



Send a secure email to the insured to esign and pay online

RLI[®]
DIFFERENT WORKS

After completing the application, you are ready to select a signature option:

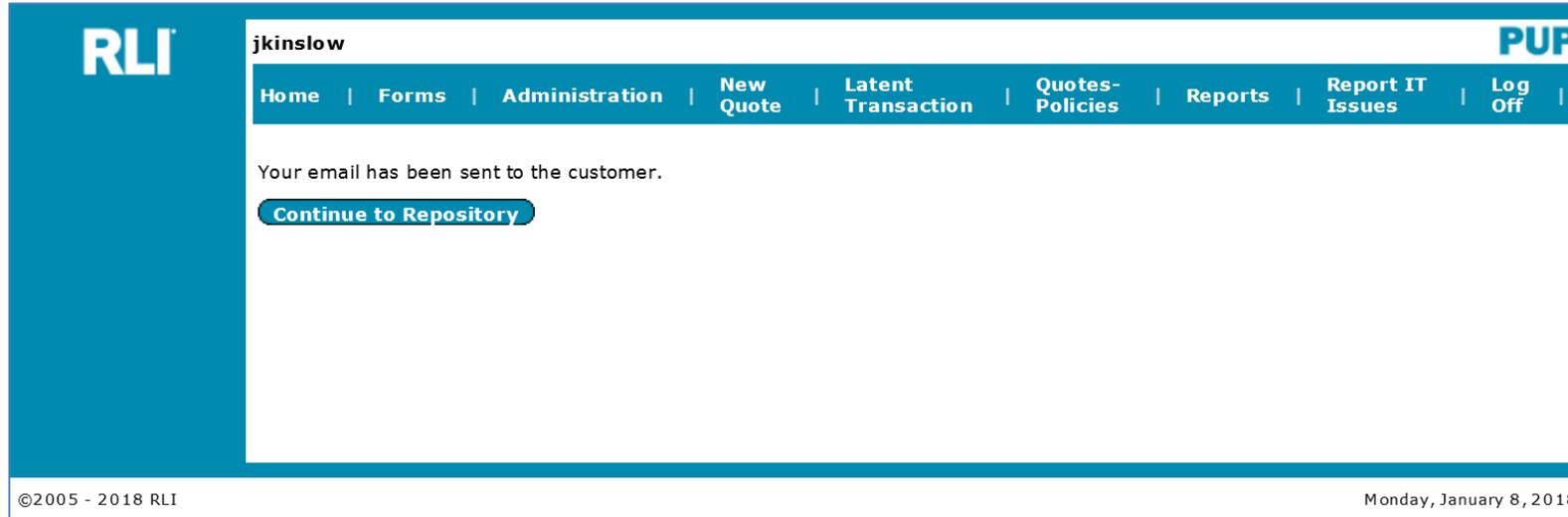
The screenshot shows the RLI PUP web application interface. The user is logged in as shpuptraining@gmail.com. The page displays the Quote number 3531771 and the Confirmation section with the instruction "Please Select a Signature Option:". There are four buttons: "Quote Letter", "Print App", "Save & Close", and "Save". A dropdown menu is open, showing two options: "Send a secure email to the insured to eSign and Pay Online" and "Verbally provide login information to the insured to eSign and Pay Online".

At Confirmation, Signature Option: Select 'Send a secure email to the insured to eSign and Pay Online'.

- **Send a secure email to the insured to to eSign and Pay Online:** The client receives a secure email, then clicks the link in the email and is taken into the RLI system. The Administrator is notified and submits the application for binding in the RLI system.

Send a secure email to the Insured to eSign and Pay Online

This is a copy of the PUP Access system screen you will see after the email has been sent to your customer.



The screenshot displays the PUP Access system interface. On the left is a blue sidebar with the RLI logo. The top navigation bar is blue and contains the user name 'jkinslow' on the left and the 'PUP' logo on the right. Below the navigation bar is a menu with the following items: Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Report IT Issues, and Log Off. The main content area is white and contains the message 'Your email has been sent to the customer.' followed by a blue button labeled 'Continue to Repository'. At the bottom of the page, the footer contains the copyright notice '©2005 - 2018 RLI' on the left and the date 'Monday, January 8, 2018' on the right.

Send a secure email to the Insured to eSign and Pay Online

This is a copy of the e-mail your client will receive, sent from pup.esign@rlicorp.com. *The client has 5 days to complete the eSign and Electronic Payment.* The client opens the email, and then clicks on the secure link to enter RLI's eSign and online payment process.



SUBJECT LINE: YOUR RLI PERSONAL UMBRELLA APPLICATION REQUIRES YOUR SIGNATURE AND PAYMENT



Thank you for your interest in an RLI Personal Umbrella policy. In order to complete the submission process, please follow these steps:

1. Click on the link below to access your personal umbrella application.
2. Review all the information and sign the application.
3. Provide payment information for authorization.

The above steps must be completed by **11/19/2022**. (Please note: If anything on your application is incorrect, exit the application without signing it and contact your agent.)

Upon receiving notice of your signed application, we will finalize your submission.

Thank you for your business!

<https://uat.myrli.com/welcome/authentication/landing>

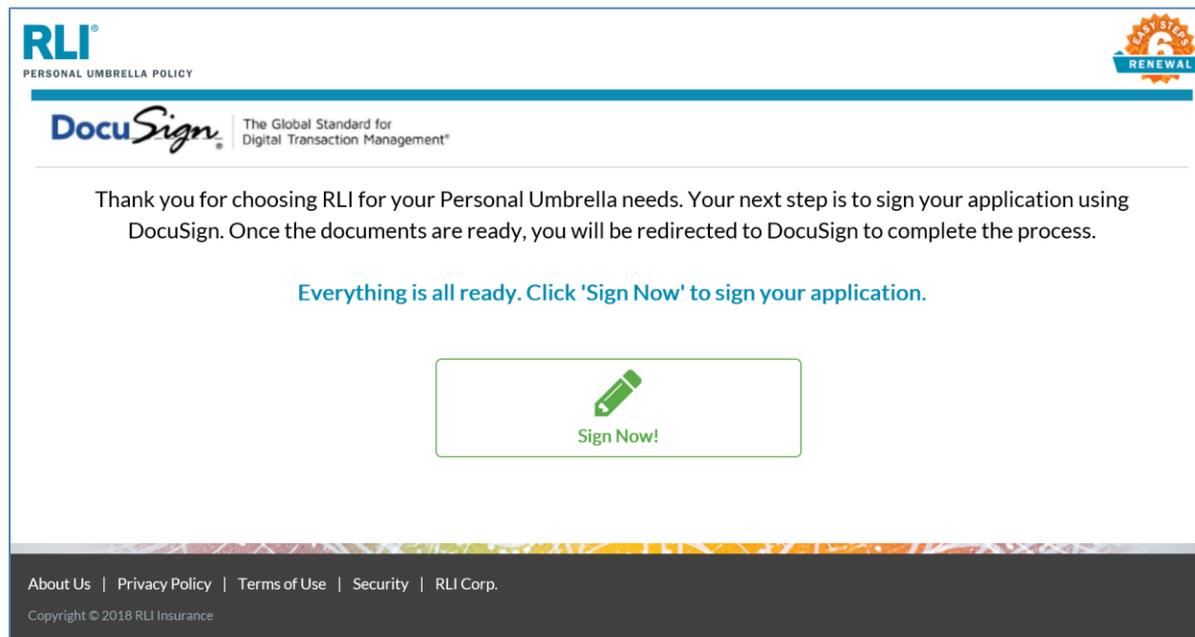
Please do not reply to this message; this is an automated email and is not set up to provide a response.

Username: [REDACTED]
Quote ID: 3143895
Agency: The Internal Test Agency

eSign Instructions

This is the first page of the electronic signature and online payment process.

Click on the “Sign Now!” button to load the application.



The screenshot shows a web page for RLI's Personal Umbrella Policy. At the top left is the RLI logo with the text "PERSONAL UMBRELLA POLICY" below it. At the top right is a "6 STEP RENEWAL" badge. Below the RLI logo is the DocuSign logo and the text "The Global Standard for Digital Transaction Management". The main content area contains the following text: "Thank you for choosing RLI for your Personal Umbrella needs. Your next step is to sign your application using DocuSign. Once the documents are ready, you will be redirected to DocuSign to complete the process." Below this is a blue link: "Everything is all ready. Click 'Sign Now' to sign your application." In the center is a large green button with a pencil icon and the text "Sign Now!". At the bottom of the page is a footer with links: "About Us | Privacy Policy | Terms of Use | Security | RLI Corp." and "Copyright © 2018 RLI Insurance".

eSign Instructions

The client will need to read the Electronic Record and Signature Disclosure and then check the box to agree to use electronic records and signatures and click continue.

Please Review and Sign Your Application



Powered by DocuSign

Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures.

[CONTINUE](#) [OTHER ACTIONS](#) ▾

DocuSign Envelope ID: BD5BF1DB-17E4-451A-A196-ASDBFD615EA3 DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE

PERSONAL UMBRELLA LIABILITY INSURANCE APPLICATION

RLI INSURANCE COMPANY

Please fully complete and print the Application, obtain the insured's signature and forward it to your Program Administrator for processing. Any changes made to an answer on this application must be initialed by the applicant.

Name 1. D H 1867563
2.
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.

Phone Email daniel.husser@rlicorp.com

Applicant's Brokering Agent Number 48936

Requested Effective Date	Premium
06/11/2018	\$758

Coverage Limit Desired:
 \$5 Million \$3 Million \$2 Million \$1 Million*
*\$1M limit is the only option available in NM

Primary Residence
Address 123
City BEVERLY HILLS State CA Zip 90210

Mailing Address (if different from Primary Residence Address)
Address
City State Zip

See page 5 for definitions and question details.

QUESTIONS 1-9:

Carefully read questions 1-9 and circle the correct number. If any question is unanswered or answered in the "Not Eligible" column, the risk is not eligible.

	Preferred	Standard	Standard II*	PUP Special**	Not Eligible
1. How many motorized vehicles licensed for road use (i.e., motor homes, motorcycles, cars, etc.) are owned (titled or registered to), leased, rented, or regularly operated by you or any member of your household? (Do not count antique, classic or collectible vehicles. See question 10.)	1				
2. How many residential properties are owned or rented by you or any member of your household? 1-4 family units are eligible and should be counted as one property. Do not include residential properties that are covered under a Commercial General Liability Policy or other non-personal Domestic Liability Policy because they are	1				

eSign Instructions

The client will then scroll down, reviewing the application answers. Once at the signature location the client will click on the orange “Sign” box to create their electronic signature.

Select the sign field to create and add your signature. **FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: DDE66C82-8086-44A9-B257-06602B699E1A **DEMONSTRATION DOCUMENT ONLY**
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE

START

PERSONAL UMBRELLA LIABILITY INSURANCE APPLICATION
RLI INSURANCE COMPANY

Please fully complete and print the Application, obtain the insured's signature and forward it to your Program Administrator for processing. Any changes made to an answer on this application must be initialed by the applicant.

Name 1. JASMINE KINSLOW 1977271
2. 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.
Phone (309)692-1000 Email jasmine.kinslow@ricorp.com

Applicant's Brokering Agent Number	
50712	
Requested Effective Date	Premium
08/08/2018	\$565

Primary Residence

I understand this Application is subject to underwriting review, is not a binder and no insurance will be in effect until RLI Insurance Company issues a policy. This application and policy cannot be accepted without applicant's original signature.

SIGN AND DATE

I UNDERSTAND THIS APPLICATION IS SUBJECT TO UNDERWRITING REVIEW, IS NOT A BINDER AND NO INSURANCE WILL BE IN EFFECT UNTIL RLI INSURANCE COMPANY ISSUES A POLICY. THIS APPLICATION AND POLICY CANNOT BE ACCEPTED WITHOUT APPLICANT'S ORIGINAL SIGNATURE.

If you are applying by Power of Attorney on behalf of the applicant, you must sign your own name followed by "POA".

SIGN HERE Applicant's Original Signature: **Required - Sign Here** Date: 1/5/2018

Applicant's Brokering Agent's Signature: _____
Applicant's Brokering Agency's Name: _____
Applicant's Brokering Agency's Address: _____

eSign Instructions

Once the client has reviewed and electronically signed the application, the client must select “FINISH” to complete the eSign process and begin the Online Payment Options *if payment has not yet been authorized.*

document.pdf

document.pdf 3 of 5

DocuSign Envelope ID: BD5BF1DB-17E4-451A-A196-A5DBFD615EA3

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE

Please fully complete and print the Application, obtain the insured's signature and forward it to your Agent Administrator for processing.

QUESTION 26:

Complete the following for all drivers AND members of your household ages 14 and older. Per the definition of driver, also include any other person who operates a vehicle owned (titled or registered to), leased, rented or regularly operated by you or a member of your household at least 50% or more of that vehicle's use.

Full Name (First, Mi, Last)	Date of Birth	Licensed or Permit? Y/N	Driver's License or Permit Number	State	Relationship to Applicant	Number of Violations 3 yrs (Incl. DWI/DUI 5 yrs/3 yrs in MT)	Number of At-Fault Accidents (3 yrs)	DWI or DUI? Y/N
D H	01/01/1980	Y	123	CA	Insured	0	0	N

IMPORTANT NOTICE REGARDING THE FAIR CREDIT REPORTING ACT: I understand that as a part of the underwriting procedure, a consumer report may be obtained or an investigative consumer report may be prepared. Such reports may include information regarding my driving record, credit history, general reputation, personal characteristics and mode of living. I hereby consent to the preparation of such reports and the disclosure of such reports to RLI Insurance Company and the producer of record. I understand that these reports will be handled in the strictest confidence, and that information as to the nature and the scope of these reports will be provided to me upon request.

FRAUD WARNING: Any person who knowingly defrauds any insurance company or other person, files an application for insurance or statement of claim containing any materially false, incomplete, or misleading information, or conceals information concerning any material fact thereof, commits a fraudulent insurance act, which is a crime punishable by incarceration, and shall also be subject to civil penalties.

APPLICANT STATEMENT: The information given on this application is true and complete to the best of my knowledge. I understand that any omission or misstatement of fact in the information given voids the policy. I agree that I will acquire and maintain Minimum Required Limits of Liability for all additional exposures (drivers, houses, vehicles, watercraft, etc.) if they become applicable during the policy period. The insured's Brokering Agent shall not have the right to make, alter, modify, or discharge any contract or policy issued on the basis of this Application. I understand that the application and prepayment of premium must be accepted by RLI Insurance Company.

SIGN AND DATE

I UNDERSTAND THIS APPLICATION IS SUBJECT TO UNDERWRITING. THIS APPLICATION IS NOT A BINDER AND NO INSURANCE WILL BE IN EFFECT UNTIL RLI INSURANCE COMPANY ISSUES A POLICY. THE APPLICATION WILL NOT BE ACCEPTED WITHOUT APPLICANT'S ORIGINAL SIGNATURE.

If you are applying by Power of Attorney on behalf of the applicant, you must sign your own name followed by "POA".

Applicant's Original Signature: [Signature] Date: 6/7/2018

Applicant's Brokering Agent's Signature: _____

Applicant's Brokering Agency's Name: _____

Applicant's Brokering Agency's Address: _____

Applicant's Brokering Agent's License ID #: _____

Online Payment Options

User will determine how to pay for the policy. This can be set up as: 1) a Credit/Debit card payment, or 2) the funds can be withdrawn from a checking or savings account (EFT). Select the payment method and fill in the required payment information. Then select “Submit” to complete the transaction. *(Note: May take 5-10 minutes for screen to refresh)*

Amount Due

\$1,697.00

Please click the Submit button only once. You may experience a delay while your payment is processing. Thank you!

- Pay with Credit Card
 Pay with Electronic Check



American Express MasterCard Discover Visa

Card Number

CVV

Expiration

Cardholder Name

Amount Due

\$1,697.00

Please click the Complete button only once. You may experience a delay while your payment is processing. Thank you!

- Pay with Credit Card
 Pay with Electronic Check

BANK NAME

Routing Number

Account Number

Name on Account

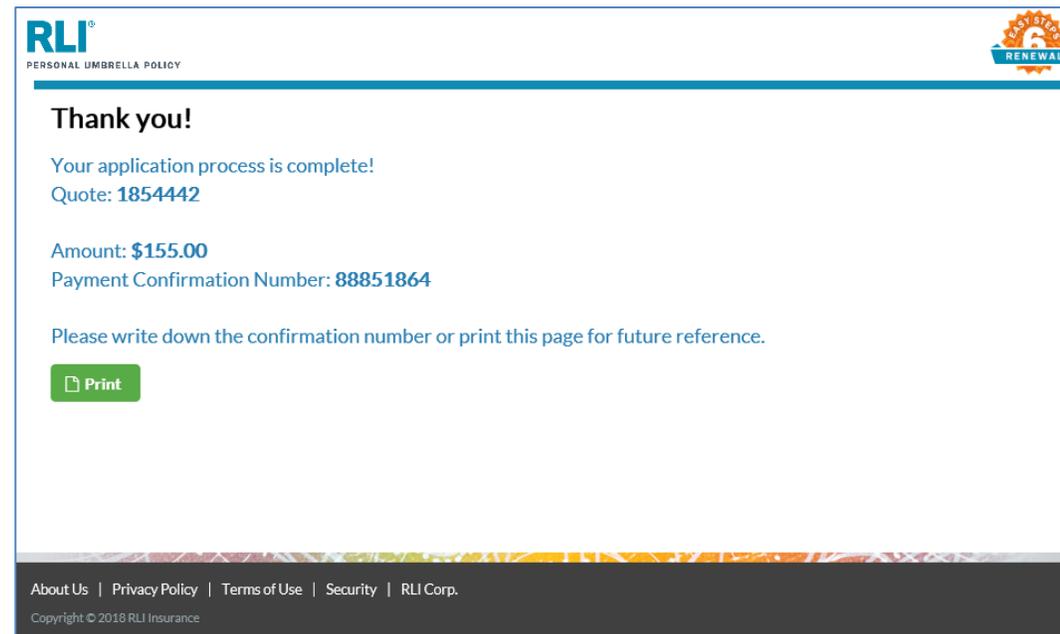
Transaction Status – On Screen Notice

When the payment has been authorized, the client will receive notice that the application process is complete on screen and via email.

Please note:

Payment status of the quote will change in PUP Access within 15 minutes, and the state RLI Administrator will need to submit the application for binding in the RLI system. Once the policy is bound (but not before), the client is charged* for the amount authorized.

**Payment may take at least one business day to appear in the Insured's credit card or bank account.*



RLI
PERSONAL UMBRELLA POLICY

Thank you!

Your application process is complete!
Quote: **1854442**

Amount: **\$155.00**
Payment Confirmation Number: **88851864**

Please write down the confirmation number or print this page for future reference.

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Administrator Alert E-mail

Once the Insured has completed the eSign and payment process, this e-mail will be sent to the state **RLI Administrator** as an alert to retrieve the quote and bind it to RLI.

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

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