NEW YORK AUTOMOBILE INSURANCE PLAN

Electronic Payment and Paperless Application Submission Process

Producer Guide for Electronic Payment and Paperless Application Submission

The Paperless Application Submission feature in PASS/EASi allows producers to electronically transmit new business private passenger and commercial applications with supporting documents directly to the Plan using a scan and upload feature, eliminating the need for mailing. This feature is the only method available to submit applications to the Plan.

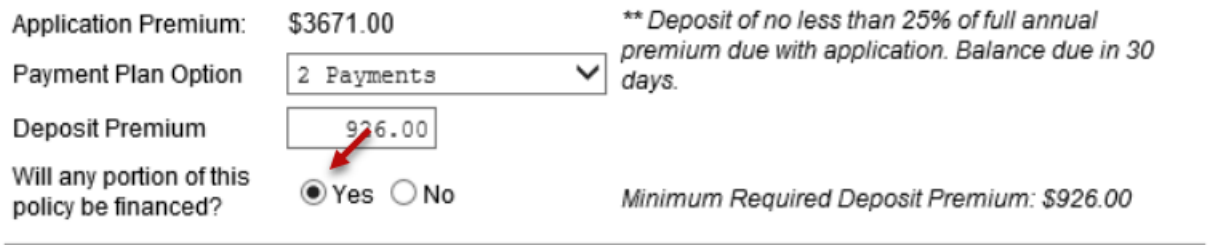
Note: Producers using a premium finance company not authorized to electronically transfer premium finance deposit to the Plan will be required to upload a copy of the finance draft with the application.

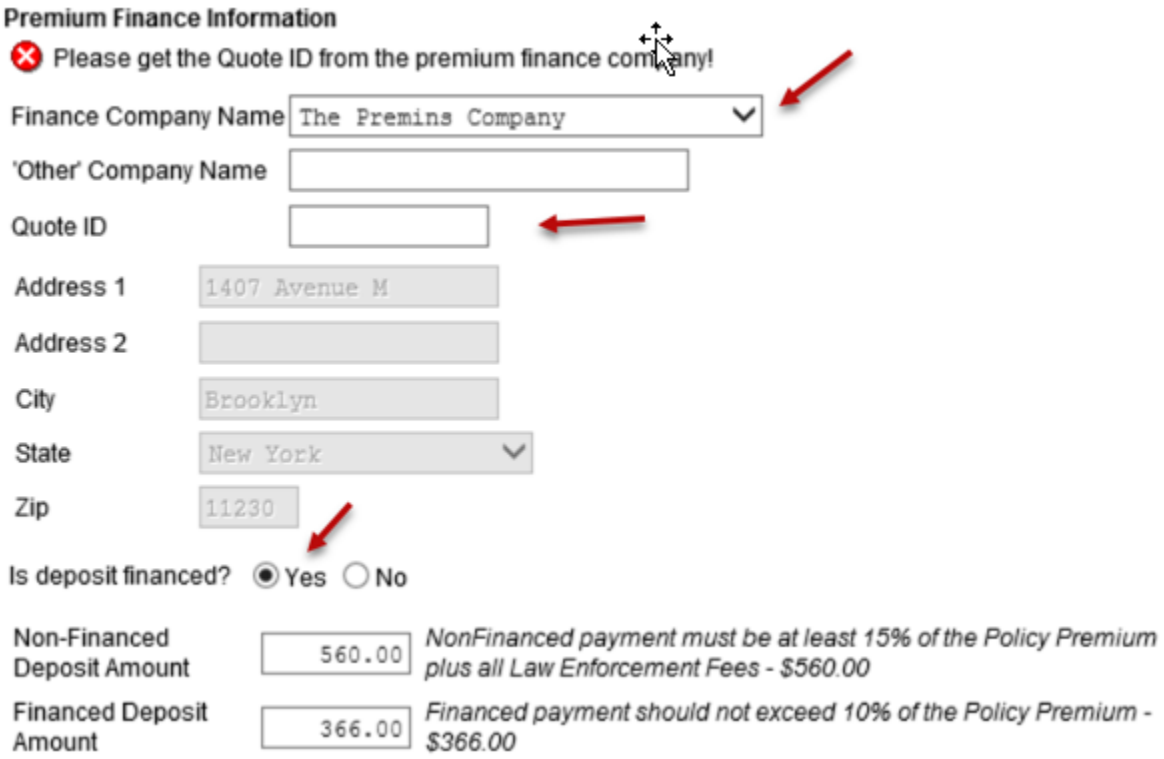
The following provides instructions on how to complete your application using the electronic payment options and transmitting the signed application and all supporting documents to the Plan using the Electronic Paperless Submission feature, scan/upload.

Premium Financed Applications:

For applications that are premium financed with a finance company authorized to electronically transfer premium deposit to the Plan, producers must:

1. answer, "yes" to the question "will any portion of this policy be financed?".
2. select the authorized premium finance company from the "finance company name" menu.
3. enter the "Quote ID" that was provided by the finance 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 finance company when scanned and uploaded through the paperless application portal.
4. also answer "yes" to the question "Is deposit financed?"





Premium Financed Applications:

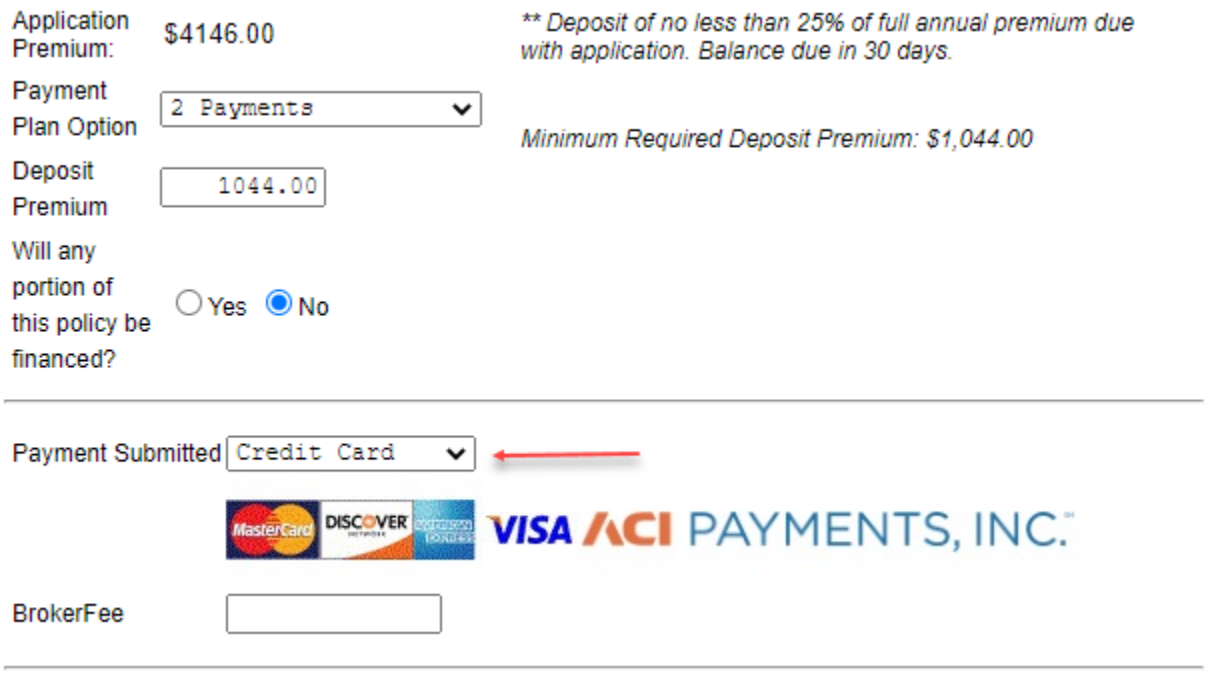
For applications that are ***NOT*** premium financed with a finance company authorized to electronically transfer premium deposit to the Plan, producers must:

1. answer, “yes” to the question “will any portion of this policy be financed?”.
2. select the premium finance company from the “finance company name” menu.
3. also answer “yes” to the question “Is deposit financed?”
4. a copy of the finance draft with agreement must be uploaded with the signed application. Once the application is assigned, the draft must be mailed to the assigned carrier.

Non- Financed Applications:

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 (Credit/Debit Card or Producer Sweep) located in the "Payment Submitted" menu.

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



When you have entered all required application information, click on the **Submit** button and you will be transferred to the ACI Payments, Inc. website at which time you will be required to enter the credit card information.

After completing the credit card information, you will see the option to view/print submitted application, view/print ID card (s) and, upload scanned documents. The application with applicable supporting documents must be signed and uploaded.

The following describes in detail, the steps to follow for:

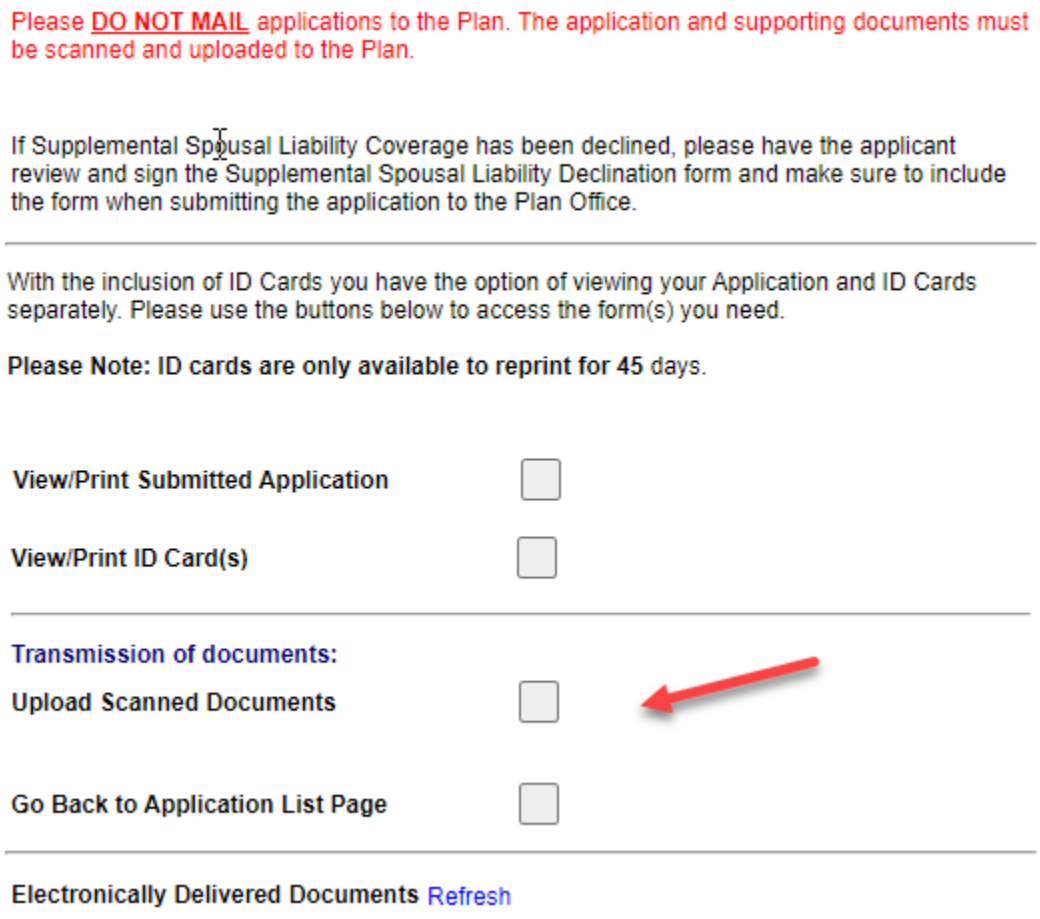
- Electronic Submission via Scan and Upload
- Attaching subsequent documents electronically

Electronic Submission via Scan and Upload *– the only delivery method*

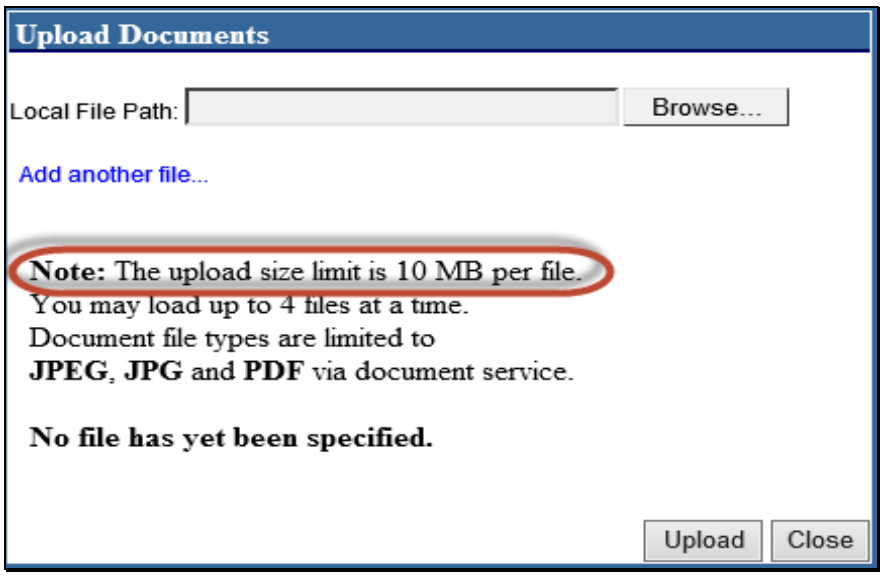
To upload the signed application with supporting documents, select the **Upload Scanned Documents** button located under "Transmission of documents". Follow the steps to complete the scanning and uploading of all required documents to the Plan.

For **Private Passenger applications**, click on the **Uploaded Scanned Documents** box to locate the files that you saved and now want to upload.

Sample of the Private Passenger application screen:

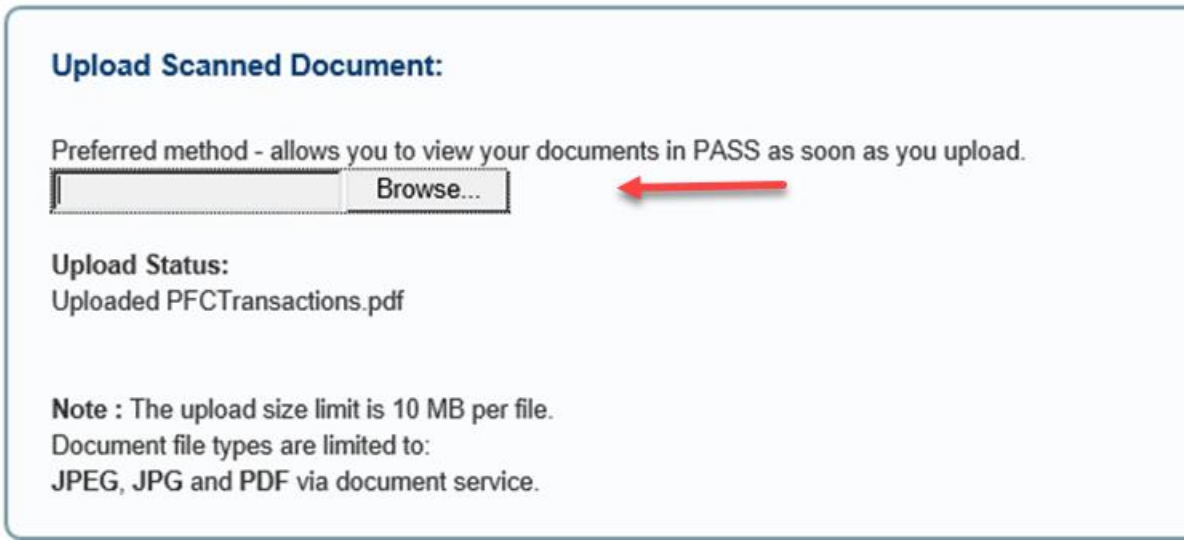


When you click on the **Upload Scanned Documents** box, the following window will open.

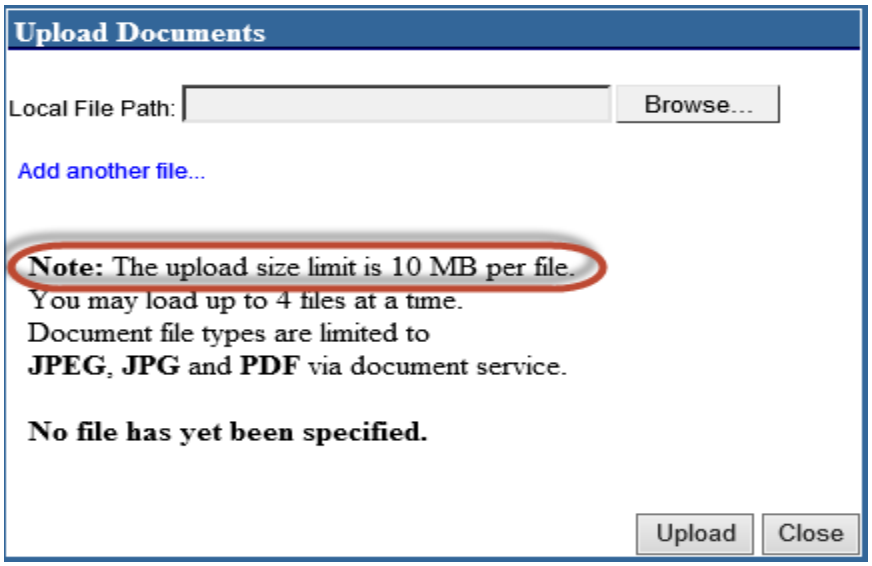


For **Commercial applications**, you must click on the **Browse** box to locate the files you want to upload.

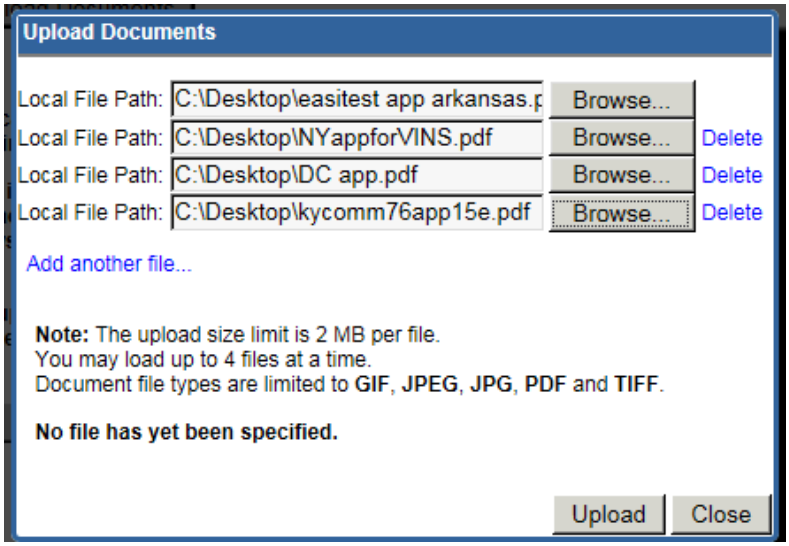
Sample of the Commercial application screen:



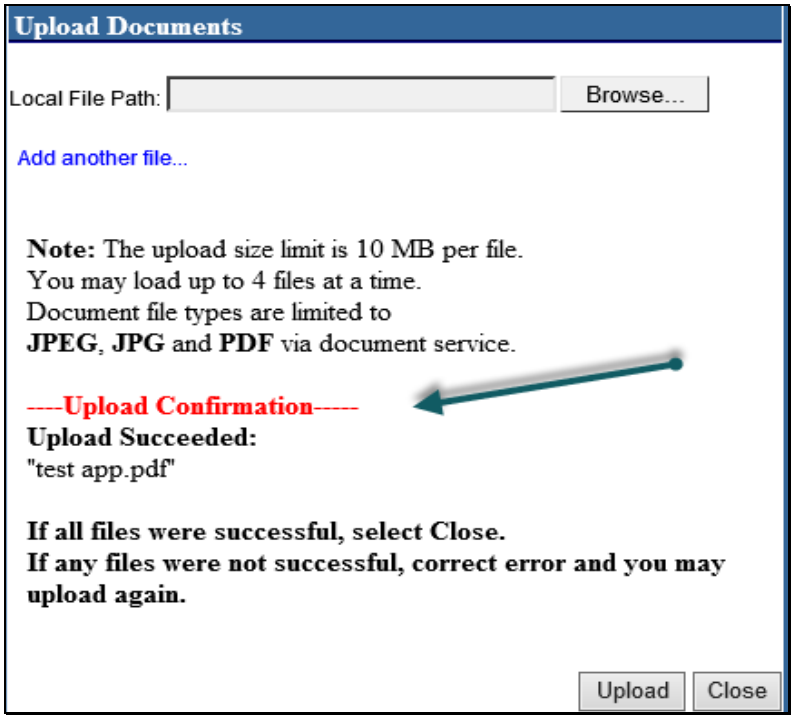
When you have located the application, and supporting documents you want to upload, click **Open** and the document name will appear in the **Local File Path** window. You may select up to 4 files to transmit in one upload. Select **Add another file** and another local file path window and Browse button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



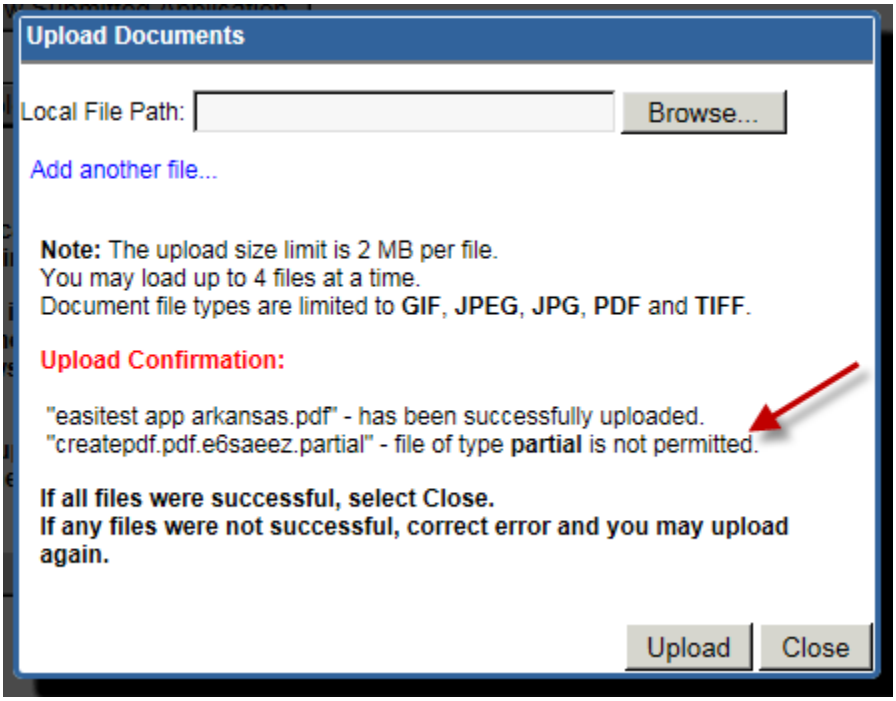
You will see the file(s) you have selected as shown below.



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.



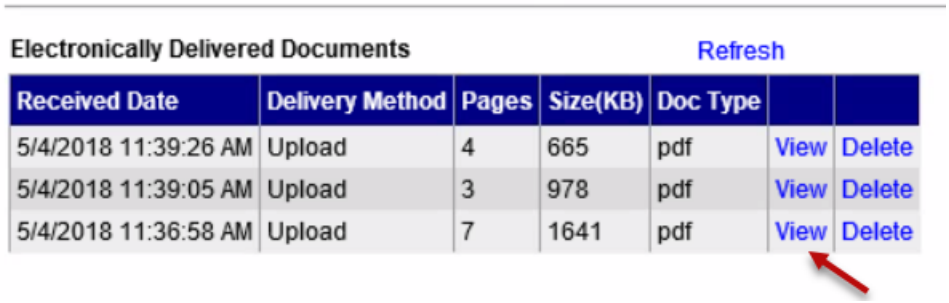
Note: File size is limited to 10MB and file types of **GIF, JPEG, JPG, PDF** and **TIFF**. **DO NOT TRANSMIT IN COLOR**, as it will greatly increase the size of your file. Your upload should contain the completely signed application, Credit Card Payment Authorization receipt and the Authorization for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

Viewing Documents

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

Sample of the Private Passenger application "Electronically Delivered Documents" screen:

Clicking on ***View*** will display the images.



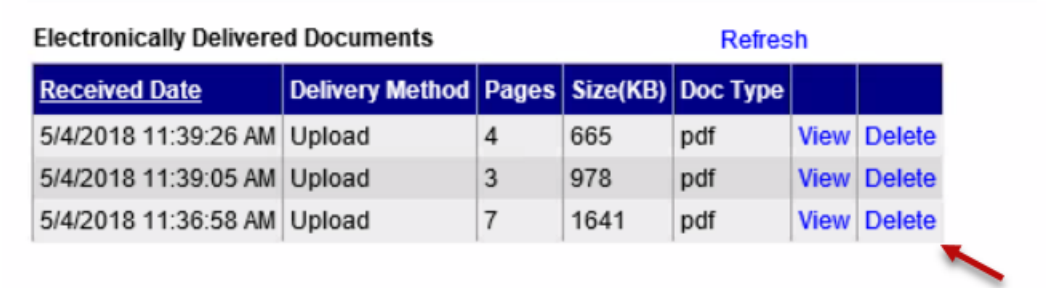
Sample of the Commercial application "Electronically Delivered Documents" screen:

Clicking on the ***paper icon*** will display the images.

Deleting Documents

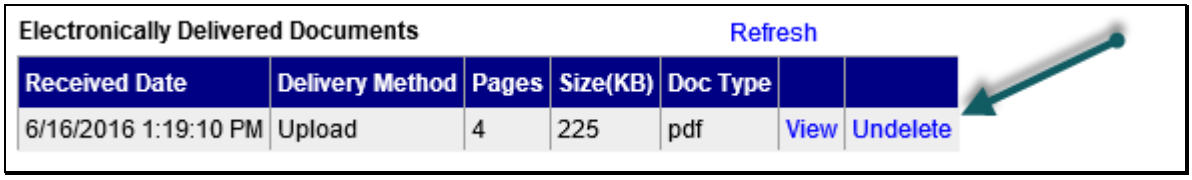
For private passenger applications, producers will be able to delete images if they have made a mistake with the documents they uploaded. The images can also be "undeleted" if necessary.

Sample of the Private Passenger application delete option screen:



Electronically Delivered Documents — Refresh

Received Date	Delivery Method	Pages	Size(KB)	Doc Type		
5/4/2018 11:39:26 AM	Upload	4	665	pdf	View	Delete
5/4/2018 11:39:05 AM	Upload	3	978	pdf	View	Delete
5/4/2018 11:36:58 AM	Upload	7	1641	pdf	View	Delete

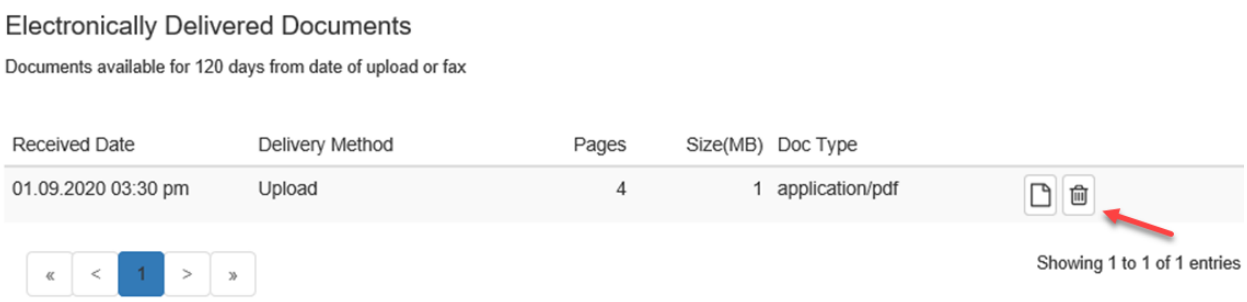


Electronically Delivered Documents — Refresh

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

For commercial applications, producers will be able to delete images by clicking on the trash icon if they have made a mistake with the documents they uploaded.

Sample of the Commercial application delete option screen:



Electronically Delivered Documents

Documents available for 120 days from date of upload or fax

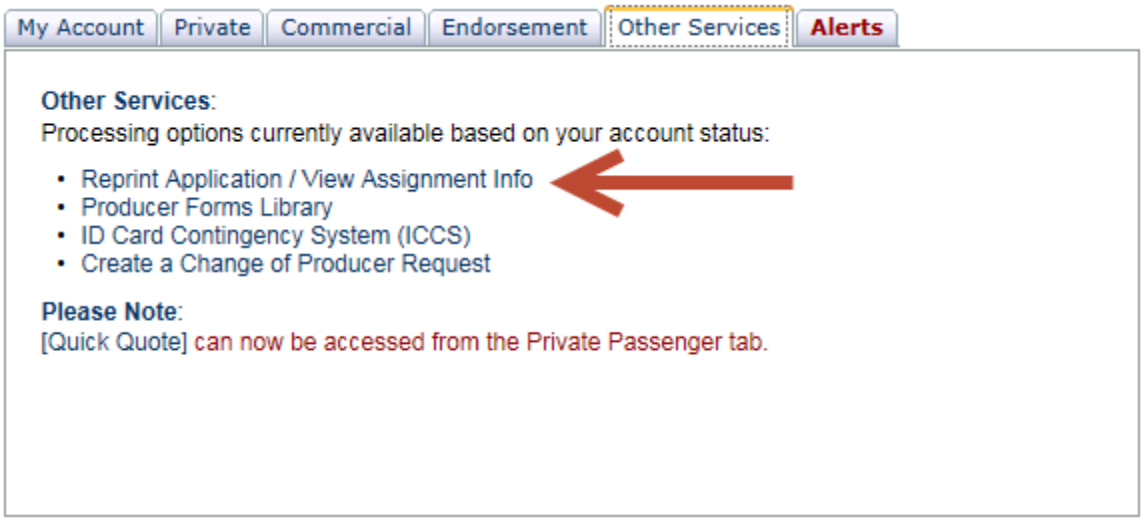
Received Date	Delivery Method	Pages	Size(MB)	Doc Type	
01.09.2020 03:30 pm	Upload	4	1	application/pdf	

« < 1 > »

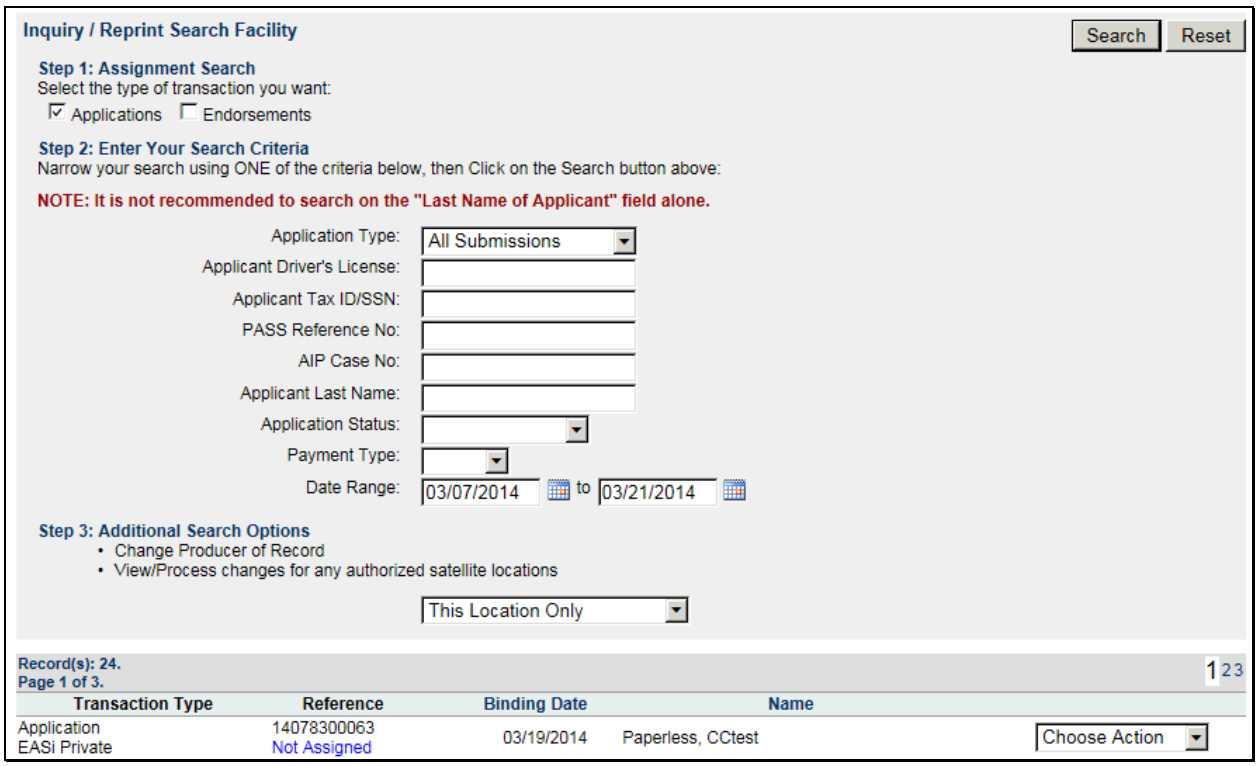
Showing 1 to 1 of 1 entries

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**.



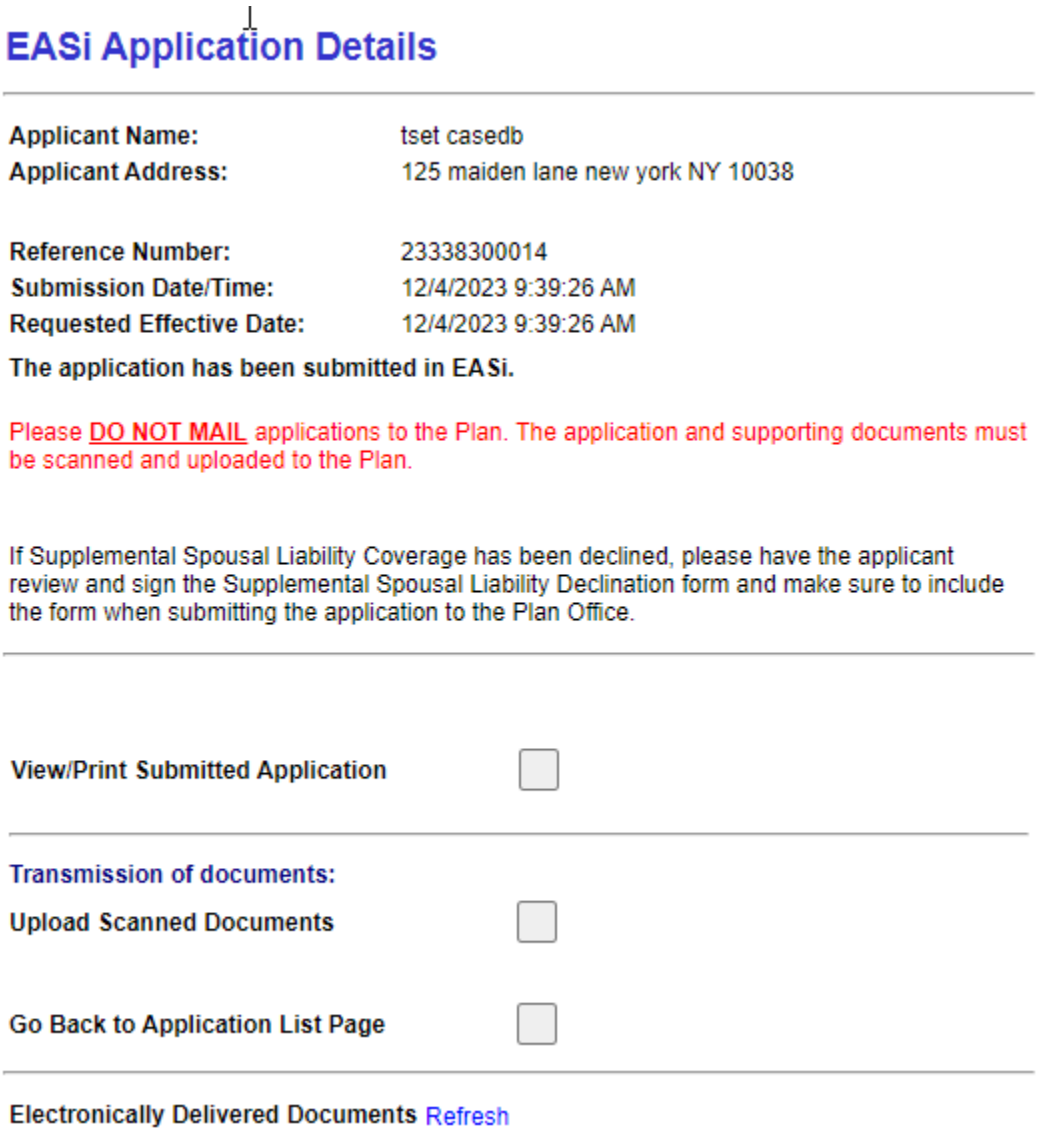
Search for the application in the Inquiry/Reprint Search Facility.



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

Once you select **View Details**, you will see the following screen based on the application type:

Sample of private passenger application details screen:



EASi Application Details

Applicant Name: tset casedb
Applicant Address: 125 maiden lane new york NY 10038

Reference Number: 23338300014
Submission Date/Time: 12/4/2023 9:39:26 AM
Requested Effective Date: 12/4/2023 9:39:26 AM

The application has been submitted in EASi.

Please DO NOT MAIL applications to the Plan. The application and supporting documents must be scanned and uploaded to the Plan.

If Supplemental Spousal Liability Coverage has been declined, please have the applicant review and sign the Supplemental Spousal Liability Declination form and make sure to include the form when submitting the application to the Plan Office.

View/Print Submitted Application

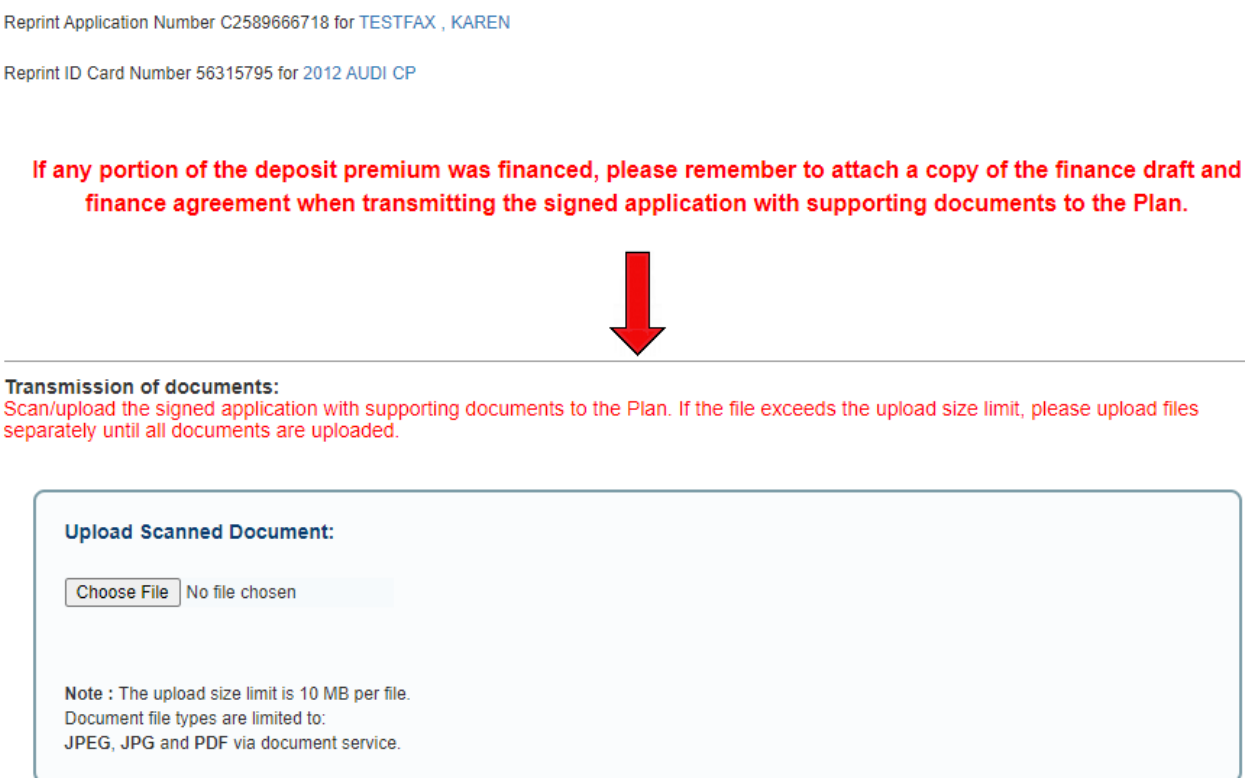
Transmission of documents:

Upload Scanned Documents

Go Back to Application List Page

Electronically Delivered Documents Refresh

Sample of commercial application details screen:



You can submit any follow up documentation for the application by using the *Upload Scanned Documents*. The submitted documents will be tagged with the application's reference number for matching purposes.