Employer Portal Experience Guide

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Document Overview

The Standard is excited to offer a new employer portal!

Purpose

This document provides information and resources to help use The Standard's employer portal**.**

Our Commitment to Continuous Improvement

The Standard is dedicated to continuous improvement. We respond to customer feedback and market trends by evaluating and improving our experiences over time. This guide will continue to be updated as new capabilities are delivered.

What's Included in this Experience Guide:

- Message from David Payne, VP of Employee Benefits
- Portal tips
- Frequently Asked Questions

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Our Promise

A Message from David Payne,
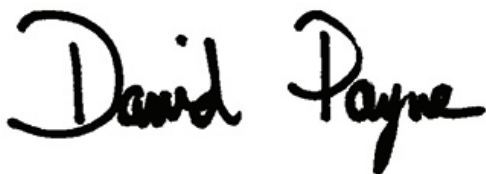*Vice President, Employee Benefits*

Dear Valued Partner,

Our customers are at the heart of everything we do. Based on your feedback, we know you want greater flexibility in how you engage with us, especially digitally. Our new employer portal is a straightforward, configurable and — most importantly — easy way to access your benefits information including bills, reporting and claim activity.

As your trusted benefits partner, we're striving to give you the tools you need to manage your business and care for your employees.

We are committed to ongoing enhancements and encourage you to continue sharing your feedback. We are your trusted partner who follows through and gets it right.

Sincerely,

David Payne | Vice President, Employee Benefits
The Standard
Phone 971.321.7996
www.standard.com

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General Portal Tips

Get an overview fast and navigate to what you need simply.

The account button is available on the top right.

- View your information
- Change your password
- Add or remove users if your access allows it
- View portal activity
- Confirm your contact information
- Log out of the portal

Using Helpful Links will open new tabs to access information like documents and forms.

Call or email us with questions.

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Reporting Tips

Reporting has been significantly improved. Instead of static reports in PDF format, you now can build and save your reporting dynamically.

New reports offer the same data as our old formatted reports.

Edit columns and filter data, then save to access reports moving forward.

- Edit and Filter data elements to view what you want to see
- Select a Date Range
- Save Settings for next time
- Download or Print

Prior status reports included:

- Contract Number
- Date Range
- Claim Status
- Claimant Name
- Claimant SSN
- Claim Number
- Benefit Start Date
- Approved Through Date
- Status Reason

Reporting Tips

Consolidated reporting saves time and effort. Edit columns on any report to add data. View results by scrolling left to right or download reports to Excel or .CSV.

	STD & LTD Claim Status	Life Claim Status	STD Claim Payment Detail	LTD Claim Payment Detail	Life Claim Payment Detail	Life Waiver Claim Detail
Report Description	View submitted claims that are pending or recently processed including expected return to work dates.	View submitted claims that are pending or recently processed.	View approved claim details including dates and amounts for claimants.	View approved claim details including dates and amounts for claimants	View approved claim details including decision date, amounts, and recipient(s).	View submitted claims that are pending and/or processed.
Report Columns	Claim Number Claimant Full Name Claim Status Status Reason Policy Number Claimant DOB SSN Admin Unit Employee ID Incurred Date Benefits Start Date Approved Through Date Anticipated Recovery Date	Claim Number Claimant Full Name Claim Status Status Reason Policy Number Claimant DOB SSN Admin Unit Employee Full Name Employee ID Claim Type Product	Claim Number Claimant Full Name Claim Status Claim Payment Amount Policy Number Claimant DOB SSN Admin Unit Employee ID Date of Disability Benefits Start Date Date Paid Payment From Date Payment To Date Approved Through Date Benefits Paid to Date Product Gross Benefit FICA Amount Taxable Overpayment Balance Overpayment Adjustment Medicare Tax Duration Weekly Salary	Claim Number Claimant Full Name Claim Status Claim Payment Amount Policy Number Claimant DOB SSN Admin Unit Employee ID Status Reason Date of Disability Benefits Start Date Claim Start Date Claim End Date Claim Paid Date Hire Date Approval Date Work Related Monthly Salary Maximum Monthly Benefit Net Monthly Benefit Offsets 4800/4850 Time Loss Benefit	Claim Number Claimant Full Name Claim Status Claim Payment Amount Policy Number Claimant DOB SSN Admin Unit Employee Full Name Employee ID Claim Type Date Paid Last Date Paid Product Amount in Review	Claim Number Claimant Full Name Claim Status Amount Policy Number Claimant DOB SSN Admin Unit Employee ID Claim Type Incurred Date Product Received Date Date of Approval Closed Date Reason for Closure

Billing Tips

Self-Administered billing is straightforward and repeatable. Follow our four steps to view, complete and pay your bill with The Standard.

1 To start paying a bill, select the calculator icon for the oldest unpaid bill.

To pay a bill after calculating it:
- Select the dollar-sign icon *-or-*
- Resume calculating a bill and select the "pay now".

To print a bill after calculating it:
- Select the print icon

2 Fill in the blanks or if nothing has changed, select "Fill With Previous Values". Complete the required fields for all listed coverages.

3 Select Pay Now or to finish later and route back choose "Save & Exit".

4 Select your preferred payment method to complete paying the bill. Once the payment is processed the status will be updated in the portal.

- First time online payments will require your bank routing and account numbers
- Contact your account representative for print & mail instructions

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Claim Tips

Use the portal to view and complete claim action items, upload claim documents, and file Life or non-death Dismemberment claims.

Claims Summary

Start a Claim

Activity Snapshot

View By
Pending Claims ∨

◉ STD ○ LTD ○ Life

20
15
10
5
0

● Incomplete ⓘ
4 Claims

● In Review ⓘ
1 Claims

Claims for the last year, Updated as of last business day.

Claim To Dos

Today

LTD 00CC0011 is incomplete.

Continue Claim

LTD 00GG0011 is incomplete.

Continue Claim

View All

Submitted Claims

All Incomplete, In Review and Decided Claims for the last year.

Search for claim number or name 🔍

▼ Filters

Claimant	Claim Number	Claimant SSN	Claim Type ↑	Claim Status ⓘ ↑	Policy Number ↑	Adɪ
Grace Robinson	#00JK0005	6429	STD	INCOMPLETE	123457	BS.
Sawyer Stokes	#001ABLF	8698	LIFE	IN REVIEW	123459	

Start a new claim using the button at the top of the page.

Route to pending action items under "Claim To Dos".

Search submitted claims to view deeper insights.

- Use the filter button to customize your view.
- Type a claimant's name or claim number to narrow your search.
- Scroll horizontally to see high-level detail or double-click a hyperlink to see a claim's specifics.

Submitted claims are viewable approximately 3 – 4 days after they are filed.

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Submitted Claim Tips

After selecting a claim to view, you can see a timeline of claim activity, upload claim documents, and view related claim payment history.

Back to Claims Summary

This Short Term Disability claim is **approved and closed.**

Employee	Claimant SSN	Claim #	Policy #	Decision Date	Claim Approved Through
Charles Wilson	9012	00CL0STD	123457	5/24/2022	5/31/2022

Claim Status

- ✓ Disability Started — 5/2/2022
- ✓ Benefits Start Date — 5/16/2022
- ✓ Claim Closed — 5/31/2022
  - 🔅 This claim was closed because Anticipated Recovery Date
- ✓ Employee Not On Approved Claim

Claim History

Payment of $692.62 mailed	12/27/2022 ⌄
Claim Closed	5/31/2022
Claim Approved	5/24/2022
Claim Assigned to Examiner	5/20/2022

View All

Upload Files

Select a document type before adding optional documents. Only one document can be uploaded at a time. A maximum of 50 documents can be uploaded per claim number.

Document Type ⌄

Drag and drop your file here
or
Browse for File

Requirements: Upload supports a cumulative file size of 20 MB (PDF format only).

Reset   **Submit Files**

At the top of the page, quickly see the claimant's name, claim number and approved claim dates.

Use the "Claim Status Tracker" to see the timeline of claim milestones.

- Upload documents for a specific claim on this page under "Upload File Options".
-
- While uploading files you'll be prompted to title the document to help route it accordingly.

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Frequently Asked Questions

How can I access the employer portal?
Visit www.standard.com and click "Log In" to get started. If it's your first time, follow the prompts to set-up an account. For existing users simply log in like normal and you'll be directed to the new experience.

How do I save a report?
After applying your filters and preferences select "Save Report" to title your report and add a description if you'd like. Access saved reports on the homepage under "Shortcuts", the navigation pane, or near the bottom of the homepage screen.

How do I print a bill?
After calculating a bill and saving it, navigate back to the "pay bill" tab to print a copy.

How do I complete the Employer Statement for a disability claim?
One business day after an Employee starts a disability claim, administrators will see a "To Do" item to complete the Employer Statement.

Can I start a new claim for my employee or their dependent?
Yes. From the landing page, navigate to "Start A Claim" under Shortcuts or to the Claims page through the left navigation panel to begin.

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Thank you for allowing us to be your benefits partner.

We appreciate your business!

If you have any questions, please reach out to your Sales or Service representative at The Standard.

This reference tool video includes screenshots of our portal at a certain point in time. As we continuously update our technology, these screenshots may not reflect what you currently see in the portal.