



Applications  
Made Easy

How It  
Works

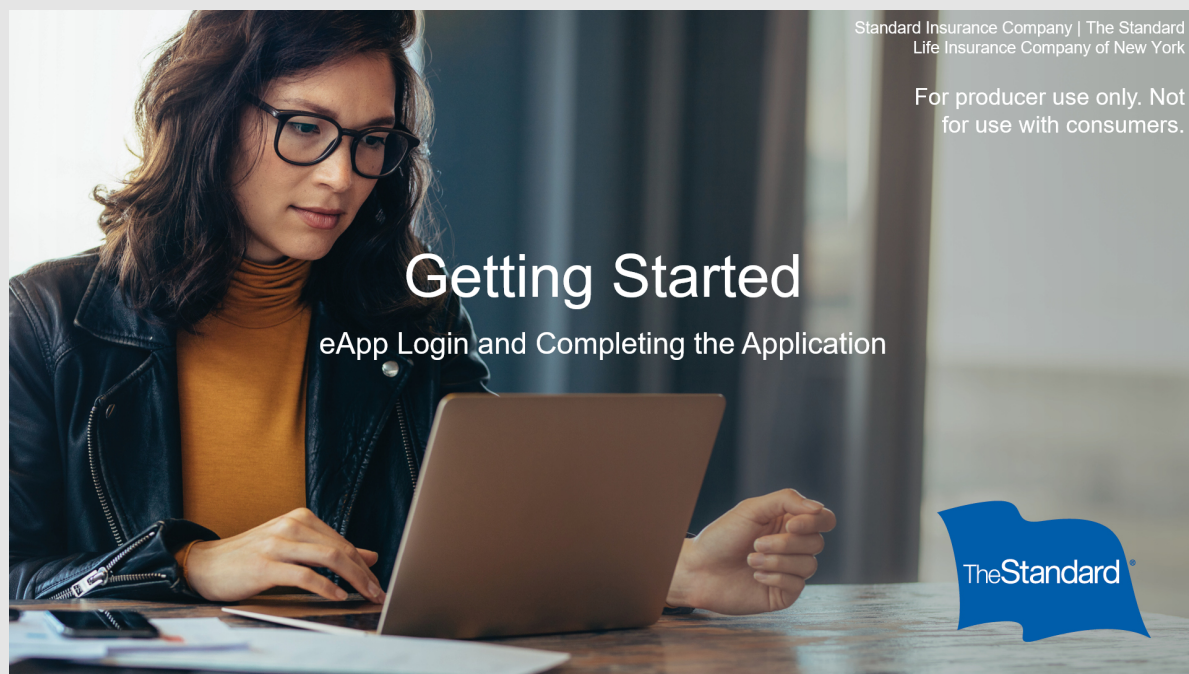
Signing  
Steps

Helpful  
Tips

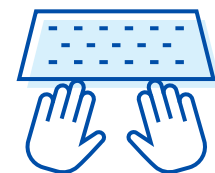
Additional  
Resources

# The Standard's eApp

## Submitting Applications Made Easy for You and Your Clients



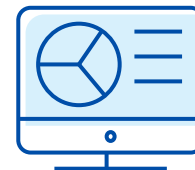
[Click to open slideshow in browser](#)



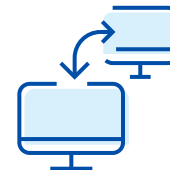
Quick fill-and-sign  
features



Can sign remotely or  
in person



Ensures your  
application is in  
good order before  
you submit it



Built-in checks to  
help you and your  
clients complete the  
application quickly

The fast and seamless eApp process  
helps producers better meet client  
schedules and preferences.

Standard Insurance Company | The Standard Life Insurance Company of New York | [standard.com/di](https://standard.com/di)

The Standard is a marketing name for StanCorp Financial Group, Inc. and subsidiaries. Insurance products are offered by Standard Insurance Company of 1100 SW Sixth Avenue, Portland, Oregon, in all states except New York, where insurance products are offered by The Standard Life Insurance Company of New York of 445 Hamilton Avenue, 11th Floor, White Plains, New York. Product features and availability vary by state and company, and are solely the responsibility of each subsidiary. Standard Insurance Company is licensed to solicit insurance business in all states except New York. The Standard Life Insurance Company of New York is licensed to solicit insurance business in only the state of New York.

The policy has exclusions and limitations and terms under which the policy may be continued or discontinued. For costs and complete details of coverage, please contact your insurance representative or The Standard at 800.247.6888 (800.378.6057 in New York).

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## Accessing eApp

You'll access eApp through [The Standard's My Home portal](#), where you also find Policy Inquiry and your commission statements. If you don't yet have a My Home account or need to add eApp services, please see the [eApp Registration Guide](#).

Once logged in, you'll see a section titled Disability Insurance Applications. Click [Go to Applications](#).

Your agency can also start an application for you. They'll send you an email via eApp to alert you when the application has been transferred to you and is ready for your review. You'll need to log in to The Standard's web portal to access the application, as detailed above.

## Getting Started

Before starting an eApp for (or with) your client, it's best to take a moment to complete your information under the [Preferences](#) tab located in the top right corner of the home page.

Once you add your information in Preferences, applications can be transferred to you. Your name will also pre-fill on the Producer Information Report.

## Making Progress

Required fields are displayed in red. These fields must be completed before the signing process can begin.

There is a helpful data entry "meter" at the top. In addition, the drop-down [Form List](#) shows how many forms you've completed.

Based on the applicant's age and coverage amount applied for, a medical exam may be required. If required, the system will provide options.

To upload additional documents, select [Other Actions](#) on the menu bar. Then select [Documents](#).

Use [Request Client to Fill App](#) to send an email to the client to request information for specific form fields.

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## Prepare for Signing

When the application has reached 100% completion, you may start the signing process. Make sure all forms, including the Producer Information Report, are complete and in good order before you click [Continue](#).

Clicking [Continue](#) moves the application to signing, which then locks it and no further changes may be made.

## Step One

### In-Person Signing

If you choose [Sign Now](#), you'll be brought to an Agent and Client Identification Verification page.

### Remote Signing

If you choose [Send Email Request](#), your client will receive an email from you. The signing process will begin once your client clicks the link in the email.

## Step Two

All forms required to be signed will be displayed one by one. For each form, the client must confirm reviewing the document and agree with the terms expressed within the document.

After your client signs, you'll receive a notice that you can finish the process with your signature.

Please note that if a change is needed on the application **after** the client signs, the application will need to be unlocked and new signatures will be required.

Congratulations, you have signed all the required document sets for this application.

[Ok](#)

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## Before You Start

- Input the producer's information in the User Full Name and User Email Address fields under [Preferences](#). This will allow your General Agent's office to transfer an application to you.
- The application name will be included in emails to your client. Therefore, be sure to give the application a client-appropriate name.
- If the font size is too small to be readable, adjust your browser settings to zoom in on the forms.

Windows

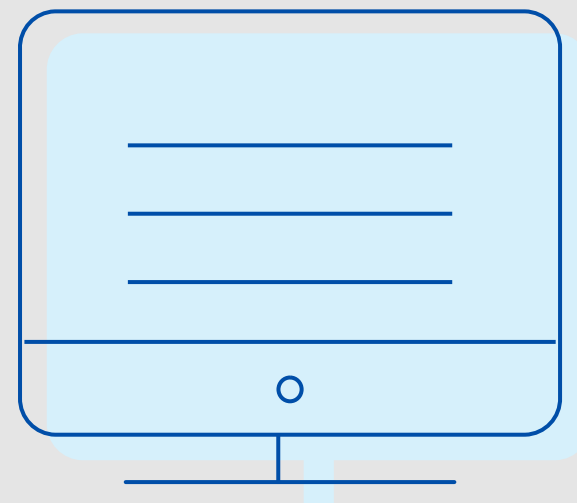


Mac



## Using eApp

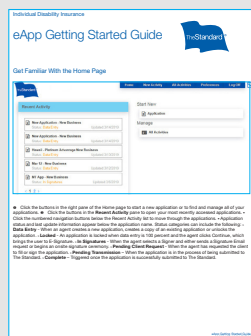
- To see all your cases, select the [All Activities](#) tab.
- Please remember the occupation class and date of birth fields must be completed before selecting policy riders.
- Be sure to confirm the accuracy of the client's email address, date of birth and Social Security number.
- If your client needs to complete a portion of the application, you may send it to them using [Request Client to Fill App](#).
- The client must sign the application before the agent. eApp disables the agent button until after all clients sign.
- Please tell clients that the signing process passcode is case sensitive.



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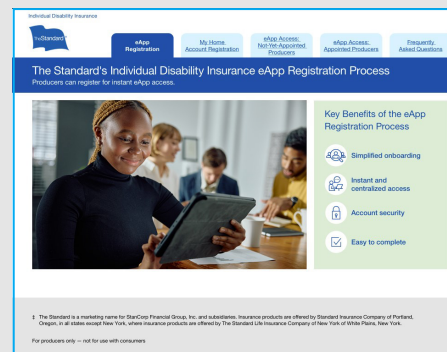
## PDF Guides

Our Getting Started Guide contains detailed information on various eApp functions, processes and options.



[eApp Getting Started Guide](#)  
(PDF)

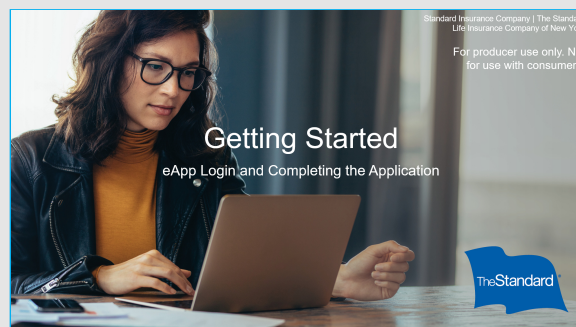
Our eApp Registration Guide will show you how to set up access to eApp.



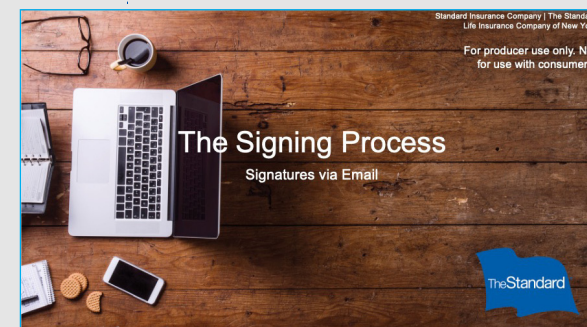
[eApp Registration Guide](#)  
(PDF)

## PowerPoints

A step-by-step guide to using eApp can be found in our PowerPoint modules. The first leads users through getting started and filling in required information. The second covers the whole of the signing process.



[Getting Started Application Access](#)  
(PowerPoint Show)



[The Signing Process](#)  
(PowerPoint Show)