# Answers to DocFast®

## Frequently Asked Questions

For assistance with DocFast, please email:

DocFast@standard.com

We are always happy to help you.

## Contents



### 1. Who do I contact for assistance with DocFast?

For technical support, please email support@ipipeline.com or call 800.641.6557. Technical support staff are available 5 a.m. – 5 p.m. Pacific, Monday through Friday.

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DocFast Answers to FAQs
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## 2. How do I access my dashboard?

If you received a notification email with a link to a policy, select that link and it will take you to the log-in page. If you do not have an active link for a specific policy, contact your general agent's office for assistance.

## 3. Who do I contact for assistance with Multi-Factor Authentication?

For Multi-Factor Authentication, please email support@ipipeline.com or call 800.641.6557.

## 4. How long does my one-time password (OTP) for Multi-Factor Authentication last?

By default, iPipeline will ask each user for the OTP once every 30 days on the same device and browser. In between those instances, the login experience will revert to username and password only.

When entering the code, the user may de-select the trusted device option which requires OTP on the next login, without waiting 30 days.

## 5. How do I access my dashboard after a time-out error?

You should be redirected to the log-in page when you try to take action. If you are not automatically taken to the log-in page, contact DocFast support (see number one above).

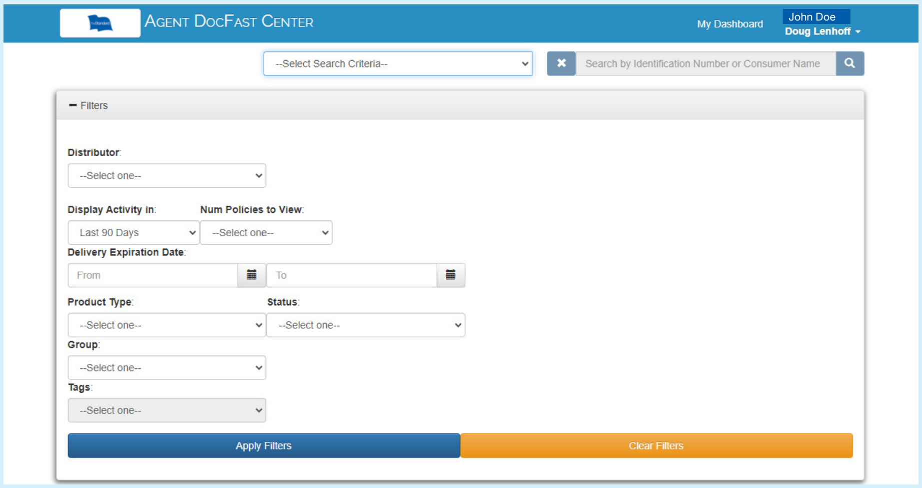
## 6. When I use the link, I am denied access. What can I do?

- Close all your browsers.
- Open your email notification and use the link in that email.
- If you continue to receive error notices, please contact DocFast support (see number one above).

## 7. I am trying to send the policy to my customer, but when I select the **Send** button, I receive a **Please Wait** message and nothing happens.

Reset your view by selecting **Filters** and choose **All** next to **Display document with activity in**.

Choosing **All** policies in the dashboard view usually resolves the **Please Wait** issue and you can then e-deliver the policy to your customer.

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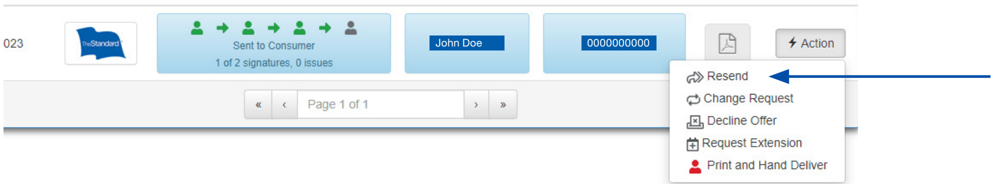
## 8. My customer is locked out of the policy. Can the link be refreshed?

Once a consumer is locked out of a policy, you must send a new link. To resend a policy link, use the **Action** button and select **Resend.**




If your customer has already signed, confirmed or declined acceptance electronically, no further action is possible. Please contact your customer management specialist at The Standard‡ or email DocFast@standard.com.

## 9. My customer entered the last four digits of their Social Security number and was denied access. What can I do now?

- Verify that your customer is using the same last four numbers of the SSN as those on the application.
- If the SSN on the application is incorrect, give your customer management specialist the correct SSN. The Standard will then make the correction and reissue the policy.
- If the SSN on the application is correct, please contact your customer management specialist to verify the number in The Standard's records.
- If the SSN on the application is correct, but the customer entered a different number, resend the policy to your customer to refresh the link and restore access to the policy.

## 10. I received notification that my customer has successfully logged in to the policy. Does this mean the policy is in force?

You will receive notifications whenever customers access policies, until the point when customers complete the signature and acceptance process.

Once the customer signs and accepts the policy, verify that the signature and acceptance process is complete:

- Locate the policy on your dashboard and open the policy's .PDF file.
- Scroll to the end of the document to view the signatures and the Certificate of Completion.

At this point, the policy may not be in force. The Standard receives notification when a policy is accepted and then processes the delivery requirements. The policy is usually placed in force within one or two business days, provided everything is in order, including valid account information for the initial premium draft, if required. When there is an issue with a delivery requirement, the writing producer is advised if further action is required.

## 11. How do I print a policy for delivery if the customer does not wish to receive the policy electronically?

Select **Actions** and **Print and Hand Deliver**. (*Do not click* on the .PDF icon in the dashboard or summary view. That opens a file with a watermark.)

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## 12. I am able to select **Print and Hand Deliver** but the document window does not open.

- Make sure the pop-up blocker in your browser is turned off.
- Confirm that the document did not open behind a window open on your desktop.
- Close all browsers.
- Use the email link to reopen the policy.
- Use the **Actions** button to find the printing option. (*Do not click* on the .PDF icon.)
- The policy should now open without the watermark.

## 13. The document opened without the watermark, but when I try to print it, nothing prints.

Check your print server connection, computer print settings and the status of your printer. You may wish to consult with your agency's information technology staff.

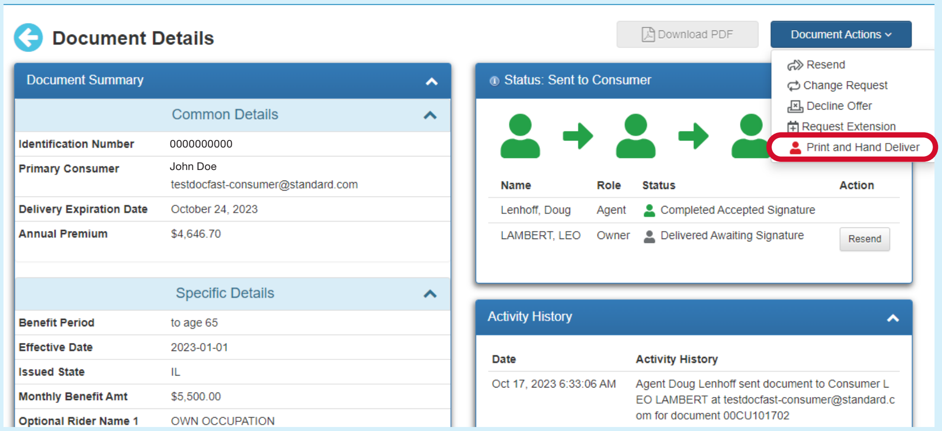
## 14. I selected **Print and Hand Deliver** from **Actions**, but the file has the watermark.

This can happen if you opened a .PDF of the policy (with the watermark) and it is open on your desktop.

Close all versions of the policy file including the .PDF and/or the one from which you are trying to print.

Select **Document Actions**.

Select **Print and Hand Deliver**.




Once printing is complete, the policy status is updated on the dashboard to **Printed for hand delivery** and you will not be able to deliver the policy electronically.

- If you see a watermark on the opened file, you are not printing from **Actions**.
- If you continue to experience the problem, follow these steps:
- Close all browsers, including the browser you used to access the policy.
- Open the notification email and use its link to the policy.
- *Do not click* on the policy .PDF.
- Select **Document Actions**.
- Select **Print and Hand Deliver**.

‡The Standard is a marketing name for StanCorp Financial Group, Inc. and subsidiaries. Insurance products are offered by Standard Insurance Company of Portland, Oregon, in all states except New York, where insurance products are offered by The Standard Life Insurance Company of New York of White Plains, New York.

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