Life and Disability administration tools

Easy, secure ways to manage life and disability benefits online

Access the tools you need to administer your life and/or disability plans online. You can add new employees, terminate employee coverage, pay your bill, access claim reports, and more.

Administer your plan with Compassi online employer self service[1]

Use Compassi to view billing statements and employee coverage information online. The secure self-service tool also allows you to[2]:

- View Life and Disability plan information
- Add or terminate employees
- View and update employee demographic data and coverage details
- Add or terminate lines of coverage to existing members
- View and download Excel or PDF version of billing invoice
- Pay your bill (list billed groups only) via link to Pay and View My Bill. The payment system requires a separate login.

Self administered groups can upload self bill worksheets.

Pay your bill with MyOnlineBill

Use this tool to view bills and make payments online. We can automatically withdraw funds from your bank account to pay your plan premium.

You can log on every month to pay your bill or set up recurring payments.

Access life and disability reports[3]

You can access life and disability reports online. Reports include:

- Life and Disability Experience Summary Reports
- Life and Disability Claims Detail Reports
- Group Statistics Reports for Disability Claims
- Group Statistics Reports for Life Claims
- Group Advice to Pay Report
- Group Paid Claims Report.

Receive Evidence of Insurability (EOI)/Medical Evidence Underwriting Communications and Reports

To help you stay current and know when to update payroll deductions, you can sign up to receive copies of letters sent to your employees about their life and disability underwriting, as well as status reports via email. You can choose to receive status reports weekly or monthly.

For more information, contact:

- AL-AdminPortalSupp@standard.com for questions about Compassi Employer Self Service, reports, and Online Bill Pay.
- AL-MedicalUnderwriting@standard.com for questions about Evidence of Insurability (EOI)/Medical Evidence Underwriting Communications and Reports.

‡ 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.

1 Eligibility and access may vary. Not applicable for groups using electronic enrollment files.
2 Only available for list billed groups.
3 Not available for any state or federal leave administration product.

Life and Disability Administration Services Registration Form and User Agreement

Complete all details for each user below and email this completed, signed agreement to AL-AdminPortalSupp@standard.com.

Company Name	
Group Number(s)	
Bill Group/Sub Group	
Address	
City	
State	
Zip	

Please list users/operators in your groups who will have access. Fill out all information for each user; add additional sheets as needed.

User 1			
First Name/Last Name		**Title**	
Email		**Daytime Phone**	
Compassi access details			
□ **This user should have the same Compassi access for all Bill Groups (*please only fill out one Bill Group section below*)**			
Select only one level of access (Full Member Access, View Member Access, or Self-bill Access)			
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Access** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill Access** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Claims Reporting Access	□ Give access to Employer Claims Reporting ***Option:*** □ Give this User access to Paid Claim Reports	□ Give access to all Bill Groups and Member Classes ***OR*** □ Give access to only these Bill Groups and Member *Classes (list Bill Groups and Member Classes)*:	
Experience Reporting	□ Give access to Experience Reporting		
Evidence of Insurability (EOI)/Medical Evidence Underwriting communications and reports details.			
EOI/MEU communications and reports	Receive copies of letters sent to employees and dependents ☐ All ☐ Final Status Only □ None	MEU Status Reports □ Monthly □ Weekly □ None	

User 2			
First Name/Last Name			**Title**
Email			**Daytime Phone**
Compassi access details			
□ **This user should have the same Compassi access for all Bill Groups (*please only fill out one Bill Group section below*)**			
Select only one level of access (Full Member Access, View Member Access, or Self-bill Access)			
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Access** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill Access** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Claims Reporting Access	□ Give access to Employer Claims Reporting ***Option:*** □ Give this User access to Paid Claim Reports	□ Give access to all Bill Groups and Member Classes ***OR*** □ Give access to only these Bill Groups and Member *Classes (list Bill Groups and Member Classes)*:	
Experience Reporting	□ Give access to Experience Reporting		
Evidence of Insurability (EOI)/Medical Evidence Underwriting communications and reports details.			
EOI/MEU communications and reports	Receive copies of letters sent to employees and dependents ☐ All ☐ Final Status Only □ None	MEU Status Reports □ Monthly □ Weekly □ None	

User 3			
First Name/Last Name			**Title**
Email			**Daytime Phone**
Compassi access details			
□ **This user should have the same Compassi access for all Bill Groups (*please only fill out one Bill Group section below*)**			
Select only one level of access (Full Member Access, View Member Access, or Self-bill Access)			
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Access** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill Access** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*

Claims Reporting Access	□ Give access to Employer Claims Reporting ***Option:*** □ Give this User access to Paid Claim Reports	□ Give access to all Bill Groups and Member Classes ***OR*** □ Give access to only these Bill Groups and Member *Classes (list Bill Groups and Member Classes)*:	
Experience Reporting	□ Give access to Experience Reporting		
Evidence of Insurability (EOI)/Medical Evidence Underwriting communications and reports details.			
EOI/MEU communications and reports	Receive copies of letters sent to employees and dependents ☐ All ☐ Final Status Only □ None	MEU Status Reports □ Monthly □ Weekly □ None	
User 4			
First Name/Last Name		**Title**	
Email		**Daytime Phone**	
Compassi access details			
□ **This user should have the same Compassi access for all Bill Groups (*please only fill out one Bill Group section below*)**			
Select only one level of access (Full Member Access, View Member Access, or Self-bill Access)			
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Access** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill Access** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Bill Group	□ **Full Member Access** *Full edit access to member data* ***Option:*** □ Hide Bills	□ **View Member Only** *No ability to make any changes to member data* ***Option:*** □ Hide Bills	□ **Self-bill** *Self-bill groups only have the ability to upload self-bill worksheets to the portal*
Claims Reporting Access	□ Give access to Employer Claims Reporting ***Option:*** □ Give this User access to Paid Claim Reports	□ Give access to all Bill Groups and Member Classes ***OR*** □ Give access to only these Bill Groups and Member *Classes (list Bill Groups and Member Classes)*:	
Experience Reporting	□ Give access to Experience Reporting		
Evidence of Insurability (EOI)/Medical Evidence Underwriting communications and reports details.			
EOI/MEU communications and reports	Receive copies of letters sent to employees and dependents ☐ All ☐ Final Status Only □ None	MEU Status Reports □ Monthly □ Weekly □ None	

If you need to deactive a user in the future, simply email AL-AdminPortalSupp@standard.com.

Only complete this section if you requested automatic recurring bill payments (EFT)

Recurring Automatic bill payments (EFT) (only available for list billed groups) – for assistance email AL-AdminPortalSupp@standard.com.

Premium Payment Authorization form

Recurring Automatic Payments through Electronic Funds Transfer (EFT)

Enrollment Information

Section 1: Enrollment information

Enrollment type	☐ New Account ☐ Existing account – Group number: Bill Group Number, if not all:
Requested effective date - submit 30 days prior	(MM/DD/YYYY)
Please select a Draft Day between the 1st – 14th of the month	
Paperless billing	□ Yes □ No
Sole Billing Contact Name	
Sole Billing Contact phone number	
Sole Billing Contact email address	

Section 2: Financial institution information

Financial Institution	
9 digit ABA/routing no.	
Account no.	
Account type	☐ Business checking ☐ Business savings ☐ Personal checking ☐ Personal savings

Please attach a voided check/scan of a voided check to ensure accuracy.

Authorization

This authorization will remain in full force and effect until written notification to cancel is received from customer with at least 30 days notice to act. Customer will receive notification at least 10 days prior to each action with the applicable amount and date information. By signing below on page 8, I (we) hereby authorize the intiation of debit entries of premiums or any other related payments to our account. I also understand if changes I make to my auto withdrawal amount are processesd close to the withdrawal date, The Insurance Company may not be able to notify me of the new auto withdrawal amount before the withdrawal is made.

User Agreement between The Standard‡ and End User of The Standard Application

Compassi Employer Self Service, Employer Claims Reporting/Status Check Application, Experience Reporting

1. Definitions

1.1. The Standard means Standard Insurance Company and The Standard Life Insurance Company of New York.

1.2. Agreement means this End User Agreement.

1.3. Application means any of the on-line bill pay, claims reporting or status check, or experience reporting services offered to Employers by The Standard to assist Employers in submitting, viewing, creating or changing membership information, or similar functions and submitting, viewing or checking status on member claims information, or premium payment information, or similar functions.

1.4. Documentation means the Application(s)and the written and printed materials in all media pertaining to such Application.

1.5. End User means a Employer or their designated agent, who desires to access an Application pursuant to the terms of this Agreement.

1.6. Member means those individuals who are eligible to receive covered services under a group life and/or disability benefit plan issued or administered in whole or in part by The Standard.

1.7. Operators means those individuals who are employees or agents or are otherwise acting exclusively on behalf of an End User accessing an Application(s).

1.8. Operator Keys means the security protocols of The Standard used to identify Operators and control access to an Application(s).

1.9. Designated Agents means those persons accessing an Application(s) for more than one End User (e.g., clearinghouses, practice management vendors or billing agents). A Designated Agent can be an individual or it can be a processing center employing several individuals, each of whom would be considered an Operator of the Designated Agent. Designated Agents must be separately designated by each End User on whose behalf the Designated Agent is accessing an Application.

1.10. Recognized Devices means those computers under the exclusive control of the End User (and/or its Designated Agent).

1.11. Site Administrators means those persons employed by, agents for or otherwise acting on behalf of the End User who are responsible for administration at the End User's site.

2. Scope of Agreement

2.1. Parties. This Agreement is by and between The Standard and End User. The Standard grants End User a non-exclusive, non-transferable, revocable, limited-use license to access the selected Application(s) set forth in this Agreement, including the online bill pay, Compassi Employer Self Service Application and the Application(s) set forth in the *Compassi User Manual* for End User's legitimate business purposes in providing services to Members. End User may request access for its Operators and/or its Designated Agents (e.g., clearinghouses, practice management vendors or billing agents), which access shall be provided and utilized in accordance with this Agreement.

2.2. Protecting Confidential Information. Member information, of any nature and in any format, along with all other sensitive or proprietary information obtained from The Standard is confidential information. End User represents and warrants that it has implemented and will enforce adequate policies and procedures to protect the confidentiality of Confidential Information as required by applicable laws, rules, and regulations. End User shall not use or disclose any Confidential Information except as expressly authorized in this Agreement or as required by applicable law. End User further represents and warrants that it shall comply with all applicable privacy and confidentiality laws, regulations and rules pertaining to the use, disclosure and transmission of Confidential Information. End User must notify The Standard as soon as possible, but no later than the next business day, after learning of any unauthorized access to, disclosure of or use of any Confidential Information and cooperate with The Standard to regain possession of the information.

2.3. Restricting Access. End User (and/or its Designated Agent) shall, directly, or through its Designated Agent, if applicable, restrict access to an Application to its authorized Operators. End User (and/or its Designated Agent) shall ensure that each Operator has access to only those records of the End User which such Operator must access for legitimate business purposes of the End User in serving End User's Members/patients who are enrolled in a health care plan offered or administered by The Standard. Operators shall access an Application(s) solely on behalf of End User's Members/patients. Such access shall be on a need-to-know basis and only in accordance with this Agreement, applicable laws, rules, and regulations.

2.4. Indemnification. End User directly or through its Designated Agent shall defend, indemnify, and hold harmless The Standard, and their respective direct and indirect subsidiaries, joint ventures, partnerships and other corporate arrangements, and each of their officers, directors, shareholders, agents and assigns from and against all claims, expenses (including reasonable attorneys' fees), damages, and liabilities arising or alleged to arise from End Users, Designated Agents, and their respective Operators and agents access of Application(s) or wrongful, unlawful or unauthorized access of an Application(s), or any breach of this Agreement. In addition, End User agrees on behalf of itself and its Designated Agent that The Standard shall have the right to obtain equitable relief from a court of competent jurisdiction as The Standard may deem necessary or appropriate to prevent or stop any unlawful or unauthorized actions.

2.5. Internet Connectivity. End User must provide its own Internet Service connectivity directly, or through its Designated Agent.

2.6. Non-disclosure of Proprietary Information. End User acknowledges and agrees that Documentation is the proprietary and intellectual property of The Standard. Except for disclosure to Site Administrators and Operators necessary to the End User's use of an Application(s), End User shall not disclose, sell, use, reengineer or re-license the Documentation for any purpose. End User

acknowledges and agrees that any unauthorized use or disclosure of The Standard 's proprietary and intellectual property would cause The Standard irreparable harm that could not be fully remedied by monetary damages. End User, therefore, agrees that The Standard shall have the right to obtain such injunctive or other equitable relief as may be necessary to prevent unauthorized or unlawful action.

2.7. Appointment of Site Administrators. End User agrees to appoint one or more Site Administrator(s) as The Standard and End User mutually agree are necessary for the administration by End User. The initial Site Administrator(s) shall be specified on this Access Request Form. End User shall notify The Standard immediately when End User must change the initial Site Administrator(s) information by completing and submitting the applicable sections of the Access Change Form to The Standard. End User agrees to provide any information regarding Site Administrators reasonably requested by The Standard. End User represents that each Site Administrator shall have the authority to make decisions on behalf of the End User.

2.8. Responsibility of Site Administrator. End User acknowledges and agrees that, as between it and The Standard, End User is solely responsible for any and all actions of its Site Administrators, Operators and Designated Agent(s) and its/their Operators.

2.9. Canceling Operator Keys. End User shall ensure that the Site Administrator(s) notify The Standard in writing within two business days to cancel an Operator Key when the Operator to whom it was assigned has been dismissed, transferred, or is otherwise no longer authorized to access one or more Applications.

2.10. Notification of Change in Designated Agent/s. End User must promptly notify The Standard in writing upon appointing a Designated Agent, changing its Designated Agent or upon discontinuing its use of its Designated Agent, and must supply all information requested by The Standard pursuant to such appointment, change, or discontinuance.

2.11. Notice of Change in Operator, Site Administrator or Designated Agents. If at any time during the term of this Agreement the End User elects to: (a) change its Operator(s) (including hiring new employees who will be Operators or terminating one of its Operators or canceling the access of one of its Operators); (b) change any of its Site Administrator(s) information; or (iii) change its Designated Agent (including the retaining of a different Designated Agent or the cancellation of the Designated Agent), the End User must agree to the applicable portions of the User Agreement and notify The Standard. No Designated Agent may access an Application until such forms are accepted and approved by The Standard and all applicable Operator Keys are issued.

2.12. Proper Use and Non-Transferability of Operator Keys. End User acknowledges Operator Keys are unique to each individual Operator and agrees it must ensure proper use of all Operator Keys assigned to its Operators. Operator Keys are nontransferable. End User must request a separate Operator Key for each Operator by submitting each Operator’s contact information to The Standard in writing in a manner acceptable to The Standard. End User agrees to implement and enforce policies and procedures to ensure that Operator Keys are disclosed only to the individual Operator to whom such Operator Key is assigned. End User also shall implement policies and procedures to ensure that no person other than Site Administrators and Operators have access to an Application(s).

2.13. Use of The Standard Group Number. End User shall implement and enforce policies and procedures to ensure that all End User's transactions and all communications from End User to The Standard include the End User's The Standard Group Number(s). The End User's tax identification number(s) is/are set forth as part of this Agreement.

2.14. The Standard Provides Applications "AS IS" without warranties of any kind. All implied warranties are hereby disclaimed to the fullest extent permitted by law. Under no circumstances shall The Standard be liable to End User (including, but not limited to, its Site Administrators, Operators or its Designated Agent and its Operators) or any third party for damages of any kind.

3. General Provisions

3.1. Assignment. This Agreement is binding upon the parties, their successors and assignees.

3.2. Termination. This Agreement may not be assigned without The Standard 's written consent. The Standard has the right to terminate access to an Application(s) by End User, any Operators, and/or End User's Designated Agent and its Operators immediately and without notice if The Standard reasonably believes that any of them breaches the terms of his or her respective agreements or if necessitated by concerns for the security of Application(s). The Standard may otherwise terminate this Agreement upon 10 days' written Notice. Any liabilities or obligations set forth in this Agreement that remain to be performed, or by their nature would be intended to be applicable following any such termination will survive termination of the Agreement.

3.3. Entire Agreement. This Agreement, together with all of the Forms and Attachments hereto, which are deemed incorporated by reference herein, represents the entire agreement between End User and The Standard and supersedes all prior and contemporaneous agreements or representations between the parties regarding the subject matter hereof.

3.4. Modifying the Agreement. The Standard reserves the right to modify this Agreement upon 15 days' notice to End User (The Standard may modify this Agreement by only the posting of modification(s) to this Agreement to its site, although The Standard may provide notice by other means as well); however, End User may notify The Standard within the 15 day period that the modification is unacceptable, and The Standard will discontinue End User's access to Applications. End User may not modify this Agreement unless the modification is in writing and signed by The Standard.

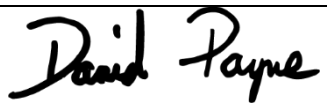
3.5. Governing Law. This Agreement will be construed in accordance with and governed by the laws of the State of Oregon without regard to its conflict of laws rules.

3.6. Waiver. All disputes arising from or relating to this Agreement shall be subject to the laws of Oregon.. The Standard 's waiver or failure to claim breach of any provision of this Agreement will not be a waiver of a breach of any other provision or subsequent breach of the same provision.

3.7. Descriptive Headings. The headings contained in this agreement are for reference purposes only and shall not affect in any way the meaning or interpretation of this Agreement.

3.8. Accuracy of Data. End User represents that all data submitted through the application is true and accurate to the best of their knowledge and understands that it is being relied on by The Standard in accepting, creating or updating membership information. Any misstatements or failure to report medical information prior to effective dates may result in a material change to coverage or premium rates. Any material misrepresentation or significant omission found may result in denial of benefits or rescission or cancellation of coverage.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement effective as of the day and year stated below.

The Standard	
Authorized Representative	David Payne
Signature	
Title	President
Date	

Employer Group Name	
Authorized Officer **CEO, CFO, President, Vice President, etc.**	
Signature	
Title	
Date	

‡ 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.