How to Quote New Business (using PUP Quick Quote)



RLI PERSONAL UMBRELLA • WWW.RLIPUP.COM

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



Most users will be able to select the 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."



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

The effective date can be typed (MM/DD/YYYY) 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.

mhpuptrainir	ng@gmail.com					PUF
Home F	Forms Administration	New Quote	Quotes-Policies	Reports	Report IT Issues	Log Off
State/Zip						
ip Code: 6	31517		Effective I	Date(MMDDYYY	Y): 02/02/2024 🖽	
			-			Continue

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.)

Prem

Home Forms	Administration	New Quote	Quotes-Policies	Reports	s Report IT Iss	ues
State/Zip						_
State: IL Zip Code	61517			Effe	ctive Date(MMDDYYY)	0: 02/02/
						000
Administrator Producer Number:	48936		Get SubAgent Lis	it.		
SubAgent				-		
SubAgent:						
Other Info	_					
Named Insured						
NOTE: Named Insured	I may be a maximum o	f two individuals,	provided both individ	uals reside in	the same household.	This polic
issued in the name of a policy using the first a	an estate, trust or LLC. ad middle initials and ti	If the first, middl he full last name	e and last name cons	ists of more ti	han 28 characters tota	d, we will
First Name	Mid	dle Initial		Last Name		
Second Named Insu	red					
Clash Name	Mid			Look Norma		
First Name	Mio			Last Name		
L How many auton	obiles are liceosed for	mad use in your	bousebold?			_
1. How many auton	tion and the second	howeehold?	nousenulu?			_
3. How many reside	raft, OTHER than perso	nal watercraft (w	aveRunners, Jet Skis	etc.), are in a	vour	_
household?	para para					
4. How many person	al watercraft (Jet Skis,	WaveRunners etc	.) in your household	?		
5. What is the total i	number of drivers? (In	clude drivers wit	h a learner's permit o	r valid driver's	s license)	
6. How many driver	s are under the age of	22? (Include driv	ers with a learner's p	permit)		
7. How many driver	s are age 70 and over?	1				
7a. Are any drivers	age 80 or older?				×	'
 How many moving within the last 5 year 	g violations have ALL d rs.	rivers had within	the last 3 years? Inc	lude DWI/DUI	violations	
9. How many at-fau	It accidents have all o	irivers had in the	last 3 years?			
10. How many antig	ue, classic or collectible	automobiles are	owned (titled or regis	tered to) by y	ou or any	-
member of your hou	sehold? (Max. of 25)					
 Of the number of rented to you or any possessions) or Can; 	f residential properties member of your house ada? (Max. of 5)	from question 2, shold are located (how many residential outside of the U.S. (in	properties ow including its ter	rritories and	
12. How many acres	of land owned or lease	ed (including parti	al ownership)?			
13. How many drive	rs have been licensed	less than one yea	r, have a learner's pe	rmit, or have a	a non- U.S.	
14a How many drive	ing incidents have all d	rivers ager 21 and	under had within th	e last 3 veare	,	
14b. How many driv	ing incidents have all d	rivers ages 80 and	over had within the	last 3 years?		
15. How many alroh	ol/drug related driving	incidents have a	I drivers had in the	last 5 years?		
Do you elect to pure	hase Excess Uninsured	/Underinsured Ma	torists coverage?	and a years?		
Automobile Liebille	man excess ormisured	y childring and Mo	contacts coverage?			•
Which of the followin	MINIMUM REQUIRED	LIMITS OF AUTOR	OBILE LIABILITY do	all drivers		
agree to maintain as	a condition of coverage	for all automob	iles that are owned (titled or		
registered to), leased member of your bo	I, rented, operated or a usehold? If you elect	cquired during the to purchase Excer	e policy period by you ss Uninsured/Underin	or any sured Motorist	t	
(UM/UIM) coverage,	the Required Basic UM/	UIM policy limits	must be equal to the	liability limits		
personal use of an a	stomobile covered une	der a Commercial	Automobile Liability.	ies equally to		
IT			LIMIT B		LIMT	тс
<u> </u>			<u>carrier o</u>		<u></u>	
\$500,000 Bodil \$500,000 Bodily	y Injury per person/ Injury per occurrence/	\$250,000 \$500,000 E	Bodily Injury per pe bodily Injury per occu	rson/ rrence/	\$100,000 Bodily Inj \$300,000 Bodily Injur	jury per oc
\$50,000 Property	Damage per occurrence	\$50,000 Pro	perty Damage per oc	currence \$	50,000 Property Dam	age per
\$500,000 Comb	ined Single Limit per	\$300,000	OR Bodily Injury per pe	rson/		
000	urrence	\$300,000 E	lodily Injury per occu	rrence/ No	ote: Limit C is availabl	e only if
Note: Limit A is AL	WAYS REQUIRED If a	\$50,000 Pro	OR Damage per oc	currience ai	available if any respor	o 69. Lin Ise maki
driver has an al	cohol related incident.	\$300,000	Combined Single Lim	it per S	tandard II; and/or if a	iny respo
			occurrence	av	vailable if you maintain	n Limit C
		Note: The	choice of Limit B resu	ilts in a	of Limit C results in a	higher p
			nigher premium.			
15						
If you are unsure	what underlying co	verage limits yo	u are carrying, OR	are required	to carry, we sugges	st conta

- 1. Producer and Sub-Producer numbers will be prefilled.
- 2. Named Insured can only be a maximum of two individuals, provided both individuals reside in the same household. *The 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.

RLI	mhpuptraining@gmail.com PU	P
	Home Forms Administration New Quote Quotes-Policies Reports Report IT Issues Log Off	
Premium Options	State/Zip	
	State: IL Zip Code: 61517 Effective Date(MMDDYYYY): 02/02/2024	
	Administrator	
	Producer Number: 48936 Get SubAgent List	
	SubAgent	
	SubAgent: 99999	_
	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 th policy using the first and middle initials and the full last name.	† 8
	First Name MIKE Middle Initial Last Name TEST	
	Second Named Insured	4
	First Name Middle Initial Last Name	
	Rating Questions	

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.

ting Questions		
1. How many automobiles are licensed for road use in your household?]
How many automobiles (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), re	nted, leased,	or regularly oper
3. Include company vehicles provided for your use, or for use by a member of your household. All vehicles li	icensed for ro	ad use need to b
4. Those that reside in a recreational vehicle (RV) full-time should count their RV as a vehicle and not a resi	dence. Do not	t count antique/c
5. What is the total number of drivers? (Include drivers with a learner's permit or valid driver's license)		
6. How many drivers are under the age of 22? (Include drivers with a learner's permit)		j
7. How many drivers are age 70 and over?		j
7a. 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.]
9. How many at-fault accidents have all drivers had in the last 3 years?)
 How many antique, classic or collectible automobiles are owned (titled or registered to) by you or any member of your household? (Max. of 25)]
11. Of the number of residential properties from question 2, how many residential properties owned by or rented to you or any member of your household are located outside of the U.S. (including its territories and possessions) or Canada? (Max. of 5)]
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 learner's permit, or have a non- U.S. driver's license?]
14a. How many driving incidents have all drivers ages 21 and under had within the last 3 years?)
14b. How many driving incidents have all drivers ages 80 and over had within the last 3 years?)
15. 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?	~]

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

Note:

- 1. The basic underlying limits, Limit A, are 500/500 or 500 combined single limit.
- 2. All households with a DUI in the household, are required to maintain limit A 500/500/50 or 500 combined single limit.
- 3. For a higher premium, the insured can maintain 250/500/50 or 300/300 or 300 combined single limit.
- 4. 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.



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

Automobile Liability

Which of the following MINIMUM REQUIRED LII agree to maintain as a condition of coverage for registered to), leased, rented, operated or acquine member of your household? If you elect to (UM/UIM) coverage, the Required Basic UM/UII for the required Basic Automobile Liability Polic personal use of an automobile covered under	MITS OF AUTOMOBILE LIABILITY do all driver or all automobiles that are owned (titled or uired during the policy period by you or any purchase Excess Uninsured/Underinsured Mot M policy limits must be equal to the liability lin cy. You agree that this condition applies equally a Commercial Automobile Liability.	A - 500/500/50 or 500 CSL
LIMIT A \$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$500,000 Combined Single Limit per occurrence Note: Limit A is ALWAYS REQUIRED if any driver has an alcohol related incident.	LIMIT B \$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Combined Single Limit per occurrence Note: The choice of Limit B results in a higher premium.	LIMIT C \$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence Note: Limit C is available only if ALL drivers 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	red to carry, we suggest contacting your

local brokering agent.

Cancel Transaction

Rate

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 on 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.

Premium Opt	ions		
\bigcirc 1 Million	\$ 318	Deline The Destand	MIKE TEST
O 2 Million	\$ 442	Rating HerPreferred	3835495
O 3 Million	\$ 535	Excess UM/UIM coverage with \$1 million limits is included at a cost	
O 5 Million	\$ 651	of \$163. <u>Click Here to remove Excess UM/UIM coverage</u>	
Rate	🛢 Quote Letter 🛛 😭 Save	& Close Save Continue	

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.

Premium Options		
 1 Million \$ 318 2 Million \$ 442 	Rating Tier Preferred	MIKE TEST 3835495
O 3 Million \$ 535 O 5 Million \$ 651	Excess UM/UIM coverage with \$1 million limits is included at a cost of \$163. <u>Click Here to remove Excess UM/UIM coverage</u>	
Rate Quote Letter 🛛 Save a	& Close Save Continue	



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	mhpuptraining@gmail.com	PUP
	Home Forms Administration New Quote Quotes-Policies Reports Report IT Issu	ies Log Off
Premium Options	Quote Ouote: 3835495	
Underwriting Questions	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 driver's 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. Are you or any member of your household recognized nationally or locally as a celebrity or famous person (i.e., professional entertainer, athlete, media personality, etc.) and/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 are you or any member of your household aware of any facts, circumstances, incidents, or accidents that could give rise to a claim or lawsuit, whether valid or not, which might directly or indirectly involve 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 80 and over had more than one driving incident within the past 3 years?	1
	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)	ie 🗸
	Quote Letter Save & Close Save Continue	

RLI

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.

RLI	mhpuptraining@gmail.com		PUP
	Home Forms Administration Ne	ew Quote Quotes-Policies Repo	rts Report IT Issues Log Off
Premium Options Underwriting Questions Limits of Liability	Quote Quote: 3835495 Limits Of Liability 24. Do you and all members of your househol	Id agree to maintain the MINIMUM REQUIRED	
	LIABILITY coverage outlined below as a condition PRIMARY RESIDENCE ONLY - REQUIRE	n of coverage?	WATERCRAFT
	PERSONAL LIABILITY \$300,000 per occurrence	(Required only if you or a member of your household own a farm which is not covered	(Including boats, personal watercraft, jet skis and canoes)
	SEASONAL, SECONDARY OR RENTAL PROPERTIES REQUIRE PREMISES LIABILITY OR COMPREHENSIVE	\$300,000 per occurrence RECREATIONAL VEHICLES (Including snowmobiles, ATVs, golf carts,	(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.)
	PERSONAL LIABILITY \$300,000 per occurrence Residential properties that are covered under	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	\$300,000 Combined Single Limit per occurrence -OR- \$250,000/500,000/100,000
	a commercial or other non-personal premises liability policy are excluded from coverage	iability policy for the following limits of liability.) \$100,000 Combined Single Limit per	-0R- or \$300,000/300,000/100,000 NOTE: The RLI Personal Umbrella does
	\$	occurrence (325,000 in Texas) -OR- \$100,000 Bodily Injury per person/\$300,000 Bodily Injury per occurrence/\$25,000	not provide coverage for watercraft exceeding 45 ft and/or 50 mph. This exclusion does not apply to personal watercraft.
	If you are unsure what underlying covera	Property Damage per occurrence ge limits you are carrying, OR are requir local insurance agent.	ed to carry, we suggest contacting your
	- Quata Lattar III Sava & Class	Continue	

RLI

Next you will enter each member of the household's information. Date of Birth entry format is (MM/DD/YYYY.)

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	mhpuptra	ining@gn	ail.com											PUP
	Home	Forms	Adı	ninistration	N	lew Quote	Т	Quotes-Policies	Repo	rts	Repor	t IT Iss	ues	Log Off
Premium Options	Quote Quote:	38	35495											
Limits of Liability	Members Complete i	Of House	hold ng for all	drivers AND m	embe	ers of your h	ouse	hold ages 14 and ol	lder. Indiv	iduals li	sted bek	ow are fo	r detern	nining policy
Members of Household	Member	r a policy i	s issued,	coverage for e	ach is	s determined	ı pur	suant to the policy (provisions Licer	ise		Result	s 1-1 of	1 < < > >
	Number 1	N	ame			D	OB	Age	Num	ber		St	Rel. Vi	ol. DUIs Acc. 0 0
	Editing M	ember Nı	mber: :	L										
	First Name Date of Bir	e: rth:	MIKE 01/01/19	980				Middle Initial: Licensed/Permitted?	? Yes ✔	Last I Licen Numl	Name: se ber:	TEST 123		
	State: # of Violat (include D	tions	ILLINOI 0	s]	~			# At Fault Accidents	Relation	oship to Opera w/DL	Insured: ator	No V	older 🗸	
	Add Me	Member mber	Done	Delete Memb	er	X Can	cel)		,				
	Conti	inue												

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

Note: Insured's phone number *and* email <u>must</u> be entered. To use the eSign and Pay Online option, an email address is required. *If the applicant does not have an email - enter none@none.com and the eSign/Pay online option cannot be selected.*

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.

RLI	mhpuptraining@gm	ail.com					PUP
	Home Forms	Administration	New Quote	Quotes-Policies	Reports	Report IT Issues	Log Off
Premium Options	Quote 38	35495					
Underwriting Questions	Primary Address						
Limits of Liability	Address1:					Third-Party	Addresses
Members of Household	Address2:					<u></u>	
Address Information	City:	BRIMFIELD	~				
	State		Zip C	ode: 61517			
	Phone Number:		E-Ma	il:			
	Same As Mailing? RV Full timer	-	Yes 🗸 No 🗸				
	🖶 Quote Letter	Save & Close	Save Contir	iue			
	-						

****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.





At Please Select a Signature Option - select 'Send a secure email to the insured to eSign and Pay Online' and click 'Bind'.

NOTE: This does not bind coverage. This sends a secure email to the applicant to electronically sign the application and make full payment. Once completed, the Admin will receive an email to bind.

RLI	jcarlson@massagent.com
	Home Forms Administration New Quote Quotes-Policies Reports Report IT Issues Log Off
Premium Options	Quote: 20826195
Members of Household	Confirmation
Address Information	Please Select a Signature Option: Send a secure email to the insured to eSign and Pay Online
Confirmation	A Quote Letter Ann Save & Close Save Bind
	a guote Letter a rinit App

If the applicant cannot complete the eSign/Pay Online option, *do not* select a signature option and click 'Print App'. Have applicant sign/ date and complete Broker section before submitting to the Admin with completed payment authorization form.

