

Quote & Policy Maintenance

To open an existing quote in the PUP Access system:

1. Click on the "Quotes-Policies" tab
2. Enter your search criteria
3. Click "Search"
4. Highlight the quote you wish to open by clicking on it
5. Click "Load" to open the existing quote

Repository

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

Search

Policy Number: Effective Date:

Quote ID: Expiration Date:

Insured First Name: Insured Last Name:

Second Insured First Name: Second Insured Last Name:

Status:

State: UM/UIM:

Producer Number: 48936 [Get SubAgent List](#)

SubAgent:

Connect Reference Number:

Working List: Recent Transactions

Quote #	Policy #	Name	St	Eff Dte	Premium	Type	Status	Limit
3804166	PUP5000040	DAVEY DAVE	IL	1/11/2024	\$105	NEWISSUE	Bound	\$1,000,000
3804165	**	DAVEY DAVE	IL	1/11/2024	\$195	QUOTE	Quote Rated	\$1,000,000
3804154	PUP1566450	TEST DRIVER	IL	1/11/2024	\$322	NEWISSUE	Bound	\$1,000,000

Results 1-50 of 100

To open a policy in the PUP Access system:

6. Click on the "Quotes-Policies" tab
7. Enter your search criteria
8. Click "Search"
9. Highlight the policy you wish to open by clicking on it
10. Click "Policy Inquiry" to open the policy

Repository

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

Search

Policy Number: Effective Date:

Quote ID: Expiration Date:

Insured First Name: Insured Last Name:

Second Insured First Name: Second Insured Last Name:

Status:

State: UM/UIM:

Producer Number: 48936 [Get SubAgent List](#)

SubAgent:

Connect Reference Number:

Working List: Recent Transactions

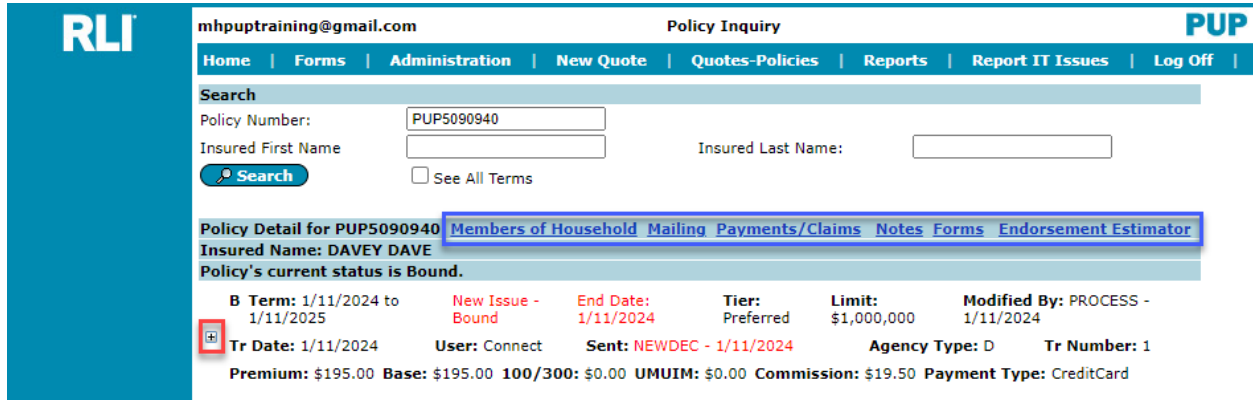
Quote #	Policy #	Name	St	Eff Dte	Premium	Type	Status	Limit
3804166	PUP5090940	DAVEY DAVE	IL	1/11/2024	\$195	NEWISSUE	Bound	\$1,000,000
3804165	**	DAVEY DAVE	IL	1/11/2024	\$195	QUOTE	Quote Rated	\$1,000,000
3804154	PUP1566450	TEST DRIVER	IL	1/11/2024	\$322	NEWISSUE	Bound	\$1,000,000

Results 1-50 of 100

Policy Inquiry view:

Expand a policy term to review the application answers and insured contact information by clicking on the plus sign to the left of the policy term. [Marked in red]

You can also view members of household, mailing information, payments/claims, notes, forms, and our endorsement estimator by clicking on their respective hyperlinks. [Marked in blue]



The screenshot shows the RLI Policy Inquiry web application. The header includes the RLI logo, the email address mhuptraining@gmail.com, the title Policy Inquiry, and the PUP logo. A navigation bar contains links: Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. Below the navigation bar is a search section with fields for Policy Number (PUP5090940), Insured First Name, and Insured Last Name, along with a Search button and a checkbox for See All Terms. A section titled Policy Detail for PUP5090940 shows the Insured Name as DAVEY DAVE and the Policy's current status as Bound. A table of policy terms is displayed, with the first term highlighted by a red box. The table includes columns for B Term, New Issue - Bound, End Date, Tier, Limit, and Modified By. Below the table, a row of details includes Tr Date, User, Sent, Agency Type, and Tr Number. At the bottom, a summary row shows Premium, Base, 100/300, UMUIM, Commission, and Payment Type.

B Term	New Issue - Bound	End Date	Tier	Limit	Modified By
1/11/2024 to 1/11/2025	New Issue - Bound	1/11/2024	Preferred	\$1,000,000	PROCESS - 1/11/2024

Tr Date: 1/11/2024 User: Connect Sent: NEWDEC - 1/11/2024 Agency Type: D Tr Number: 1

Premium: \$195.00 Base: \$195.00 100/300: \$0.00 UMUIM: \$0.00 Commission: \$19.50 Payment Type: CreditCard

Please Note:

- RLI does not process exposure changes mid-term on the RLI Personal Umbrella policies. If there is an exposure change that needs to be made, please have the insured update their policy when they receive the renewal questionnaire at the end of the policy term.
- To request any other endorsement changes (Named Insured, change of address, new drivers, please send the endorsement request to your RLI state Administrator.



PERSONAL UMBRELLA

NEW BUSINESS & RENEWAL STATUSES

Status	Definition
Bound	The status of a policy that we have received the signed application, payment, and the administrator has bound the policy in the system.
Final Bill Sent	10 days prior to the policy expiration, RLI will send a final bill to the insured for the renewal policy premium if payment has not yet been received.
MVR has been Ordered	MVR's are ordered for submissions with youthful drivers or DUIs. While MVRs are received almost instantly for most states, some states take up to 3 days to deliver an MVR to RLI. [HI, CA, WA]
MVR has been Received	MVR's are ordered for submissions with youthful drivers or DUIs. This status means that RLI has received the MVR and the underwriter is reviewing the submission.
New Quote Paid	The applicant has signed the application and paid the premium due. Has been submitted to RLI for binding by the Program Administrator.
Payment Pending	Agent selected signature option 'Signed App, Pay Now' and Payment has not completed its process in RLI's system.
Policy Has Been Nonrenewed	Policy will enter nonrenewed status roughly 30 days before the policy term expires, if we have not received the signed application back from the insured. Whether the insured completes the renewal questionnaire online or returns it in the mail, the renewal questionnaire must be signed and completed to renew their RLI PUP policy.
Quote Billed	Once RLI receives the renewal questionnaire back from the insured, a bill is sent to the insured.
Quote Rated	A quote has been rated but no further action has been taken. Application with payment must be submitted to administrator for binding. #1 Payment Authorization form required.
Renewal Questionnaire Mailed	90 to 60 days prior to renewal, a renewal application is sent to the insured. This status indicates that a renewal questionnaire has been mailed to the insured. MA - Mailed 85 days prior
Revised Before Payment	A revised questionnaire was submitted, and has been processed for the upcoming policy term. The insured still needs to submit their payment for the upcoming policy term.

ESIGNATURE STATUSES

eSig Complete	The applicant has signed the application, but has not yet completed the electronic payment process. <u>No changes can be made to the quote.</u>
eSig e-mailed Pending	The email with the secure login link was sent to the applicant. If the quote needs to be revised, the client must exit the DocuSign and any changes made <i>must be rated and submitted again</i> . A new link will be sent to the client with the corrected information.
eSig Expired	The email link or the verbal login information expires after 5 days. The applicant did not finish the electronic signature and online payment process prior to this expiration, OR the administrator neglected to bind the policy once payment had been applied and notification was sent to the administrator. <i>In order to re-submit, please select the quote> Policy Inquiry> Copy Quote.</i>
eSig Pending	The login information was given to the applicant verbally. If the quote needs to be revised, the client must exit the DocuSign and any changes made <i>must be rated and submitted again</i> . New credentials will be generated with the corrected information.