

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, provides producers with the ability to **electronically transmit new business private passenger and commercial applications directly to the Plan**. Producers who submit applications using an electronic payment method (Credit/Debit 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.


- ❖ Private Passenger and all Commercial new business applications.
- ❖ Application must be submitted using an electronic payment method, Producer Sweep or Credit/Debit Card, if available for the application type.
- ❖ Premium Financed Applications. The application must be submitted using an electronic payment for the non-financed deposit premium and a premium finance company that is authorized to electronically transfer premium financed deposit to the NY Plan. ***This option is only applicable to private passenger applications.***

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 and upload, or fax.


Premium Financed Applications:

To use the paperless application submission feature for applications **that are premium financed**, 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 or faxed through the paperless application portal.
4. also answer “yes” to the question “Is deposit financed?”

Application Premium:	\$3671.00	
Payment Plan Option	2 Payments 	** Deposit of no less than 25% of full annual premium due with application. Balance due in 30 days.
Deposit Premium	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*


**If credit card or producer sweep is selected, please upload or fax application and supporting documents.
DO NOT MAIL finance draft or application.**

Non- Financed Applications:

To use the paperless application submission feature 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.

Will any portion of this policy be financed? Yes No Minimum Required Deposit Premium: \$926.00

Payment Submitted





Broker Fee:

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

Application Premium: \$3671.00 *** 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: 926.00

Will any portion of this policy be financed? Yes No *Minimum Required Deposit Premium: \$926.00*

Payment Submitted: Credit Card ▼ ←



Broker Fee: 20


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.

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

Sample of the Private Passenger application screen:

View/Print Submitted Application	<input type="checkbox"/>
View/Print ID Card(s)	<input type="checkbox"/>
<hr/>	
Transmission of documents:	
	Please upload or fax the signed application and all supporting documents immediately. DO NOT MAIL.
Upload Scanned Documents	<input type="checkbox"/>
or:	
Print Fax Cover Page	<input type="checkbox"/>
	Preferred method - allows you to view your documents in EASi as soon as you upload.
	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	<input type="checkbox"/>
<hr/>	

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

Upload Documents

Local File Path:

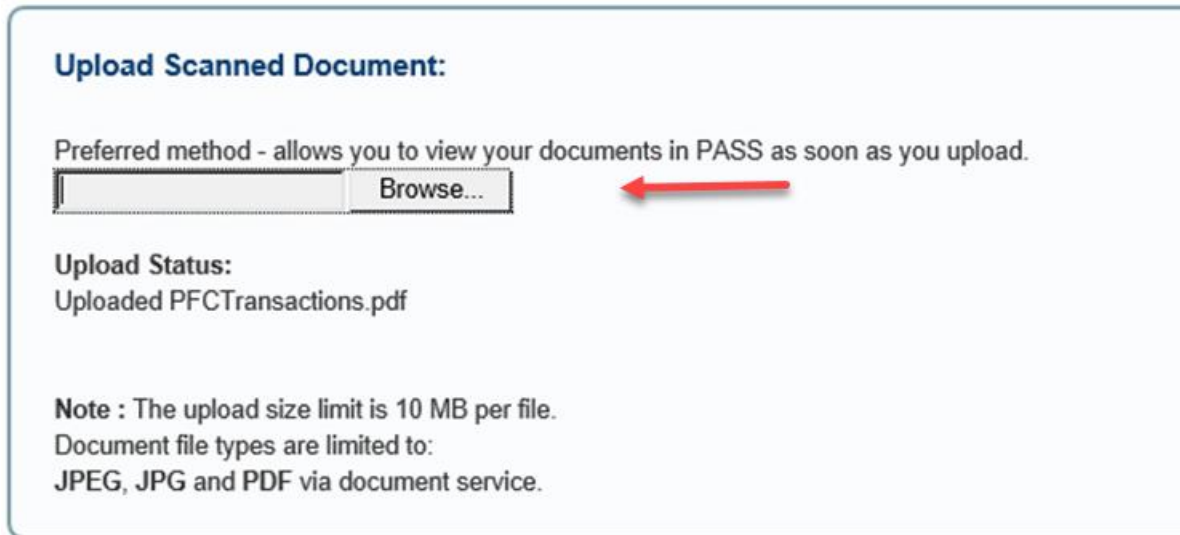
[Add another file...](#)

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.

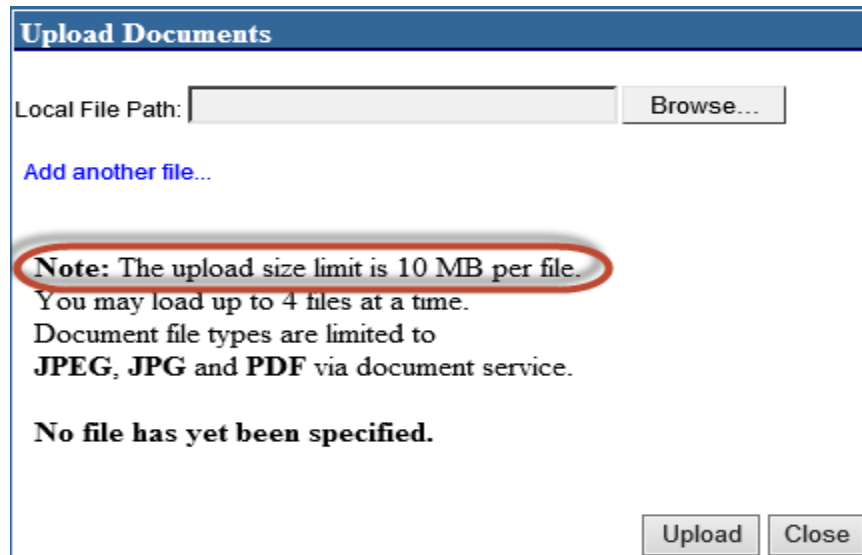
No file has yet been specified.

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

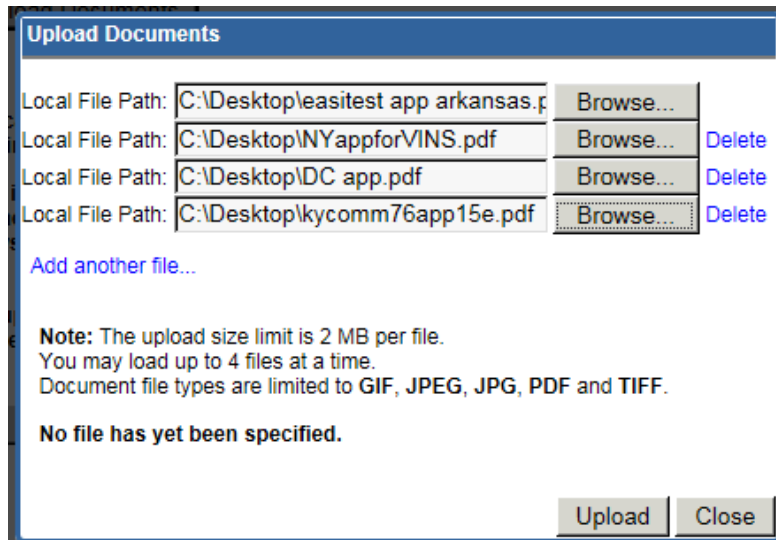
Sample of the Commercial application screen:



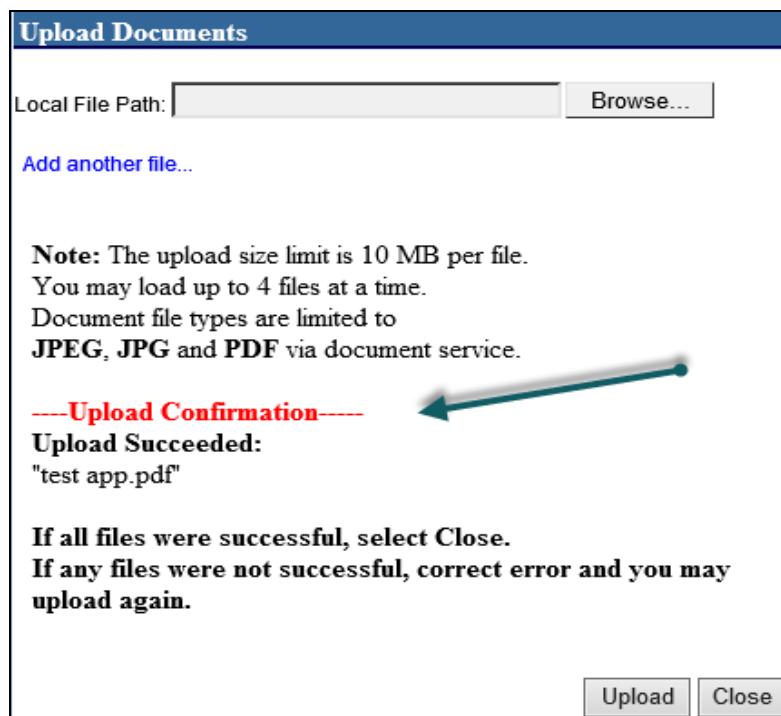
When you have located the application, and supporting documents you want to upload, click **Open** and the document name will appear in the **Local File Path** window. You may select up to 4 files to transmit in one upload. Select **Add another file** and another local file path window and Browse button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



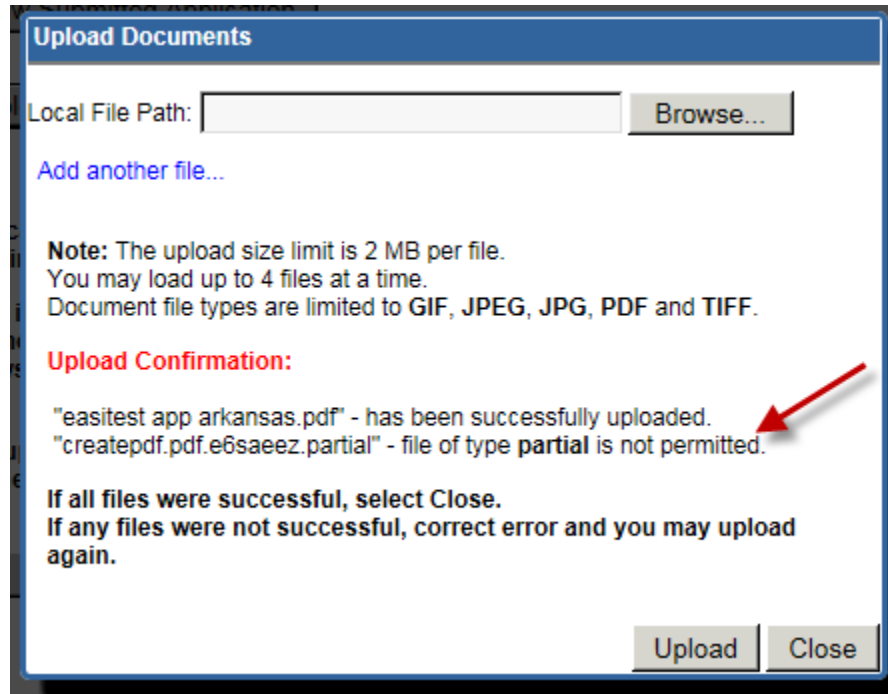
You will see the file(s) you have selected as shown below.



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.

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

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	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

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.

Application Premium:	\$3463.00	** 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	874.00	Minimum Required Deposit Premium: \$874.00
Will any portion of this policy be financed? <input type="radio"/> Yes <input checked="" type="radio"/> No		
Payment Submitted	Producer Sweep	
		
Broker Fee:	25	

When you have entered all the required application information, click on the **Submit** button and you will see the following screen.

To get the fax cover page for private passenger applications, click on the box next to the “Print Fax Cover Page” under Transmission of documents, the cover page will then be populated with the fax number, and information from the application.

Sample of the Private Passenger application fax option screen:

Transmission of documents:

Please upload or fax the signed application and all supporting documents immediately. DO NOT MAIL.

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 for commercial applications, click on the “Print Fax Cover Page” under Transmission of documents, the cover page will then be populated with the fax number, and information from the application.

Sample of the Commercial application fax option screen:

Print Fax Cover Page

Note: Fax cover page contains information and barcode for this application only. Each application must include its own Fax cover page as page 1 of the transmission. Fax only one application at a time. Do not fax documents for any other application using this Fax cover page.

 Print Fax Cover Page



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

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 **MUST** be included as page one of your transmission. 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/PASS reference number of the application.
- A checklist showing all the required documents you should include in the fax transmission.

Sample of Private Passenger Fax Cover Page:

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"/>

Sample of Commercial Fax Cover Page:

To: New York Automobile Insurance Plan
Fax Number: 1-844-874-3528
Applicant: EPAY
Producer: TESTAGENCY BR999999
Date: 1/8/2020
PASS Ref #: S0536567859

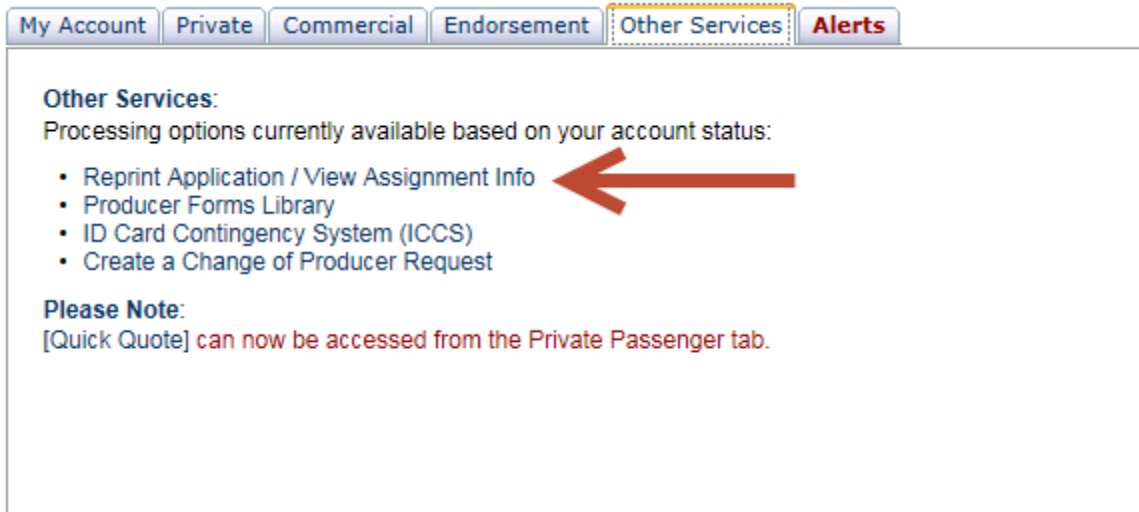
Enclosed is the signed application with the following attachments for submission to the NYAIP.

- | | |
|------------------------------|-------------------------------------|
| Signed Application | <input type="checkbox"/> |
| Commercial Rating Quote | <input checked="" type="checkbox"/> |
| Motor Vehicle Report (s) | <input checked="" type="checkbox"/> |
| Copy of Driver's License (s) | <input type="checkbox"/> |

Once you select Close, you will be redirected to the Application Submission screen, where you can view your faxed documents. To view your faxed documents, the fax cover page **MUST** be included as page one of your transmission.

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.

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:

Applicant Driver's License:

Applicant Tax ID/SSN:

PASS Reference No:

AIP Case No:

Applicant Last Name:

Application Status:

Payment Type:

Date Range: to

Step 3: Additional Search Options

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

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

Transaction Type	Reference	Binding Date	Name	
Application EASi Private	14078300063 Not Assigned	03/19/2014	Paperless, CCtest	<input type="text" value="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 based on the application type:

Sample of private passenger application details 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	<input type="checkbox"/>
View/Print ID Card(s)	<input type="checkbox"/>

Transmission of documents:

Upload Scanned Documents	<input type="checkbox"/>	Preferred method - allows you to view your documents in EASi as soon as you upload.
or:		
Print Fax Cover Page	<input type="checkbox"/>	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	<input type="checkbox"/>
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Sample of commercial application details screen:

Applicant Name: EPAY
Applicant Address: 125 MAIDEN LANE NEW YORK NY 10038
Binding Number: S0536567859
Bind Date: 1/8/2020 2:48:41 PM
Effective Date: 1/8/2020

Reprint Application Number S0536567859 for [EPAY](#)

Transmission of documents:

Upload Scanned Document:

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

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

Print Fax Cover Page

Note: Fax cover page contains information and barcode for this application only. Each application must include its own Fax cover page as page 1 of the transmission. Fax only one application at a time. **Do not fax documents for any other application using this Fax cover page.**

 [Print Fax Cover 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.