



800.257.5590 / [polycservices@primeis.com](mailto:polycservices@primeis.com) / [primeis.com](http://primeis.com)

**Service &  
Endorsement  
Processing Requests  
How To's**

**HOW TO**

# SERVICE REQUESTS



**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 insured that best fits their needs and only one request to be sent over to our workflow
- Both payments 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

## **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

## **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 and/or driver information to be deleted and the effective date

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 and returned to Prime along with applicable payment. Endorsement Quotes will not be processed without Payment.

# PROCESSING ENDORSEMENTS



- 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
  - 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

Contact us with  
questions.