



800.257.5590 / polycyservices@primeis.com /
primeis.com

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

- All endorsement requests must be sent by email to policyervices@primeis.com. For any request resulting in an additional premium, Prime will issue an Endorsement Quote. Please note that this is merely a quote and does not indicate that the change has been applied to the policy. If the insured wishes to proceed with the Endorsement Quote, we require the quote to be signed and returned to Prime, along with the necessary payment. We will not process any Endorsement Quotes without payment. (payment options below)
- Each Endorsement Quote is sent with detailed instructions on how to proceed. The email will include a link where either the insured can securely store their credit card or bank account information in our system. The information will be stored securely, and payment will only be processed once the signed quote is received.

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

- Email subject line to Prime: Insured Name – Policy Number
- All requests must include the following in the body of your email:
 - 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 policyervices@primeis.com
- Both payment and signed quote should be sent in **together**. If using stored card or ACH on file, please mention last 4 digits of the account 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 per state).
- 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

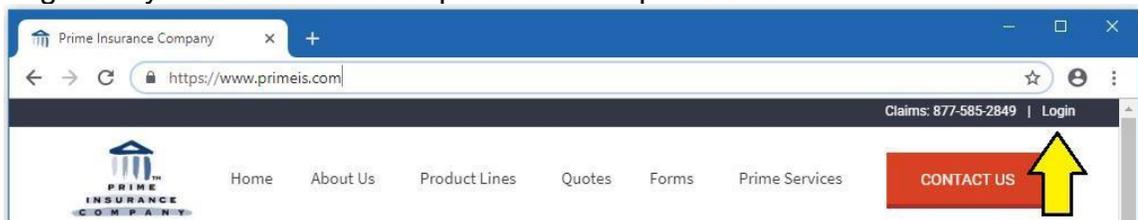
- Provide coverage needed and limit requested.

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.
- Insureds will pay premiums directly with Prime. Insured must specify payment amount and payment type. (Credit card, ACH/EFT, or Wire)

*** Please note there will be a Credit Card fee of 2.99% each charge. ***

- If using a credit card/ACH/EFT, the account must be stored using link provided in email received with quote. The comment section **must** have amount to be paid and quote number.
- If you have recently stored a payment method - credit card (**2.99% fee**) or bank ACH/EFT information, your information is automatically saved on file. Please provide the last 4 digits of the account to be billed, along with your 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:** Down payment must be made directly to Prime, not the finance company.
 - Wholesalers and retail agents are responsible for communicating these changes to finance companies. Prime will notify finance companies upon receipt of down payments.
 - Producers must ensure that Premium Finance companies understand Prime's earned premium requirements
 - If a Premium Finance company allows for a down payment that is less than the earned premium, the finance company assumes the risk for the gap between the down payment and the earned premium.
 - Clear communication of these requirements will help avoid potential issues and ensure a smooth financing process.
- **Additional Insureds and Driver additions cannot be financed and must be paid in full.**

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