Individual Disability Insurance

The Standard®

Guaranteed Standard Issue Individual Disability Insurance Policy eDelivery

With The Standard's‡ 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

| | Policy eDelivery | Setup and Registration | Your Main Dashboard | Group Summary Dashboard | Reporting | Member Experience | FAQ |

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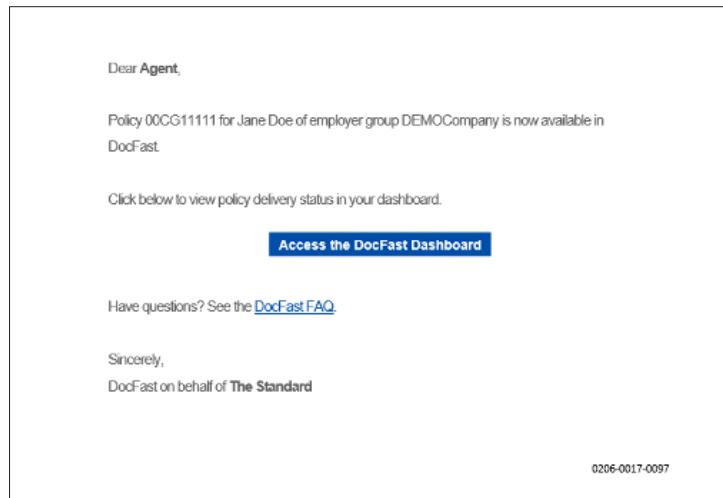
▶ 2. Complete the online registration information.
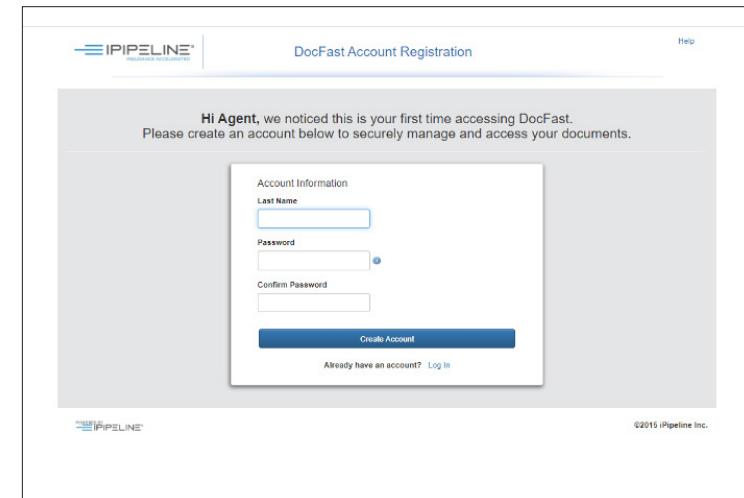
▶ **Note:** the password you create during the registration process must be 14+ characters with at least one non-alphabetic character and at least one alphabetic character. Three or more consecutive repeat characters is disallowed ("sss" or "111", etc.).

Continued on next page

▶ Be sure to bookmark DocFast's login page and note your username and password for future access.

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3. After completing the registration, you'll receive an email message that includes your username and a link to your dashboard.
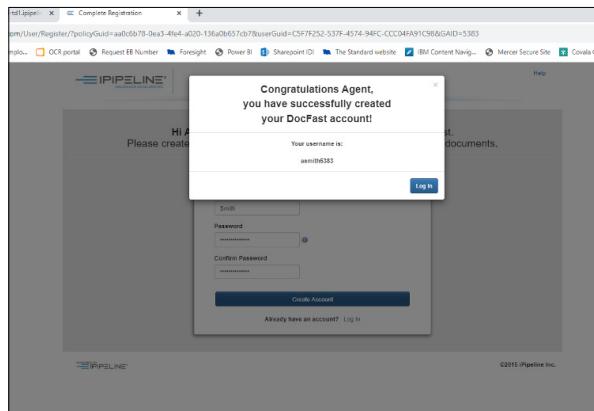
4. You'll be prompted to enter a one-time access code sent to your preferred contact method—either email or text message.

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?

▶ Be sure to bookmark DocFast's login page and note your username and password for future access.

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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**.

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

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| Policy eDelivery | Setup and Registration | Your Main Dashboard | **Group Summary Dashboard** | Reporting | Member Experience | FAQ |

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**.

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| Policy eDelivery | Setup and Registration | Your Main Dashboard | Group Summary Dashboard | **Reporting** | Member Experience | FAQ |

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

Reporting: Group Policy Information

▶ 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.

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

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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.
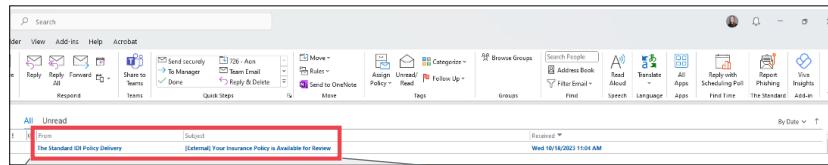
From: The Standard IDI Policy Delivery
Subject: [External] Your Insurance Policy is Available for Review
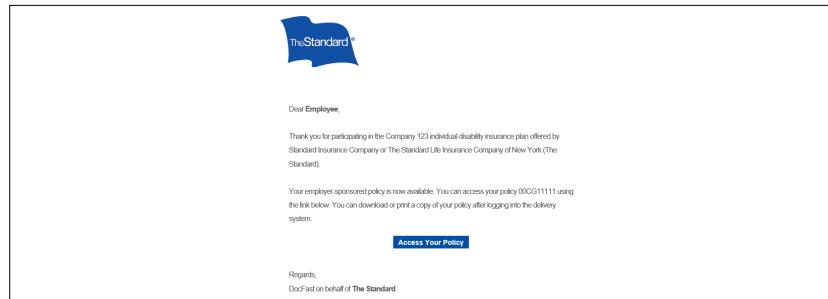
2. The member will enter the last four digits of their Social Security number on the DocFast login screen.

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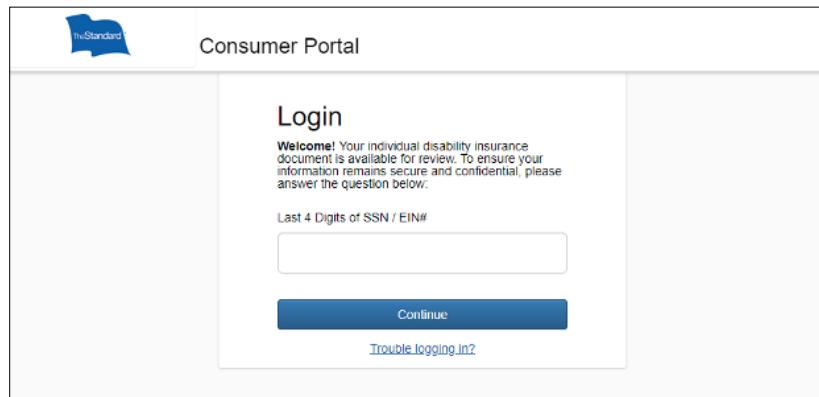
3. Once they agree to do business electronically with The Standard, they'll be able to access the policy.
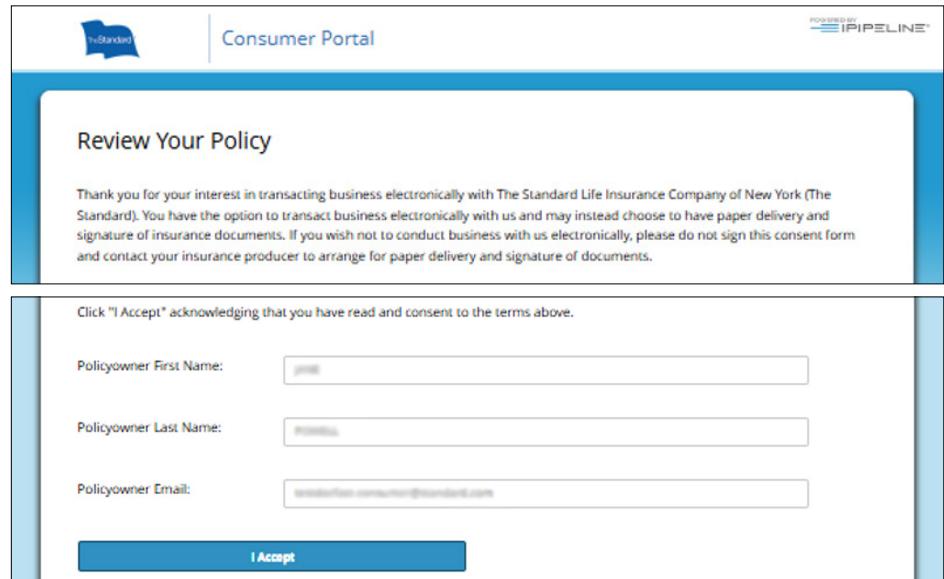
The member can now review the policy and save or print a copy for their records.
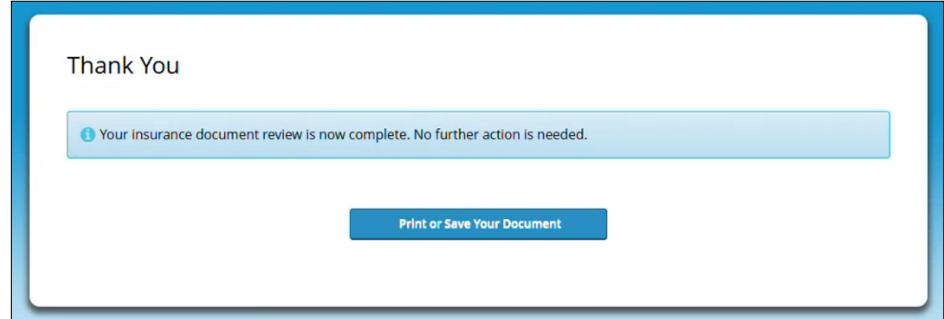
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Additional Information

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

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** or **800.641.6557**.
Technical support staff are available **5 a.m. – 5 p.m. Pacific, Monday through Friday**.