



ATTN: Specialty Operations VIDA
P.O. Box 182361
Columbus OH 43218-2361

SAMPLE – Standalone Life and Disability Self Billed groups without Anthem medical, dental, vision, or supplemental health plans

We're making changes to how we administer your life and disability plan. Here's what to expect.

Life and disability group number <GRP_NO>

Dear <GRP_CONTACT>,

StanCorp Financial Group, Inc., (The Standard) will soon acquire our parent company's life and disability business. You can find more details about the change here: standard.com/about-standard/newsroom/press-releases/standard-acquire-life-disability-business-elevance-health. The contract is expected to close in the first quarter of 2024.

We're still Anthem Life, the life and disability company you know and trust. Our commitment to you remains the same: Deliver excellent life and disability benefits and service to you and your employees.

We're making some administrative changes to prepare for the transition to The Standard

The changes affect how you submit your self-bill worksheet and premium payments. This letter outlines what you can expect and what you'll need to do. The changes start with your September payment.

What will change?

Life and disability self-bill worksheet

- Starting with your September payment, you'll need to use a new self-bill worksheet for your life and disability plans instead of submitting them through EmployerAccess.
- We'll email you the new worksheet in August.
- You'll email your worksheet each month to:
LifeDisabilitySelfBilledAccountsInquiries@anthem.com.

Premium payments

- Starting with your September payment, you'll need to mail us a check for your life and disability premium payments instead of paying them through EmployerAccess.
- Please mail your payments to:
Group Enrollment & Billing
Department L-8111
Columbus Ohio 43268-8111

Employee applications

- If you use employee applications, please go to anthem.com/employer/forms and download the most current life and disability employee application. Select your state, then scroll down to *Life and Disability*.

What will not change?

- Your life and disability claims process and contacts will not change. We'll continue to administer all life and disability claims without interruption.
- Your access to life and disability reports will not change. You'll continue to access your life and/or disability reports through the portals you use today.

Our *Life and Disability Welcome Guide* is always a great resource to help with administering your life and disability plans. It's at **[anthem.com/employer/life-and-disability](https://www.anthem.com/employer/life-and-disability)**. From the *Employers* tab located in the center of the page, scroll down to *Group Administration*, then select **Welcome Guide**.

Please contact us if you have questions

Our life and disability experts are here to support you. Call them at **833-755-0483** or email **LifeandDisabilityMigrationCommandCenter@anthem.com**.

We look forward to working with you to ensure you have a smooth transition to the new system.



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Administration and billing for your life and disability plans will be managed separately from your Anthem medical, dental, vision, and supplemental health plans. The changes are only for group life and disability plans. Your medical, dental, vision, and supplemental health plans are not affected.

What will change?

Life and disability self-bill worksheet

- Starting your September payment, you'll need to use a new self-bill worksheet for your life and disability plans instead of submitting them through EmployerAccess.
- We'll email you the new worksheet in August.
- You'll email your worksheet each month to:
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- Starting your September payment, you'll need to mail us a check for your life and disability premium payments instead of paying them through EmployerAccess.
- Please mail your payments to:
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Department L-8111
Columbus Ohio 43268-8111
- You can continue paying your medical, dental, vision, and supplemental health premium using EmployerAccess.

Employee applications

- If you use employee applications, please go to **[anthem.com/employer/forms](https://www.anthem.com/employer/forms)** and download the most current life and disability employee application. Select your state, then scroll down to *Life and Disability*.

What will not change?

- Administration contacts, online tools, and bills for Anthem medical, dental, vision, and supplemental health plans will not change.
- Your life and disability claims process and contacts will not change. We'll continue to administer all life and disability claims without interruption.
- Your access to life and disability reports will not change. You'll continue to access your life and/or disability reports through the portals you use today.

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Starting September 1, 2023, we'll move your life and disability plans to a new system. It's called Compass. This letter outlines what you can expect during the change and what you'll need to do.

What you need to do now

1. If you currently use EmployerAccess online self-service to manage your life and disability plans or pay your bill, **please fill out, sign, and return the enclosed form to us by August 1, 2023**. We'll send your Compassi login credentials after we receive your form.
 - **If you pay your bill online through EmployerAccess, be sure to fill out the Online Bill Payment section.** Beginning September 1, 2023, you'll pay your life and disability bill on a site called MyOnlineBill[®].
 - **If you pay your bill through automatic withdrawals, please complete the Online Bill Payment section.**
2. **Review your most recent bill carefully** to make sure your membership and employee salaries are correct. Please notify your current enrollment and billing contact immediately if you need to make any updates.

What else will change?

Life and disability bills

- Your life and disability bill will be in a new format. Be sure to check your bill carefully.

Compassi self-service tool

- For details and helpful tips on Compassi online self-service, go to [anthem.com/employer/life-and-disability](https://www.anthem.com/employer/life-and-disability). Scroll down to *Compassi Employer Self-service*, then select **Employer Self-service demo**.

Premium payment address

- If you mail checks for your life and disability premium payments, use the following new address. It's also listed on the life and disability bill:
Group Enrollment & Billing
Department L-8111
Columbus Ohio 43268-8111

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Please go to [anthem.com/employer/forms](https://www.anthem.com/employer/forms) and download the most current life and disability employee application. Select your state, then scroll down to *Life and Disability*.

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- Your access to life and disability reports will not change. You will continue to access your life and/or disability reports through the portals you use today.

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- 3.** If you currently use EmployerAccess online self-service to manage your life and disability plans or pay your bill, **please fill out, sign, and return the enclosed form to us by August 1, 2023.** We'll send your Compassi login credentials after we receive your form.
 - **If you pay your bill online through EmployerAccess, be sure to fill out the Online Bill Payment section.** Beginning September 1, 2023, you'll pay your life and disability bill on a site called MyOnlineBill[®]. You'll still use EmployerAccess to pay your medical, dental, vision, and/or supplemental health plan bills online.
 - **If you pay your bill through automatic withdrawals, please complete the Online Bill Payment section.** Automatic premium payments for your medical, dental, vision, and/or supplemental health plans will not change.
- 4.** **Review your most recent combined bill carefully** to make sure your membership and employee salaries are correct. Please notify your current enrollment and billing contact immediately if you need to make any updates.

What else will change?

Life and disability bills

- Life and disability plans will be billed separately from your Anthem medical, dental, vision, and supplemental health plans. You'll receive the first separate life and disability bill in mid August for your September premiums.
- Your life and disability bill will be in a new format. Be sure to check your bill carefully.

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- Your medical, dental, vision, and supplemental health plan bill payment address will not change.

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Sample form included with all List Billed groups letters

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 claims reports, and more.

Administer your plan with Compassi¹

Use this tool to view your billing statements and employee coverage information online. The secure self-service tool also allows you to:

- View Life and Disability plan information.
- Add new employees.
- Terminate employees.
- View and update employee demographic data.
- Make changes to employee information such as name, salary, date of birth and Social Security number.
- View monthly billing summary.
- Add new lines of coverage to existing members.
- Terminate lines of coverage from existing members.
- View/print/save PDF of Billing Invoice.
- Download Excel 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.
- View Employee Specific Coverage Details - Effective Dates, Line of business, coverage amounts, monthly premium.

Select Compassi Employer Self Service on the attached form and fill in the form for access. You can register as many users as needed.

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.

Select Online Bill Pay on the attached form and fill in the form for access. There can only be one active user per bill group.

Return this completed form

Complete this PDF, print it, have it signed by an authorized officer of your company, then scan and return it to:

compassicustomersupp@anthem.com

¹ Available for list billed groups. Eligibility and access may vary. Not applicable for groups using electronic enrollment files.

Life and Disability Administration Services Registration Form and User Agreement

Select all that apply for user access to:

- Compassi Employer Self Service (only available for list billed groups) – for assistance email compassicustomersupp@anthem.com
- Online Bill Pay (only available for list billed groups) – for assistance email mypayment@anthem.com. Complete this page and page 4, Premium Authorization.

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

Email this completed, signed agreement to: compassicustomersupp@anthem.com

Please list users/operators in your groups who will have access. Fill out all information for each user. To deactivate a user, fill out information and choose *Deactivate user*.

First Name/Last Name			Title		
Email			Daytime Phone		
Compassi Access	Give access to Compassi <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Deactivate user	Compassi access <input type="checkbox"/> Full Access <input type="checkbox"/> View Only	Bill groups for user access <input type="checkbox"/> All bill groups <input type="checkbox"/> Specific bill groups – list:	<input type="checkbox"/> Use my Medical User Name (enter User Name):	
First Name/Last Name			Title		
Email			Daytime Phone		
Compassi Access	Give access to Compassi <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Deactivate user	Compassi access <input type="checkbox"/> Full Access <input type="checkbox"/> View Only	Bill groups for user access <input type="checkbox"/> All bill groups <input type="checkbox"/> Specific bill groups – list:	<input type="checkbox"/> Use my Anthem User Name (enter User Name):	
First Name/Last Name			Title		
Email			Daytime Phone		
Compassi Access	Give access to Compassi <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Deactivate user	Compassi access <input type="checkbox"/> Full Access <input type="checkbox"/> View Only	Bill groups for user access <input type="checkbox"/> All bill groups <input type="checkbox"/> Specific bill groups – list:	<input type="checkbox"/> Use my Anthem User Name (enter User Name):	

Only complete this section if you requested Online Bill Pay

Premium Payment Authorization

Recurring Payments through Electronic Funds Transfer (EFT)

Enrollment Information

Section 1: Enrollment information

Enrollment type	<input type="checkbox"/> New Account <input type="checkbox"/> 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 1 st – 15 th of the month	
Paperless billing	<input type="checkbox"/> Yes <input type="checkbox"/> 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	<input type="checkbox"/> Business checking <input type="checkbox"/> Business savings <input type="checkbox"/> Personal checking <input type="checkbox"/> 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, I (we) hereby authorize the initiation 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 processed 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 Anthem and End User of Anthem Application

Compassi Employer Self Service and Employer Claims Reporting/Status Check Application

1. Definitions

- 1.1. Affiliate means any entity which owns or is owned by Anthem, directly or indirectly, and any entity which is under common ownership directly or indirectly, by or with Anthem.
- 1.2. Agreement means this End User Agreement.
- 1.3. Application means any of the on-line bill pay, claims reporting or status check services offered to Employers by Anthem 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 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 Anthem or an Affiliate.
- 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 Anthem 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.
- 1.12. Anthem means Anthem Life Insurance Company and its affiliates.

2. Scope of Agreement

- 2.1. Parties. This Agreement is by and between Anthem (on behalf of itself and its Affiliates) and End User. Anthem 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 *Life and Disability Claims Employer 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 Anthem 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 Anthem 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 Anthem 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 Anthem or one of its affiliates. 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 Anthem, Anthem, Inc., Affiliates, 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 Anthem shall have the right to obtain equitable relief from a court of competent jurisdiction as Anthem 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 Anthem. 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 Anthem's proprietary and intellectual property would cause Anthem irreparable harm that could not be fully remedied by monetary damages. End User, therefore, agrees that Anthem 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 Anthem 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 Anthem 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 Anthem. End User agrees to provide any information regarding Site Administrators reasonably requested by Anthem. 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 Anthem, 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 Anthem 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 Anthem 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 Anthem 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 Anthem. No Designated Agent may access an Application until such forms are accepted and approved by Anthem 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 Anthem in writing in a manner acceptable to Anthem. 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 Anthem 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 Anthem include the End User's Anthem Group Number(s). The End User's tax identification number(s) is/are set forth as part of this Agreement.
- 2.14. Anthem 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 Anthem 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 Anthem's written consent. Anthem 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 Anthem 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). Anthem 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 Anthem and supersedes all prior and contemporaneous agreements or representations between the parties regarding the subject matter hereof.

- 3.4. Modifying the Agreement. Anthem reserves the right to modify this Agreement upon 15 days' notice to End User (Anthem may modify this Agreement by only the posting of modification(s) to this Agreement to its site, although Anthem may provide notice by other means as well); however, End User may notify Anthem within the 15 day period that the modification is unacceptable, and Anthem will discontinue End User's access to Applications. End User may not modify this Agreement unless the modification is in writing and signed by Anthem.
- 3.5. Governing Law. This Agreement will be construed in accordance with and governed by the laws of the State of Indiana without regard to its conflict of laws rules.
- 3.6. Waiver. All disputes arising from or relating to this Agreement shall be litigated only in the state courts in Marion County, Indiana, or in the United States District Court for the Southern District of Indiana. Anthem'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 Anthem 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.

Anthem	
Authorized Representative	Scott Towers
Signature	
Title	President
Date	June 12, 2023

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

In California, Life and Disability products are underwritten by Anthem Blue Cross Life and Health Insurance Company. In Georgia, Life and Disability products are underwritten by Greater Georgia Life Insurance Company using the trade name Anthem Life. In New York, Life and Disability products are underwritten by Anthem Life & Disability Insurance Company. In all other states: Life and Disability products are underwritten by Anthem Life Insurance Company. Anthem is a registered trademark of Anthem Insurance Companies, Inc.