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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

[‡] 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.

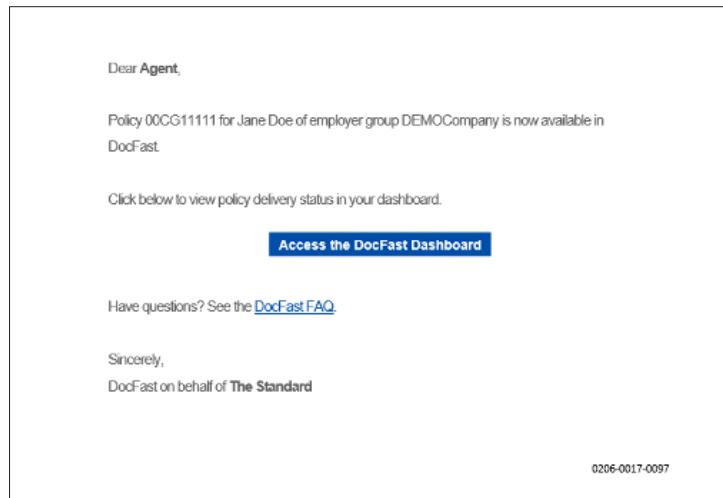

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Registering for DocFast® is easy.

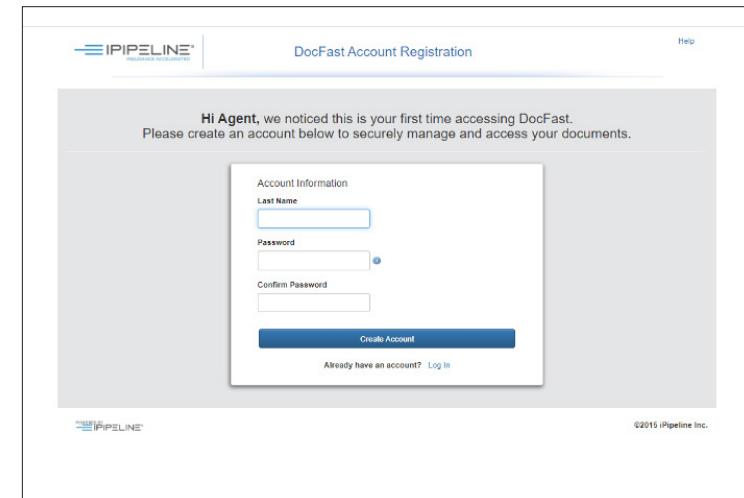
For new group implementations, agencies will complete and return a setup form. The Standard will then work with you and iPipeline to set up DocFast access. If you already have a DocFast account with The Standard, no account changes are needed. Newly issued GSI policies will automatically appear in your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

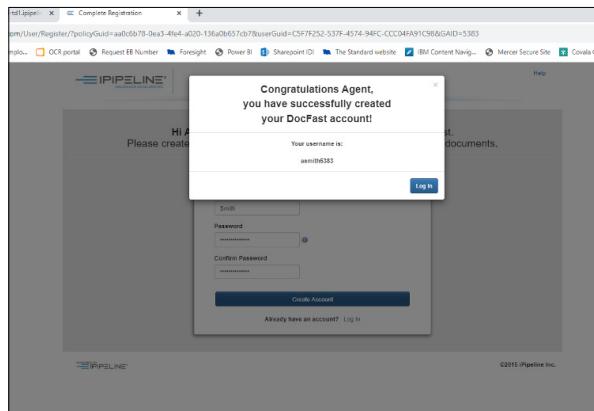
Continued on next page

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


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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

 Mobile

[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. ?

[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**.

The screenshot shows the main dashboard of the Distributor DocFAST Center. At the top, there is a search bar labeled "Search by Identification Number or Consumer Name". Below the search bar, a red box highlights the "Filters" button. The main content area is divided into sections: "Alerts (0)" and "General Policies (1)". The "General Policies" section displays a table with columns: Last Activity Date, Carrier, Status, Primary Consumer, and Identification Number. The table shows one row for November 16, 2023, with the carrier being "ABC Company" and the identification number being "X8756111".

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

The screenshot shows the main dashboard of the Distributor DocFAST Center. The "Filters" section is highlighted with a red box. It contains dropdown menus for "Distributor" (set to "DIBroker"), "Display Activity in" (set to "Last 90 Days"), "Num Policies to View" (set to "Select one"), "Delivery Expiration Date" (with "From" and "To" fields), "Product Type" (with "Select one" dropdown), "Status" (with "Select one" dropdown), "Group" (set to "ABC Company"), and "Tags" (with "Select one" dropdown). Below the filters are two buttons: "Apply Filters" (in a blue bar) and "Clear Filters" (in an orange bar). The main content area is divided into sections: "Alerts (0)" and "General Policies (1)". The "General Policies" section displays a table with columns: Last Activity Date, Carrier, Status, Primary Consumer, and Identification Number. The table shows one row for November 16, 2023, with the carrier being "ABC Company" and the identification number being "X8756111".


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

Accessing Group Summary Dashboard

There are no documents to display.

General Policies (1)

| Last Activity Date | Carrier | Status | Primary Consumer | Identification Number |
|--------------------|-------------|-------------|------------------|-------------------------|
| November 16, 2023 | ABC Company | ABC Company | XBT50111 | Details |

Latest Activity November 16, 2023

Distributor: Distributor
Agent: Lenhoff Doug
Group: ABC Company

[More Details](#)

Document Details: Individual Policy Data

Group Name: ABC Company Group Number: XBT50111

Individual Policies (1)

| Member Name | Policy Number | Status | Last Activity Date | Expiration Date |
|-------------|---------------|---|--------------------|-----------------|
| Doe, Bob | 00050402005 | Not in Consumer No Signature Required | February 20, 2025 | April 30, 2025 |
| Doe, Jill | 00050402004 | Pending Delivery No Signature Required | February 20, 2025 | April 30, 2025 |
| Doe, Jack | 00050402003 | Not in Consumer No Signature Required | February 20, 2025 | April 30, 2025 |
| Doe, Jane | 00050402002 | Not in Consumer No Signature Required | February 20, 2025 | April 30, 2025 |

[More Details](#)

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

Document Details

Document Summary

| Group | Identification Number | Member Name | Delivery Expiration Date |
|-------------|-----------------------|--|--------------------------|
| ABC Company | 00050402005 | Isabella Henderson jennifer.bonk@standard.com | December 31, 2023 |

Common Details

| Effective Date | PolicyType | Monthly Benefit Amt | Catastrophic Benefit Amt | Premium Amt Due | Premium Mode | Signature Required |
|----------------|---------------|---------------------|--------------------------|-----------------|--------------|--------------------|
| 2023-01-01 | Employee Paid | \$6,500 | \$6,500 | \$166.96 | Monthly | Yes |

Activity History

| Date | Activity History |
|-------------------------|--|
| Nov 15, 2023 7:48:30 PM | Carrier Case Manager Jennifer Bonk sent a document to Consumer Isabella Henderson for document 00050402005. Isabella Henderson's link has been expired. |
| Nov 16, 2023 7:45:25 PM | Carrier Case Manager Jennifer Bonk sent approval ownership of document 00050402005 from Carrier Case Manager Administrator Nancy Young to Jennifer Bonk. |
| Oct 9, 2023 5:00:45 AM | Document reminder notification sent to Carrier Case Manager Jennifer Bonk at jennifer.bonk@standard.com |
| Oct 9, 2023 1:18:24 AM | Document reminder notification sent to Consumer Isabella Henderson at jennifer.bonk@standard.com |
| Sep 19, 2023 5:00:22 AM | Isabella Henderson's link has been expired. |

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

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

Reporting: Group Policy Information

The screenshot shows the Group Summary dashboard with a list of individual policies. The search bar at the top has a red circle around the 'Export' icon (a file folder icon). The table below lists policies for members: Doe, Bob, Doe, Jill, Doe, Jack, and Doe, Jane. Each row shows policy details like Policy Number, Status, and Action buttons.

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.

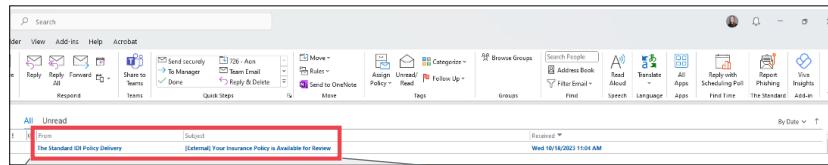
The screenshot shows an Excel spreadsheet with a CSV report of group policy information. The columns include Group Name, Member Last Name, Member First Name, Policy Type, Effective Date, Policy Number, Benefit Amount, Catastrophic Benefit, Premium Amt Due, Premium Mode, Status, Delivery Expiration Date, and Signature Required. The data is organized into rows, showing details for various policies across different companies and members.

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

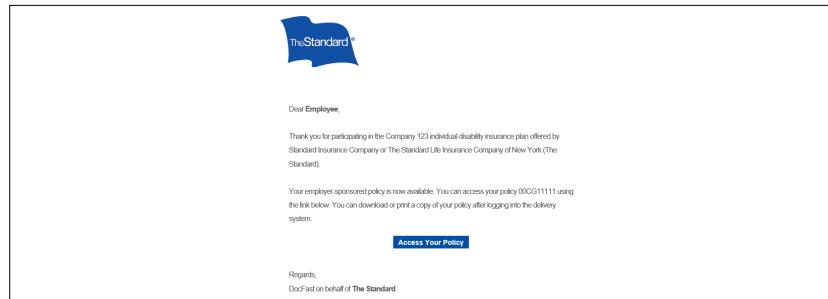
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The individual member will access their policy in **three easy steps:**

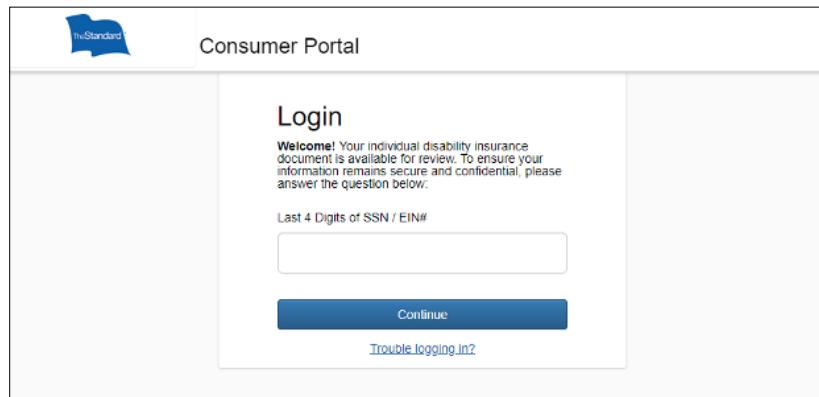
- 1. An email notice is sent to the member when their policy is available.



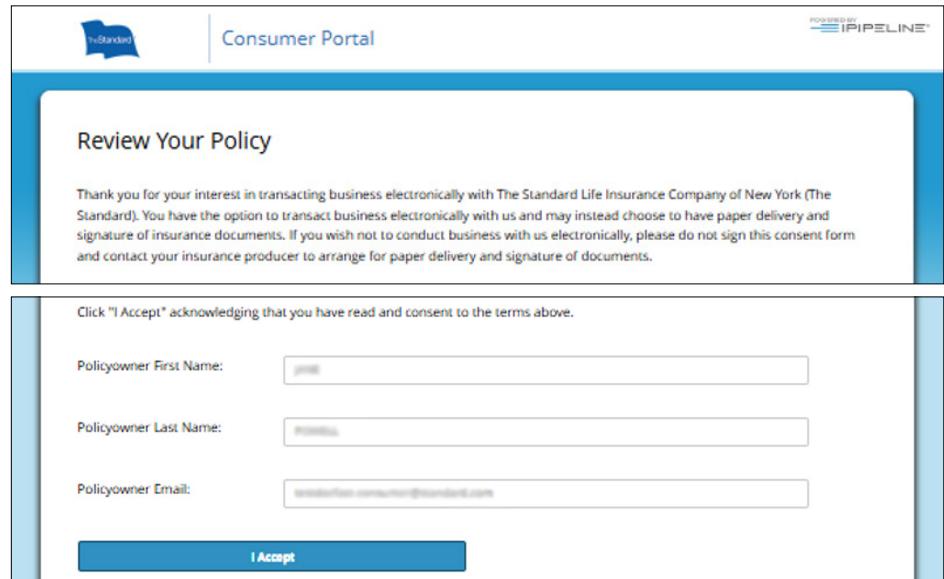
From: The Standard IDI Policy Delivery
Subject: [External] Your Insurance Policy is Available for Review



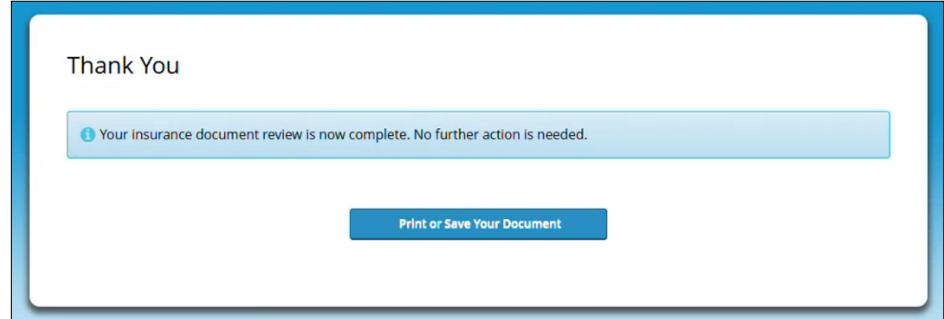
- 2. The member will enter the last four digits of their Social Security number on the DocFast login screen.



- 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**.

Standard Insurance Company | The Standard Life Insurance Company of New York | 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.