How to Quote New Business (using PUP App Entry)





Log in to RLI's portal at <u>portal.rlicorp.com</u> using your registered E-mail and Password.



RLI

Welcome to the RLI Portal.

To start a new quote, click on the "Personal Umbrella" box, and then select "Start Quote" from the drop down.



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Most users will be able to select a quote preference from the 2 options in the left margin. To begin a new quote, select either "PUP Quick Quote" or "PUP App Entry".

Both options will allow you to complete a full PUP application, however the PUP Quick Quote option breaks the application into sections and allows the rating questions to be asked first in order to get a premium quote before answering additional underwriting questions.

This instruction set will use "PUP App Entry."



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Enter the applicant's residential zip code and the effective date, and then select "Continue."

The effective date can be typed (MMDDYYYY) or you can select a date using the calendar icon.

The system will allow you to select an effective date up to 3 days in the past and up to 60 days into the future.

RII	jkinslow		F	PUP		
	Home Forms Administration New Latent Quotes- Reports Reports Issues	tΠ s	I Lo	ig ↓ f ↓		
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2005 - 2017 RLI	Wednesday	y				



Complete the questions on the Premium Options page, then click "Rate."

(There are additional instructions for the questions on the "Premium Options" page on the following slides.)

	Administration	New Quote	Latent Transaction	Quotes- Policies	Reports	Report 1 Issues	- L
itate/Zip							
State: IL Zip Co	de: 61615				Iffective Date(M	NDDYYYY):	06/01/2018
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Rating Questions						_	1
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3. How many wa	tercraft, OTHER than persor	nal watercri	aft (waverunners,	jet skis, etc.), :	are in your		i
4. How many per	sonal watercraft (waverun	pers, let ski	s, etc.) in your h	usebold?			ĩ
5. What is the nu	mber of drivers? (Include	drivers wit	h a learners perm	R.)			i
6. How many dri	vers under the age of 22?	(Include dr	ivers with a learne	ars permit.)			ĭ
7. How many dri	vers are age 70 and over?	,					ī.
7a. Are any driv	ers age 80 or older?					~	
 How many mo within the last 5 	ving violations have all dri years/3 year MT.	vers had w	ithin the last 3 ye	ars? Include DV	/I/DUI violations	·	
9. How many at I	ault accidents have all driv	vers had in	the last 3 years?				_
10. How many a	tique, classic and/or or	of rested b	vehicles are in yo	our household?	hourshold are		-
located outside U	.S. (including U.S. territorie	es and poss	essions), Canada,	or Puerto Rico	? Partial	er	
this question, but	must maintain appropriate	e underlying	lability coverage				-
 How many ai How many di 	res of land owned or lease rivers have been licensed	d (including less than or	i partial ownership 1e year, have a le	-)? amers permit,	or have a non-	-	-
U.S. drivers licer	se? Woo incidents have all di	rivers aper	21 and under an	d/or age 80 or	over had within		-
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Do you elect to p	urchase Excess Uninsured/	/Underinsur	ed Motorists cover	age?			4
Automobile Liabi	iity						
Which of the follow agree to maintain	ing MINIMUM REQUIRED L as a condition of coverage	for all licen	UTOMOBILE LIABI sed vehicles, that	LITY do all driv are owned (tit)	ners ed or		
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- 1. Producer and SubAgent numbers will be prefilled.
- 2. You are allowed two named insureds. Both must live in the same residence.
- 3. Enter the insured's primary residential address and contact information.

Note: To use an eSignature and Online Payment option, you <u>must</u> enter an **email address**.

RLI	jkinslow PUP
	Home Forms Administration New Latent Quotes- Reports Report IT Log Off
Options	
	State/Zip
	State: IL Zip Code: 61615 Effective Date(MMDDYYYY): 12/11/2017
	Update
	Administrature
	Superproducer Number: Get Agent List
1	Producer Number: 48936 Get SubAgent List
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	SubAgent: 50712 ×
	Otner Into
	Named Insured
	NOTE: If the first, middle and last name consists of more than 28 characters total, we will process the policy using the first and middle initials and the full last name.
(2)	First Name Middle Initial Last Name
-	Second Named Insured
	First Name Middle Initial Last Name
	Primary Address
	Address1:
	Address2:
	City: PEORIA V
2	State: ILLINOIS V Zip Code: 61615
0	Phone Number:
	Same As Mailing? Yes V
	RV Full timer No
	Rating Questions
	 How many motorized vehicles licensed for road use in your household?



Questions 1 through 15 are the rating questions.

To see a more comprehensive description of an application question, hover your curser over the question.

You must answer all rating questions. You cannot leave an answer of zero blank. You must type the zero.

The applicant must accept or reject the optional UM/UIM coverage.

1. How many motorized vehicles licensed for road use in your household?	1
2. How many residential properties in your household?	1
3. How How many residential properties are owned or rented by you or any member of your househo house family units are eligible and should be counted as one property.	ld? 1-4
4. How Primary residences must have liability coverage under a policy containing comprehensive pers	onal
5. Whit liability (including homeowners or farmowners). Seasonal, secondary or rental properties may liability coverage under a comprehensive personal liability or premises liability policy. Do not i	have nclude
6. How properties that are covered under a commercial general liability policy. Residential	are
7. How	
7a. Ar Partial ownership of a property should be counted.	
 Hov Vacant lots with no structure do not need to be counted under this question, but must maintain within appropriate underlying liability coverage. 	
9. How many at fault accidents have all drivers had in the last 3 years?	0
10. How many antique, classic and/or collectible vehicles are in your household?	0
11. How many residential properties owned or rented by you or any member of your household a	are 0
overeship of a property should be counted. Vacant lots with no structure do not need to be counted u this question, but must maintain appropriate underlying liability coverage.	Inder
12. How many acres of land owned or leased (including partial ownership)?	0
13. How many drivers have been licensed less than one year, have a learners permit, or have a nor U.S. drivers license?	n- 0
14. How many driving incidents have all drivers ages 21 and under and/or age 80 or over had with the last 3 years?	nin 0
How many alcohol/drug related driving incidents have all drivers had in the last 5 years?	0
De you elect te purchase Evenes Uningured/Underingured Materiate equarage?	Reject

RL

Next you must elect the underlying auto limits that the applicant agrees to maintain.

Note:

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- 1. The basic underlying limits, Limit B, are 250/500 or 300/300 or 300 combined single limit.
- 2. All risks with a DUI in the household are required to maintain limit A of 500/500/50 or 500 combined single limits.
- 3. Some risks have the ability to buy back limit from underlying auto limits of 100/300. However, limit C, 100/300, is not an option if there is a driver under 22 in the household, if there is a driver over 70 in the household, if the risk falls into RLI's standard II rating tier, if the risk falls into RLI's PUP Special rating tier, or if the insured has chosen to accept the excess uninsured/under insured motorist coverage.

All of this information is noted in the table under the question in the rater, and on the next slide.



Minimum required limits of automobile liability table.

Automobile Lipbility							
Which of the following MINIMUM REQUIRED LI agree to maintain as a condition of coverage for registered to), leased, rented, operated or acc member of your household? If you elect to Motorist (UM/UIM) coverage the Required Bas liability limits for the required Basic Automobil applies equally to personal use of a vehicle co Policy.	MITS OF AUTOMOBILE LIABILITY do all driv for all licensed vehicles, that are owned (title quired during the policy period by you or any to purchase Excess Uninsured/Underinsured ic UM/UIM policy limits must be equal to the le Liability Policy. You agree that this condition overed under a Commercial Automobile Liabi	ers d or y on lity					
LIMIT A \$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$500,000 Combined Single Limit per occurrence Note: Limit A is ALWAYS REQUIRED if any driver has an alcohol related incident.	LIMIT B \$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Combined Single Limit per occurrence (\$325,000 in Texas)	LIMIT C \$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence Note: Limit C is available ONLY if all drivers in the household are age 22 and over. Limit C is NOT available if there are any drivers age 70 or over; and/or if any response makes the risk Standard II (N/A in Hawaii); and/or if any response makes the risk PUP Special. Excess UM/UIM is not available if you maintain Limit C. The choice of Limit C results in a higher premium.					
If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent.							



Next answer RLI's underwriting questions.

An answer of "yes" to any one of the underwriting questions would make the applicant ineligible.

 Have you or any other drive driving, negligent driving and/or l the influence of alcohol or drugs), 	ir had an arrest, citation or conviction nad a drivers license suspended (for , revoked or refused in the last 5 ye	on for reckless driving, careless r reasons other than driving under ears?	No 🗸
17. Have you or any member o within the last 5 years?	f your household been indicted, c	harged with or convicted of a felony	No 🗸
18. Do you or any member of y athlete, or media personality, or l or state level?	rour household have an occupatio hold a position as an appointed or e	n of a professional entertainer, lected political figure at the federal	No 🗸
19. Have you or any member o years or is there any open liability household?	f your household had a liability lo y claim or lawsuit pending against y	ss greater than \$50,000 in the past ! ou or any member of your	No 🗸
20. Does any other member of Umbrella policy with RLI Insurance	your household or person residing e Company other than this policy?	g in your household have a Persona	No 🗸
 Has any one driver had more incidents within the last 5 years 	e than 3 moving violations within the)	e last 3 years? (Include DWI/DUI	No 🗸
22. Has any one driver ages 21 within the past 3 years?	and under and/or age 80 or over ha	ad more than one driving incident	No 🗸
23. Do you elect to purchase or r Submission of a state mandated f you wish to change your answer	eject Excess UM/UIM coverage? Res form supersedes any response you to this question, please return to the	sidents of FL, LA, NH, VT and WV: may make to this Question 23. (If a rating section and change it there)	

RLI[®] 11

Next the applicant must agree to maintain the minimum required limits of liability. Then select the signature option and select "Rate."



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Your Signature/Payment Options May Include:

- Application contains original signature The Administrator submits a completed, signed application to RLI. The Administrator is billed for total premium, less commission on a monthly account current statement.
- No signature on application. This option informs the user that an application cannot be bound without being completed in full and signed by the applicant.
- Send a secure email to the insured to eSign and Pay Online. The insured receives a secure email, then clicks the link in the email and is taken into the RLI system. Here the insured signs the application and makes the premium payment. The Administrator is notified and binds the policy in the RLI system.
- Verbally provide login information to the insured to eSign and Pay Online The Administrator / Agent provides the insured with a User Name and Password for the RLI system. Here the insured signs the application and makes the premium payment. The Administrator is notified and binds the policy in the RLI system.

Next you will enter each member of the household's information.

Date of Birth entry format is MMDDYYYY.

Always click "Save Member" once you have finished entering a member of household's information before you select another option to avoid losing the information you have entered.

RLI is asking for all members of the household over the age of 14 to be entered.

RLI	jkinslow							PUI
	Home Forms	Administration	New Quote	Latent Transaction	l Quote Polic	es- Reports ies	Report IT Issues	Log Off
Premium Options								
lembers of Household	Quote Quote: 60	71412						
	Members Of House	ehold						
						F	lesults 1-1 of 1	N N
	Member Na	me		DOB	Age	License	St Rel. Vio	l. DUIs Ac
	1					Humber	0	0 0
		77.5						
	Editing Member N	umber: 1			12 <u>-</u>		Lawrence -	
	First Name:	JASMINE		Middle Initial:		Last Name:	TEST	
	Date of Birth:	01/01/1980		Licensed?	Y	es V License Number:	123456789	
	State:	ILLINOIS 🗸				Relationship to Insur	ed: Policyholder	~
	# of Violations (include DUI/DWI)	0	ξ.	# At Fault Accidents	0	Operator w/DUI/DWI?	No 🗸	-
	(H Sava Mambar	Delete Nember						
	Add Member	Done		-1				
	Add Hember	Done 1						

RLI

After selecting "Save Member," you can choose to add another member of the household, or click on "Premium Options" in the left margin to review and select a coverage option.

RLI	jasmine.kin	slow@rlicorp.com							PUP	~
	Home	Forms Administration	New Quote	Quotes- Policies	I	Reports	Report IT Issues	I	Log Off	
Premium Options										
Members of Household	Quote Quote:	6077660								
	Members 0	f Household								
							Results 1	-1 of 1	< $>$ $>$	
	Member Number	Name		DOB	Age	License Number	St	Rel. Viol	. DUIs Acc.	
	1	JASMINE TEST		1/1/1980	37	123456789	IL	I 0	0 0	
(Add Memi	ber								~

The available limits and their corresponding premiums will be displayed at the bottom of the "Premium Options" page.

From here you have the ability to:

- 1. Generate a quote letter for your applicant.
- 2. Print the application (it will only include application answers that have completed at the time you click this option).
- 3. You may save and close the quote.
- 4. Or select a limit and click "Continue" to submit the quote.



Note:

If you need to correct or change the application, this needs to be done prior to binding the application. Navigate the application using the page names in the left margin. Make the changes and then click on "Rate" again to update coverage options and premiums.

If you add drivers, be sure to go back into the Members of Household section to enter their details prior to submitting the application.



RLI

Selecting "Application Contains Original Signature":



Once you click "Continue" to submit the application, next screen will notify you of the next steps required to complete your submission.

You will need to send the premium payment and a copy of the completed and signed application to your program administrator so that they can bind the policy.



From here you may now close PUP Access, direct yourself to another section of PUP Access using the blue tabs across the top, or you can continue to the Quote-Policy Repository by clicking "Continue to Quote-Policies".



Selecting an eSignature and Online Payment Option:

1. Send a secure email to the insured to eSign and Pay Online



2. Verbally provide login information to the insured to eSign and Pay Online

and the second second	LIASLELLY COVERAGE OF CAREER STATE	or cay		
	Confirmation			
	Please Select a Signature Option:		Verbally provide login information to t	the insured to eSign and Pay Online 🗸
	Premium Options			
Maria Maria Maria	A SHADE A	and the second	- A March	and have been all and

Please refer to RLI's electronic signature and online payment handout for further information and instructions on eSign and Pay Online options.

This document can be obtained on the RLI Portal or from your Program Administrator.

