

Instruction Guide

Paperless Application Submission Process

for Private Passenger Applications in PASS/EASi

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), will have the option to submit the signed application and all supporting documents electronically, eliminating the need for mailing.

Currently only applications meeting the following conditions can be submitted to the Plan using the paperless application submission process.

- ❖ For Private Passenger applications, only.
- ❖ Application must be submitted using an electronic payment method.
- ❖ The Premins Company is currently the only premium finance company that will issue electronic finance payments. Additional premium financed companies will be introduced in the fourth quarter of 2017. For complete instructions on the Epay for PFC process related to The Premins Company, click the following link. https://www.nypass.com/forms/Epay_PFC_Userguide.pdf

The following pages provide instructions on how to complete your application using electronic payment options, and transmitting the completed application and all supporting documents using the electronic submission options; either by scan and upload, or by fax.

To use the paperless application submission option for applications that are not premium financed, you must first answer “No” to the question “Will any portion of this policy be financed?”. The producer must then select an electronic form of payment located in the “Payment Submitted” menu.

Application Premium: \$3259.00 *** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.*

Payment Plan Option: 2 Payments

Deposit Premium: 823.00 *Minimum Required Deposit Premium: \$823.00*

Will any portion of this policy be financed? Yes No ←

Payment Submitted: Select One ←



Broker Fee:

Application Premium: \$3259.00 *** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.*

Payment Plan Option: 2 Payments


Deposit Premium: 823.00 *Minimum Required Deposit Premium: \$823.00*

Will any portion of this policy be financed? Yes No

Payment Submitted: Credit Card



To use the paperless application submission option for applications that are premium financed through The Premins Company, 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: Minimum Required Deposit Premium: \$628.00

Deposit Premium:

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

The following pages describe in detail, the steps to follow for:

- **Electronic Submission via Scan and Upload**
- **Electronic Submission via Fax**
- **Attaching subsequent documents electronically**

Electronic Submission via Scan and Upload – the most efficient delivery method

In the following example, we have selected **Scan and Upload** with **Credit Card** as the electronic payment method.

When you complete all required information, click on the **Submit** button and you will be transferred to the Official Payments website.

Payment Submitted: **Credit Card**

Broker Fee: 50

OFFICIAL PAYMENTS

Buttons: Save and Exit, Submit

After completing the credit card information, you will see the following screen. From this screen, click on the box to view/print the application and ID cards. You will also see the **Upload Scanned Documents** button located under “Transmission of documents”. Follow these steps to complete the scanning and uploading of all required documents to the Plan.

Application Submission

Reference Number: 16168300030
Applicant Name: Karen NoFinEpay
Requested Effective Date: 6/16/2016 12:45 PM

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

View/Print Submitted Application

View/Print ID Card(s)

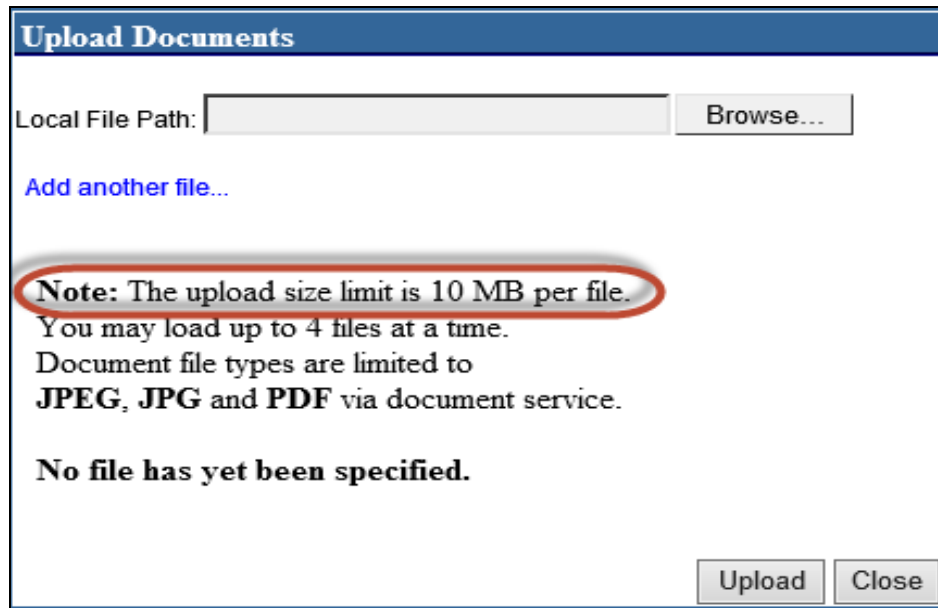
Transmission of documents:

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

or:

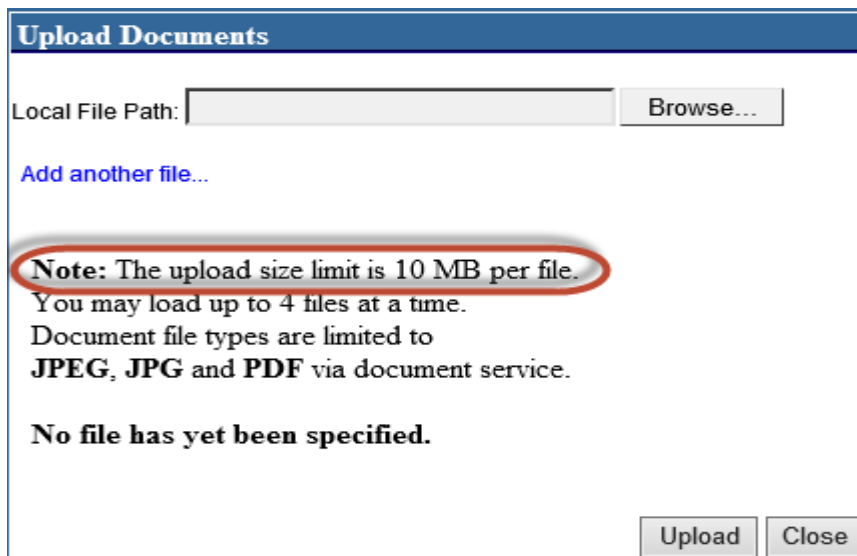
Print Fax Cover Page
You **must** include this fax cover page with the transmission in order to see your documents in EASI within 30 minutes.

When you click on the **Upload Scanned Documents** box, the following window will open.

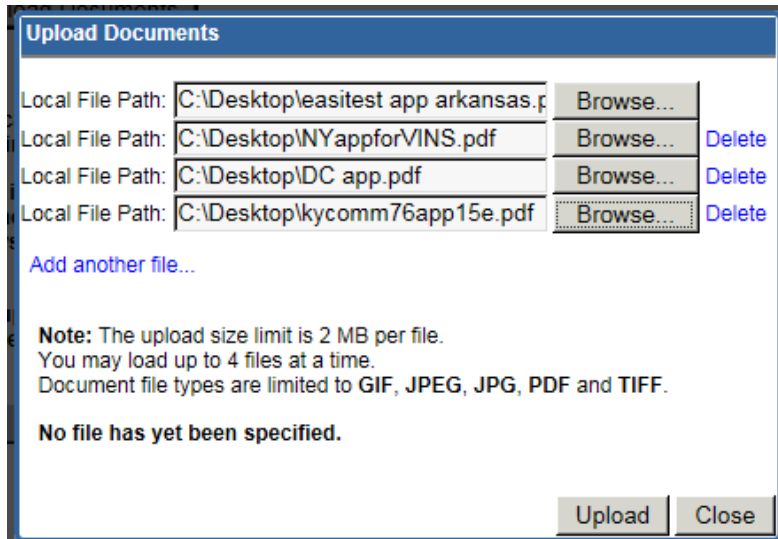


Select **Browse** to search for your saved document (s).

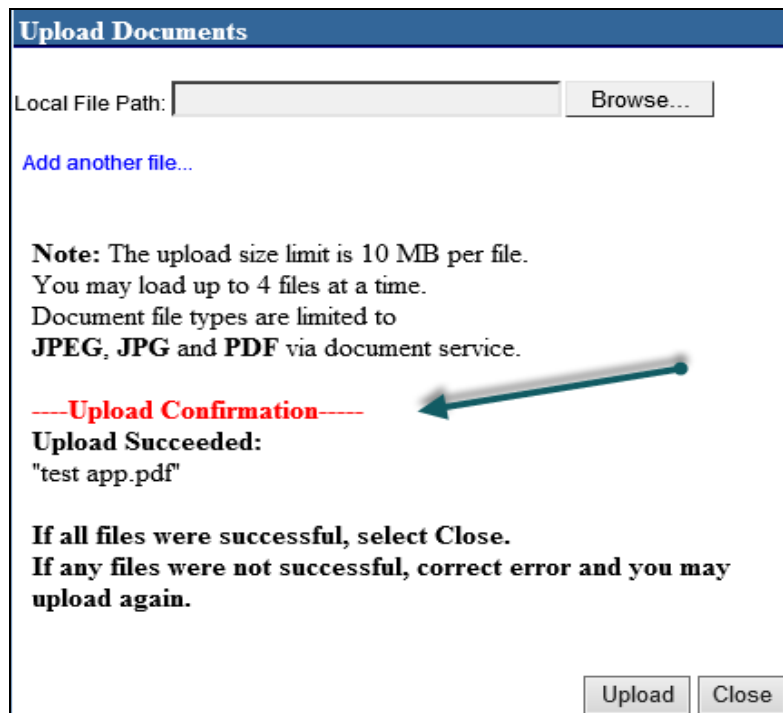
When you have located the application, and supporting documents you want to upload, click **Open** and the document name will appear in the **Local File Path** window. You may select up to 4 files to transmit in one upload. Select **Add another file** and another local file path window and Browse button will appear.



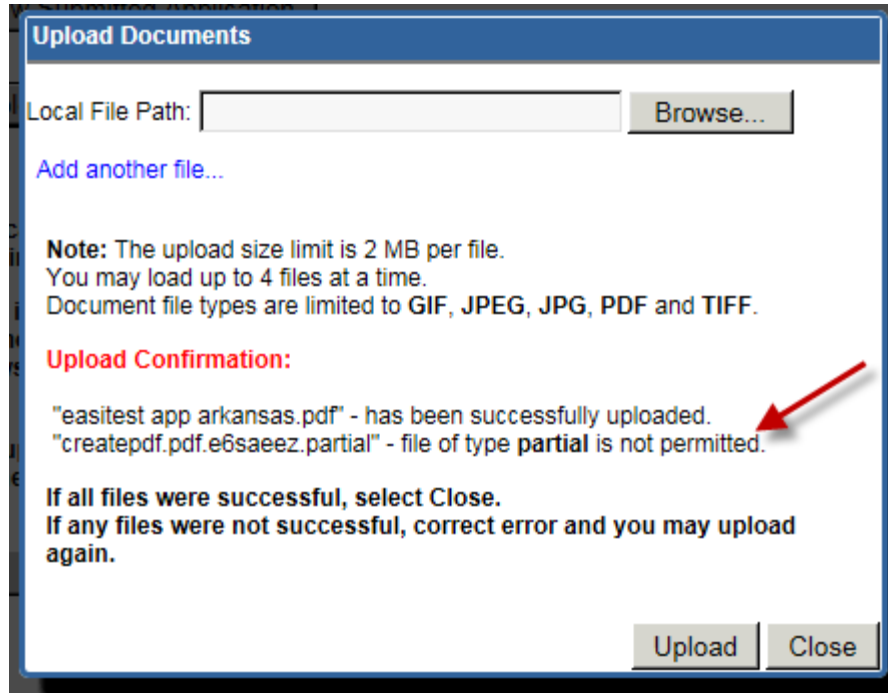
You will see the file(s) you have selected as shown below.



Once you select your file (s) and click upload, the following confirmation message will appear.



If any of the files in your transmission were not successful, an error message will display in the confirmation for that specific file, as shown below.



Note: File size is limited to 10MB and file types of **GIF, JPEG, JPG, PDF** and **TIFF**. **DO NOT TRANSMIT IN COLOR**, as it will greatly increase the size of your file. Your upload should contain the completely signed application, Credit Card Payment Authorization receipt and the Authorization for Photo Inspection, if applicable, and all other supporting documents required for the processing of the application.

Once you select Close, you will be re-directed back to the Application Submission screen, where you can view your uploaded documents.

Application Submission

Reference Number: 16168300030
 Applicant Name: Karen NoFinEpay
 Requested Effective Date: 6/16/2016 12:45 PM

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		
6/16/2016 12:53:25 PM	Upload	4	225	pdf	View	Delete

Clicking on View will display the images.

Note: Producers will be able to delete images if they have made a mistake with the documents they uploaded. 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

Electronic Submission via Fax

As a secondary option to those who do not have a process for scanning documents, you will also have the option of faxing the application and all supporting documents to the Plan. In this example, we have selected **Fax** and **Producer Sweep**. When you have completed all required information, click on the **Submit** button and you will see the following screen

Payment Submitted

Select One
Producer Check
Credit Card
Producer Sweep
Other

Broker Fee: 50

OFFICIAL PAYMENTS

Save and Exit Submit

Application Submission

Reference Number: 16168300030
Applicant Name: Karen NoFinEpay
Requested Effective Date: 6/16/2016 12:45 PM

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.

To get the fax cover page, click on the box next to the “Print Fax Cover Page”, the cover page will then be populated with the fax number, and information from the application. Once you have gathered all the documents to include in your transmission, fax the entire packet to the Plan using the fax number on the fax cover page. The fax cover page will contain the following:

- The fax number to fax the documents

- Applicant and Producer Names
- Date the fax was generated
- EASi reference number of the application
- A checklist showing all the required documents you should include in the fax transmission.

Sample of Fax Cover Page below.

To: New York Automobile Insurance Plan	
Fax Number:	<u>1-844-874-3528</u>
Applicant:	<u>Fax, Test</u>
Producer:	<u>NYTEST, PRODUCER</u> # <u>BR924776</u>
Date:	<u>8/3/2015</u>
Reference Number:	<u>15215300028</u>
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"/>

Once you select Close, you will be redirected back to the Application Submission screen, where you can view your faxed documents. The fax cover page **MUST** be included with the transmission to view the documents.

Application Submission

Reference Number: 16168300030
 Applicant Name: Karen NoFinEpay
 Requested Effective Date: 6/16/2016 12:45 PM

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.

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Received Date	Delivery Method	Pages	Size(KB)	Doc Type		
6/16/2016 12:53:25 PM	Upload	4	225	pdf	View	Delete

Clicking on View will display the images.

Note: The producer can delete images if they have made a mistake with what they 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.