

The background of the slide features a low-angle shot of several umbrellas. One umbrella in the upper right is white and has a vibrant, hand-painted mural. The mural depicts a landscape with a large orange sun with intricate patterns, a blue sky with white clouds, and three stylized human figures in blue and green. Other umbrellas are in shades of grey and black, some partially visible. A solid blue horizontal band is overlaid across the middle of the image, containing the title text.

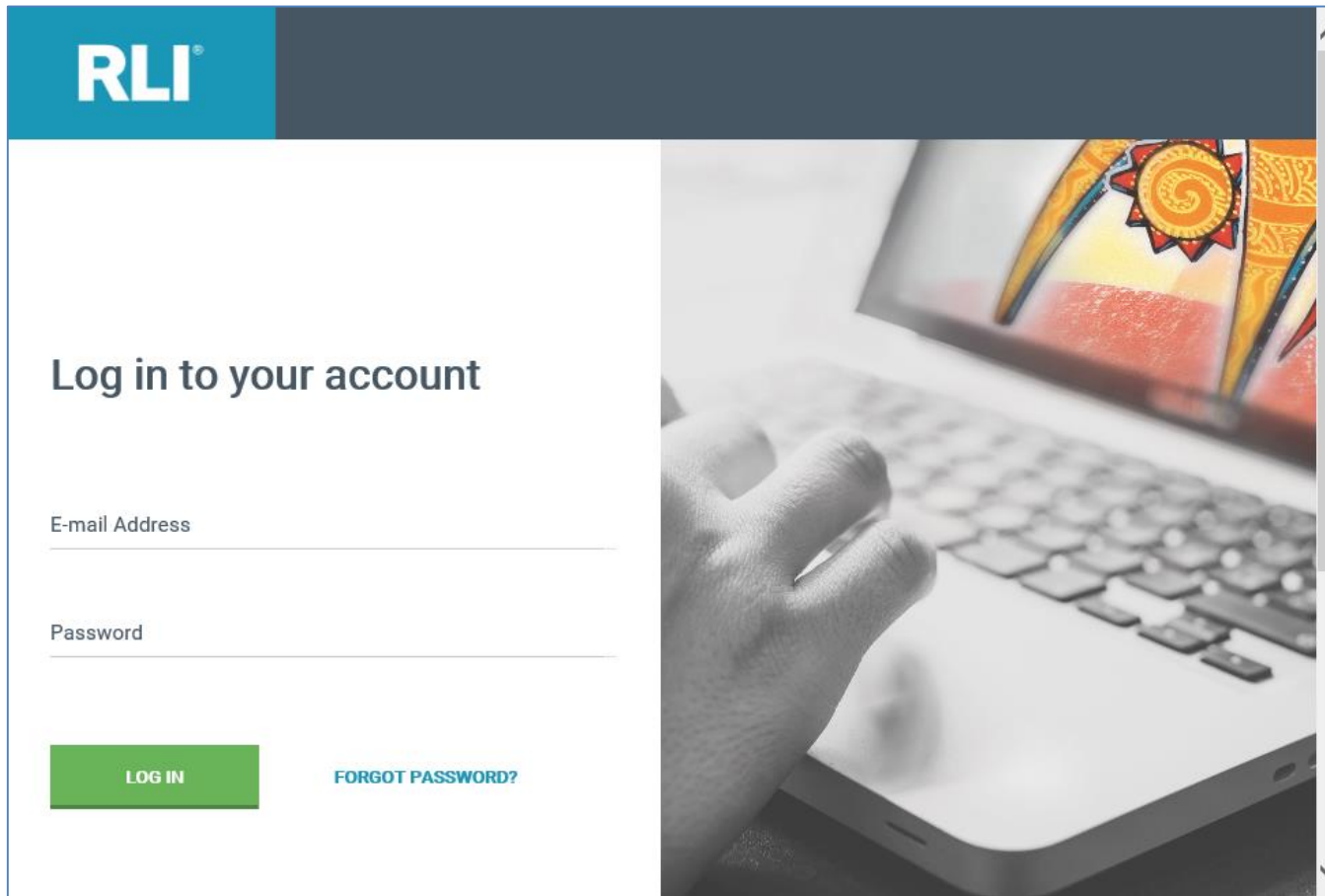
How to Quote New Business

(using PUP App Entry)

RLI[®]

DIFFERENT WORKS

Log in to RLI's portal at myportal.rlicorp.com using your registered E-mail and Password.

A screenshot of the RLI login portal. The top header features the RLI logo in white on a teal background, followed by a dark grey navigation bar. The main content area is split: the left side is white and contains the login form, while the right side is a large image of a hand typing on a laptop keyboard with a colorful, stylized sun graphic on the screen. The login form includes the heading "Log in to your account", an "E-mail Address" input field, a "Password" input field, a green "LOG IN" button, and a blue "FORGOT PASSWORD?" link.

RLI®

Log in to your account

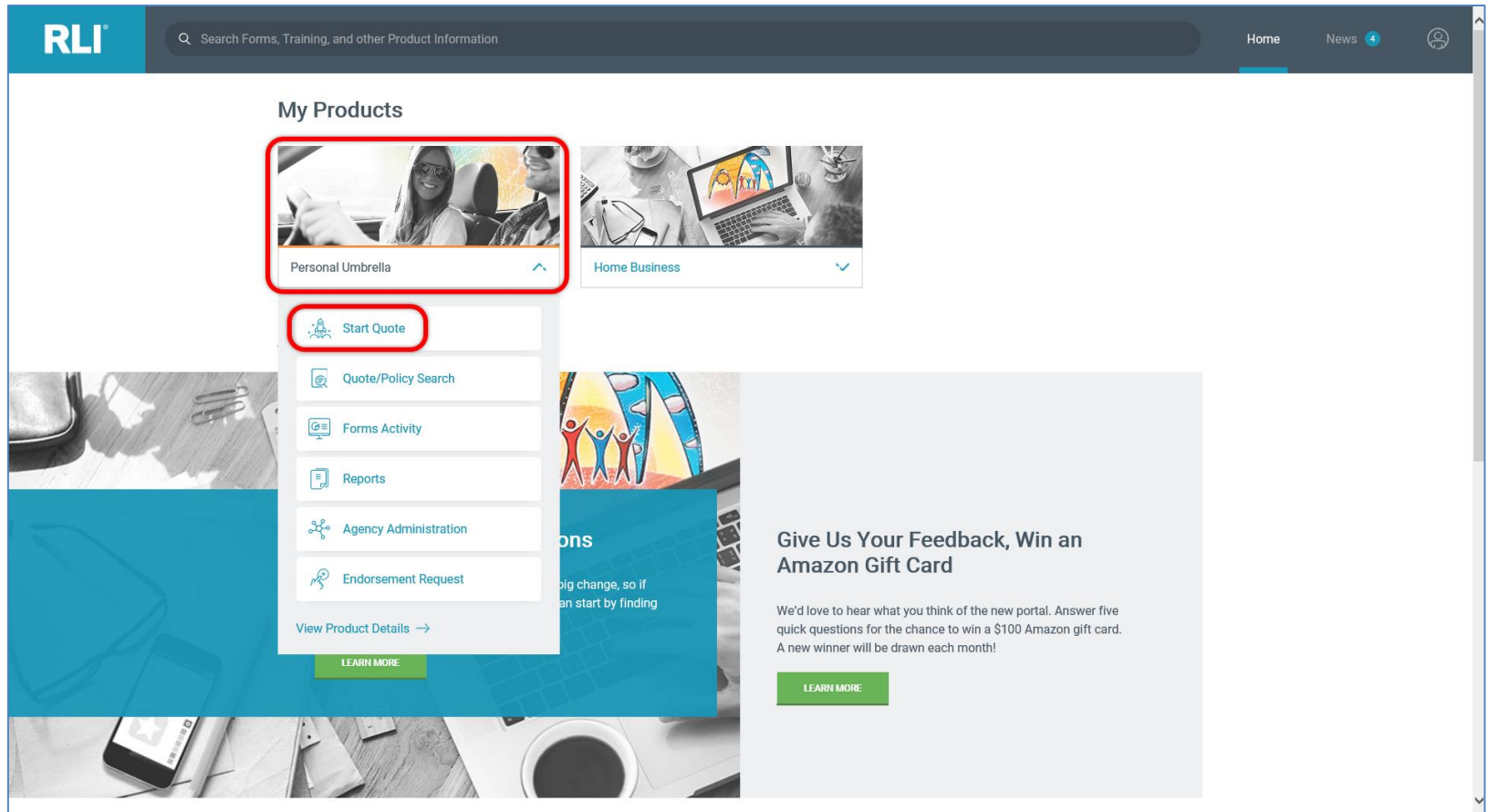
E-mail Address

Password

LOG IN [FORGOT PASSWORD?](#)

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 “PUP App Entry”.

Note: Both PUP App Entry & PUP Quick Quote 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. *(which applicant by be ineligible once answered)*

This instruction set will use “PUP App Entry.”

The screenshot displays the PUP training application interface. On the left, a blue sidebar contains the RLI logo and two options: 'PUP Quick Quote' and 'PUP App Entry'. The 'PUP App Entry' option is highlighted with a red rectangular box. The main content area has a white background with a blue header bar. The header bar includes the email address 'Ituptraining@gmail.com', the title 'New Quote', and the PUP logo. Below the header bar is a navigation menu with links: Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The main content area is currently blank.

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 5 days in the past and up to 60 days into the future.

RLI® PUP

ltpuptraining@gmail.com

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

State/Zip

Zip Code: 61616

Effective Date(MMDDYYYY):

February 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
X	X	X	X	X	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

Clear Cancel

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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 Home | Forms | Administration | New Quote | Latest Transaction | Quotes/Policies | Reports | Report IT Issues | Log Off **PUP**

Premium Options

State/Zip: State: Zip Code: Effective Date/Rebid/YYYY:

Administrator: Get Agent List
SuperProducer Number: Get SubAgent List
Producer Number:
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:

Primary Address
Address:
City: State: Zip Code:
Phone Number: E-Mail:
Same As Mailing: ☐ Yes ☐ No Additional Address:

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 (severinners, jet skis, etc.), are in your household?
- How many personal watercraft (severinners, 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.)
- 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 5 years/1 year RT.
- 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 antique, classic and/or collectible vehicles are in 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 on this question, but must mention appropriate 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 alcohol/drug related driving incidents have all drivers had in the last 3 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 (title 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) 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 the conditions apply 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	\$250,000 Bodily Injury per person/ \$250,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$250,000 Combined Single Limit per occurrence (\$25,000 in Texas)	\$100,000 Bodily Injury per person/ \$100,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$100,000 Combined Single Limit per occurrence

Note: Limit A is ALWAYS REQUIRED if any driver has an alcohol related 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 21 or under. If any response makes the risk Standard II (N/A in Hawaii), and/or if any response makes the risk PUP Special, Excess UIM/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 broker/agent.

Underwriting Questions

- 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?
- Have you or any member of your household been indicted, charged with or convicted of a felony within the last 5 years?
- 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?
- Have you or any member of your household had a liability loss greater than \$50,000 in the past 3 years or 3 there any open 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?
- Has any one driver had more than 3 moving violations within the last 3 years? (Include DWI/DUI incidents within the last 3 years)
- 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?
- Do you elect to purchase or reject Excess UIM/UIM coverage? Residents of FL, LA, NH, VT and WV: Submission of a state mandated form supercedes 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 0 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 Option:

60000 - 3018.RL
Monday, January 6, 2014

1. Producer and SubAgent numbers will be prefilled.
2. You are allowed two named insureds, both must live in the same residence. You cannot list an estate, trust or LLC as a Named Insured.
3. Enter the insured's primary residential address and contact information including phone and email (*required*). **DO NOT USE AGENCY EMAIL.** If insured does not have an email, enter none@none.com

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

RLI PUP
ltuptraining@gmail.com

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

Premium Options

State/Zip
State: IL Zip Code: 61615 Effective Date(MMDDYYYY): 02/02/2024
Update

Administrator
48936

SubAgent
SubAgent: 50712

Other Info

Named Insured
NOTE: Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC. 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

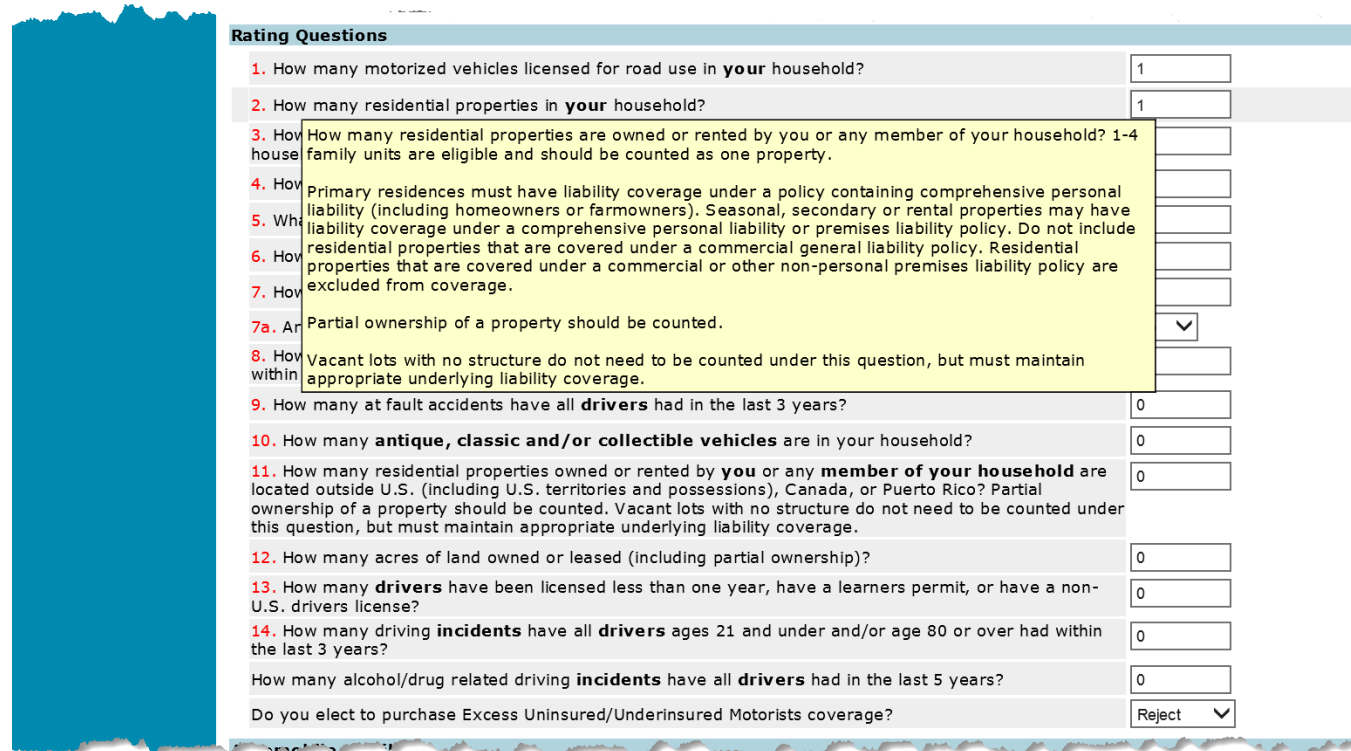
Primary Address
Address1:
Address2:
City: PEORIA
State: ILLINOIS
Zip Code: 61615
Phone Number:
E-Mail:
Same As Mailing? Yes ☐ No ☐
RV Full timer No ☐
Third-Party Addresses? No ☐

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?	1
2. How many residential properties in your household?	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.	
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.	
5. What is the primary residence?	
6. How many residential properties are owned or rented by you or any member of your household?	
7. How many residential properties are owned or rented by you or any member of your household?	
7a. Are you a partial owner of a property? Partial ownership of a property should be counted.	▼
8. How many vacant lots with no structure do not need to be counted under this question, but must maintain 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 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.	0
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 non-U.S. drivers license?	0
14. How many driving incidents have all drivers ages 21 and under and/or age 80 or over had within the last 3 years?	0
How many alcohol/drug related driving incidents have all drivers had in the last 5 years?	0
Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?	Reject ▼

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

Note:

- ❑ The basic underlying limits, Limit A, are 500/500 or 500 combined single limit.
- ❑ All risks with a DUI in the household or if the applicant resides in California are required to maintain limit A of 500/500 or 500 combined single limits.
- ❑ Some risks have the ability to buy back limits from underlying auto limits of 100/300, 250/500, or 300/300.
 - ❑ 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, and/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 - 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 **automobiles** 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 an **automobile** covered under a Commercial Automobile Liability.

<u>LIMIT A</u>	<u>LIMIT B</u>	<u>LIMIT C</u>
\$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 Note: The choice of Limit B results in a higher premium.	\$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 are between age 22 and 69. Limit C is NOT available if any response makes the risk Standard II; 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.		

NOTE: If no autos in household, the applicant is still required to select an auto limit they will maintain *should* they operate any vehicle.

CA & FL Residents: For New Business, clients are *required* to maintain a minimum underlying auto limit of 500/500/50 (Limit A).

Next answer RLI's underwriting questions.

An answer of "yes" to any one of the underwriting questions will 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?

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)

▼

Limits Of Liability

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

Submit... of a State... (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:

- **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. **Quickest option with no paper application going back & forth.**
- **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.

If neither above option is selected, the application needs to be printed. The completed and signed application with payment needs to be sent to the Administrator to bind. **RLI no longer accepts physical checks.** Contact the state Administrator on how to submit the signed application and payment.

Coverage is not bound until receipt, acceptance and policy issued by RLI.

**Not all signature/payment options are available. Please contact your administrator for questions regarding available payment options

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.

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

Premium Options

Members of Household

Quote: 3835496

Members Of Household

Complete the following for all drivers AND members of your household ages 14 and older. Individuals listed below are for determining policy eligibility; if a policy is issued, coverage for each is determined pursuant to the policy provisions.

Results 1-1 of 1

Member Number	Name	DOB	Age	License Number	St	Rel.	Viol.	DUIs	Acc.
1							0	0	0

Editing Member Number: 1

First Name: JASMINE Middle Initial: Last Name: TEST

Date of Birth: 01/01/1990 Licensed/Permitted? Yes License Number: T123456789

State: ILLINOIS Relationship to Insured: Policyholder

of Violations (include DUI/DWI) 0 # At Fault Accidents 0 Operator w/DUI/DWI? No

Save Member Delete Member Cancel

Add Member Done

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.

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

Premium Options

Members of Household

Quote

Quote: 3835494

Members Of Household

Complete the following for all drivers AND members of your household ages 14 and older. Individuals listed below are for determining policy eligibility; if a policy is issued, coverage for each is determined pursuant to the policy provisions.

Results 1-1 of 1

Member Number	Name	DOB	Age	License Number	St	Rel.	Viol.	DUIs	Acc.
1	JASMINE TEST	1/1/1990	34	T123456789	IL	I	0	0	0

Add Member

Done

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" after selecting a Signature Option (*refer to slide 12 or slide 17*).

RLI ltpuptraining@gmail.com **PUP**

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

Premium Options
Members of Household

Quote: 3835488

State/Zip
State: IL Zip Code: 61615 Effective Date(MMDDYYYY): 02/02/2024 **Update**

Confirmation
Please Select a Signature Option: Send a secure email to the insured to eSign and Pay Online

Premium Options

<input type="radio"/> 1 Million	\$ 224	Rating Tier Preferred Excess UM/UIM coverage is available with limits of \$1 million at an additional cost of \$163. Click Here to Purchase Excess UM/UIM coverage	TEST TEST 3835488
<input type="radio"/> 2 Million	\$ 403		
<input type="radio"/> 3 Million	\$ 538		
<input type="radio"/> 5 Million	\$ 706		

Rate **Quote Letter** **Print App** **Save & Close** **Save** **Continue** **Cancel Transaction**

1 2 3 4

Friday, February 2, 2024

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 mhpuptraining@gmail.com **PUP**

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

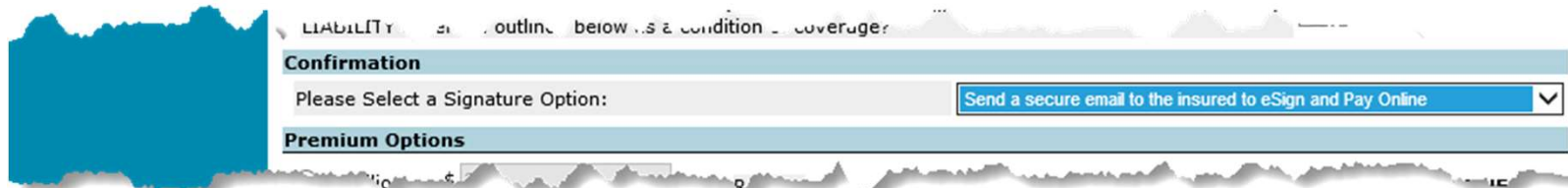
Quote
Quote: 3835495

Confirmation
Please Select a Signature Option:

Quote Letter Print App Save & Close Save Bind

Selecting an eSignature and Online Payment Option:

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



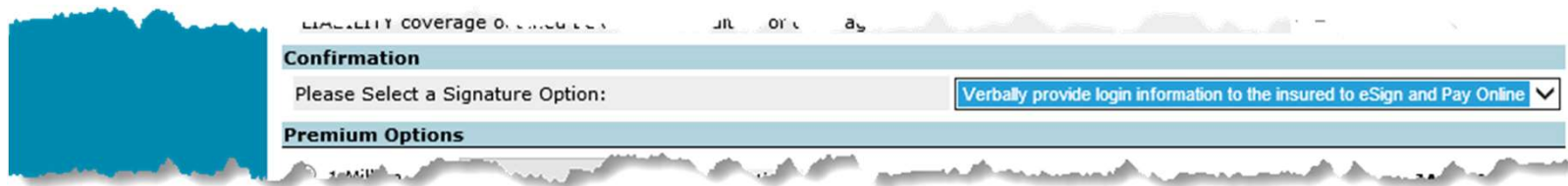
LIABILITY coverage outline below is a condition of coverage

Confirmation

Please Select a Signature Option: Send a secure email to the insured to eSign and Pay Online

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: Verbally provide login information to the insured to eSign and Pay Online

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.

The background of the entire image is a photograph of several open umbrellas. Most are plain grey or white. One umbrella in the upper right quadrant features a vibrant, hand-drawn style illustration. This illustration depicts a bright sun with a spiral pattern in the upper left, three stylized human figures in red, blue, and red holding hands in the center, and a blue, cloud-like shape on the right. The background of the illustration is a mix of orange, yellow, and red. The overall scene suggests a rainy day with people using umbrellas.

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