

Electronic Payments and Paperless Application Submission for Premium Financed Applications Instructions

The Paperless Application Submission feature in PASS/EASi, provides producers with the ability to electronically transmit new business private passenger applications directly to the Plan. Producers who submit an application using an electronic payment method (Credit Card or Producer Sweep), and “The Premins Company” as the finance company will have the option to submit the signed application and all supporting documents electronically to the Plan, eliminating the need for mailing.

The Premins Company is currently the only premium finance company that will issue electronic finance payment. Additional premium financed companies will be introduced in the fourth quarter of 2017.


The Premins Company will accept either electronic deposit premium or paper finance drafts. If “The Premins Company” is selected for premium financing, producers will have 2 options for submission of the application:

1. If an electronic payment method is selected, either by credit/debit card or producer sweep, there will be no need to complete a paper finance draft, the premium finance company will electronically transfer the financed deposit to the Plan. The signed application and all relevant documents must be either scanned and uploaded or faxed to the Plan through the Paperless Application Submission portal. There is no need to mail the application to the NY Plan. Once the application is assigned, the financed and non-financed deposit premium will be credited to the assigned carrier.
2. If paper check is selected as the payment method, the producer must complete a paper finance draft and mail the draft, the signed application and all relevant documents to the NY Plan.

The following pages provide instructions on how to complete your application using electronic payment options, and transmitting the signed application and all supporting documents to the NY Plan using the electronic submission options, scan and upload (preferred method), or fax.

Electronic Payment and Paperless Submission for Financed and Non-Financed Deposit Premium. (The Premins Company Only)

To use the electronic payment feature for the financed deposit premium, producers must:


1. answer, "yes" to the question "will any portion of this policy be financed?".
2. select "The Premins Company" from the "finance company name" menu.
3. enter the "Quote ID" that was provided by The Premins Company. If the Quote ID is not entered, the following error message  will appear when the producer tries to submit the application. The Quote ID is to ensure that the application can be easily identified by The Premins Company when scanned and uploaded or faxed through the paperless application portal.


Application Premium: \$2480.00 *** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.*

Payment Plan Option:


Deposit Premium: *Minimum Required Deposit Premium: \$628.00*

Will any portion of this policy be financed? Yes No

Premium Finance Information  Please get the Quote ID from the premium finance company!

Finance Company Name: 

'Other' Company Name:

Quote ID: 

Address 1:

Address 2:

City:

State:

Zip:

This premium finance company only accepts electronic finance payment if credit card or producer sweep is selected.

There is no need to submit a paper finance draft.

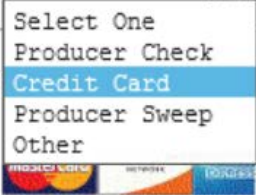
Producers must then answer "yes" to the question "Is deposit financed?"

Is deposit financed? Yes No


Non-Financed Deposit Amount: *NonFinanced payment must be at least 15% of the Policy Premium plus all Law Enforcement Fees - \$381.00*

Financed Deposit Amount: *Financed payment should not exceed 10% of the Policy Premium - \$247.00*

Producers must then select the form of electronic payment for the non-financed deposit premium, producer sweep or credit card located in the “Payment Submitted” menu.

Payment Submitted 

Broker Fee:



If Credit Card is selected for the non-financed deposit premium, you will be transferred to the Official Payments website to complete the credit card information when you click on the “**Submit**” button.

After completing the credit card information on the Official Payments site, you will be re-directed back to the Application Submission page on the PASS/EASi site where you will be able to choose a paperless application submission method for submitting all required documents.


The signed application, finance agreement and all other supporting documents must be transmitted to the NY Plan using a paperless application submission method, scan and upload or fax. Once uploaded or faxed, The Premins Company is notified of the financed deposit amount they are being asked to electronically transfer to the NY Plan to be credited to the assigned carrier.

From the Application Submission screen, click on the box to view/print the application and ID cards. You will also see the **Upload Scanned Documents or Print Fax Cover Page button** located under “Transmission of documents”. Follow these steps to complete the scanning and uploading or faxing of all required documents to the NY Plan.

NOTE: The Premins Company requires a copy of the MVR or a copy of the applicant’s Driver License. Therefore, producers should attach a copy of the MVR retrieved through PASS/EASi when the application is scanned and uploaded or faxed to the NY Plan. If a valid MVR is not retrieved, a copy of the applicant’s Driver License must be scanned and uploaded or faxed with the application.

Application Submission

Reference Number: **16272300016**
Applicant Name: **Joey Premins**
Requested Effective Date: **10/28/2016 12:01 AM**

The application has been submitted. 

View/Print Submitted Application


View/Print ID Card(s)

Transmission of documents:

Upload Scanned Documents
Preferred method - allows you to view your documents in EASi as soon as you upload.

or:

Print Fax Cover Page
You **must** include this fax cover page with the transmission in order to see your documents in EASi within 30 minutes.



Upload Scanned Documents allows you to browse for your file(s) and send directly to PASS/EASi.

Upload Documents

Local File Path:

[Add another file...](#)

Note: The upload size limit is 10 MB per file.
 You may load up to 4 files at a time.
 Document file types are limited to
JPEG, JPG and PDF via document service.

No file has yet been specified.

The, **Print Fax Cover Page**, produces a prefilled cover sheet that identifies the specific application you are faxing, and includes the fax number for sending the documents to the NY Plan. The fax cover page **MUST** be included with the transmission to view the documents.

Sample of Fax Cover Page below.

To: New York Automobile Insurance Plan

Fax Number: 1-844-874-3528

Applicant: Fax, Test

Producer: NYTEST, PRODUCER # BR924776

Date: 8/3/2015

Reference Number: 15215300028

The enclosed documentation is an application for submission to the NYAIP. In addition to the signed application, this transmission contains the following attachments:

End of Assignment/Termination Notice	<input type="checkbox"/>
Dec Page for Household Coverage	<input type="checkbox"/>
Authorization for Physical Damage Inspection	<input type="checkbox"/>
Credit Card Authorization Form	<input type="checkbox"/>
Photocopy of Driver's License for:	<input checked="" type="checkbox"/>

After completing the transmission by either method, you will be able to view the documents on the Application Submission page.

Application Submission

Reference Number: 16272300016
Applicant Name: Joey Premins
Requested Effective Date: 10/28/2016 12:01 AM

The application has been submitted. Please print, sign and mail the application.

View/Print Submitted Application

View/Print ID Card(s)

Transmission of documents:

Upload Scanned Documents

Preferred method - allows you to view your documents in EASi as soon as you upload.

or:

Print Fax Cover Page

You **must** include this fax cover page with the transmission in order to see your documents in EASi within 30 minutes.

Received Date	Delivery Method	Pages	Size(KB)	Doc Type		
9/29/2016 9:42:14 AM	Upload	4	463	pdf	View	Delete



Clicking on View will display the images.

Note: Producers can delete images if they have made a mistake with what they have uploaded or faxed. If deleted, the images can be “undeleted” if necessary.

Electronically Delivered Documents						Refresh	
Received Date	Delivery Method	Pages	Size(KB)	Doc Type			
6/16/2016 1:19:10 PM	Upload	4	225	pdf	View	Undelete	



Attaching Subsequent Documents Electronically

After you have completed your electronic submission, you may come to realize that you omitted something, or you may be requested by the NYAIP, to submit documents you may have forgotten to include in your original electronic submission. Once the application has been submitted, you may access the application by going to **Other Services** on the PASS Home Page and clicking on **Reprint Application/View Assignment Information**.

My Account Private Commercial Endorsement **Other Services**

Other Services:
Processing options currently available based on your account status:

- **Reprint Application / View Assignment Info** ←
- Producer Forms Library
- ID Card Contingency System (ICCS)

Please Note:
[Quick Quote] can now be accessed from the Private Passenger tab.

Search for the application in the Inquiry/Reprint Search Facility.

Inquiry / Reprint Search Facility Search Reset

Step 1: Assignment Search
Select the type of transaction you want:
 Applications Endorsements

Step 2: Enter Your Search Criteria
Narrow your search using ONE of the criteria below, then Click on the Search button above:
NOTE: It is not recommended to search on the "Last Name of Applicant" field alone.

Application Type: All Submissions
Applicant Driver's License:
Applicant Tax ID/SSN:
PASS Reference No:
AIP Case No:
Applicant Last Name:
Application Status:
Payment Type:
Date Range: 03/07/2014 to 03/21/2014

Step 3: Additional Search Options

- Change Producer of Record
- View/Process changes for any authorized satellite locations

This Location Only

Record(s): 24.
Page 1 of 3. 1 2 3

Transaction Type	Reference	Binding Date	Name	
Application EASi Private	14078300063 Not Assigned	03/19/2014	Paperless, CCtest	Choose Action

Once you have located your application, click on the **Choose Action** dropdown and select **View Details**.

Once you select **View Details**, you will see the following screen:

EASi Application Details

Applicant Name:	Karen TestPFC3
Applicant Address:	Broadway New York NY 10003
Reference Number:	16238300025
Submission Date/Time:	8/25/2016 1:13:41 PM
Requested Effective Date:	8/27/2016 12:01:00 AM

With the inclusion of ID Cards you have the option of viewing your Application and ID Cards separately. Please use the buttons below to access the form(s) you need.

Please Note: ID cards are only available to reprint for 45 days.

View/Print Submitted Application

View/Print ID Card(s)

Transmission of documents:

Upload Scanned Documents
Preferred method - allows you to view your documents in EASi as soon as you upload.

or:

Print Fax Cover Page
You must include this fax cover page with the transmission in order to see your documents in EASi within 30 minutes.

Go Back to Application List Page

If the application was submitted using the electronic payment method for the full deposit premium, you will see the *Upload Scanned Documents and Print Fax Cover Page* options. You can submit any follow up documentation for the application using either one of these methods, and your submitted documents will be tagged with the application's reference number for matching purposes.

A premium financed draft MUST be mailed with the application if producer check is selected as the payment method. The Producer **must** forward the signed application, finance agreement and paper draft by mail to the NY Plan. The Paperless Application Submission feature will not appear if paper check is selected.

Application Submission

Reference Number: **16278300018**
Applicant Name: **Karen TestPremins**
Requested Effective Date: **10/4/2016 2:46 PM**

The application has been submitted. [View/print sign and mail draft](#)
Mail original copy to the plan office address listed on the application.

View/Print Submitted Application

View/Print ID Card(s)