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## Guaranteed Standard Issue Individual Disability Insurance Policy eDelivery

With The Standard's<sup>‡</sup> online delivery system, policies are delivered efficiently and direct to individual members.



### Key Benefits of the eDelivery System



Carrier ► Individuals



Secure



24/7 access



Real-time dashboards  
agencies and producers

<sup>‡</sup> 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.

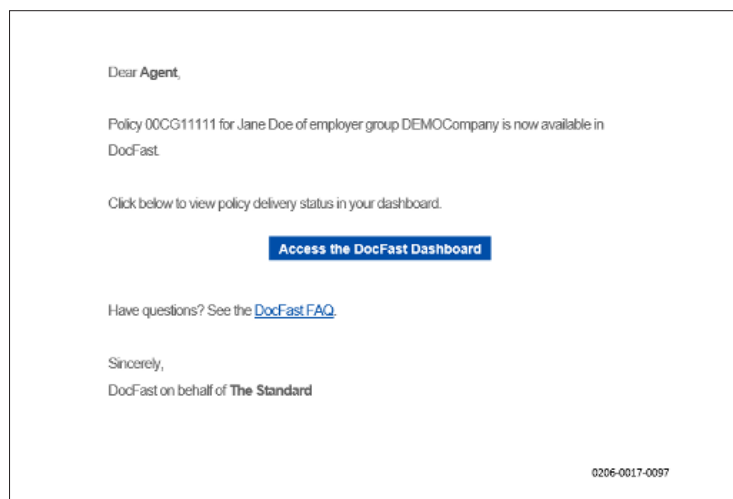


## Registering for DocFast® is easy.

For new group implementations, agencies will complete and return a setup form. The Standard will then work with you and iPipeline to set up DocFast access. If you already have a DocFast account with The Standard, no account changes are needed. Newly issued GSI policies will automatically appear in your dashboard.

If you are a first-time user of DocFast, you will need to complete the registration process when you receive an email notice that policies are available to view in your dashboard.

1. Select **Access the DocFast Dashboard** and you'll be directed to register with DocFast.



2. Complete the online registration information.

DocFast Account Registration

Hi Agent, we noticed this is your first time accessing DocFast. Please create an account below to securely manage and access your documents.

Account Information

Last Name

Password

Confirm Password

[Create Account](#)

[Already have an account? Log In](#)

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- Note:** the password you create during the registration process must be 14+ characters with at least one non-alphabetic character and at least one alphabetic character. Three or more consecutive repeat characters is disallowed (“sss” or “111”, etc.).

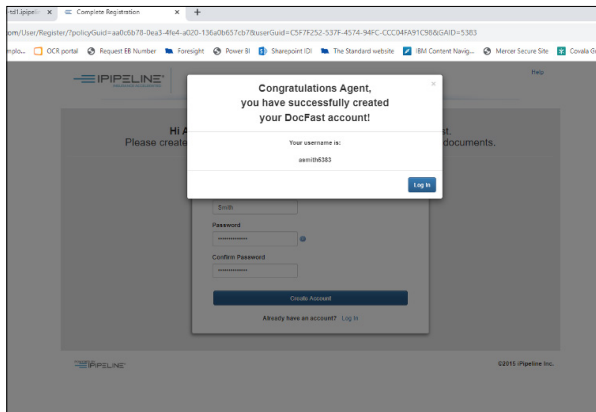
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- Be sure to bookmark [DocFast's login page](#) and note your username and password for future access.


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Registering for DocFast® is easy.

- 3. After completing the registration, you'll receive an email message that includes your username and a link to your dashboard.



- 4. 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?](#)

- 5. 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. ⓘ

Cancel

Submit

[Need help?](#)

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Agencies and producers can track delivery status at any time through a self-service, real-time dashboard, including GSI, fully underwritten and Graduate Medical Education policies.

## Main Dashboard

➤ The search bar queries individual policies, not group names or ID numbers.

➤ You can search for a group using **Filters**. Select the employer's name from the **Group** drop-down list and **Apply Filters**.

The screenshot shows the DISTRIBUTOR DocFAST CENTER dashboard. At the top, there is a search bar labeled "Search by Identification Number or Consumer Name". Below the search bar, the "Filters" button is highlighted with a red box. The dashboard also displays an "Alerts (0)" section with a message "There are no documents to display." and a "General Policies (1)" section with a table of policy details.

Last Activity Date	Carrier	Status	Primary Consumer	Identification Number
November 16, 2023			ABC Company	XB756111

➤ To start a new search, go to **Filters** and select **Clear Filters**.

The screenshot shows the DISTRIBUTOR DocFAST CENTER dashboard with the "Filters" section expanded. The "Clear Filters" button is highlighted with a red box. The filters section includes dropdowns for Distributor, Display Activity in, Num Policies to View, Delivery Expiration Date, Product Type, Status, Group, and Tags. Below the filters, there are "Apply Filters" and "Clear Filters" buttons.

**Filters:**

- Distributor:
- Display Activity in:  Num Policies to View:
- Delivery Expiration Date:
- Product Type:  Status:
- Group:
- Tags:

**Buttons:**

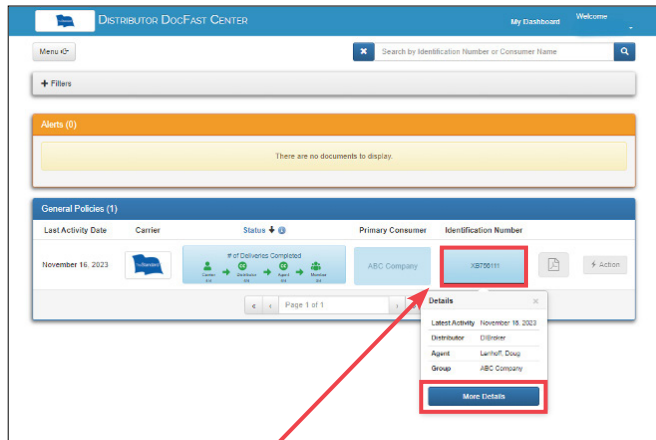
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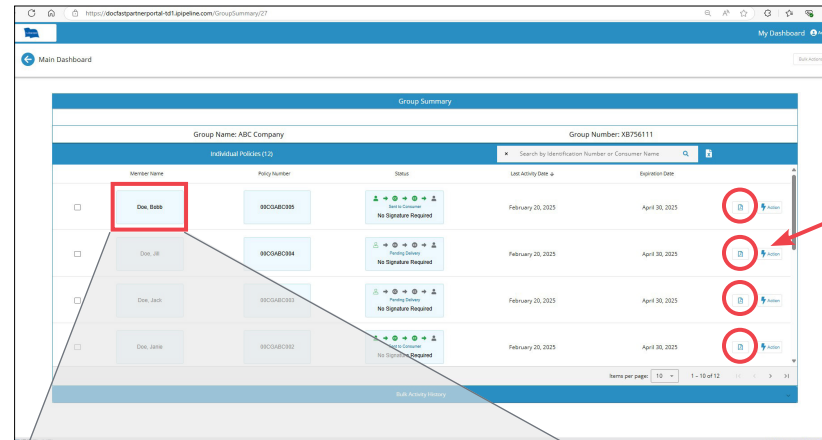
Your Group Summary Dashboard provides you delivery statuses for every policy in that employer group.

## Accessing Group Summary Dashboard

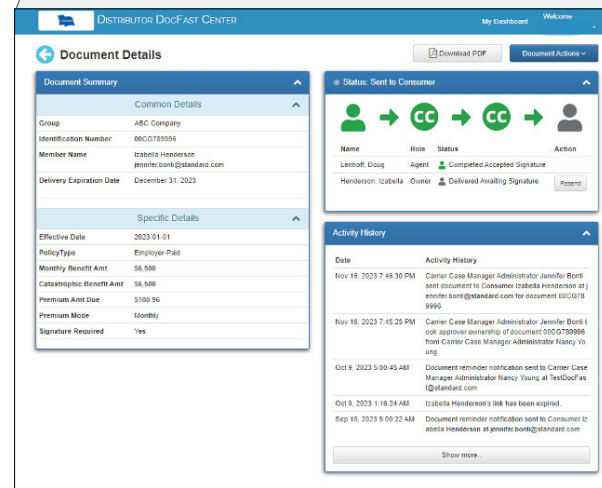


Click **Identification Number** and select **More Details** to see all policies and statuses under that group.

## Document Details: Individual Policy Data



Review a copy of a policy by selecting the **PDF icon**.



See individual policy details by selecting the member's name under **Member Name** and **More Details**.





The export feature within the employer's Group Summary Dashboard provides a report including policy details, delivery statuses and more.

## Reporting: Group Policy Information

Group Summary

Group Name: ABC Company Group Number: XBT56111

Individual Policies (12)

Search by Identification Number or Consumer Name

Member Name	Policy Number	Status	Last Activity Date	Expiration Date	Action
Doc, Bob	09COAB035	Active	February 20, 2025	April 30, 2025	Download
Doc, Jill	09COAB034	Pending Delivery	February 20, 2025	April 30, 2025	Download
Doc, Jack	09COAB033	Pending Delivery	February 20, 2025	April 30, 2025	Download
Doc, Jane	09COAB032	Active	February 20, 2025	April 30, 2025	Download

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Bulk Activity History

To view the employer's group policy details and delivery statuses, navigate to the employer's Group Summary Dashboard. To **export the report**, click on the icon next to the search bar.

Group Name	Member Last Name	Member First Name	Policy Type	Policy Effective Date	Policy Number	Benefit Amount	Catastrophic Benefit	Premium Amt Due	Premium Mode	Status	Delivery Expiration Date	Signature Required
ABC COMPANY	JERRY	BEN	Mandatory	1/1/2024	00XGA00001	\$15,000	\$0	\$279.33	Monthly	Expired	3/31/2024	No
ABC COMPANY	JERRY	TOM	Mandatory	1/1/2024	00XGA00002	\$15,000	\$0	\$255.43	Monthly	Expired	3/31/2024	No
ABC COMPANY	WRONG	RIGHT	Mandatory	1/1/2024	00XGA00003	\$15,000	\$0	\$205.61	Monthly	Declined Offer by Carrier (NTO)	3/31/2024	No
ABC COMPANY	AFTER	BEFORE	Mandatory	1/1/2024	00XGA00004	\$15,000	\$0	\$225.47	Monthly	Expired	3/31/2024	No
ABC COMPANY	MAIN	FIFTH	Mandatory	1/1/2024	00XGA00005	\$15,000	\$0	\$279.33	Monthly	Expired	3/31/2024	No
ABC COMPANY	DRAGONS	DUNGEONS	Mandatory	1/1/2024	00XGA00007	\$15,000	\$0	\$255.43	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	TEN	FIST	Mandatory	1/1/2024	00XGA00008	\$15,000	\$0	\$205.61	Monthly	Expired	3/31/2024	No
ABC COMPANY	NINE	SECOND	Mandatory	1/1/2024	00XGA00009	\$15,000	\$0	\$225.47	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	LONG	THIRD	Mandatory	1/1/2024	00XGA00010	\$15,000	\$0	\$279.33	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	GOAL	FOURTH	Mandatory	1/1/2024	00XGA00011	\$15,000	\$0	\$255.43	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	LACEY	CAGNEY	Mandatory	1/1/2024	00XGA00012	\$15,000	\$0	\$205.61	Monthly	Expired	3/31/2024	No
ABC COMPANY	MCCORMICK	HARDCASTLE	Mandatory	1/1/2024	00XGA00013	\$15,000	\$0	\$225.47	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	OLLIFSEN	BANG	Mandatory	1/1/2024	00XGA00014	\$15,000	\$0	\$279.33	Monthly	Expired	3/31/2024	No
ABC COMPANY	CHEESE	HAC	Mandatory	1/1/2024	00XGA00015	\$15,000	\$0	\$225.47	Monthly	Expired	3/31/2024	No
ABC COMPANY	IVORY	EBONY	Mandatory	1/1/2024	00XGA00016	\$15,000	\$0	\$183.29	Monthly	Expired	3/31/2024	No
ABC COMPANY	COSTELLO	ABBOTT	Mandatory	1/1/2024	00XGA00017	\$15,000	\$0	\$279.33	Monthly	Expired	3/31/2024	No
ABC COMPANY	COSTELLO	ABBY	Mandatory	1/1/2024	00XGA00018	\$15,000	\$0	\$255.43	Monthly	Expired	3/31/2024	No
ABC COMPANY	COSTELLO	ABBOT	Mandatory	1/1/2024	00XGA00019	\$7,500	\$0	\$149.22	Monthly	Expired	3/31/2024	No
ABC COMPANY	LOMB	BAUSCH	Mandatory	1/1/2024	00XGA00020	\$15,000	\$0	\$225.47	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	CONS	PHOS	Mandatory	1/1/2024	00XGA00022	\$12,500	\$0	\$201.49	Monthly	Delivery Requirements Received	3/31/2024	Yes
ABC COMPANY	CLYDE	BUNNIE	Mandatory	1/1/2024	00XGA00023	\$15,000	\$0	\$279.33	Monthly	Delivery Requirements Received	3/31/2024	No
ABC COMPANY	LUIGI	MARIO	Mandatory	1/1/2024	00XGA00024	\$15,000	\$0	\$255.43	Monthly	Expired	3/31/2024	No
ABC COMPANY	CHEWBACA	HANI	Mandatory	1/1/2024	00XGA00025	\$15,000	\$0	\$205.61	Monthly	Expired	3/31/2024	No
ABC COMPANY	WATSON	HOLMES	Mandatory	1/1/2024	00XGA00026	\$15,000	\$0	\$225.47	Monthly	Change Requested by Carrier	3/31/2024	No

A CSV/Excel report will populate with details regarding your policies.



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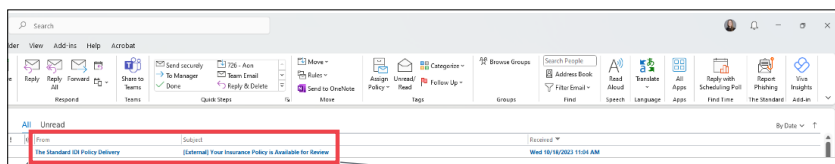
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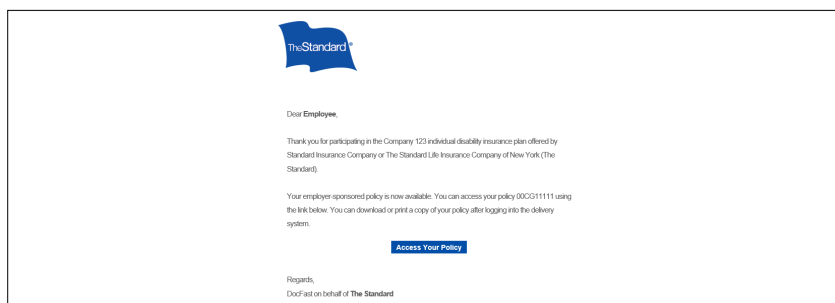
[FAQ](#)

The individual member will access their policy in **three easy steps**:

1. An email notice is sent to the member when their policy is available.



From: The Standard IDI Policy Delivery  
Subject: [External] Your Insurance Policy is Available for Review



2. The member will enter the last four digits of their Social Security number on the DocFast login screen.

Consumer Portal

### Login

**Welcome!** Your individual disability insurance document is available for review. To ensure your information remains secure and confidential, please answer the question below.

Last 4 Digits of SSN / EIN#

[Continue](#)

[Trouble logging in?](#)

For Producers Only – Not for use with Consumers.

3. Once they agree to do business electronically with The Standard, they'll be able to access the policy.

Consumer Portal

### Review Your Policy

Thank you for your interest in transacting business electronically with The Standard Life Insurance Company of New York (The Standard). You have the option to transact business electronically with us and may instead choose to have paper delivery and signature of insurance documents. If you wish not to conduct business with us electronically, please do not sign this consent form and contact your insurance producer to arrange for paper delivery and signature of documents.

Click "I Accept" acknowledging that you have read and consent to the terms above.

Policyowner First Name:

Policyowner Last Name:

Policyowner Email:

[I Accept](#)

The member can now review the policy and save or print a copy for their records.

### Thank You

**3** Your insurance document review is now complete. No further action is needed.

[Print or Save Your Document](#)



## Additional Information

### What are my responsibilities in the policy delivery process?

#### Inform the employer:

- They must white-list the delivery IP address 216.203.12.211 to ensure successful deliveries
- Members will receive their policies from [thestandard-idipolicydelivery@standard.com](mailto:thestandard-idipolicydelivery@standard.com)

#### Check your dashboard for real-time delivery statuses.

#### For policies requiring an amendment signature or letter of decline or postponement:

You will be responsible for reviewing and approving the policy inside of DocFast before delivering to the member for signature.

#### How long is a policy available in DocFast?

eDeliveries expire after 60 days. A duplicate policy can be requested from The Standard. However, DocFast eDelivery will not be available.

#### What if a policyowner doesn't receive a policy? Can it be resent?

If The Standard receives the request within 60 days of policy issue, it can be resent through DocFast. For requests received after 60 days, you can download the policy through your dashboard or contact The Standard.

#### Can The Standard deliver policies to the employer for individual policy delivery?

The Standard is unable to deliver policies to the employer through DocFast.

## Need technical assistance with DocFast?

For technical support, contact iPipeline at [support@ipipeline.com](mailto:support@ipipeline.com) or 800.641.6557.

Technical support staff are available **5 a.m. – 5 p.m. Pacific, Monday through Friday.**

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

† 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 of 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.