



800.257.5590 / policyservices@primeis.com /
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Service Endorsement Processing & Requests

Learn the process of Service Requests with Prime

Inside:

- How to send a request
- What information is needed to receive a quote
 - Using our online portal
- What is needed to process your request

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Important things to know about Endorsement Requests

- For all service requests resulting in an Additional Premium, Prime will send out an Endorsement Quote. This does not mean that the change request has been processed and added to the policy. It is only a Quote. If the Insured wants to move forward with the Endorsement Quote, we require that the Quote be signed by the insured and returned to Prime along with applicable payment. Endorsement Quotes will not be processed by us without Payment.
- All Endorsement Quotes are sent out with detailed procedures on how to process. Included in the email we provide a Link where either the Insured or Producer can save their credit card information in our system. It will store the information only. Payment will be processed after the signed quote is received.

When sending any policy request, please be as detailed as possible.

- In the email subject line, all requests must include the following:
 - Insured Name – Policy Number
- Effective dates, description of request, etc.
- If Insured is sending in request, agent should be copied.
- To avoid duplicate emails of the same request, agents should set up a procedure with their insured that best fits their needs. Only one request should be sent to our workflow policyservices@primeis.com
- Both payment and signed quote should be sent in **together**. If using card on file, please mention last 4 digits of card and payment amount.

Adding Vehicles/Trailers/Units

- Provide full VIN and coverages needed with the value amount if applicable.
- Vehicle can we be requested through online portal as well.

Adding Drivers

- Provide driver(s)' full name, driver's license number, State DL issue, & DOB
- Provide a **current** 5-year MVR if available.
- If policy has the Approved Driver Endorsement, provide MVR with request explaining why driver does not fall into approved category.
- If driver meets qualification of an approved driver – no need to send in
- Drivers are fully earned and to be paid in full.
- Driver can we be requested through online portal as well.

SERVICE



Adding Additional insureds/Loss Payee

- Provide full entity name and address.
- Additional Insureds are fully earned and to be paid in full.

Adding/Amending Coverages

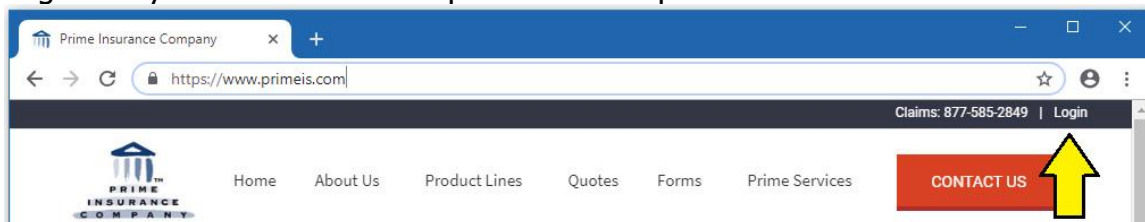
- Provide coverage needed and limit requested.

Delete Requests

- Provide full vehicle information, reason for deletion, lease termination/BOS and the effective date.
- Provide driver information (Driver name, DOB, & Driver's License Number) to be deleted and the effective date.

Online Portal

- Insureds and producers also have the availability to send add/delete request through our online portal.
- The portal gives you access to view and manage your current insurance policy. This includes printing certificates of insurance, requesting to add and delete drivers, requesting to add and delete vehicles, printing ID cards, and viewing documents.
- Log on to your account via our portal at www.primeis.com.



PROCESSING



- Quotes must be signed **and** paid for within 72 hours before quote expires.
- Signed quote **and** sufficient payment to be sent together.
- Must specify payment amount and payment type. (Credit card, Check by fax, EFT, Wire, ACH)
 - If using a credit card, the credit card must be stored using link. The comment section **must** have amount to be paid and quote number.
 - If card is already saved, please provide last 4 digits of card to be used and payment amount in email with signed quote.
- If financing is available, please see below options:
 - Greenlight Premium Financing: 30% down payment.
 - Must have 2 remaining payments left and in good status.
 - Outside Financing: 10% down payment from producer only
 - Additional Insureds and Driver additions **cannot** be financed and must be paid in full.
- To apply any endorsement to the agency on account monthly billing, we must have authorization from main producer on file to add the endorsement premium to the billing cycle.

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