

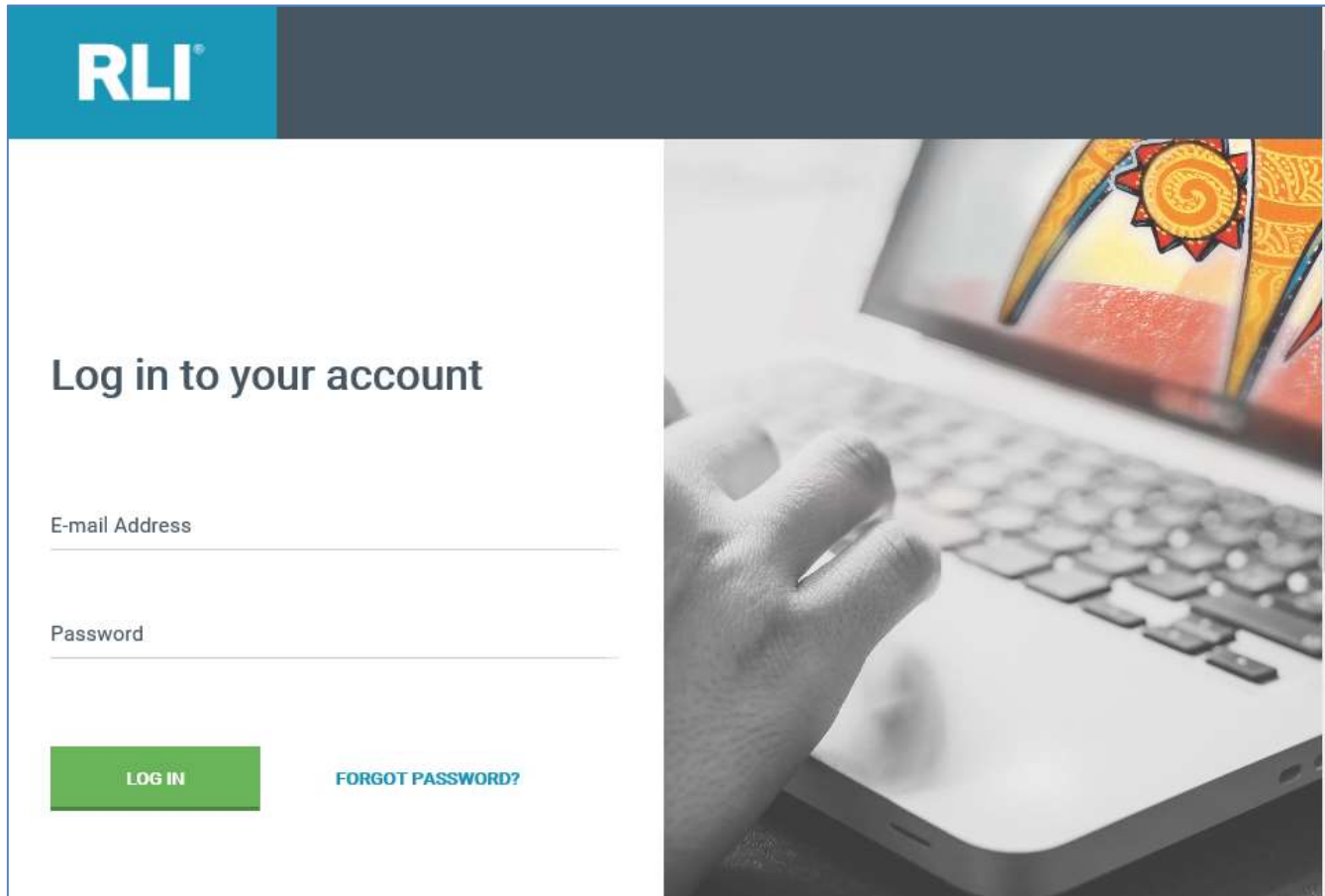


# How to Quote New Business

*(using PUP Quick Quote)*

**RLI**<sup>®</sup>  
DIFFERENT WORKS

Log in to RLI's portal at [portal.rlicorp.com](http://portal.rlicorp.com) using your registered E-mail and Password.



The screenshot shows the RLI login portal. At the top left, the RLI logo is displayed in white on a teal background. Below the logo, the text "Log in to your account" is centered. Underneath, there are two input fields: "E-mail Address" and "Password". A green "LOG IN" button is positioned below the "Password" field. To the right of the "LOG IN" button is a blue link labeled "FORGOT PASSWORD?". The right side of the page features a background image of a hand typing on a laptop keyboard, with the laptop screen displaying a colorful, stylized sun or logo.

Welcome to the RLI Portal.

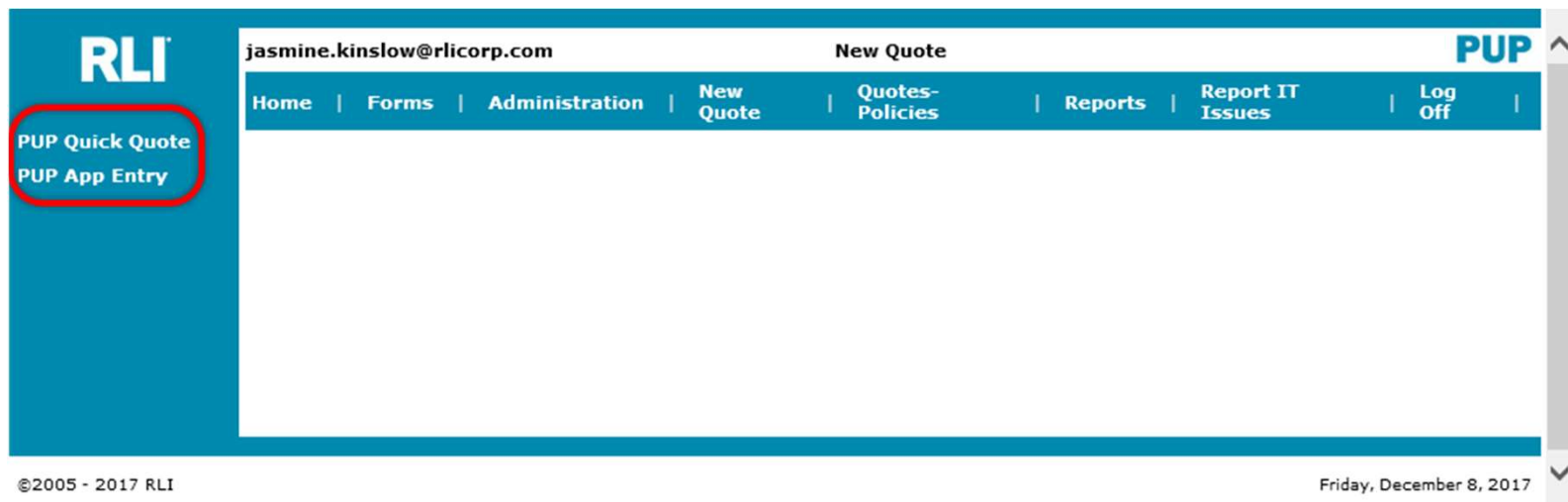
To start a new quote, click on the “Personal Umbrella” box, and then select “Start Quote” from the drop down.

The screenshot displays the RLI Portal interface. At the top left is the RLI logo. A search bar contains the text "Search Forms, Training, and other Product Information". On the top right are links for "Home" and "News" with a notification icon. The main content area is titled "My Products" and features two product cards: "Personal Umbrella" and "Home Business". The "Personal Umbrella" card is highlighted with a red border, and its dropdown menu is open, showing options: "Start Quote" (highlighted with a red circle), "Quote/Policy Search", "Forms Activity", "Reports", "Agency Administration", and "Endorsement Request". Below the dropdown is a "View Product Details" link and a "LEARN MORE" button. To the right, there is a promotional banner for a feedback survey: "Give Us Your Feedback, Win an Amazon Gift Card". The banner text reads: "We'd love to hear what you think of the new portal. Answer five quick questions for the chance to win a \$100 Amazon gift card. A new winner will be drawn each month!" and includes a "LEARN MORE" button.

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 Quick Quote.”*



The screenshot displays the RLI PUP application interface. The top navigation bar includes the RLI logo, the user email 'jasmine.kinslow@rlicorp.com', the page title 'New Quote', and the PUP logo. A secondary navigation bar contains links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. In the left sidebar, the options 'PUP Quick Quote' and 'PUP App Entry' are listed, with 'PUP Quick Quote' highlighted by a red circle. The footer shows the copyright notice '©2005 - 2017 RLI' and the date 'Friday, December 8, 2017'.

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.

The screenshot shows the RLI PUP system interface. The user is logged in as 'jkinslow'. The navigation menu includes: Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Report IT Issues, and Log Off. The form fields are:

- State/Zip: Zip Code: 61615
- Effective Date(MMDDYYYY):

A calendar icon is visible next to the Effective Date field, and a calendar is open showing the date '29' selected. The calendar is for November 2017. The date '29' is highlighted in blue. The calendar also shows 'Clear' and 'Cancel' buttons.

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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.)

**RLI**
jkinslow
**PUP**

Home | Forms | Administration | New Quote | Latent Transaction | Quotes-Policies | Reports | Report IT Issues | Log Off

**Premium Options**

**Address Information**

State/Zip  
 State:  Zip Code:  Effective Date(MMDDYYYY):

**Administrator**  
 SuperProducer Number:  [Get Agent List](#)  
 Producer Number:  [Get SubAgent List](#)

**SubAgent**  
 SubAgent:

**Other Info**

**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.  
 First Name  Middle Initial  Last Name

**Second Named Insured**  
 First Name  Middle Initial  Last Name

**Rating Questions**

1. How many motorized vehicles licensed for road use in **your** household?
2. How many residential properties in **your** household?
3. How many watercraft, OTHER than personal watercraft (waverunners, jet skis, etc.), are in **your** household?
4. How many personal watercraft (waverunners, jet skis, etc.) in **your** household?
5. What is the number of **drivers**? (Include drivers with a learners permit.)
6. How many **drivers** under the age of 22? (Include drivers with a learners permit.)
7. How many **drivers** are age 70 and over?
- 7a. Are any **drivers** age 80 or older?
8. How many moving violations have all **drivers** had within the last 3 years? Include DWI/DUI violations within the last 3 years/3 year MT.
9. How many at fault accidents have all **drivers** had in the last 3 years?
10. How many **antique, classic and/or collectible vehicles** are in your household?
11. How many residential properties owned or rented by **you** or any **member of your household** are located outside U.S. (including U.S. territories and possessions), Canada, or Puerto Rico? Partial ownership of a property should be counted. Vacant lots with no structure do not need to be counted under this question, but must maintain appropriate underlying liability coverage.
12. How many acres of land owned or leased (including partial ownership)?
13. How many **drivers** have been licensed less than one year, have a learners permit, or have a non-U.S. drivers license?
14. How many driving **incidents** have all **drivers** ages 21 and under and/or age 80 or over had within the last 3 years?

How many alcohol/drug related driving **incidents** have all **drivers** had in the last 5 years?

Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?

**Automobile Liability**  
 Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all licensed vehicles, that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by **you** or any **member of your household**? If you elect to purchase Excess Uninsured/Underinsured Motorist (UIM/UM) coverage the Required Basic UIM/UM policy limits must be equal to the liability limits for the required Basic Automobile Liability Policy. **You** agree that this condition applies equally to personal use of a vehicle covered under a Commercial Automobile Liability Policy.

LIMIT A	LIMIT B	LIMIT C
\$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.	\$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)	\$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/UM 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.

1. Producer and SubAgent numbers will be prefilled.
2. You are allowed two named insureds. Both must live in the same residence.

The screenshot shows the RLI PUP web application interface. The user is logged in as 'jkinslow'. The navigation menu includes Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Report IT Issues, and Log Off. The left sidebar contains 'Premium Options' and 'Address Information'. The main form area is titled 'State/Zip' and includes fields for State (IL), Zip Code (61615), and Effective Date (11/29/2017). Below this, the 'Administrator' section is highlighted with a red box and a '1' in a red circle. It contains fields for SuperProducer Number, Producer Number (prefilled with 48936), and SubAgent (prefilled with 50712). There are also links for 'Get Agent List' and 'Get SubAgent List'. The 'Named Insured' section is highlighted with a red box and a '2' in a red circle. It includes a note about name length and fields for First Name (JASMINE), Middle Initial, and Last Name (TEST). Below this is the 'Second Named Insured' section with fields for First Name, Middle Initial, and Last Name. The 'Rating Questions' section is partially visible at the bottom.

Questions 1 through 15 are the rating questions.

To see a more comprehensive description of an application question, hover your cursor 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.

**Rating Questions**

1. How many motorized vehicles licensed for road use in **your** household?
2. How many motorized vehicles licensed for road use (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household?
3. How many motorized vehicles licensed for road use (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household?
4. How many motorized vehicles licensed for road use (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household?
5. How many motorized vehicles licensed for road use (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household?
6. How many motorized vehicles licensed for road use (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household?
7. How many **drivers** are age 70 and over?
- 7a. Are any **drivers** age 80 or older?
8. How many moving violations have all **drivers** had within the last 3 years? Include DWI/DUI violations within the last 5 years/3 year MT.
9. How many at fault accidents have all **drivers** had in the last 3 years?
10. How many **antique, classic and/or collectible vehicles** are in your household?
11. How many residential properties owned or rented by **you** or any **member of your household** are located outside U.S. (including U.S. territories and possessions), Canada, or Puerto Rico? Partial ownership of a property should be counted. Vacant lots with no structure do not need to be counted under this question, but must maintain appropriate underlying liability coverage.
12. How many acres of land owned or leased (including partial ownership)?
13. How many **drivers** have been licensed less than one year, have a learners permit, or have a non-U.S. drivers license?
14. How many driving **incidents** have all **drivers** ages 21 and under and/or age 80 or over had within the last 3 years?
- How many alcohol/drug related driving **incidents** have all **drivers** had in the last 5 years?
- Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?

**Automobile Liability**



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

**Note:**

1. The basic underlying limits, Limit B, are 250/500 or 300/300 or 300 combined single limit.
2. All households 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 over 70 in the household, if the risk falls into RLI's standard II or 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.

**Automobile Liability**

Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all licensed vehicles, that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by **you** or any **member of your household**? If **you** elect to purchase Excess Uninsured/Underinsured Motorist (UM/UIM) coverage the Required Basic UM/UIM policy limits must be equal to the liability limits for the required Basic Automobile Liability Policy. **You** agree that this condition applies equally to personal use of a vehicle covered under a Commercial Automobile Liability Policy.

<b>LIMIT A</b>	<b>LIMIT B</b>	<b>LIMIT C</b>
\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/	\$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/	\$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/

## Minimum required limits of automobile liability table.

### Automobile Liability

Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all licensed vehicles, that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by **you** or any **member of your household**? If **you** elect to purchase Excess Uninsured/Underinsured Motorist (UM/UIM) coverage the Required Basic UM/UIM policy limits must be equal to the liability limits for the required Basic Automobile Liability Policy. **You** agree that this condition applies equally to personal use of a vehicle covered under a Commercial Automobile Liability Policy.

<b><u>LIMIT A</u></b>	<b><u>LIMIT B</u></b>	<b><u>LIMIT C</u></b>
<p>\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence <b>OR</b> \$500,000 Combined Single Limit per occurrence</p> <p><b>Note:</b> Limit A is <b>ALWAYS REQUIRED</b> if any <b>driver</b> has an alcohol related incident.</p>	<p>\$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence <b>OR</b> \$300,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence <b>OR</b> \$300,000 Combined Single Limit per occurrence (\$325,000 in Texas)</p>	<p>\$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence</p> <p><b>Note:</b> Limit C is available <b>ONLY</b> if all <b>drivers</b> in the household are age 22 and over. Limit C is <b>NOT</b> available if there are any <b>drivers</b> 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.</p>
<p><b>If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent.</b></p>		

After answering all of the questions on the Premium Options page select “Rate” to generate RLI’s coverage options and the corresponding policy premiums.

The screenshot displays the RLI Premium Options page. At the top left is the RLI logo. The user's name 'jkinslow' is shown in the top right, along with a 'PUP' label. A navigation menu includes: Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Report IT Issues, and Log Off. The 'Premium Options' section is active, showing 'Address Information' with fields for State (IL), Zip Code (61615), and Effective Date (06/01/2018). Below this is the 'Administrator' section with a SuperProducer Number field and a 'Get Agent List' link. The main content area contains coverage options: 'occurrence' with a note that Limit A is always required for alcohol-related incidents; '\$300,000 Bodily Injury per occurrence/ce/ \$50,000 Property Damage per occurrence OR \$300,000 Combined Single Limit per occurrence (\$325,000 in Texas)'; and 'Note: Limit C is available ONLY if all drivers in the household are age 22 and over...' A warning message states: 'If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent.' At the bottom, there are two buttons: 'Rate' (circled in red) and 'Cancel Transaction'. The footer shows '©2005 - 2018 RLI' and the date 'Monday, January 8, 2018'.

After you click “Rate”, you will 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 continue to complete the application.

You will be able to select these options at any time throughout the application going forward.

The screenshot displays a web application interface for premium options. At the top, a warning message states: "If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent." Below this, the "Premium Options" section lists four coverage limits: 1 Million (\$155), 2 Million (\$279), 3 Million (\$372), and 5 Million (\$488). The "1 Million" option is selected. To the right, the "Rating Tier" is "Preferred" and the applicant's name is "JASMINE TEST" with ID "1977393". A link "Adjust Premium" is visible. A note mentions "Excess UM/UIM coverage is available with limits of \$1 million at an additional cost of \$150." At the bottom, a navigation bar contains buttons: "Rate", "Quote Letter", "Print App", "Save & Close", "Save", and "Continue". The "Quote Letter", "Print App", and "Continue" buttons are circled in red, with red circles containing the numbers 1, 2, and 4 respectively below them. The footer includes "©2005 - 2018 RLI" and "Monday, January 8, 2018".

Once you have selected “Rate”, and the available limits and their corresponding premiums are displayed, select the limit and click “Continue” to continue to complete the application process.

*Note:*

There are still questions remaining on the next page, Underwriting Questions, that could disqualify an applicant from coverage.

If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent.

**Premium Options**

<input checked="" type="radio"/> 1 Million	\$ 155	Rating Tier Preferred <a href="#">Adjust Premium</a>	JASMINE TEST 1977393
<input type="radio"/> 2 Million	\$ 279		
<input type="radio"/> 3 Million	\$ 372		
<input type="radio"/> 5 Million	\$ 488		

Excess UM/UIM coverage is available with limits of \$1 million at an additional cost of \$150. [Click Here to Purchase Excess UM/UIM coverage](#)

[Rate](#) [Quote Letter](#) [Print App](#) [Save & Close](#) [Save](#) [Continue](#)

©2005 - 2018 RLI Monday, January 8, 2018

Next answer RLI's underwriting questions and click "Continue."

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

**RLI** jkinslow **PUP**

Home | Forms | Administration | New Quote | Latent Transaction | Quotes-Policies | Reports | Report IT Issues | Log Off

Premium Options  
**Underwriting Questions**  
Address Information

**Quote**  
Quote: 1977393

**Underwriting Questions**

16. Have **you** or any other **driver** had an arrest, citation or conviction for reckless driving, careless driving, negligent driving and/or had a drivers license suspended (for reasons other than driving under the influence of alcohol or drugs), revoked or refused in the last 5 years? No ▾

17. Have **you** or any **member of your household** been indicted, charged with or convicted of a felony within the last 5 years? No ▾

18. Do **you** or any **member of your household** have an occupation of a professional entertainer, athlete, or media personality, or hold a position as an appointed or elected political figure at the federal or state level? No ▾

19. Have **you** or any **member of your household** had a liability loss greater than \$50,000 in the past 5 years or is there any open liability claim or lawsuit pending against **you** or any **member of your household**? No ▾

20. Does any other **member of your household** or person residing in **your** household have a Personal Umbrella policy with RLI Insurance Company other than this policy? No ▾

21. Has any one **driver** had more than 3 moving violations within the last 3 years? (Include DWI/DUI **incidents** within the last 5 years) No ▾

22. Has any one **driver** ages 21 and under and/or age 80 or over had more than one driving **incident** within the past 3 years? No ▾

23. Do you elect to purchase or reject Excess UM/UIM coverage? Residents of FL, LA, NH, VT and WV: Submission of a state mandated form supersedes any response you may make to this Question 23. (If you wish to change your answer to this question, please return to the rating section and change it there) Reject ▾

Quote Letter | Print App | Save & Close | Save | Continue

Next the applicant must agree to maintain the minimum required limits of liability, then click “Continue.”

The chart outlines the minimum required underlying limit of liability.

jkinslow PUP

Home | Forms | Administration | New Quote | Latent Transaction | Quotes-Policies | Reports | Report IT Issues | Log Off

Premium Options  
Underwriting Questions  
**Limits of Liability**  
Address Information

Quote: 6056201

**Limits Of Liability**

26. Do you and all members of your household agree to maintain the MINIMUM REQUIRED LIMITS OF LIABILITY coverage outlined below as a condition of coverage? Yes

<p><b>PRIMARY RESIDENCE ONLY - REQUIRE HOMEOWNERS OR COMPREHENSIVE PERSONAL LIABILITY</b> \$300,000 per occurrence</p> <p><b>SEASONAL, SECONDARY OR RENTAL PROPERTIES REQUIRE PREMISES LIABILITY OR COMPREHENSIVE PERSONAL LIABILITY</b> \$300,000 per occurrence</p> <p>Residential properties that are covered under a commercial or other non-personal premises liability policy are excluded from coverage</p>	<p><b>FARMOWNERS OR FARM COMPREHENSIVE PERSONAL LIABILITY</b> (Required only if you or a member of your household own a farm which is not covered by your homeowners policy.) \$300,000 per occurrence</p> <p><b>UNLICENSED RECREATIONAL VEHICLES</b> (Including snowmobiles, ATVs, golf carts, etc.) (Required only if you or a member of your household own or acquire a recreational vehicle during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.) \$100,000 Combined Single Limit per occurrence (325,000 in Texas) -OR- \$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$25,000 Property Damage per occurrence</p>	<p><b>WATERCRAFT</b> (Including boats, personal watercraft, jet skis and canoes) (Required only if you or a member of your household own or acquire a watercraft of this size during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.) \$300,000 Combined Single Limit per occurrence -OR- \$250,000/500,000/100,000 -OR- or \$300,000/300,000/100,000</p> <p><b>NOTE: The RLI Personal Umbrella does not provide coverage for watercraft exceeding 45 ft and/or 50 mph. This exclusion does not apply to personal watercraft.</b></p>
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If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local insurance agent.

Quote Letter | Print App | Save & Close | Save | Continue

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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.

The screenshot shows the RLI web application interface. The user is logged in as 'jkinslow' and is viewing the 'Members of Household' section. The 'Editing Member Number: 1' form is highlighted with a red box. The form contains the following fields and values:

Member Number	Name	DOB	Age	License Number	St Rel. Viol. DUIs Acc.
1	JASMINE TEST	01/01/1980		ABC123456789	0 0 0

The 'Editing Member Number: 1' form includes the following fields and values:

First Name:	JASMINE	Middle Initial:		Last Name:	TEST
Date of Birth:	01/01/1980	Licensed?:	Yes	License Number:	ABC123456789
State:	ILLINOIS	Relationship to Insured:	Policyholder		
# of Violations (include DUI/DWI):	0	# At Fault Accidents:	0	Operator w/DUI/DWI?:	No

Buttons at the bottom of the form include: Save Member, Delete Member, Cancel, Add Member, Done, Quote Letter, Print App, and Continue.



After selecting “Save Member,” you can choose to add another member of the household, or click continue to go to the next page of the application.

The screenshot displays the RLI application interface for user 'jkinslow'. The top navigation bar includes links for Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Report IT Issues, and Log Off. The left sidebar lists Premium Options, Underwriting Questions, Limits of Liability, and Members of Household. The main content area shows the 'Members Of Household' section with a table of household members. Below the table are buttons for 'Add Member', 'Done', 'Quote Letter', 'Print App', and 'Continue'. The 'Add Member' and 'Continue' buttons are circled in red.

Quote: 6056201

Members Of 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	ABC123456789	IL I 0 0 0

Buttons: Add Member, Done, Quote Letter, Print App, Continue

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The final part of the application is the applicants address and contact information. Complete the contact information being asked.

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

At this point you have the option to generate a quote letter, print the application, save and close the quote, save the quote, or to continue and submit the application.

The screenshot displays the RLI application interface. On the left is a blue sidebar with the RLI logo and navigation links: Premium Options, Underwriting Questions, Limits of Liability, Members of Household, and Address Information (which is highlighted). The top navigation bar includes 'Home', 'Forms', 'Administration', 'New Quote', 'Latent Transaction', 'Quotes-Policies', 'Reports', 'Report IT Issues', and 'Log Off'. The user 'jkinslow' is logged in, and 'PUP' is visible in the top right corner. The main content area shows the 'Quote' section with 'Quote: 6056201' and the 'Primary Address' section. The 'Primary Address' section contains the following fields: Address1, Address2, City (PEORIA), State (ILLINOIS), Zip Code (61615), Phone Number, E-Mail (highlighted with a red circle), Same As Mailing? (Yes/No), and RV Full timer (Yes/No). At the bottom of the form, there are five buttons: Quote Letter, Print App, Save & Close, Save, and Continue, all of which are highlighted with a red circle. A link 'Enter Additional Addresses' is also present. The footer shows '©2005 - 2017 RLI'.

**\*\*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.

The screenshot displays the RLI application interface. At the top left, the RLI logo is visible. A navigation menu on the left side includes 'Premium Options', 'Underwriting Questions', 'Limits of Liability', 'Members of Household', 'Address Information', and 'Confirmation'. The 'Premium Options' menu item is highlighted with a red circle. The main content area shows the user 'jkinslow' and the 'PUP' (Premium Update) section. The quote number is 6071464. The state is IL and the zip code is 61615. The effective date is 12/11/2017. Below this, there are 'Rating Questions' with four items, each with a dropdown menu. The second dropdown menu is highlighted with a red circle. At the bottom, there are 'Premium Options' for 1, 2, 3, and 5 million dollars. The 'Rate' button is highlighted with a red circle. The footer shows '©2005 - 2017 RLI' and 'Monday, December 11, 2017'.

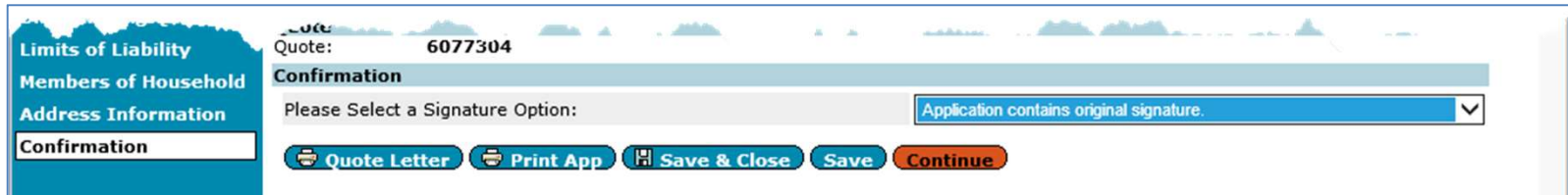
Next select a signature option from the drop down box and click “Continue”.

The screenshot shows the RLI web application interface. At the top left is the RLI logo. The user is logged in as jasmine.kinslow@rlicorp.com. The navigation menu includes Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The main content area shows the Quote number 6077304 and a Confirmation section with a dropdown menu for selecting a signature option. The 'Continue' button is highlighted with a red circle.

## 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.

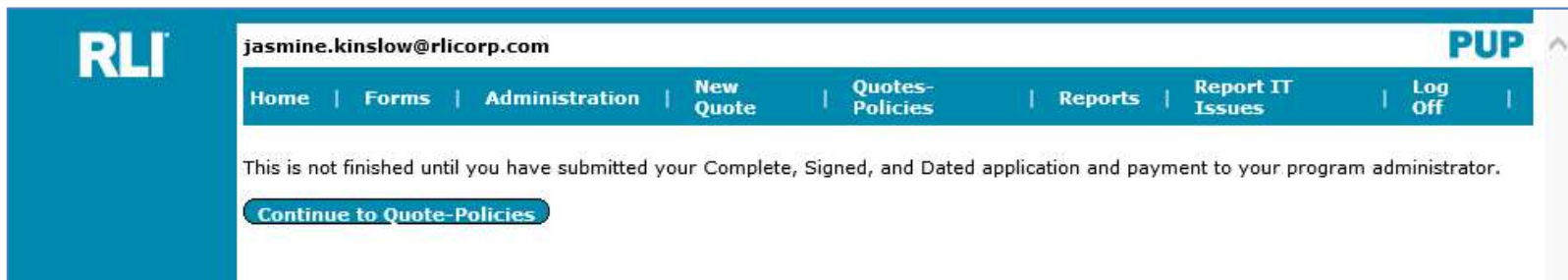
## Selecting “Application Contains Original Signature”:



The screenshot shows a web application interface for RLI. On the left is a blue sidebar with navigation links: "Limits of Liability", "Members of Household", "Address Information", and "Confirmation" (which is highlighted). The main content area is titled "Confirmation" and shows "Quote: 6077304". Below this, it says "Please Select a Signature Option:" followed by a dropdown menu with the selected option "Application contains original signature.". At the bottom of the form are five buttons: "Quote Letter", "Print App", "Save & Close", "Save", and "Continue".

Once you click “Continue,” the 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.



The screenshot shows the RLI PUP Access interface. The top left features the RLI logo. The user's email address, "jasmine.kinslow@rlicorp.com", is displayed in the top right. A navigation bar contains tabs for "Home", "Forms", "Administration", "New Quote", "Quotes-Policies", "Reports", "Report IT Issues", and "Log Off". Below the navigation bar, a message states: "This is not finished until you have submitted your Complete, Signed, and Dated application and payment to your program administrator." A blue button labeled "Continue to Quote-Policies" is positioned below the message.

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



Confirmation

Quote: 6077326

Please Select a Signature Option:

Navigation menu: Limits of Liability, Members of Household, Address Information, Confirmation

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



Confirmation

Quote: 6077328

Please Select a Signature Option:

Navigation menu: Limits of Liability, Members of Household, Address Information, Confirmation

**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.**

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# DIFFERENT WORKS

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