



## PRIME DIRECT SERVICE COMMUNICATION PROTOCOLS



1. **Requests coming from the insured, sub-producer, or Prime appointed producer (“Producer”), when NOT account current:**
  - a. We intend to include all entities (insureds, sub-producers, and Producers) in the email chain and communications.
  - b. If we do not have the sub-producer’s contact information, we will ask for and input:
    - i. the company name,
    - ii. the sub-producer’s name,
    - iii. the sub-producer’s email address,
    - iv. the service contact name (if different), and
    - v. the service contact’s email address.
  - c. The body of the email response (to all) will state that the endorsement cannot be processed without:
    - i. A signed quote and sufficient payment from the Producer.<sup>1</sup>
    - ii. If financing is available and elected, see *Greenlight and Other Financing – Endorsement Procedures*.
  - d. The quote without commission will be sent out to all.
  - e. The quote with commission will be sent to the Producer.
  - f. The request will be endorsed, and sent out to all, when both of the following are received:
    - i. Sufficient payment, and
    - ii. A signed quote.
  - g. The invoice and endorsement will be sent to the Producer in a separate email.
2. **Requests coming from the insured, sub-producers, or the Producer, when on account current:**
  - a. We intend to include all entities (insureds, sub-producers, and Producers) in the email chain and communications.
  - b. If we do not have the sub-producer’s contact information, we will ask for and input:
    - i. the company name,
    - ii. the sub-producer’s name,
    - iii. the sub-producer’s email address,
    - iv. the service contact name (if different), and
    - v. the service contact’s email address.
  - c. The body of the email response (to all) will state that the endorsement cannot be processed without:
    - i. A signed quote and sufficient payment, from the Producer. *See Footnote 1 below.*
    - ii. If financing is available and elected, see *Greenlight and Other Financing – Endorsement Procedures*.
  - d. The quote without commission will be sent out to all.
  - e. The quote with commission will be sent to the Producer.
  - f. If the signed quote comes from the insured or sub-producer (i.e. anyone but the Producer):
    - i. We will send an email to the Producer (cc’ing all) asking the Producer to verify receipt of payment and attaching the referenced quote. *See Footnote 1 below.*
    - ii. The request will be processed when payment is verified in writing by the Producer. *See Footnote 1 below.*
    - iii. If financing is available and elected, see *Greenlight and Other Financing – Endorsement Procedures*.
  - g. If the signed quote comes from the Producer, the request will be processed (i.e. verification of payment will be waived).
  - h. The endorsement will be sent out to all.
  - i. The invoice and endorsement will be sent to the Producer attached to a separate email.

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<sup>1</sup> **NOTE TO PRIME APPOINTED PRODUCERS:** If the insured chooses to pay us directly and in full, payment will be accepted and processed. If on account current, verification of receipt of payment from the Producer is required in lieu of sufficient payment. Additionally, our accounting team will process the overpayment via refund check to the Producer, or for Producers on account current with Prime, the net return premium will be reflected on the next monthly statement.