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.

Producers must then answer “yes” to the question “Is deposit financed?”
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.

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.

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**Application Submission**

<table>
<thead>
<tr>
<th>Reference Number:</th>
<th>16272300016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name:</td>
<td>Joey Premins</td>
</tr>
<tr>
<td>Requested Effective Date:</td>
<td>10/28/2016 12:01 AM</td>
</tr>
</tbody>
</table>

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.
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 # BR924778
Date: 8/3/2016
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
- Dec Page for Household Coverage
- Authorization for Physical Damage Inspection
- Credit Card Authorization Form
- Photocopy of Driver's License for: ☑
After completing the transmission by either method, you will be able to view the documents on the Application Submission page.

**Application Submission**

Reference Number: 16272300618  
Applicant Name: Joey Premo  
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.

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**

<table>
<thead>
<tr>
<th>Received Date</th>
<th>Delivery Method</th>
<th>Pages</th>
<th>Size(KB)</th>
<th>Doc Type</th>
<th>View</th>
<th>Undelete</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/16/2016 1:19:10 PM</td>
<td>Upload</td>
<td>4</td>
<td>225</td>
<td>pdf</td>
<td>View</td>
<td>Undelete</td>
</tr>
</tbody>
</table>
**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**.

![Reprint Application/View Assignment Information](image)

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

![Inquiry/Reprint Search Facility](image)

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**

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

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.

<table>
<thead>
<tr>
<th>View/Print Submitted Application</th>
<th></th>
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**Transmission of documents:**

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</thead>
<tbody>
<tr>
<td>Print Fax Cover Page</td>
<td>You must include this fax cover page with the transmission in order to see your documents in EASI within 30 minutes.</td>
</tr>
</tbody>
</table>

**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: 16270300018  
Applicant Name: Karen TestPremins  
Requested Effective Date: 10/4/2016 2:46 PM

*The application has been submitted.*  
*Mail original copy to the plan office address listed on the application.*