Insurance Overview
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:*
   
   - 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**

<table>
<thead>
<tr>
<th>Coverage</th>
<th>Deficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Builder's Risk Liability</td>
<td>Builders Risk - Expired Coverage.</td>
</tr>
<tr>
<td>Excess Liability</td>
<td>Excess Liability - Expired Coverage.</td>
</tr>
<tr>
<td>General Liability</td>
<td>General Liability - Expired Coverage.</td>
</tr>
<tr>
<td>Cancellation Days does not meet required minimum.</td>
<td></td>
</tr>
</tbody>
</table>
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