

## 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?”

Application Premium:	\$3671.00	<b>** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.</b>
Payment Plan Option	2 Payments 	
Deposit Premium	<input type="text" value="926.00"/>	
Will any portion of this policy be financed?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Minimum Required Deposit Premium: \$926.00

#### 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

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 - \$560.00

Financed Deposit Amount  Financed payment should not exceed 10% of the Policy Premium - \$366.00

#### **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.

Application Premium:	\$4146.00	<i>** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.</i>
Payment Plan Option	2 Payments	Minimum Required Deposit Premium: \$1,044.00
Deposit Premium	1044.00	
Will any portion of this policy be financed?	<input type="radio"/> Yes <input checked="" type="radio"/> No	

---

Payment Submitted	Credit Card	
 <b>ACI PAYMENTS, INC.™</b>		
BrokerFee		

---

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:**

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.

---

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

☐

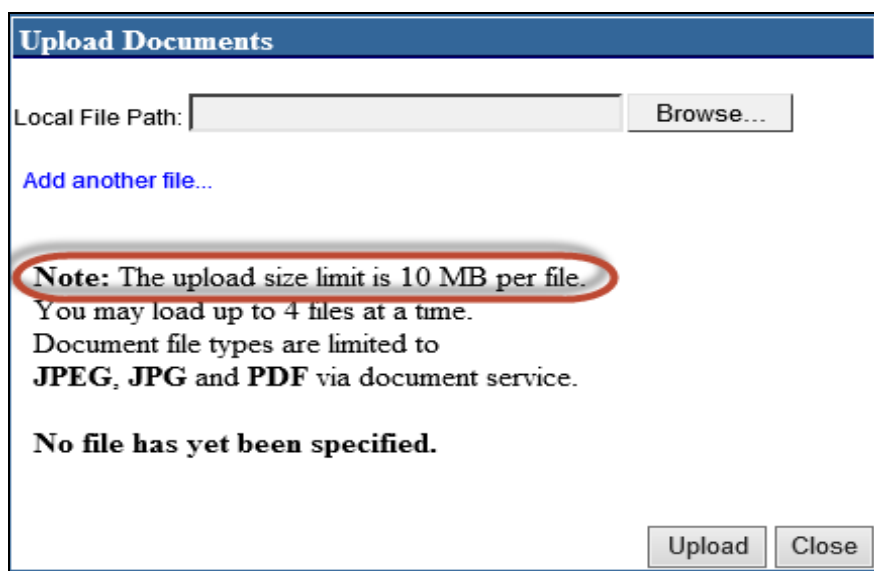
Go Back to Application List Page

☐

---

Electronically Delivered Documents [Refresh](#)

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



**Upload Documents**

Local File Path:  **Browse...**

[Add another file...](#)

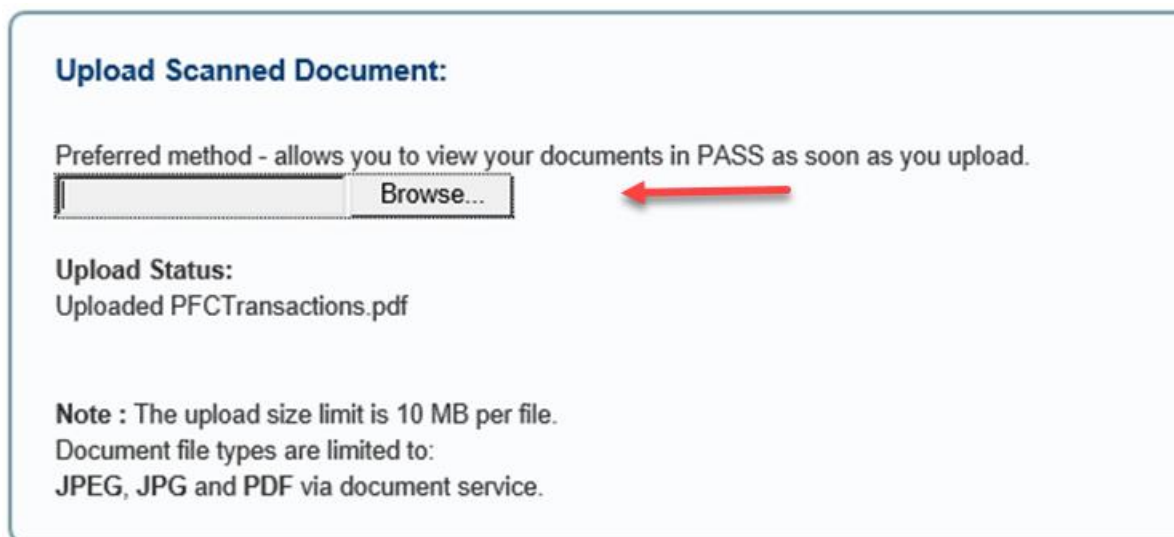
**Note:** The upload size limit is 10 MB per file.  
You may load up to 4 files at a time.  
Document file types are limited to  
**JPEG, JPG and PDF** via document service.

**No file has yet been specified.**

**Upload** **Close**

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

**Sample of the Commercial application screen:**



**Upload Scanned Document:**

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

**Browse...**

**Upload Status:**  
Uploaded PFCTransactions.pdf

**Note :** The upload size limit is 10 MB per file.  
Document file types are limited to:  
**JPEG, JPG and PDF** via document service.

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.

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.**

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

Upload Documents

Local File Path: C:\Desktop\leasitest app arkansas.p

Local File Path: C:\Desktop\NYappforVINS.pdf  [Delete](#)

Local File Path: C:\Desktop\DC app.pdf  [Delete](#)

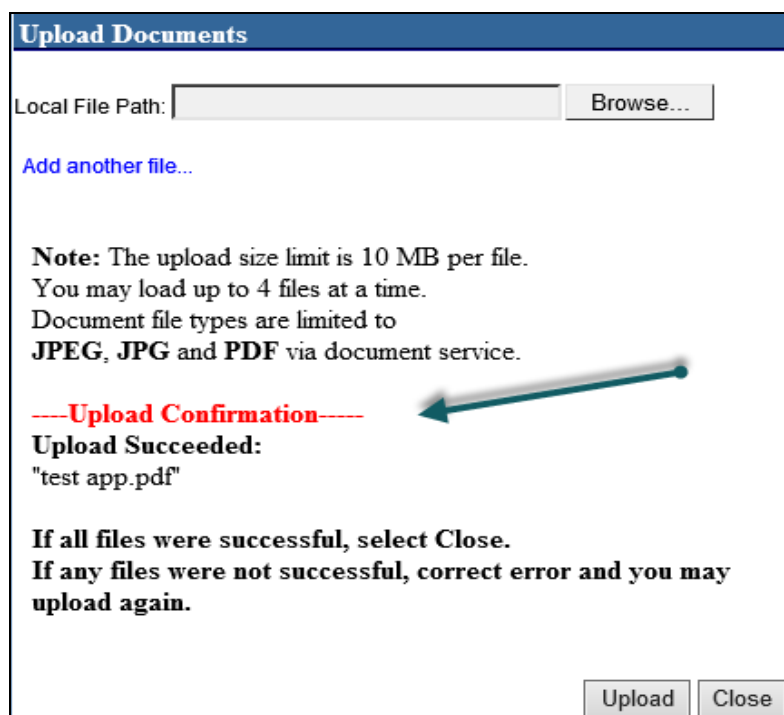
Local File Path: C:\Desktop\kycomm76app15e.pdf  [Delete](#)

[Add another file...](#)

**Note:** The upload size limit is 2 MB per file.  
You may load up to 4 files at a time.  
Document file types are limited to GIF, JPEG, JPG, PDF and TIFF.

**No file has yet been specified.**

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



**Upload Documents**

Local File Path:

[Add another file...](#)

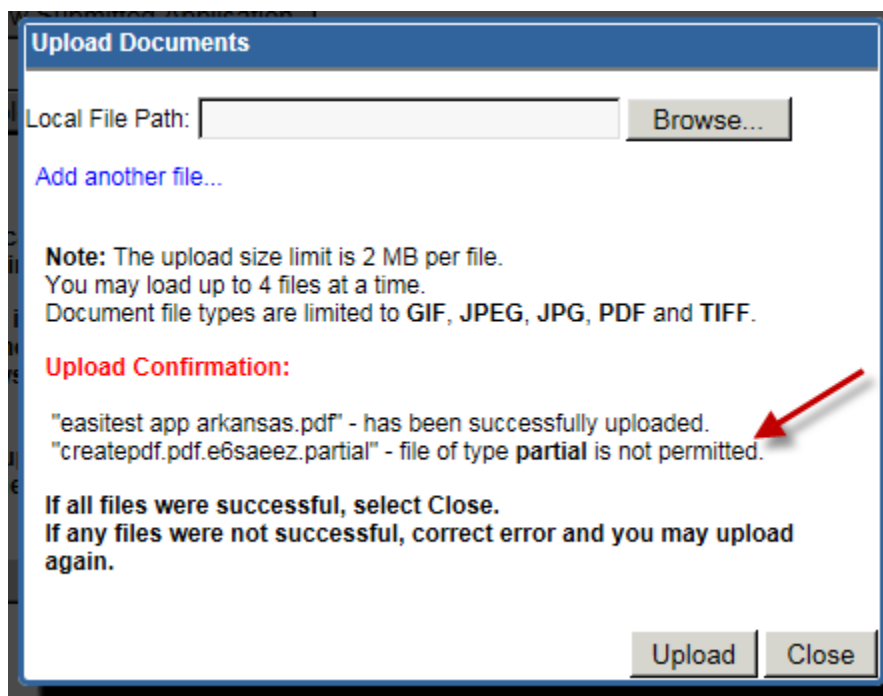
**Note:** The upload size limit is 10 MB per file.  
You may load up to 4 files at a time.  
Document file types are limited to **JPEG, JPG and PDF** via document service.

**---Upload Confirmation---**

**Upload Succeeded:**  
"test app.pdf"

**If all files were successful, select Close.**  
**If any files were not successful, correct error and you may upload again.**

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.



**Upload Documents**

Local File Path:

[Add another file...](#)

**Note:** The upload size limit is 2 MB per file.  
You may load up to 4 files at a time.  
Document file types are limited to GIF, JPEG, JPG, PDF and TIFF.

**Upload Confirmation:**

"easitest app arkansas.pdf" - has been successfully uploaded.  
"createpdf.pdf.e6saez.partial" - file of type **partial** is not permitted.

**If all files were successful, select Close.**  
**If any files were not successful, correct error and you may upload again.**



**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.

Electronically Delivered Documents					Refresh	
Received Date	Delivery Method	Pages	Size(KB)	Doc Type		
5/4/2018 11:39:26 AM	Upload	4	665	pdf	<a href="#">View</a>	<a href="#">Delete</a>
5/4/2018 11:39:05 AM	Upload	3	978	pdf	<a href="#">View</a>	<a href="#">Delete</a>
5/4/2018 11:36:58 AM	Upload	7	1641	pdf	<a href="#">View</a>	<a href="#">Delete</a>

#### Sample of the Commercial application “Electronically Delivered Documents” screen:

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

##### 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

### 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	<a href="#">View</a>	<a href="#">Delete</a>
5/4/2018 11:39:05 AM	Upload	3	978	pdf	<a href="#">View</a>	<a href="#">Delete</a>
5/4/2018 11:36:58 AM	Upload	7	1641	pdf	<a href="#">View</a>	<a href="#">Delete</a>

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

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**.

My Account
Private
Commercial
Endorsement
Other Services
Alerts

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

- Reprint Application / View Assignment Info
- Producer Forms Library
- ID Card Contingency System (ICCS)
- Create a Change of Producer Request

**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

SearchReset

**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.

123

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

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:

Reprint Application Number C2589666718 for TESTFAX , KAREN

Reprint ID Card Number 56315795 for 2012 AUDI CP

**If any portion of the deposit premium was financed, please remember to attach a copy of the finance draft and finance agreement when transmitting the signed application with supporting documents to the Plan.**



#### Transmission of documents:

Scan/upload the signed application with supporting documents to the Plan. If the file exceeds the upload size limit, please upload files separately until all documents are uploaded.

#### Upload Scanned Document:

No file chosen

**Note :** The upload size limit is 10 MB per file.  
Document file types are limited to:  
JPEG, JPG and PDF via document service.

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.