

Starting Guide

Streamline the Application Process with the Electronic Medical Questionnaire*



When your clients opt to complete their Full Underwriting Application Supplement with the Electronic Medical Questionnaire, they can speed up the underwriting process, reduce requests for additional information and receive a policy decision sooner. The Electronic Medical Questionnaire offers the option for clients to enter their employment, income and medical information that is needed for underwriting in a simple to use format.

Preparing for the Medical Questionnaire



The Electronic Medical Questionnaire is an end-to-end system built in the same program as The Standard's[‡] eApp. If you already have access to or are using eApp, you can simply launch the Electronic Medical Questionnaire from the same screen and enter some basic client information.

If you don't have access to eApp, please contact your General Agent.

Starting the Electronic Medical Questionnaire



Make sure to connect with your client before starting the Electronic Medical Questionnaire. You can help prepare them for what's in the application with the interactive **Getting Started with the Electronic Medical Questionnaire** flyer. Your client can review possible information they'll need to provide. Find information to review on the back side of this flyer.

With the Electronic Medical Questionnaire there's no need to schedule an appointment. Your clients complete the questionnaire at a time and place that fits their schedules. It should take your clients about 30-40 minutes to complete. And they will have access to complete the Electronic Medical Questionnaire for up to 30 days.

Signing Online



The Electronic Medical Questionnaire, including document signing, is completed online. Once your client completes all answers and signs the questionnaire, it is submitted to The Standard.

After your client submits the questionnaire, you can access a copy of the completed application as a PDF under your All Activities tab.

*The Electronic Medical Questionnaire is not available for use in SC.

‡ 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.

Getting Prepared

Make sure your client is prepared to provide this information during their online application:

- ☐ Foreign travel history for the last two years
- ☐ Names and addresses of employers and dates of employment
- ☐ Details of participation in sports or activities
- ☐ Date your client last saw their primary medical provider or other health care practitioner, including reason seen, treatment provided or prescribed, and results
- ☐ Names, addresses and phone numbers of medical providers visited in the last 10 years
- ☐ Approximate dates of injuries, surgeries, emergency room visits, hospitalizations, illnesses and/or conditions
- ☐ Prescription history over the last three years, including medication names, dosages, dates taken and reasons for use

Clients will need medical history information for the application

Diagnoses, treatment, medical advice or medical testing within the past 10 years for:

- ☐ 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
- ☐ Disease or disorder of the eye, ear, nose, throat or skin
- ☐ Disease or disorder of the urinary system or prostate
- ☐ 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

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‡ 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. Each company is solely responsible for its own financial condition. 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.