



Insurance Overview

April 2021

Topics Covered

- Your Firm's Responsibilities
- Ebix
 - Overview
 - Review Cycle
 - Resolving Discrepancies & Issues (Key Contacts)
- Using Ebix
 - Logging In
 - Monitoring Compliance
 - Uploading Documents

Your Firm's Responsibilities

- Maintain the required and updated insurance as established in DASNY's Contracts and General Conditions
- DASNY is using **Ebix** for insurance compliance. Your firm is expected to use Ebix to:
 - Provide/upload insurance documents for contracts
 - Monitor compliance status on contracts
 - Resolve any discrepancies through Ebix, as needed

Non-compliant insurance is a violation of your Contract and will prevent payment to your firm by DASNY

Ebix

- Overview
- Review Cycle
- Resolving
Deficiencies & Issues
(Key Contacts)

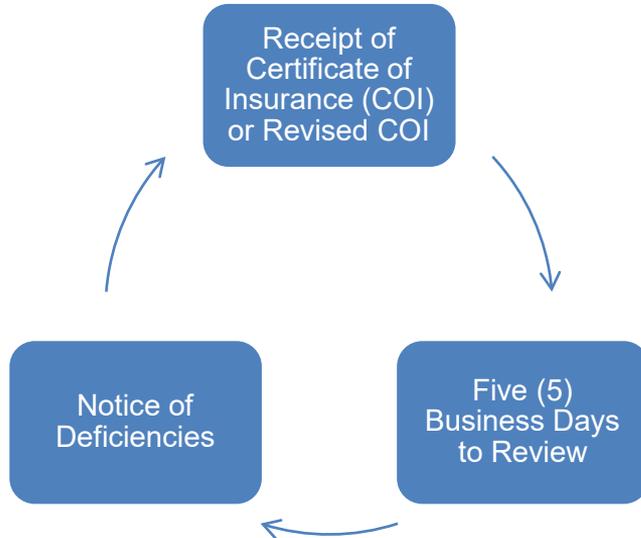
Ebix Overview

All certificates must be sent to Ebix at DASNY@ebix.com or via fax to 770-325-6348 - DASNY is no longer accepting certificates at insurance@dasny.org

Ebix performs the following on DASNY's behalf:

- Requests your firm's Certificate of Insurance
- Reviews your firm's Certificate of Insurance to determine if the coverage meets the stated Contract requirements
- Contacts your firm if the documentation received does not meet the stated Contract requirements
- Notifies DASNY of any expired coverage or deficiency based on the Contract requirements

Ebix Review Cycle



- Your firm submits the Certificate of Insurance and endorsements to DASNY@ebix.com, via fax to 770-325-6348, or uploaded through Ebix's website (refer to *Using Ebix* section)
Always include the contract number in all correspondence and on the insurance certificates
- Ebix reviews documentation for accuracy and completeness (approximately 5 days)
Please be reminded that just because documentation was sent, it does not mean that it is acceptable
- The status of your insurance can always be reviewed in Ebix (refer to the *Using Ebix* section)
- If there are any deficiencies, Ebix will contact your firm via email.
Please read all correspondence from Ebix.
(refer to the *Resolving Deficiencies & Issues* section)

Resolving Deficiencies & Issues (Key Contacts)

Deficiency / Issue

- Expired Certificate
- Certificate is not signed
- No current insurance on account
- Missing Coverage



Contact your Carrier to have appropriate document emailed to DASNY@ebix.com

If you believe the appropriate documents were produced and you are still receiving deficiency notification, call Ebix at 951-652-6444 to confirm receipt and check compliancy status

- Updating your firm's contact information in Ebix
- General Liability - Additional Insured Endorsement is not in compliance
- Insurance Carrier name incomplete.
Must match A.M. Best Rating Guide
- Coverage does not meet required _____.
- All other matters



Email insurance@dasny.org

Using Ebix

- Logging In
- Monitoring Compliance
- Uploading Documents

Logging into Ebix

1. Use the Ebix correspondence to locate the Reference Number and Pin Number.
Note: each Contract will have a unique PIN Number.



2. Log on to www.ebixcerts.com
Username = Reference Number
Password = PIN Number

Monitoring Compliance in Ebix

1. After logging in, view the compliance under the Status field.

Example status messages:

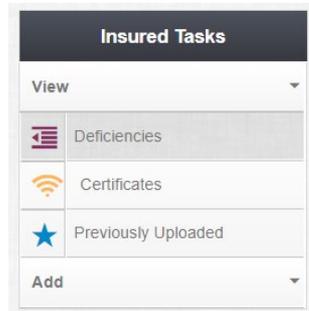
Status:

Your account is currently compliant no action is required.

This Insured Has Deficiencies.

2. If your account status has Deficiencies...

Under Insured Tasks – View,
click on Deficiencies

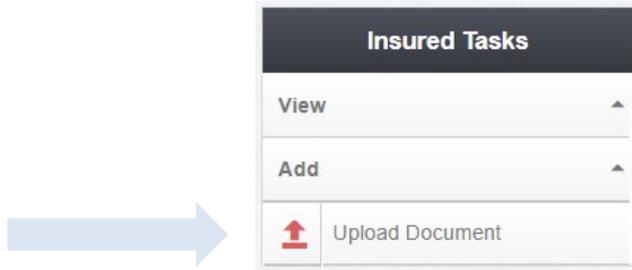


Review the Deficiencies Information section

Deficiencies Information	
Coverage	Deficiency
	Cancellation Days does not meet required minimum.
Builder's Risk Liability	Builders Risk - Expired Coverage.
Excess Liability	Excess Liability - Expired Coverage.
General Liability	General Liability - Expired Coverage.

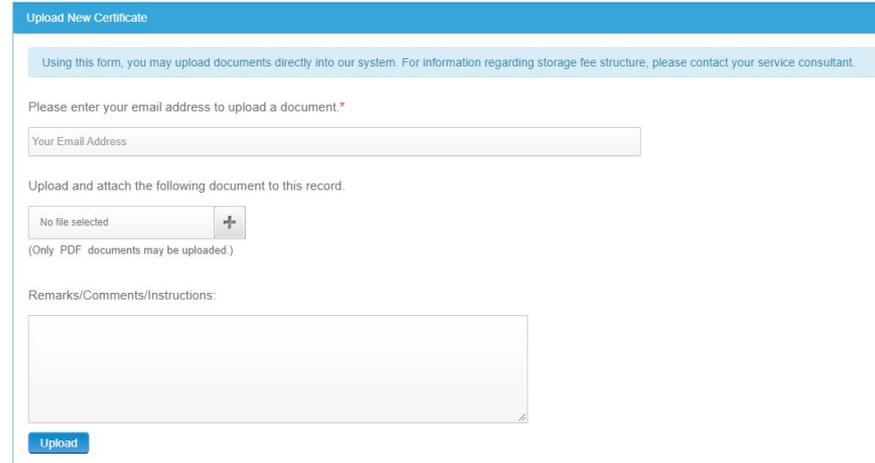
Uploading Documents in Ebix

1. After logging in, under Insured Tasks – Add, click on Upload Document



2. In the Upload New Certificate area:

- Enter your email address
- Upload document (**PDF only**)
- Enter any comments (optional)
- Click Upload

A screenshot of a web form titled "Upload New Certificate". The form has a blue header bar with the title. Below the header, there is a light blue informational box with text: "Using this form, you may upload documents directly into our system. For information regarding storage fee structure, please contact your service consultant." Below this, there is a red asterisk and the text "Please enter your email address to upload a document". This is followed by a text input field labeled "Your Email Address". Below the input field, there is text: "Upload and attach the following document to this record." This is followed by a file selection area showing "No file selected" and a plus sign icon. Below this, there is text: "(Only PDF documents may be uploaded.)". Below the file selection area, there is a text area labeled "Remarks/Comments/Instructions:". At the bottom of the form, there is a blue "Upload" button.