

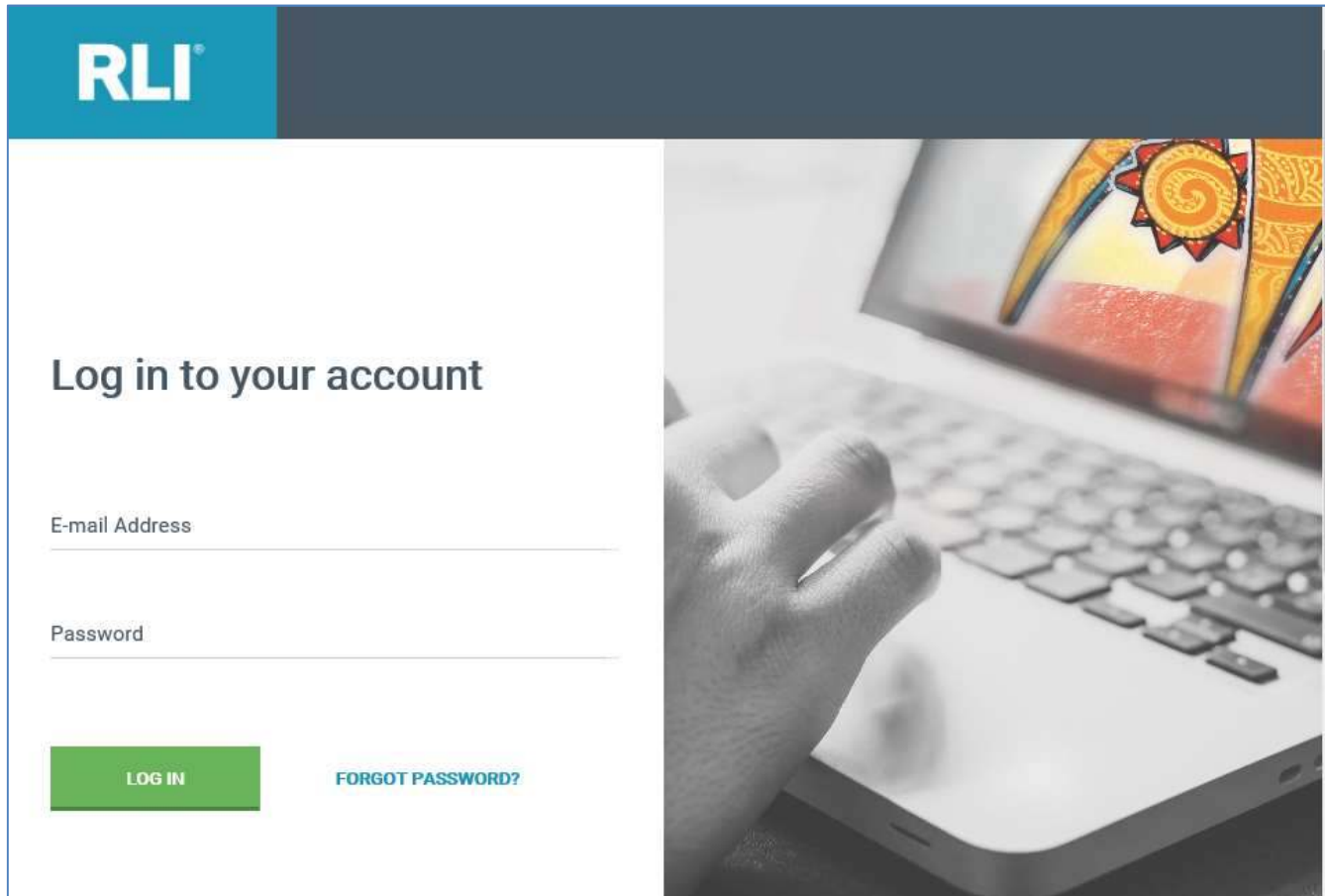


# How to Quote New Business

*(using PUP App Entry)*

**RLI**<sup>®</sup>  
DIFFERENT WORKS

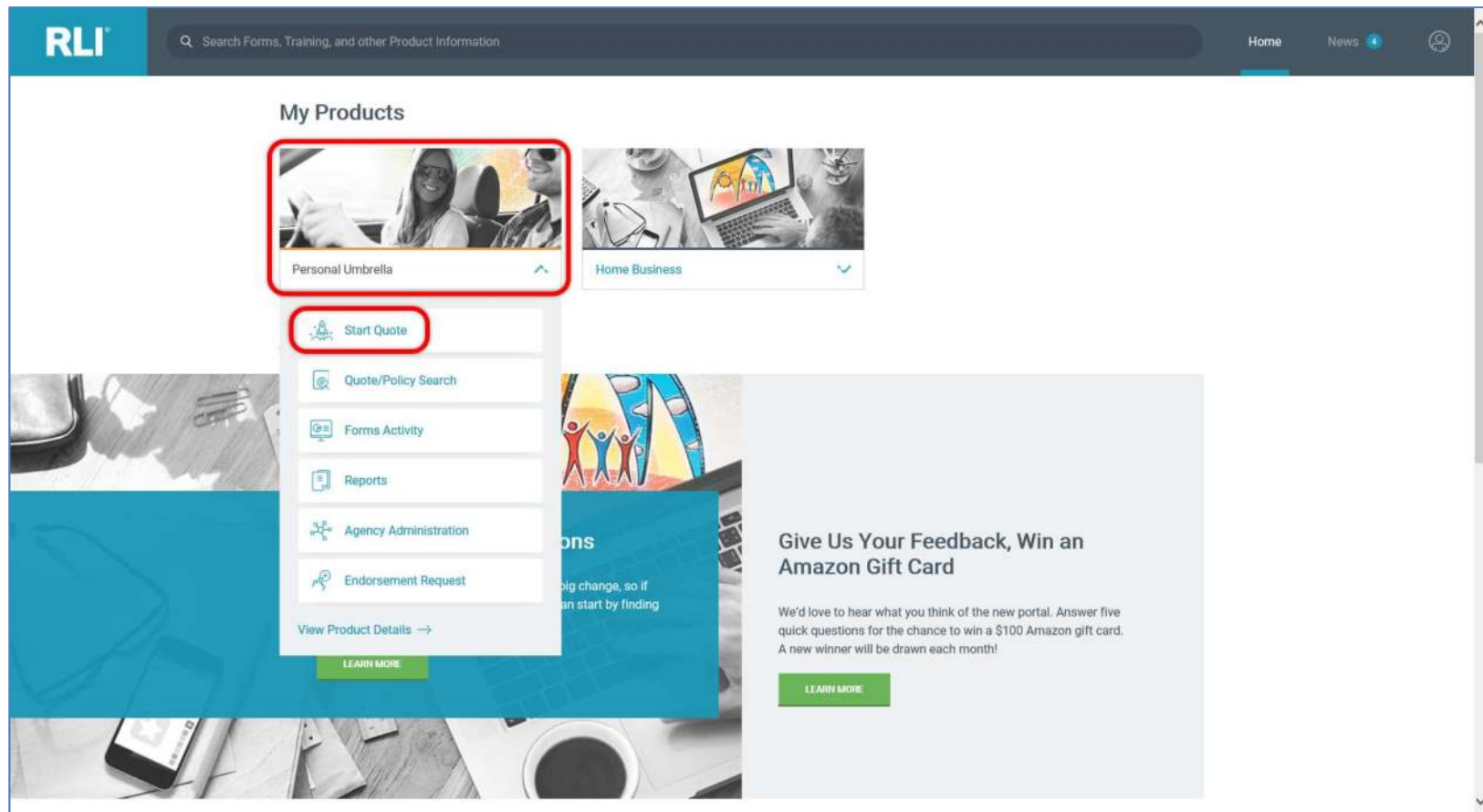
Log in to RLI's portal at [portal.rlicorp.com](http://portal.rlicorp.com) using your registered E-mail and Password.



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 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.

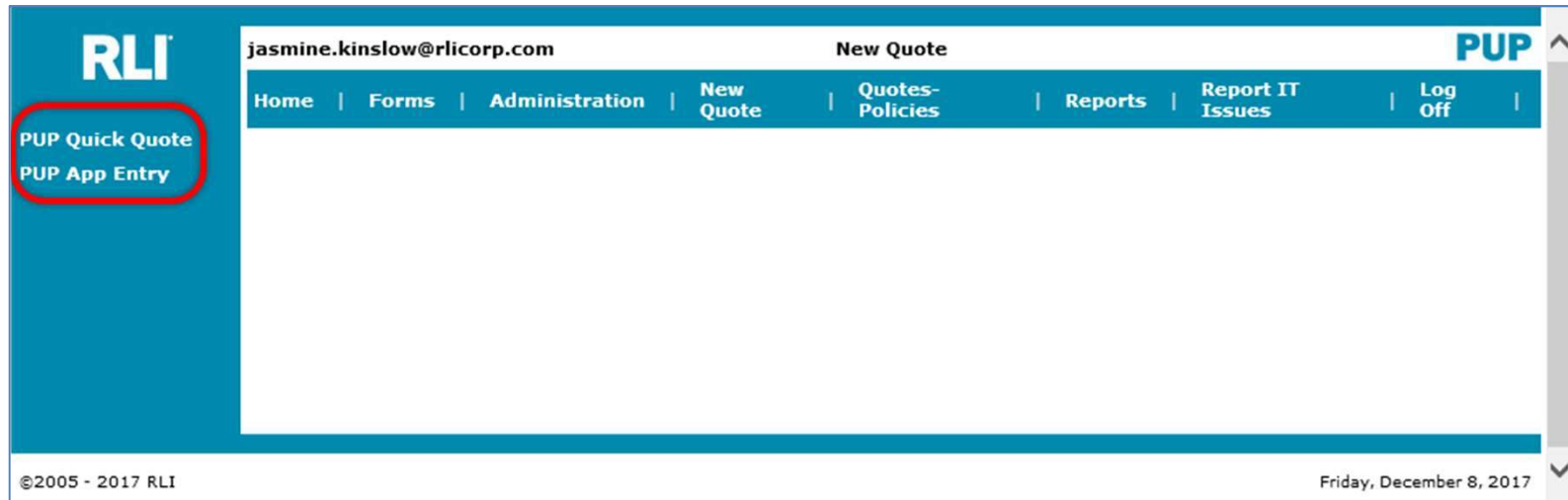
To start a new quote, click on the “Personal Umbrella” box, and then select “Start Quote” from the drop down.



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.”*







# 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** PUP

Home | Policies | Administration | Renew | Action | Quotes | Reports | Request IT | Log Off

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**Premium Options**

State/Zip:   Effective Date(MMDDYYYY):

Administrator:

Super/Producer Number:

Producer Number:

Subagent:

Other Info:

**Personal Information**

**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 names and the full last name.

First Name:  Middle Initial:  Last Name:

Second Named Insured

First Name:  Middle Initial:  Last Name:

**Primary Address**

Address:

City:  State:  Zip Code:

Phone Number:  E-Mail:

Same As Mailing:  Yes  No Additional Address:

By Rule:  No  Yes

**Rating Questions**

- How many motorized vehicles licensed for road use in your household?
- How many residential properties in your household?
- How many watercraft, OTHER than personal watercraft (seesawers, jet skis, etc.), are in your household?
- How many personal watercraft (seesawers, jet skis, etc.) in your household?
- What is the number of drivers? (Include drivers with a learners permit.)
- How many drivers under the age of 21? (Include drivers with a learners permit.)
- How many drivers age 21 or older?
- Are any drivers age 80 or older?
- How many moving violations have all drivers had within the last 3 years? (Include DWI/DUI violations within the last 3 years/3 year RTT.)
- How many at-fault accidents have all drivers had in the last 3 years?
- How many antique, classic and/or collectible vehicles are in your household?
- 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? (The ownership of a property should be counted. Vacant lots with no structure do not need to be counted under this question, but must mention assumptions underlying liability coverage.)
- How many acres of land owned or leased (including partial ownership)?
- How many drivers have been licensed less than one year, have a learners permit, or have a non-U.S. drivers license?
- 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 at-faulting related driving incidents have all drivers had in the last 3 years?

Do you need to purchase Excess Uninsured/Underinsured Motorist 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, driven or operated by, leased, rented, operated or insured during the policy period by you or any member of your household? If you elect to purchase Excess Uninsured/Underinsured Motorist (UIM) coverage the Required Basic UIM/UIM policy limits must be equal to the liability limits for the required Basic Automobile Liability Policy. You agree that this coverage applies equally to personal use of a vehicle covered under a Commercial Automobile Liability Policy.

LIMIT A	LIMIT B	LIMIT C
\$50,000 Bodily Injury per person/ \$50,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$50,000 Combined Single Limit per occurrence	\$250,000 Bodily Injury per person/ \$250,000 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 \$50,000 Combined Single Limit per occurrence (\$50,000 in Texas)	\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$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 uncorrelated incident.

**NOTE:** Limit C is available ONLY if all drivers in the household are age 21 and over. Limit C is NOT available if there are any drivers age 18 or over. Select any insurance method the most Standard II (NIA) in remarks, and/or any response make the max PUP Special. Excess UIM/UIM is not available if the selected 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 teaching agent.

**Underwriting Questions**

- Do you or any other driver had an arrest, citation or conviction for reckless driving, careless driving, negligent driving and/or a drivers license suspension (for reasons other than driving under the influence of alcohol or drugs), revoked or refused in the last 3 years?
- Do you or any member of your household ever been involved, charged with or convicted of a felony within the last 3 years?
- Do you or any member of your household have an occupation of a professional endorser, arbitrator, or media personality, or hold a position as an appointed or elected public figure at the federal or state level?
- Have you or any member of your household had a liability loss greater than \$50,000 in the past 3 years or 3 times the total liability claim or lawsuit pending against you or any member of your household?
- 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?
- How many drivers had more than 3 moving violations within the last 3 years? (Include DWI/DUI incidents within the last 3 years.)
- How many drivers ages 21 and under and/or age 80 or over had more than one driving incident within the past 3 years?
- Do you elect to purchase or reject Excess UIM/UIM coverage? Residents of FL, GA, IL, MI, VT and NY: Supervisor of a state mandated form regardless any response you may make to this Question 21. (If you wish to change limit entered to the question, please return to the rating section and change it there.)

**Limits of Liability**

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?

Confirmation:

Please Select a Signature Date:

01/01/2015 10:48 AM Monday, January 6, 2015

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 must enter an **email address**.

**RLI** jkinslow **PUP**

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

Premium Options

State/Zip  
 State: IL Zip Code: 61615 Effective Date(MMDDYYYY): 12/11/2017

**1** **Administrator**  
 SuperProducer Number:  [Get Agent List](#)  
 Producer Number: 48936 [Get SubAgent List](#)  
**SubAgent**  
 SubAgent: 50712

**2** **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

**3** **Primary Address**  
 Address1:   
 Address2:   
 City: PEORIA   
 State: ILLINOIS  Zip Code: 61615   
 Phone Number:  E-Mail:   
 Same As Mailing? Yes   
 RV Full timer No

**Rating Questions**  
 1. 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 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 <b>your</b> household?	<input type="text" value="1"/>
2. How many residential properties in <b>your</b> household?	<input type="text" value="1"/>
3. How many residential properties are owned or rented by you or any member of your household? 1-4 household family units are eligible and should be counted as one property.	<input type="text"/>
4. How many primary residences must have liability coverage under a policy containing comprehensive personal liability (including homeowners or farmowners). Seasonal, secondary or rental properties may have liability coverage under a comprehensive personal liability or premises liability policy. Do not include residential properties that are covered under a commercial general liability policy. Residential properties that are covered under a commercial or other non-personal premises liability policy are excluded from coverage.	<input type="text"/>
5. What is the total number of residential properties owned or rented by you or any member of your household? Partial ownership of a property should be counted.	<input type="text"/>
6. How many vacant lots with no structure do not need to be counted under this question, but must maintain appropriate underlying liability coverage.	<input type="text"/>
7. How many at fault accidents have all <b>drivers</b> had in the last 3 years?	<input type="text" value="0"/>
7a. Are there any antique, classic and/or collectible vehicles in your household?	<input type="text" value="0"/>
8. How many antique, classic and/or collectible vehicles are in your household?	<input type="text" value="0"/>
9. How many residential properties owned or rented by <b>you</b> or any <b>member of your household</b> 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.	<input type="text" value="0"/>
10. How many acres of land owned or leased (including partial ownership)?	<input type="text" value="0"/>
11. How many <b>drivers</b> have been licensed less than one year, have a learners permit, or have a non-U.S. drivers license?	<input type="text" value="0"/>
12. How many driving <b>incidents</b> have all <b>drivers</b> ages 21 and under and/or age 80 or over had within the last 3 years?	<input type="text" value="0"/>
How many alcohol/drug related driving <b>incidents</b> have all <b>drivers</b> had in the last 5 years?	<input type="text" value="0"/>
Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?	Reject <input type="text"/>



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 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.

**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, 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 - 250/500/50 or 300/300/50 or 300 CSL

LIMIT A	LIMIT B	LIMIT C
\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence	\$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence	\$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence

## Minimum required limits of automobile liability table.

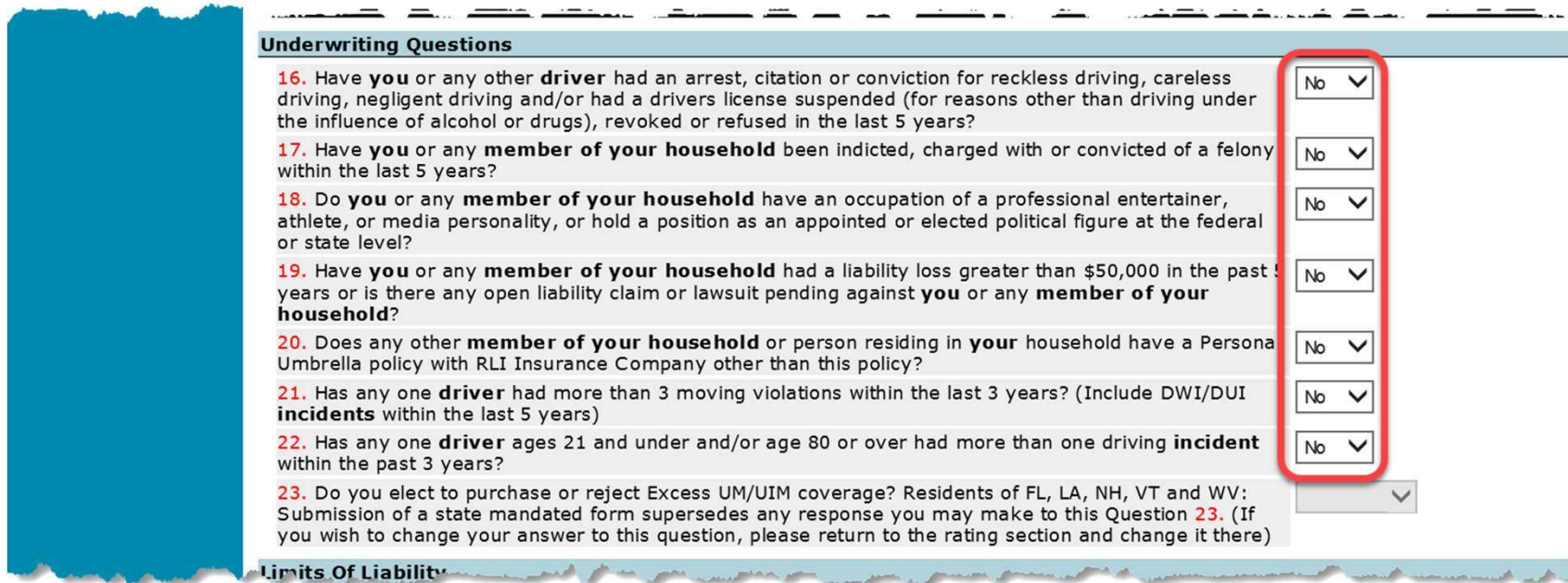
### Automobile Liability

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>		

Next answer RLI's underwriting questions.

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



**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?  ▾

17. Have **you** or any **member of your household** been indicted, charged with or convicted of a felony within the last 5 years?  ▾

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?  ▾

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**?  ▾

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?  ▾

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)  ▾

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?  ▾

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)  ▾

**Limits Of Liability**

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

Submission of a state-issued policy supersedes any previous response. If you wish to change your answer to this question, please return to the rating section and change it there)

**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?

**Confirmation**

Please Select a Signature Option:

**Rate** Save & Close Cancel Transaction

©2005 - 2017 RLI Monday, December 11, 2017

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.

The screenshot displays the RLI web application interface. At the top, 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 main content area is titled 'Members of Household' and shows a quote number of 6071412. Below this is a table of household members with the following columns: Member Number, Name, DOB, Age, License Number, and St Rel. Viol. DUIs Ac. The table contains one entry for Member Number 1. Below the table is an 'Editing Member Number: 1' form with the following fields: First Name (JASMINE), Middle Initial (empty), Last Name (TEST), Date of Birth (01/01/1980), Licensed? (Yes), License Number (123456789), State (ILLINOIS), # of Violations (include DUI/DWI) (0), # At Fault Accidents (0), Relationship to Insured (Policyholder), and Operator w/DUI/DWI? (No). The 'Save Member' button is circled in red, along with the 'Delete Member' and 'Cancel' buttons. The 'Add Member' and 'Done' buttons are also visible.



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.

The screenshot displays the RLI web application interface. At the top left is the RLI logo. The user's email address, jasmine.kinslow@rlicorp.com, is shown at the top right, along with a PUP status indicator. A navigation menu includes links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. In the left sidebar, 'Premium Options' and 'Members of Household' are highlighted with red circles. The main content area shows a 'Quote' section with the number 6077660, followed by a 'Members Of Household' section. A table lists one member: JASMINE TEST, with details for DOB (1/1/1980), Age (37), License Number (123456789), and St. Rel. Viol. DUIs Acc. (IL I 0 0 0). A red circle highlights the 'Add Member' button at the bottom left of the table.

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

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.

The screenshot shows the RLI Premium Options page. At the top, the user's email is jasmine.kinslow@rlicorp.com and the user ID is PUP. The navigation menu includes Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The quote number is 6077660. The state is IL and the zip code is 61615. The effective date is 12/14/2017. There is an Update button. Below this, there is a Confirmation section with a dropdown menu for signature options. The Premium Options table is as follows:

Limit	Premium
<input type="radio"/> 1 Million	\$ 155
<input type="radio"/> 2 Million	\$ 279
<input type="radio"/> 3 Million	\$ 372
<input type="radio"/> 5 Million	\$ 488

The Rating Tier is Preferred. There is a note about excess UM/UIM coverage. At the bottom, there are buttons for Rate, Quote Letter, Print App, Save & Close, Save, Continue, and Cancel Transaction. The Continue button is highlighted with a red circle and the number 4. The Quote Letter, Print App, and Save & Close buttons are also highlighted with red circles and numbers 1, 2, and 3 respectively.

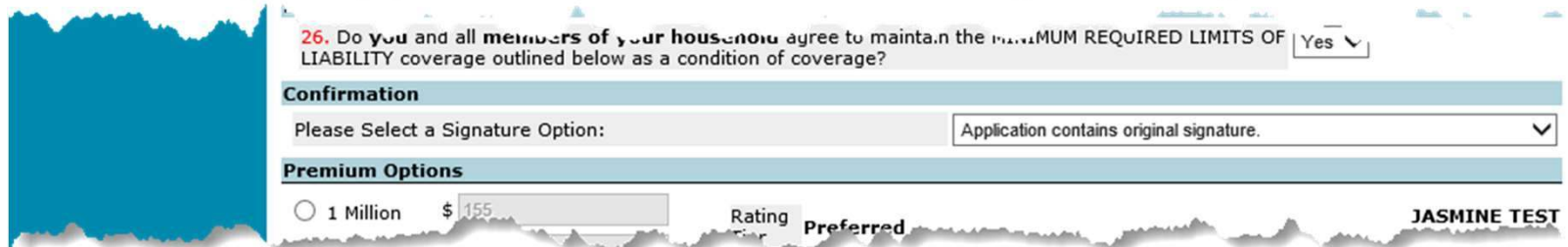
Note:

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. The user's name 'jkinslow' and the role 'PUP' are shown at the top right. A 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 'Members of Household', both highlighted with red circles. The main content area shows 'Quote: 6071412', 'State: IL', 'Zip Code: 61615', and 'Effective Date(MMDDYYYY): 12/11/2017'. Below this, there is a section for 'Rating Questions' with three questions and corresponding input fields. The first question is 'How many motorized vehicles licensed for road use in your household?' with a value of '3' entered. The second question is 'How many residential properties in your household?' with a value of '2' entered. The third question is 'How many watercraft, other than personal watercraft (canoes, jet skis, etc.), in your household?' with a value of '0' entered. The '3' and '0' values are highlighted with red circles. Below the rating questions, there is a section for 'Premium Options' with a dropdown menu for 'Please Select a Signature Option:' set to 'Application contains original signature.'. The 'Premium Options' section shows four radio button options: '1 Million \$ 277', '2 Million \$ 499', '3 Million \$ 665', and '5 Million \$ 873'. The 'Rating Tier' is set to 'Standard'. The name 'JASMINE TEST' and quote number '6071412' are displayed. At the bottom, there is a row of buttons: 'Rate' (highlighted with a red circle), 'Quote Letter', 'Print App', 'Save & Close', 'Save', 'Submit/Bind', and 'Cancel Transaction'. The footer contains the copyright notice '©2005 - 2017 RLI' and the date 'Monday, December 11, 2017'.

## Selecting “Application Contains Original Signature”:



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

**Confirmation**


Please Select a Signature Option:

**Premium Options**

1 Million \$ 155 Rating Preferred JASMINE TEST

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.



**RLI** jasmine.kinslow@rlicorp.com **PUP**

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

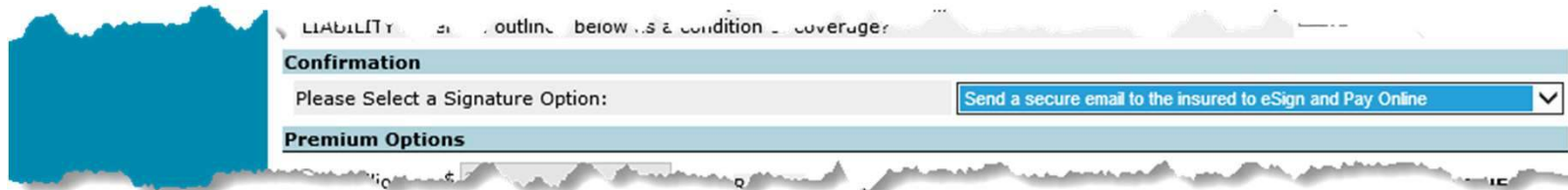
This is not finished until you have submitted your Complete, Signed, and Dated application and payment to your program administrator.

[Continue to Quote-Policies](#)

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



LIABILITY coverage outline below is a condition of coverage

**Confirmation**

Please Select a Signature Option:

**Premium Options**

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



LIABILITY coverage outline below is a condition of coverage

**Confirmation**

Please Select a Signature Option:

**Premium Options**

**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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