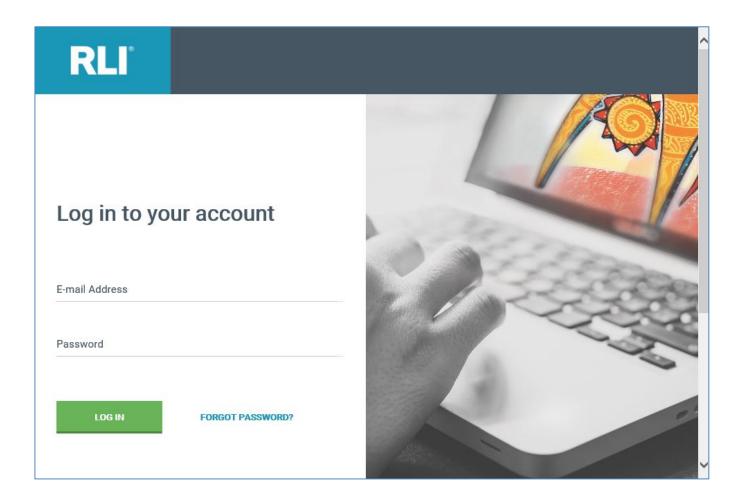


# How to Quote New Business (using PUP App Entry)





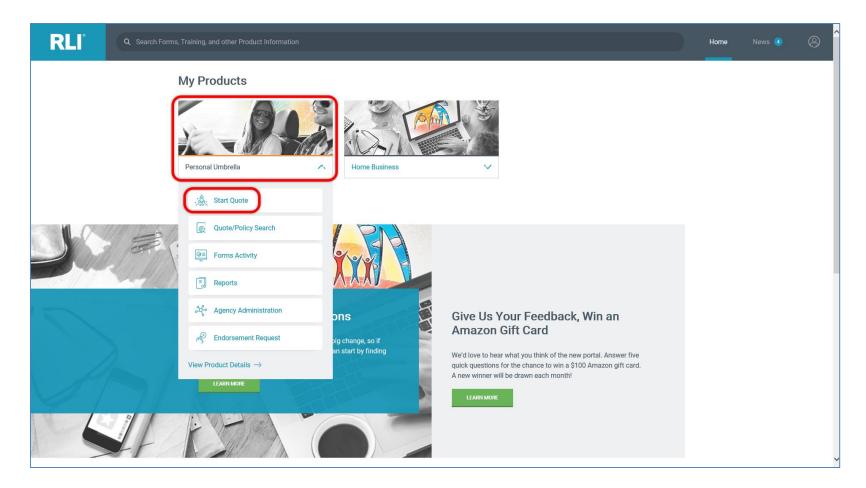
## Log in to RLI's portal at <u>myportal.rlicorp.com</u> using your registered E-mail and Password.



RLI®

Welcome to the RLI Portal.

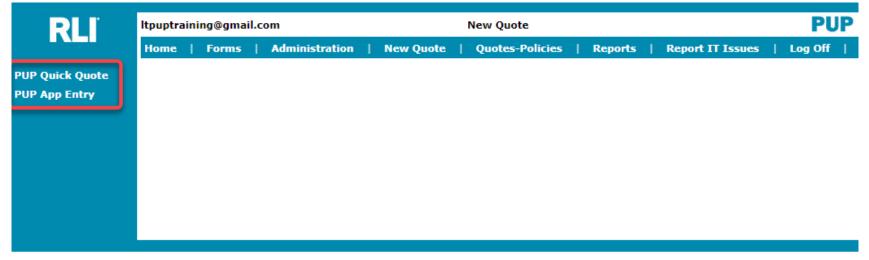
To start a new quote, click on the "Personal Umbrella" box, and then select "Start Quote" from the drop down.



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."



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

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

The system will allow you to select an effective date up to 5 days in the past and up to 60 days into the future.

	ng@gmail.	com										PU	Ρ		
Home	Forms	Administra	tion	New Quote	1	Quotes-Policies	Reports	Re	port IT I	ssues	Log	Off	1		
State/Zip										-					
						Effectiv	ve Date(MMDI	ovvvv):							
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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.)

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	Administration	Quote	Transaction	Policies	Reports	Issues
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Administrator						
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SubAgent			K SubAgem List			
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Other Info	1					
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Second Named Ins	sured					
First Name	Middle Initia	al		st Name		
Primary Address						
Address1: Address2:						
Address2: City:	PEORA		~			
State:	LLINOS V		Zip Code		61615	
Phone Number:		]	E-Mail:	_		
Same As Mailing? Yo RV Full timer N			Additional i	Addresses?	• •	
RV Full timer N		_	_	_	_	
	orized vehicles licensed fo	r road use in	your household?			
2. How many resid	dential properties in your	household?				
3. How many wate household?	ercraft, OTHER than perso	nal watercraft	(waverunners, jet	skis, etc.), a	e in your	
4. How many pers	ional watercraft (waverun	ners, jet skis,	etc.) in your house			
	mber of drivers? (Include					
	vers under the age of 22?		ers with a learners	permit.)		
	vers are age 70 and over? ers age 80 or older?					
8. How many mov	ers age 50 or older? ring violations have all dri ears/3 year MT.	wers had with	in the last 3 years?	Include DW	/DUI violations	
	ears/3 year MT. sult accidents have all driv					
10. How many and	tique, classic and/or co	ollectible ve	hicles are in your	household?		_
11. How many resiling and nutrated putrated	idential properties owned 5. (Including U.S. territoris operty should be counted. must maintain appropriate	or rented by	you or any memb	er of your h	ousehold are	
ownership of a pro this question, but r	sperty should be counted. must maintain appropriate	Vacant lots w	ith no structure do ability coverage.	not need to b	e counted unde	r
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<ol> <li>How many driv the last 3 years?</li> </ol>	ving incidents have all d	rivers ages 2	1 and under and/o	rage 80 or o	ver had within	
How many alcohol	(idrug related driving inci	dents have a	I drivers had in th	e last 5 year	17	
						~
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	coverage the Required Bar	sic UN/UIM po lie Uability Po	licy limits must be licy. You spree the	equal to the t this condition		
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Motorist (UM/UIM) c liability limits for the applies equally to p Policy.	e required Basic Automobi versional use of a vehicle o	overed under	a Commercial Auto			
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	IMIT A	1	LIMIT B			
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- 1. Producer and SubAgent numbers will be prefilled.
- 2. You are allowed two named insureds, both must live in the same residence. 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 <u>must</u> enter an **email address**.

RLI	Itpuptraining@gmail.com PUP
	Home   Forms   Administration   New Quote   Quotes-Policies   Reports   Report IT Issues   Log Off
Premium Options	State/Zip State: IL Zip Code: 61615 02/02/2024 Update
1	Administrator 48936 SubAgent
	SubAgent: 50712 Other Info
2	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
3	Primary Address         Address1:         Address2:         City:       PEORIA         State:       ILLINOIS         Phone Number:         Same As Mailing?       Yes V         RV Full timer       No V

Questions 1 through 15 are the rating questions. To see a more comprehensive description of an application question, hover your curser over the question.

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

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

	· Karakatar			
Rating (	Questions			
1. Hov	w many motorized vehicles licensed for road use in <b>your</b> household?	[	1	
2. Hov	w many residential properties in <b>your</b> household?	[	1	
house <mark>4.</mark> Hov	How many residential properties are owned or rented by you or any member of your hous family units are eligible and should be counted as one property. Primary residences must have liability coverage under a policy containing comprehensive liability (including homeowners or farmowners). Seasonal, secondary or rental properties	personal		
6. Hov	liability (including homeowners or farmowners). Seasonal, secondary or rental properties liability coverage under a comprehensive personal liability or premises liability policy. Do residential properties that are covered under a commercial general liability policy. Resideu properties that are covered under a commercial or other non-personal premises liability p excluded from coverage.	ntial		
<mark>7a.</mark> Ar	Partial ownership of a property should be counted.		$\sim$	
<mark>8.</mark> Hov within	Vacant lots with no structure do not need to be counted under this question, but must mai appropriate underlying liability coverage.	ntain		
9. Hov	w many at fault accidents have all <b>drivers</b> had in the last 3 years?		0	
10. Ho	ow many antique, classic and/or collectible vehicles are in your household?	[	0	
locate owner	ow many residential properties owned or rented by <b>you</b> or any <b>member of your househ</b> id outside U.S. (including U.S. territories and possessions), Canada, or Puerto Rico? Partial rship of a property should be counted. Vacant lots with no structure do not need to be coun uestion, but must maintain appropriate underlying liability coverage.	L	0	
12. Ho	ow many acres of land owned or leased (including partial ownership)?	[	0	
	ow many <b>drivers</b> have been licensed less than one year, have a learners permit, or have a lrivers license?	a non-	0	
	ow many driving <b>incidents</b> have all <b>drivers</b> ages 21 and under and/or age 80 or over had st 3 years?	l within	0	
How n	nany alcohol/drug related driving incidents have all drivers had in the last 5 years?	[	0	
Deve	u elect to purchase Excess Uninsured/Underinsured Motorists coverage?	[	Reject	

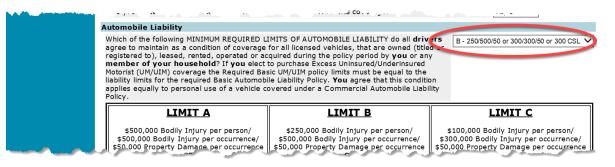
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Next you must elect the underlying auto limits that the applicant agrees to maintain.

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.



### 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.

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.	\$50,000 Property Damage per occurrence	<ul> <li>\$100,000 Bodily Injury per person/</li> <li>\$300,000 Bodily Injury per occurrence/</li> <li>\$50,000 Property Damage per occurrence</li> </ul> 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 cover	age limits you are carrying, OR are requi local brokering agent.	red to carry, we suggest contacting your							

**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 <u>New</u> 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	
<b>16.</b> Have <b>you</b> or any other <b>driver</b> 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?	<u>vo</u>
17. Have you or any member of your household been indicted, charged with or convicted of a felony within the last 5 years?	vo 🗸
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?	<u>vo</u>
19. Have you or any member of your household had a liability loss greater than \$50,000 in the past years or is there any open liability claim or lawsuit pending against you or any member of your household?	<u>vo</u>
20. Does any other <b>member of your household</b> or person residing in <b>your</b> household have a Persona Umbrella policy with RLI Insurance Company other than this policy?	vo 🗸
21. Has any one <b>driver</b> had more than 3 moving violations within the last 3 years? (Include DWI/DUI <b>incidents</b> within the last 5 years)	vo 🗸
22. Has any one <b>driver</b> ages 21 and under and/or age 80 or over had more than one driving <b>incident</b> within the past 3 years?	vo 🗸
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 guestion, please return to the rating section and change it there)	

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



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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.

RLI	ltpuptrain	ning@gma	il.com									PUP
	Home	Forms	Administra	tion   N	lew Quote	Quo	tes-Policies	Repo	ts   Re	port IT Issu	ies	Log Off
Premium Options	Quote Quote:	28	35496									
Members of Household	-	Of House										
			ng for all drivers A s issued, coverag						duals listed	below are fo	r detern	nining policy
	Member							Licen	5.0	Result		1 < < > >
	Number	N	ame		D	ов	Age	Numb		St		ol. DUIs Acc
	L Editing M	lember Nu	umbore 1								0	0 0
	First Name		JASMINE			Middl	e Initial:		Last Name	e: TEST		
	Date of Bi	rth:	01/01/1990			Licen	sed/Permitted	]? Yes ✔	License Number:	T123456	6789	
	State:		ILLINOIS	~				Relation	ship to Insu	red: Policyho	older 🗸	
	# of Violat (include D		0			# At	Fault Accident	ts 0	Operator w/DUI/DW	VI? No 🗸		J
	( 📙 Save	. Member	Delete	Member	🔀 Cano	el						
	Add Me	ember )	X Done									

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

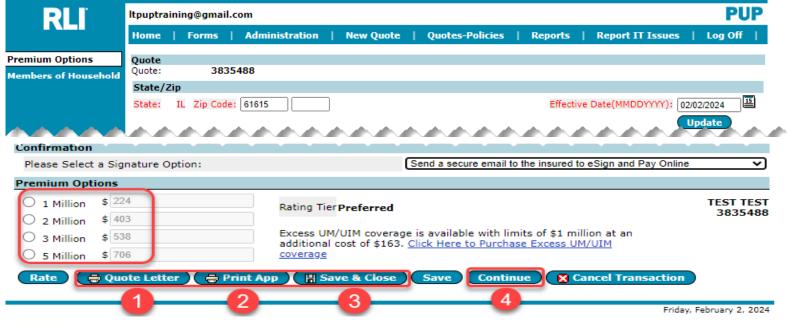
RLI	ltpuptrain	ing@gmail.com					PU	JP
	Home	Forms   Administration	New Quote   Quot	es-Policies	Reports   Re	port IT Issu	es   Log Off	T
um Options	Quote							
rs of Household	Quote:	3835494						
	Members	Of Household						
	Complete t	Of Household the following for all drivers AND if a policy is issued, coverage fo					determining polic	
	Complete t	the following for all drivers AND				Results		> >
	Complete t eligibilty; i Member	the following for all drivers AND if a policy is issued, coverage fo	r each is determined pursuant	to the policy	provisions.	Results	s 1-1 of 1 🗹 🖉	Acc.



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:

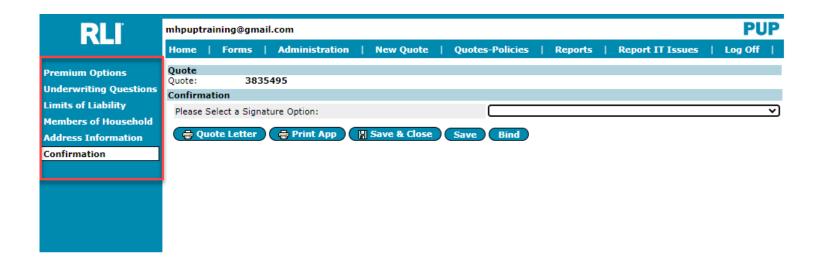
- 1. Generate a quote letter for your applicant.
- 2. Print the application (it will only include application answers that have completed at the time you click this option).
- 3. You may Save and Close the quote.
- 4. Or select a limit and click "Continue" after selecting a Signature Option (*refer to slide 12 or slide 17*).



#### 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.

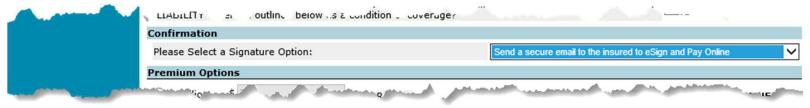
If you add drivers, be sure to go back into the Members of Household section to enter their details prior to submitting the application.





### Selecting an eSignature and Online Payment Option:

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



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

and the second second	LIACLELLY COVERAGE ON CONCURSION JR	Oric	as	A second s
	Confirmation			
	Please Select a Signature Option:			Verbally provide login information to the insured to eSign and Pay Online $\checkmark$
	Premium Options			
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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.

