for any of the following in the last 10 years?*

- Disorder of the eye, ear, nose throat or skin?
- Anxiety, depression, nervousness, stress or post-traumatic stress disorder (PTSD)?
- Disease or disorder of the brain or nervous system?
- Disease or disorder of the immune system?
- Kidney, urinary system or prostate disorder?
- Disease or disorder of the lungs or respiratory system?
- Disease or disorder of the heart, blood or blood vessels?
- Disease or disorder of the liver, gallbladder, pancreas or digestive tract?
- Disease or disorder of the glandular systems?
- Complications of pregnancy, C-section or infertility?
- Cancer?
- Disease, disorder or injury of the bones, joints, nerves or muscles?

*In the last five years, have you:*

- Been hospitalized or been seen by a physician, chiropractor, counselor, psychiatrist, therapist or other medical professional?
- Had an EKG, blood test or sleep study or other medical procedure, study or test?
- Been advised by a medical professional to have any diagnostic test, medical care surgery or hospitalization that was not completed?