Individual Disability Insurance

TheStandard ®

Agent Instructions
for DocFast® Electronic Policy Delivery

For producer use only.
Not for use with consumers.

Content

When You Receive a Notice That a Policy Is Ready for Delivery

When a policy is ready for delivery, you'll receive an email like this.

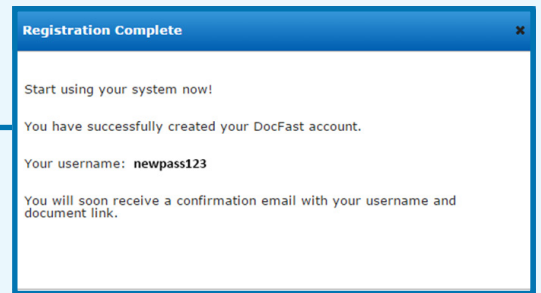Select **Click here to access the policy.**
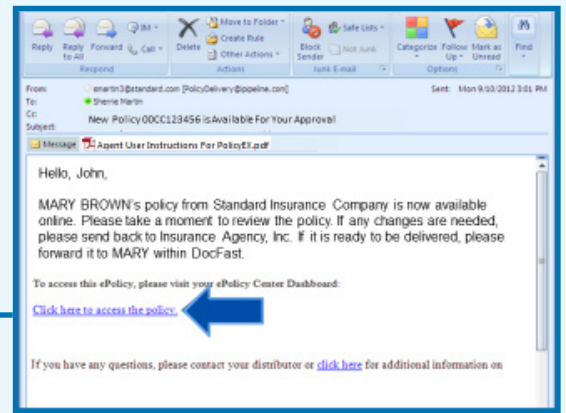
Registering With DocFast

If this is your first time using DocFast, go to the DocFast Registration Center.

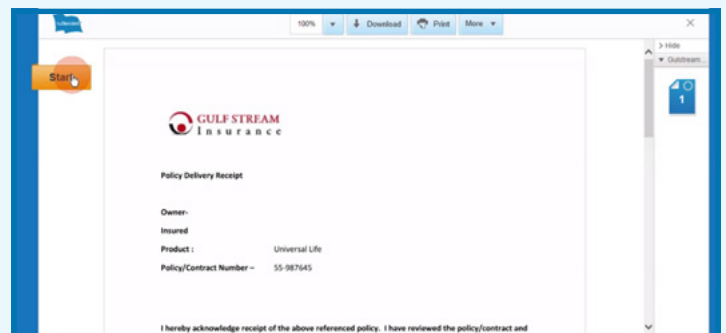After you complete the registration, you'll see this message. Click **OK**. Follow the prompts.
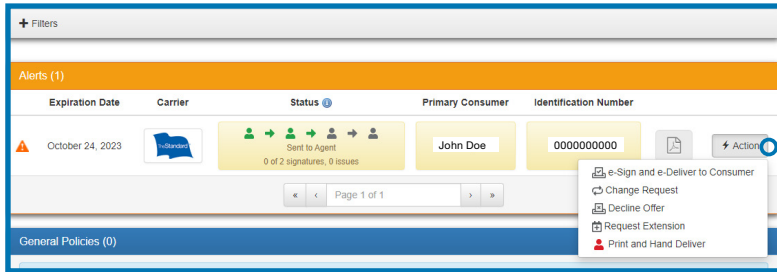
Signing the Policy

In states where agents' signatures are required, agents will see a **Start** tab. If there is no Start tab, then no signature is required.
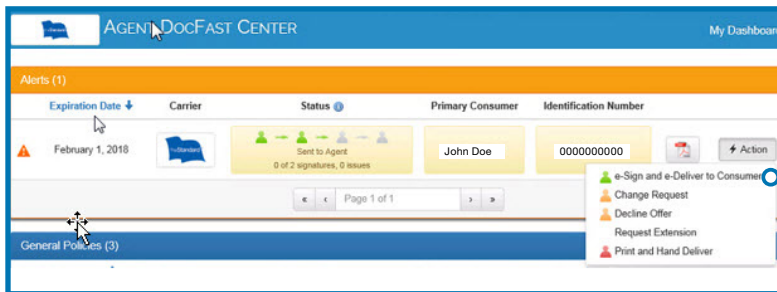
Preparing for Electronic Delivery

You can deliver policies electronically while meeting with your customer in person or with a link in an email. Either way, the process starts the same.

From your desktop or laptop computer, tablet or handheld device, go to your agent dashboard. Click **Action**.

From the drop-down menu, choose **e-Sign and e-Deliver to Consumer**.
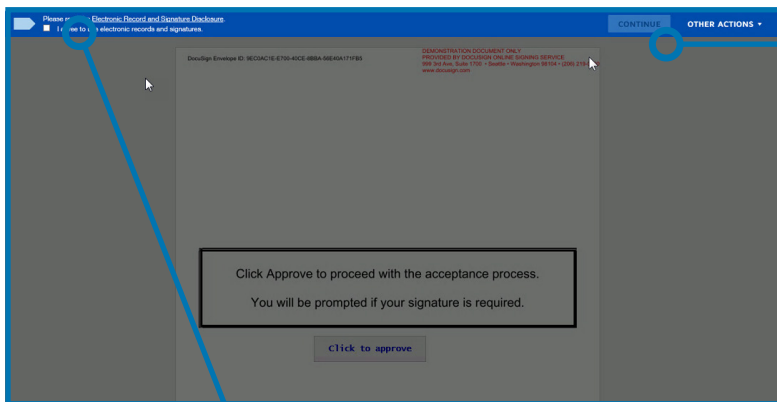
Notice that the screen is grayed out. Before moving to the next step, you must agree to use electronic records and signatures.

Click the box found on the top left of the screen. Then select **Continue** on the top right of the screen.

Select **Click to approve** and follow the prompts to sign, if required.

Then click **FINISH**.
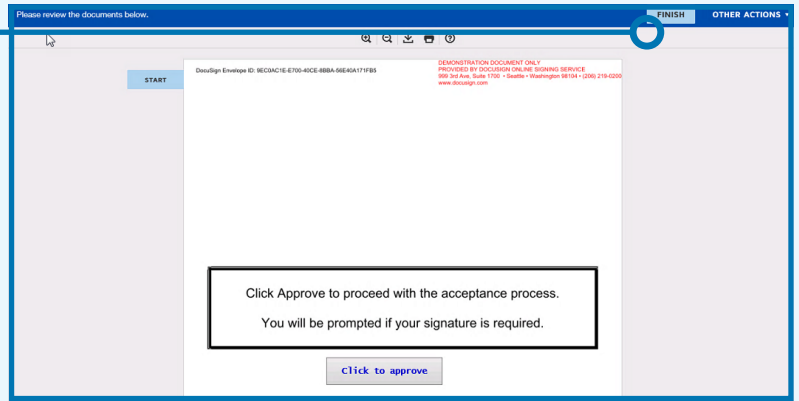
Delivering the Policy to Your Customer

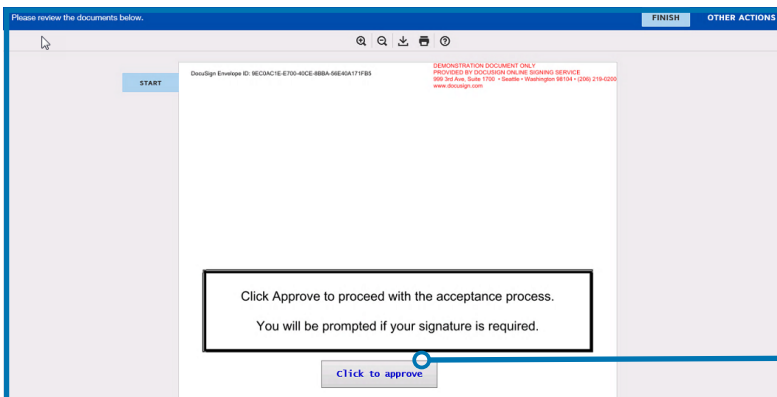Now is when you choose to deliver the policy via email or in person. If you prefer to meet with your customers in person to deliver policies, it's easy!

Choose your signing method: **Email** or **Face To Face**.

Face to Face View

If you chose **Face To Face**, the next screen will ask you to pass your device to your client. Your client will select **Start Review & Sign** and then follow the prompts.

Email View

Your client will receive an email similar to this. They will click **Access My Policy** to be delivered to the Consumer Portal.

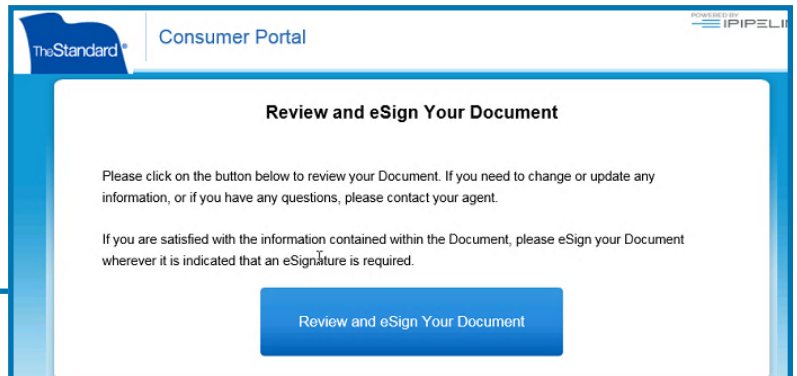Your client will log into the Consumer Portal using the last four digits of their Social Security number.
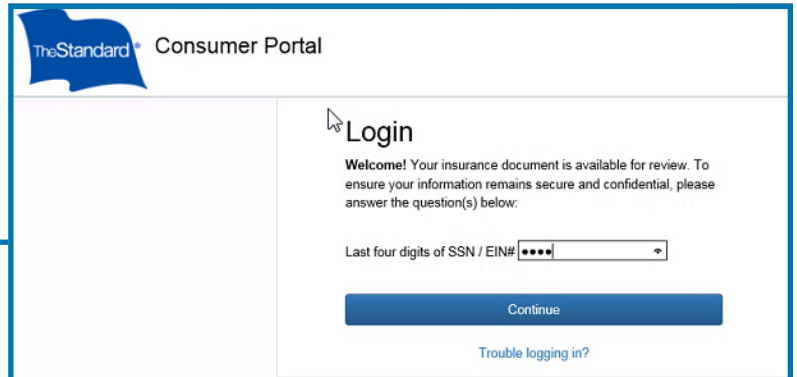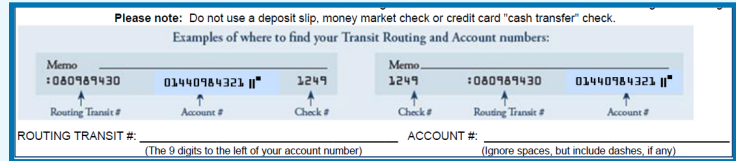

Then they will select **Review and eSign Your Document**.

Premium Payment

A one-time electronic funds transfer is usually required to put the policy in force.

If a customer brings a paper check to pay for the initial premium, they can enter the bank routing and account number in the form.

Please note: Do not use a deposit slip, money market check or credit card "cash transfer" check.

Examples of where to find your Transit Routing and Account numbers:

Memo			Memo		
:080989430	01440984321 ⑈	1249	1249	:080989430	01440984321 ⑈
Routing Transit #	Account #	Check #	Check #	Routing Transit #	Account #

ROUTING TRANSIT #: _____ (The 9 digits to the left of your account number)   ACCOUNT #: _____ (Ignore spaces, but include dashes, if any)
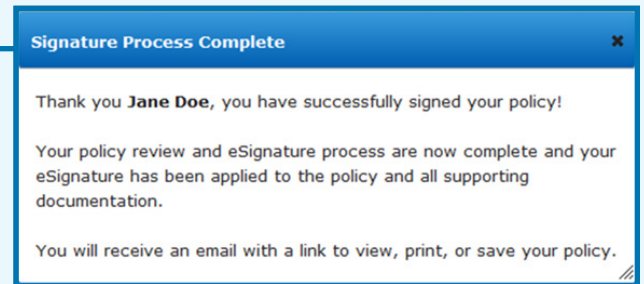
If you are sending a paper check, as in an employer-paid case, please advise your Customer Management Specialist at The Standard before delivering the policy.

Your customers are then taken to the **Review Documents** screen, which gives them the opportunity to review each page of the policy.

Once they have reviewed the policy and confirmed that everything is as they expect, they can **Sign** and **Confirm Acceptance** of their policy.
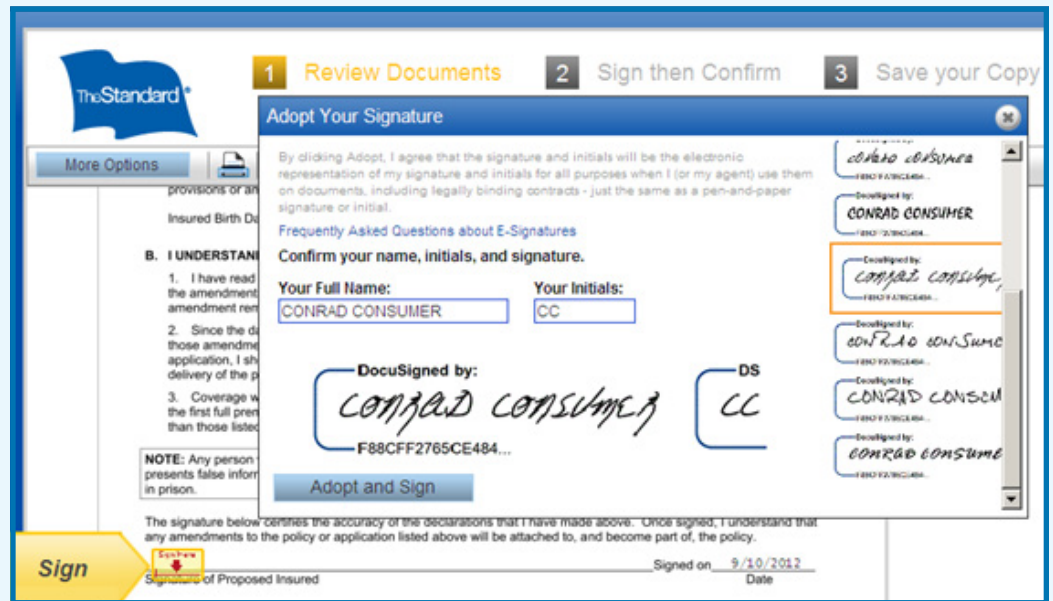
Once the signature process is completed, your customers will see a notice similar to this example.

Signature Process Complete

Thank you **Jane Doe**, you have successfully signed your policy!

Your policy review and eSignature process are now complete and your eSignature has been applied to the policy and all supporting documentation.

You will receive an email with a link to view, print, or save your policy.
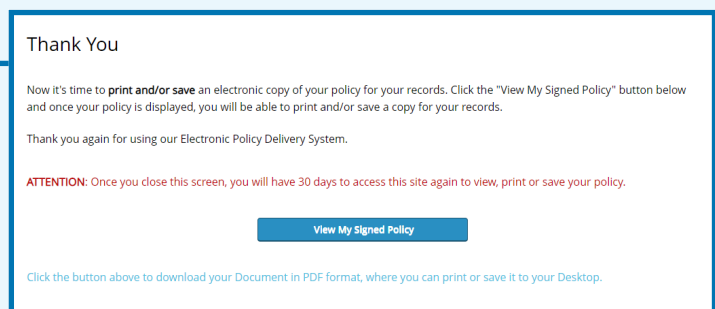
Notice of 30 Days to View, Print or Save Policies

Your customer will then see a notice similar to this example.

If you wish to print a copy of a policy, wait until after it has been e-signed by the customer.

Do not choose the *Print* option before policies are signed.

That will void the capability for an electronic signature and electronic delivery.

Thank You

Now it's time to **print and/or save** an electronic copy of your policy for your records. Click the "View My Signed Policy" button below and once your policy is displayed, you will be able to print and/or save a copy for your records.

Thank you again for using our Electronic Policy Delivery System.

ATTENTION: Once you close this screen, you will have 30 days to access this site again to view, print or save your policy.

View My Signed Policy

Click the button above to download your Document in PDF format, where you can print or save it to your Desktop.

Browser Information

DocFast supports most current internet browsers.
Please see the DocFast system requirements for more information.

DocFast Technical Assistance

For technical support with e-delivery, please email support@ipipeline.com or call 800.641.6557.

Standard Insurance Company
The Standard Life Insurance
Company of New York

standard.com/di

DocFast Agent Overview
17355 (12/23) SI/SNY
Back to Index ⬆