

Agent Instructions

for DocFast® Electronic Policy Delivery

Content

- [What to do when you receive a notice that a customer's policy is ready for delivery](#)
- [Registering with DocFast](#)
- [Signing the policy](#)
- [Preparing for electronic delivery](#)
- [Delivering the policy](#)
- [Payment](#)
- [Printing and saving the policy](#)
- [Browser information](#)
- [Obtaining technical assistance](#)

*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.

For Producers Only – Not for use with Consumers.

**Standard Insurance Company
The Standard Life Insurance
Company of New York**

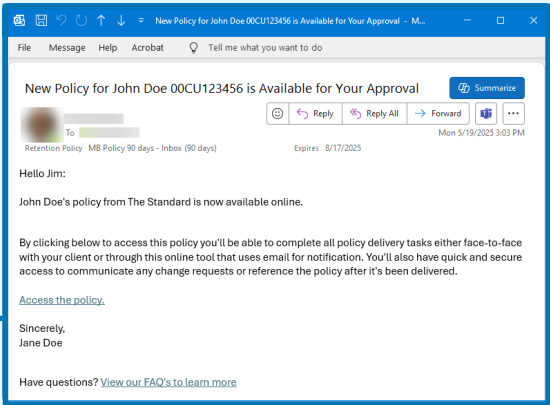
standard.com/di

DocFast Agent Overview
17355 (6/25) SI/SNY

When You Receive a Notice That a Policy Is Ready for Delivery

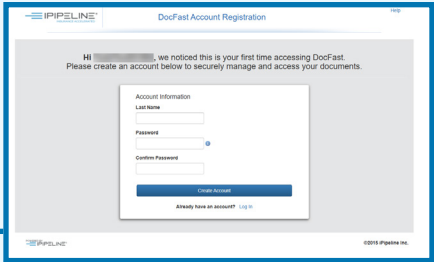
When a policy is ready for delivery, you'll receive an email like this.

Select **Click here to access the policy.**

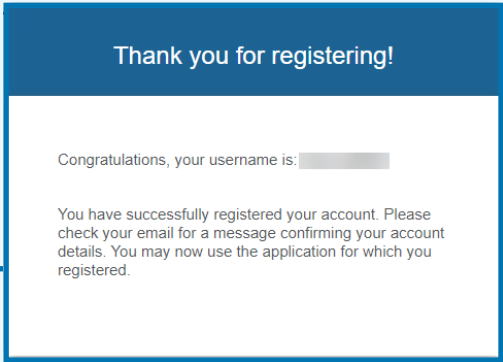


Registering With DocFast

If this is your first time using DocFast, go to the DocFast Registration Center.



After you complete the registration, you'll see this message. Click **OK**. Follow the prompts to update your account for Multi-factor Authentication.



You'll be prompted to enter a one-time access code sent to your preferred contact method—either email or text message.

Select Your Preferred Delivery Method

Welcome, Laura.

For additional security, we need to send you a time-sensitive access code. Please select how you would like to receive your one-time access code and click Submit. We'll ask for your access code on the next page.

☒ Email

la*****ty@gmail.com

☐ Mobile

(***) ***-*267

Cancel

Submit

[Need help?](#)

Enter the access code you received to log in to your main dashboard.

Enter Your Access Code

Your one-time access code is valid for a limited time. Once the time expires, you'll be required to request a new one-time access code.

9:55

Enter Your Access Code Here

[Resend Code](#)

☒ Do not ask me for codes on this computer for the next 30 days. [i](#)

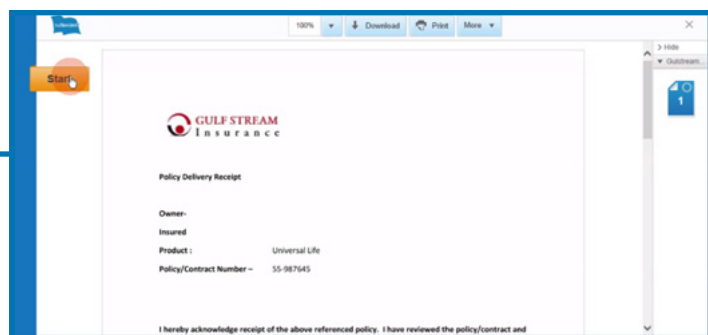
Cancel

Submit

[Need help?](#)

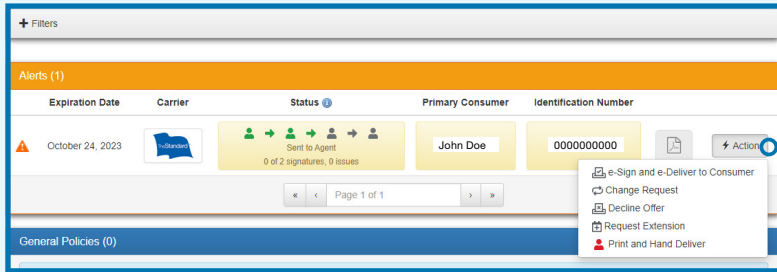
Signing the Policy

In states where agents' signatures are required, agents will see a **Start** tab. If there is no Start tab, then no signature is required.

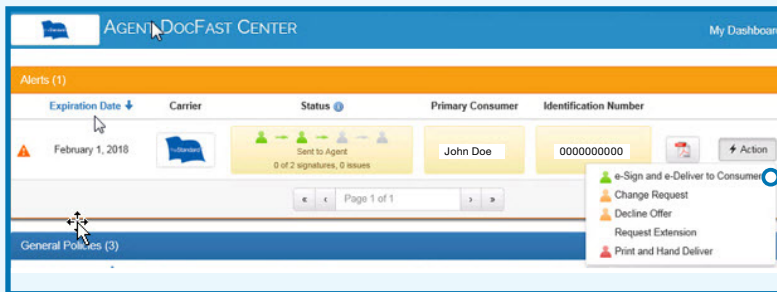


Preparing for Electronic Delivery

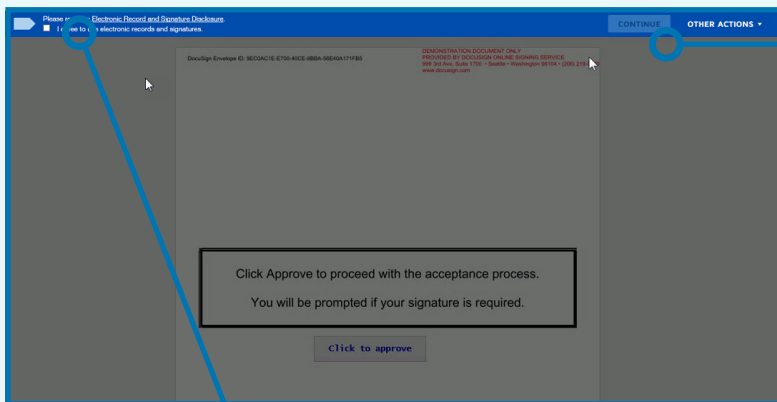
You can deliver policies electronically while meeting with your customer in person or with a link in an email. Either way, the process starts the same.



From your desktop or laptop computer, tablet or handheld device, go to your agent dashboard. Click **Action**.

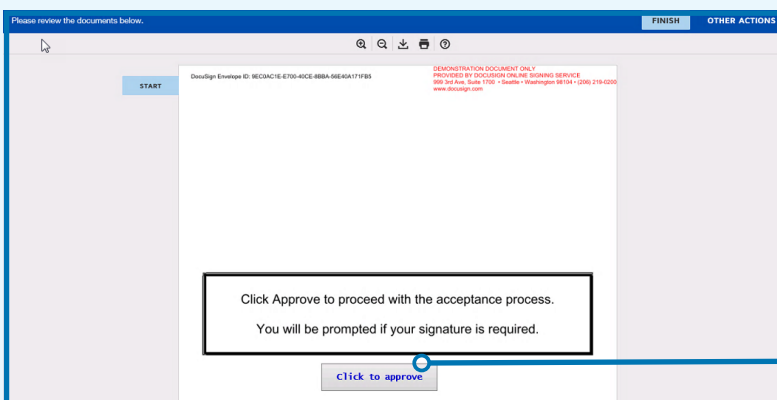
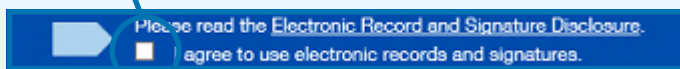


From the drop-down menu, choose **e-Sign and e-Deliver to Consumer**.



Notice that the screen is grayed out. Before moving to the next step, you must agree to use electronic records and signatures.

Click the box found on the top left of the screen. Then select **Continue** on the top right of the screen.



Select **Click to approve** and follow the prompts to sign, if required.

Then click **FINISH**.

Please review the documents below.

FINISH OTHER ACTIONS

START

DocuSign Envelope ID: 8E2C4C1E-E700-4DCE-8BBA-56E6A17F5B5

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
800 254 4848, Suite 1100 • Seattle • Washington 98104 • (206) 279-0200
www.docusign.com

Click Approve to proceed with the acceptance process.
You will be prompted if your signature is required.

Click to approve

Delivering the Policy to Your Customer

Now is when you choose to deliver the policy via email or in person. If you prefer to meet with your customers in person to deliver policies, it's easy!

Choose your signing method: **Email** or **Face To Face**.

Send Document

Please select a signing method for each consumer below, then click 'Continue'

OWNER

First Name Last Name

E-mail Address

Signing Method

☒ Email ☐ Face To Face

Continue Cancel

Face to Face View

If you chose **Face To Face**, the next screen will ask you to pass your device to your client. Your client will select **Start Review & Sign** and then follow the prompts.

Send Document

Start Face to Face Signing by clicking on the 'Start Review & Sign' button below. A new window will open up to complete the signing process. Note: If prompted, allow pop-ups in your browser.

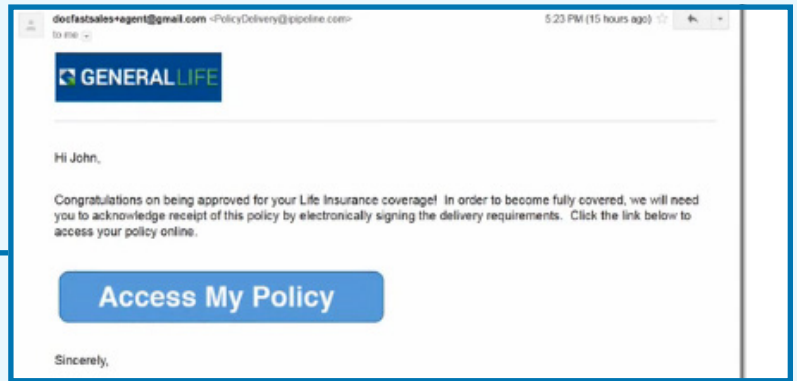
Pass control to to complete review and signature process.

Start Review & Sign

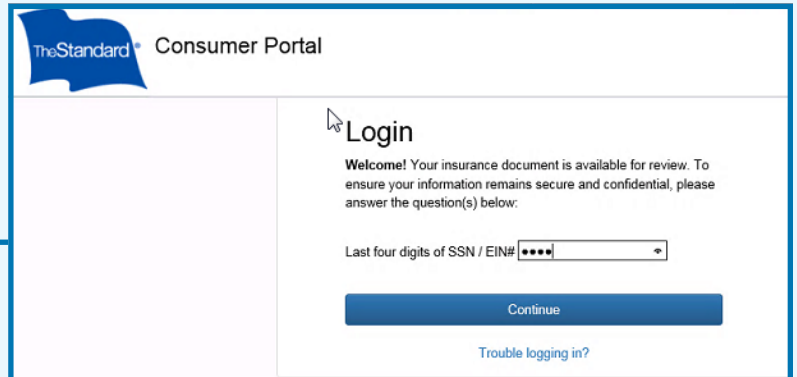
Back Cancel

Email View

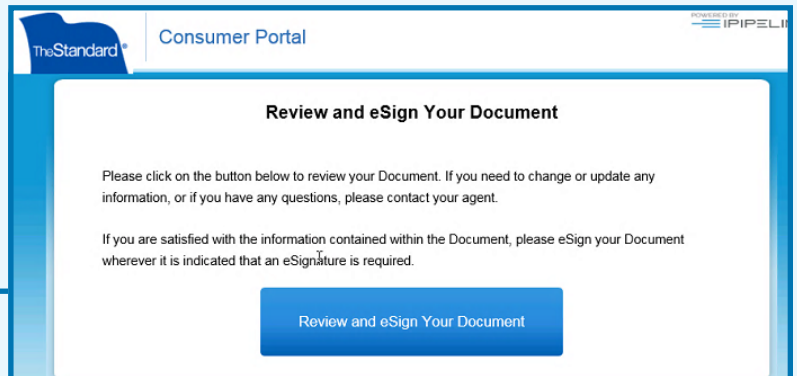
Your client will receive an email similar to this. They will click **Access My Policy** to be delivered to the Consumer Portal.



Your client will log into the Consumer Portal using the last four digits of their Social Security number.



Then they will select **Review and eSign Your Document**.



Premium Payment

A one-time electronic funds transfer is usually required to put the policy in force.

If a customer brings a paper check to pay for the initial premium, they can enter the bank routing and account number in the form.

If you are sending a paper check, as in an employer-paid case, please advise your Customer Management Specialist at The Standard[®] before delivering the policy.

Your customers are then taken to the **Review Documents** screen, which gives them the opportunity to review each page of the policy.

Once they have reviewed the policy and confirmed that everything is as they expect, they can **Sign** and **Confirm Acceptance** of their policy.

Please note: Do not use a deposit slip, money market check or credit card "cash transfer" check.

Examples of where to find your Transit Routing and Account numbers:

Memo	Routing Transit #	Account #	Check #
060969430	01440964321	1249	
1249	060969430	01440964321	

ROUTING TRANSIT #: _____ ACCOUNT #: _____
(The 9 digits to the left of your account number) (Ignore spaces, but include dashes, if any)

The Standard[®]

1 Review Documents **2 Sign then Confirm** **3 Save your Copy**


Adopt Your Signature

By clicking Adopt, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

Frequently Asked Questions about E-Signatures

Confirm your name, initials, and signature.

Your Full Name: Your Initials:

DocuSigned by:  DS

F88CFF2765CE484...

Adopt and Sign

NOTE: Any person presents false information in prison.

The signature below certifies the accuracy of the declarations that I have made above. Once signed, I understand that any amendments to the policy or application listed above will be attached to, and become part of, the policy.

Sign

Signed on 9/10/2012 Date

Once the signature process is completed, your customers will see a notice similar to this example.

Signature Process Complete

Thank you **Jane Doe**, you have successfully signed your policy!

Your policy review and eSignature process are now complete and your eSignature has been applied to the policy and all supporting documentation.

You will receive an email with a link to view, print, or save your policy.

Notice of 30 Days to View, Print or Save Policies

Your customer will then see a notice similar to this example.

If you wish to print a copy of a policy, wait until after it has been e-signed by the customer.

Do not choose the *Print* option before policies are signed.

That will void the capability for an electronic signature and electronic delivery.

Thank You

Now it's time to **print and/or save** an electronic copy of your policy for your records. Click the "View My Signed Policy" button below and once your policy is displayed, you will be able to print and/or save a copy for your records.

Thank you again for using our Electronic Policy Delivery System.

ATTENTION: Once you close this screen, you will have 30 days to access this site again to view, print or save your policy.

Click the button above to download your Document in PDF format, where you can print or save it to your Desktop.

Browser Information

DocFast supports most current internet browsers.
Please see the [DocFast system requirements](#) for more information.

DocFast Technical Assistance

For technical support with e-delivery, please email support@ipipeline.com or call 800.641.6557.

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The Standard Life Insurance
Company of New York

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[Back to Index](#) 