

Launch Electronic Medical Questionnaire

For Your Agency's Producers

Thank for choosing to submit your client's Full Underwriting Application Supplement using The Standard's Electronic Medical Questionnaire.

1 To start the Electronic Medical Questionnaire, your producer needs to provide this client information to you:

- State in which the applicant lives
- First and last name
- Date of Birth (mm/dd/yyyy)
- Last four digits of Social Security Number
- Email address
- Cell phone number

All these items are needed to send the Electronic Medical Questionnaire to the client for completion.

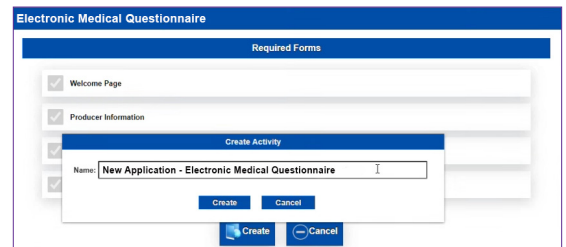
Not available for use in California, Florida, Montana, New York, North Dakota, South Dakota and Wyoming.

2 Go to The Standard's eApp platform

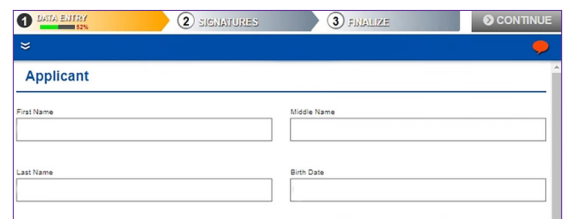
- From the same list used to launch eApp, you can select to launch the Electronic Medical Questionnaire.

Select the **Electronic Medical Questionnaire**, then click **Create**.

In the **Create Activity** dialogue box, change "New Application" to your client's name.

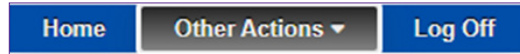


- You'll fill in the client information in the initial screen.



3 Generate the Electronic Medical Questionnaire link to send to the client:

- **Request that client fill and sign**, from **Other Actions** drop down at top right of screen.



- The client information prepopulates here:

A screenshot of a web form titled "Request Clients to Complete Filing and Signing Application". The form has several input fields: "Your Name" (pre-filled with "Producer Name"), "Your Email" (pre-filled with "producer@email.com"), "Subject" (pre-filled with "Name Last- Electronic Application - Please Complete Your Application"), "Primary" (checked), "Insured" (checked), "Name" (pre-filled with "John Smith"), "Email" (pre-filled with "john.smith@email.com"), "Last 4 Digits of SSN/Government ID" (pre-filled with "1234"), "Birth Date" (pre-filled with "01/01/1989"), and "Mobile Number" (pre-filled with "314-555-1212"). To the right, there is a text area containing a template email message: "<Client Name>,\nThank you for applying for individual disability insurance from The Standard.\n\n<a href=<URL_LINK>>Please complete your electronic application here.\n\nPlease enter your birth date and the last four digits of your Social Security number to log in. You'll be asked to accept the disclosure terms and consent to conducting business electronically;". Below the text area are three buttons: "Send Email", "Generate Link Without Email", and "Cancel". At the bottom, there is a note: "The primary signer will receive an email message with instructions to complete the forms and signature. After the primary signer completes the signature, other signers will receive an email with instructions to complete their signatures."

You can send the Electronic Medical Questionnaire to your client with an email greeting and the link or create a unique questionnaire link to send via text or email from the agency or producer.

4 The client will have up to 30 days to complete the Electronic Medical Questionnaire.

If your client has any questions, they may send a message from inside the questionnaire. All communications in the questionnaire will be directed to the person who initiated the application.

5 After the client signs the application, the Electronic Medical Questionnaire is submitted to The Standard.



Producer

Submits request to the agency to launch the Electronic Medical Questionnaire. Provides applicant's first name, last name, last 4 of SSN, state of residence, email address and cell phone number.



Agency Staff

Launches the Electronic Medical Questionnaire, including the client info provided. Next, sends questionnaire email or link to client.



Client

Client completes the Electronic Medical Questionnaire and signs.



Home Office