



## **PUP ACCESS**

# **RLI Personal Umbrella Policy On-Line Processing Instructions for SubProducers**

NOTE: For best results in displaying .PDF documents, it is recommended that you have Adobe 8.0 or later installed on your computer.

RLI Sub-Producer,

You have been given access to the RLI Specialty Markets Community Home page or “PUPAccess” via a User ID and password provided to you by an RLI Administrator. You are not directly appointed by RLI and are not paid a commission by RLI. Any questions you have regarding your relationship with RLI should be directed to your RLI Administrator.

Within this system, you will find a host of information enabling you to interact with RLI for Personal Umbrella Policies (PUP) and/or Home Business Insurance (HBI) policies. This manual is specific to PUP written with RLI.

From the “Community Home Page”, you will have the ability to quote and inquire on RLI Personal Umbrella Policies. The system also has the ability to provide copies of umbrella forms and reports that will make your use of the RLI PUP so much easier. The following instructions will illustrate how to utilize this online tool.

This system will not only allow the user to quote and submit a new business application on-line, but also to make inquiries on existing policies. Always remember, policies are not bound until RLI assigns a policy number which will start with the prefix “PUP”.

In these instructions, you will find information on how to quote new submissions, how to inquire on your existing policies and how to obtain copies of necessary forms. We will explain the “terminology” used within the system so you are aware of the status of any particular policy. The “Reports” areas can provide information with expiration lists or other data to help you interact easier with your accounting area and your customers. Where possible, illustrations have been included to help you along the way.

Should you encounter a situation not noted in the Table of Contents, please contact your Administrator.

# **SUB-PRODUCER** **INFORMATION**

**User Name:** \_\_\_\_\_

**Password:** \_\_\_\_\_

**Administrator Name:**

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NOTE: A sub-producer should take great care in writing down the preceding information as this information is confidential and should be treated as such.

As an RLI Personal umbrella subproducer, you do not have a direct appointment with RLI and RLI does not pay you commission. Your program administrator is your sole source of information for RLI personal umbrella policies. Their name is above and their phone number can be found on any RLI policy documents.

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# **CHAPTER 1**

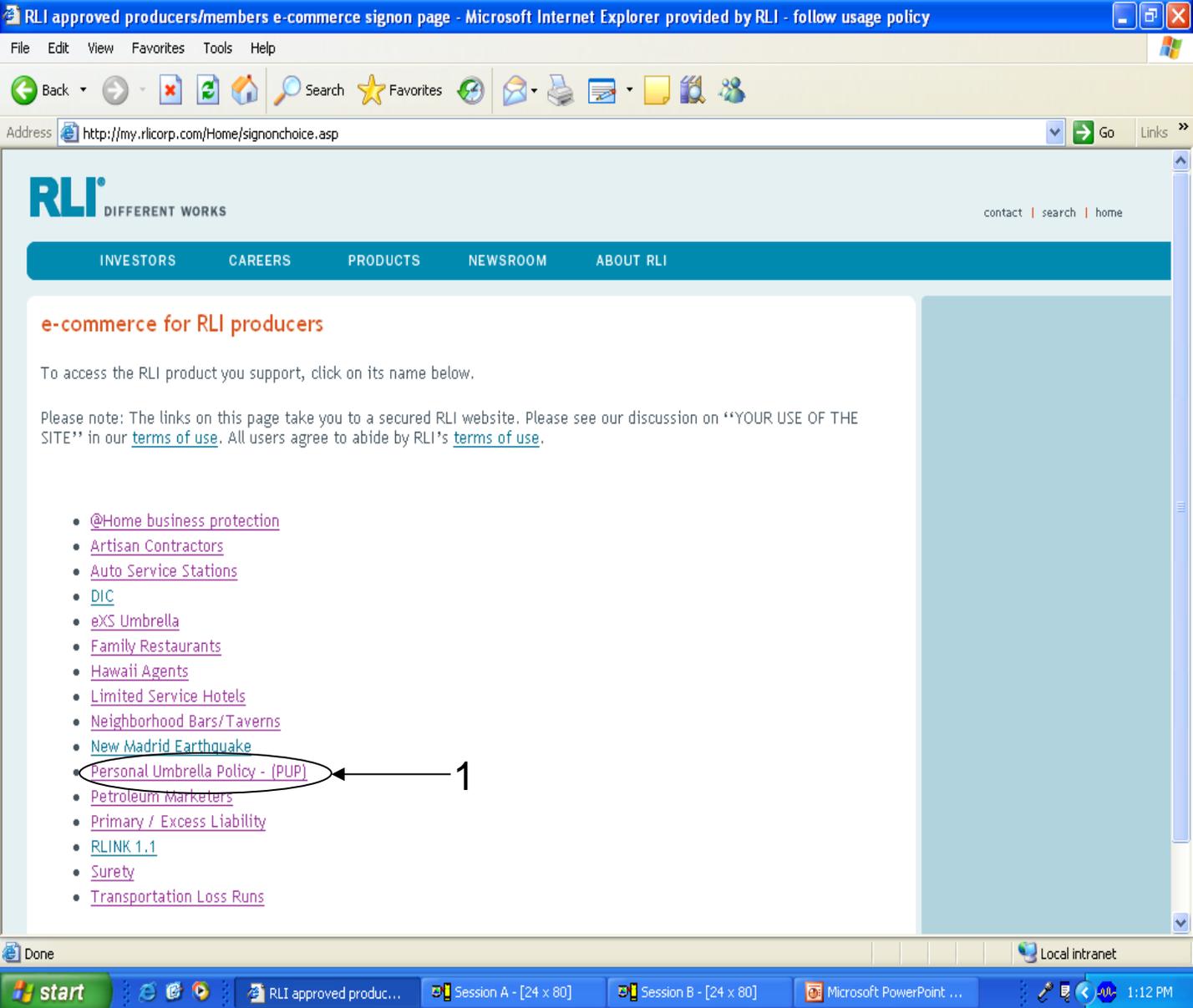
## Introduction to PUP Access



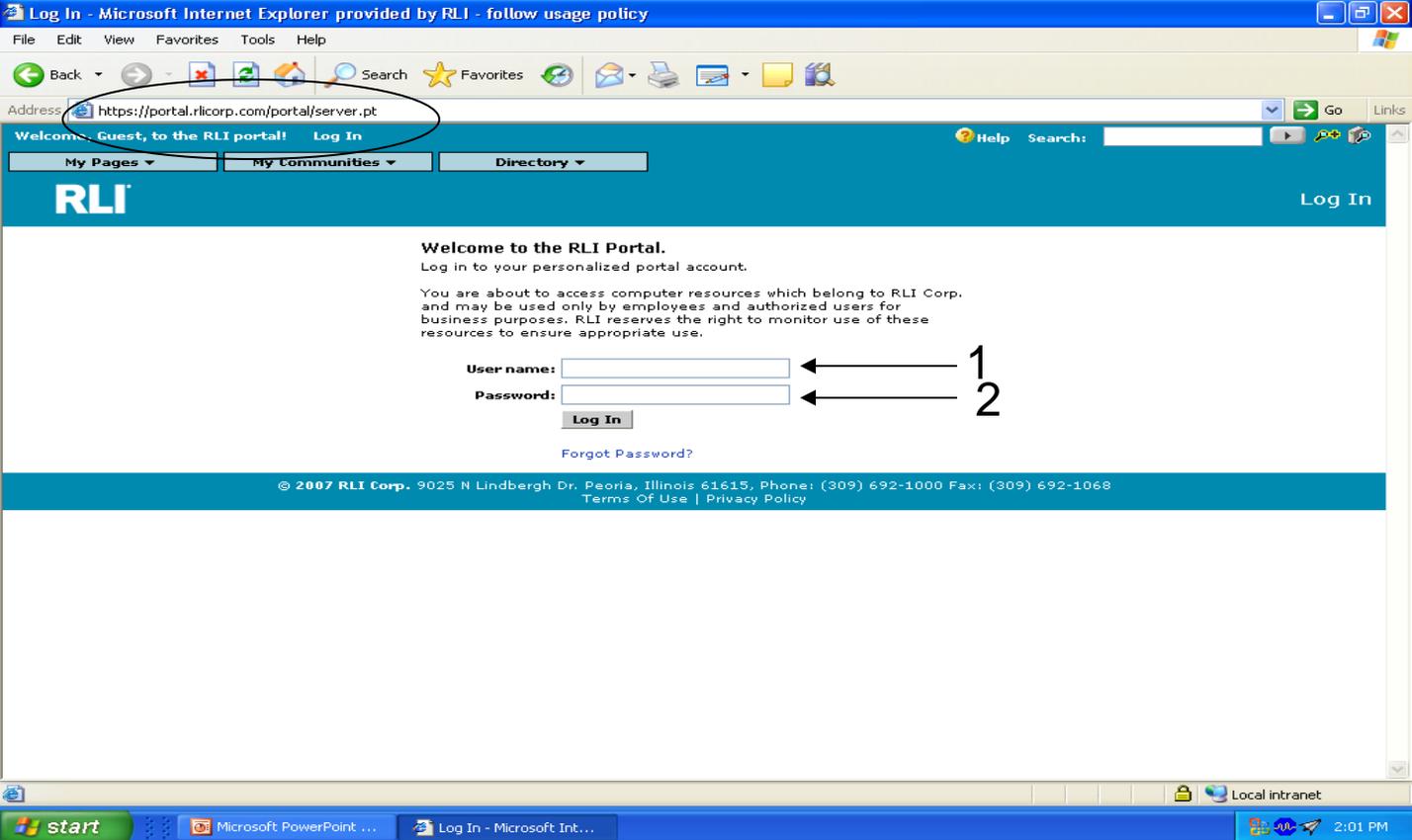
## How to Log-In To The “Specialty Markets Community Home Page”

Log onto the RLI website via the URL: [www.rlicorp.com](http://www.rlicorp.com).

1. Click on the “Producer Log-In” tab on the right side of the page.



1. Click on the “Personal Umbrella Policy – (PUP)” link.



You should now be at the following URL –

<https://portal.rlicorp.com/portal/server.pt>

You may wish to save this page to your “Favorites” to speed future access.

1. **User name** – Your initial “User name” is your 5 digit administrator number assigned by RLI, followed by a hyphen, then your 5 digit subproducer number. For example, if your administrator number is 12345 and your subproducer number is 67890, your “User name” is 12345-67890. **Once you log-on with this numeric code, you will be prompted to create a unique user ID. For additional details, refer to Chapter 9.**
2. **Password** - Enter your “Password” assigned to you by RLI. Please note “Passwords” are case sensitive.

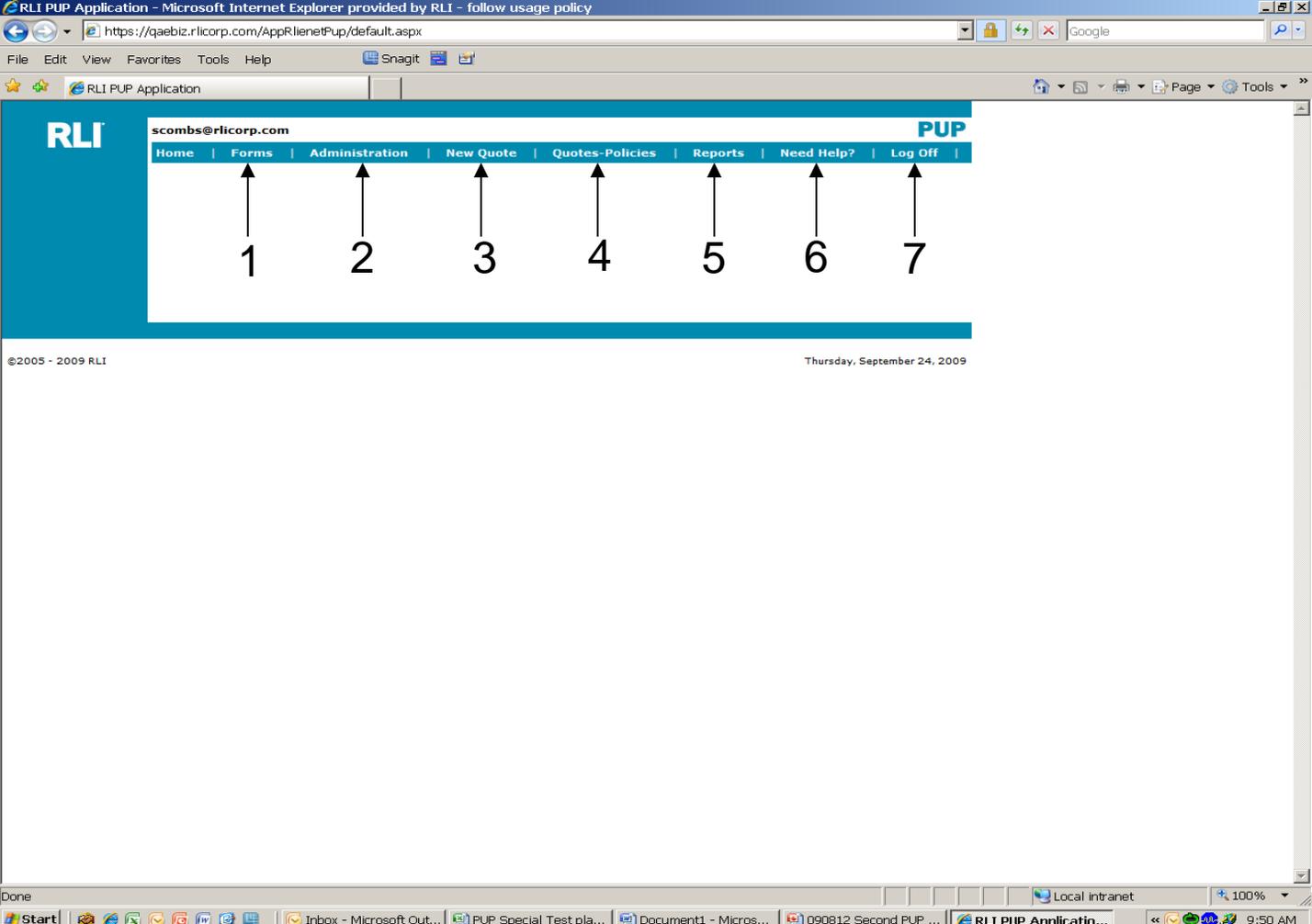
**Note: After you have logged into the system the first time with the 10 digit numeric code, you will be required to set-up a “unique user id”. This process is outlined in Chapter 9.**

**If 3 failed attempts have been made trying to log in, you will become “locked out” of the system and will have to unlock your account via the self-service password.**

The screenshot shows the RLI Specialty Personal Lines Home Page. At the top, there is a navigation bar with 'My Home', 'Welcome to the RLI Portal!', 'My Account', and 'Log Off'. A search bar is also present. Below the navigation bar, the RLI logo is on the left, and 'Specialty Personal Lines Home' is on the right. A central alert box (callout 6) contains a red warning about the PUP program's effective date. Below the alert, there are four main navigation links (callouts 1, 2, 3, 4): 'Get A New PUP Quote', 'Quote - Policy Look-up', 'Quote - Policy Form Look-up', and 'Run a PUP Report'. A fifth link (callout 5) is 'Home Business Insurance System (eRLI Access)'. At the bottom, there are links for 'Marketing Materials', 'PUP Sample Forms', 'HBI Sample Forms', 'System Manuals', 'PUP Rate Lookup', 'PUP FAQs', and 'Help'. The footer contains copyright information for 2009 RLI Corp.

The “Specialty Markets Community Home Page” contains a host of tools.

1. **Get A New PUP Quote** – This link allows you to immediately begin the PUP quoting process. You can also complete an application after obtaining a quote. This is covered in Chapter 3.
2. **Quote – Policy Look-up** – This link will allow you so view all save quotes and bound policies with one click. This is covered in Chapter 4.
3. **Quote – Policy Form Look-up** – This link will allow you to view any policy form, based on a number of various options. This is covered in Chapter 2.
4. **Run a PUP Report** – This link will allow you to run a number of various reports designed that will enable you to run your business more efficiently. This is covered in Chapter 5.
5. **Home Business Insurance System (eRLI Access)** – This button is used to launch RLI’s Home Business Insurance (HBI) rating.
6. **RLI PUP Alert** – Review this section each day to ensure you have the most up-to-date information about what is going on with the system or at RLI.



By selecting “RLI Personal Umbrella Policy System (PUP Access)” from the “Community Home Page”, you come to the “PUP Access Home Page” which shows you many of the same options you can select from the “Community Home Page”.

1. **Forms** – Allows you to view the forms associated based on a number of variables. Same as selecting “Quote-Policy Form Look-Up” from the “Community Home Page”.
2. **Administration** – This link will allow you to resend an electronic signature and payment e-mail or provide the log-in credentials in the event of a signature or payment issue.
3. **New Quote** – Your starting point to enter a new quote. Same as selecting “Get a New PUP Quote” from the “Community Home Page”.
4. **Quotes – Policies** – Allows you to view all quotes or policies. Same as selecting “Quote-Policy Look-Up” from the “Community Home Page”.
5. **Reports** – Allows you to access various reports that will allow you to more efficiently run your business. Same as selecting “Run a PUP Report” from the “Community Home Page”.
6. **Need Help?** – Provides an e-mail based help system that will be responded to within 24 hours if you experience a problem navigating the system. 10
7. **Log Off** – Will log you out of “PUP Access” and return you back to the “Community Home Page”.

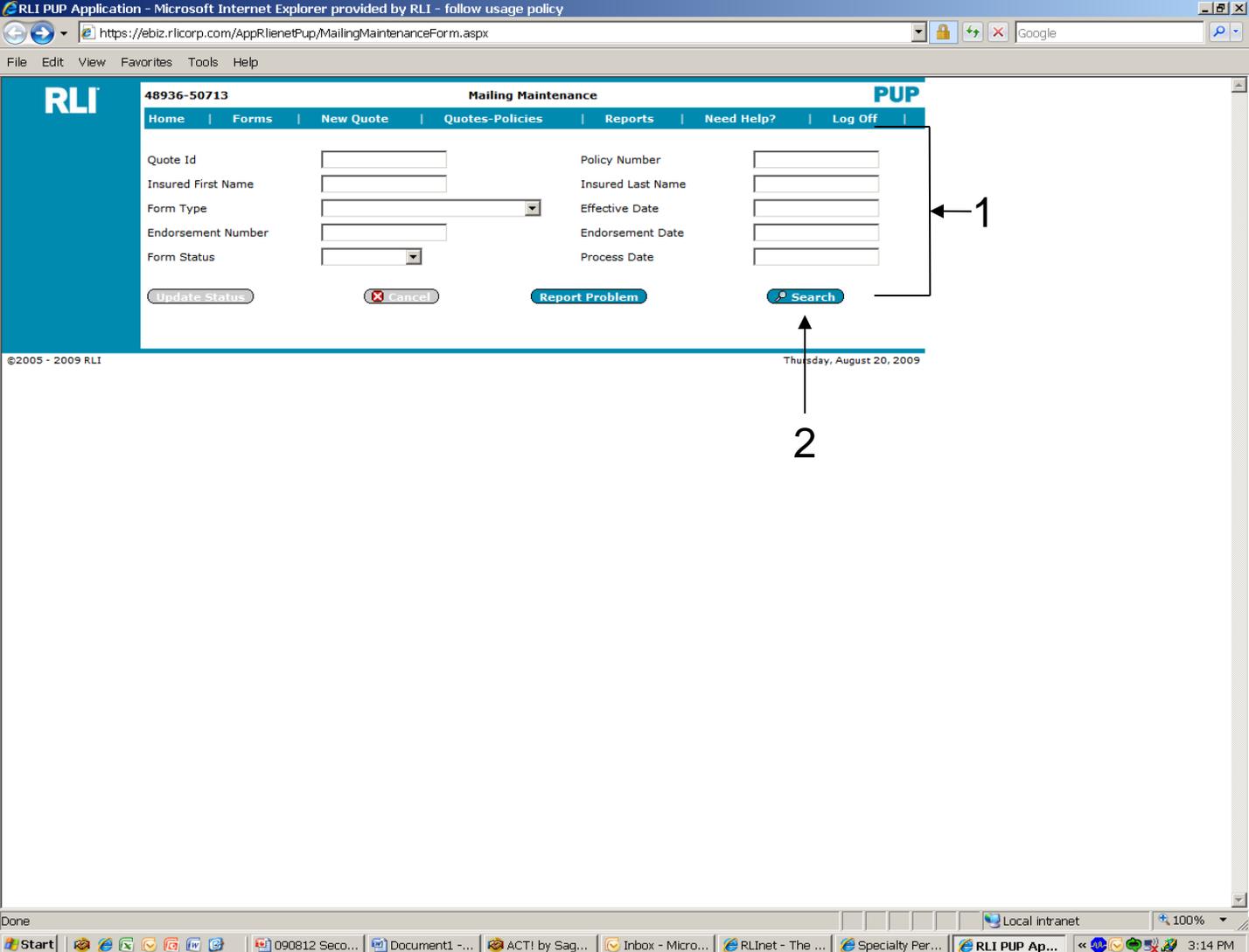
# **CHAPTER 2**

“Forms”

The screenshot shows the RLI Specialty Personal Lines portal. At the top, there is a navigation bar with the RLI logo and "Specialty Personal Lines Home". Below this, a user is logged in as "48936-50713" with the agency name "Subproducer 2". A prominent red-bordered box contains an "RLI PUP Alert" with the following text: "Effective immediately, DO NOT input ANY RLI Personal Umbrella business with an effective date of 10-1-09 OR LATER in the states of Alaska, Colorado, Florida, New York, South Carolina or Virginia until further notice. Because PUP Special IS NOT approved in these 6 states, we will 'sit tight' and hope for an approval so that we can offer the program as of 10-1-09 in these 6 states. All other states are now approved and the system is updated and compatible for entry out 60 days in advance. Thanks for your assistance in this transition. As soon as we hear from any of these 6 states we will let you know." Below the alert, there are several navigation links: "Get A New PUP Quote", "Quote - Policy Look-up", "Quote - Policy Form Look-up", and "Run a PUP Report". There is also a section for "Home Business Insurance System (eRLI Access)" with a link "Get A New Home Business Insurance (HBI) Quote". At the bottom, there are links for "Marketing Materials", "PUP Sample Forms", "HBI Sample Forms", "System Manuals", "PUP Rate Lookup", "PUP FAQs", and "Help". The footer contains copyright information for 2009 RLI Corp. and links for "Terms Of Use" and "Privacy Policy".

1. **Forms** – From the “Community Home Page”, click on the “Quote – Policy Form Look-up” link. This link will allow you to view all forms produced based on a number of variables. Future pages explain what can be done with these forms.

**Note:** Forms are available in “PUP Access” as they renew in this new system. To obtain a copy of an “old” form (anything produced prior to 5/08), you may order a duplicate on the “Mailing Screen”. See page 45 for additional information.



## “Mailing Maintenance” Screen

1. Enter the search criteria to access the forms for a particular policy or set of policies. You may fill in one field or multiple fields by which to search. Not only can you search for one particular policy, but you can search for multiple policies that have a similar characteristic.

Examples:

**Form Type**– From the drop down list, search to see which insureds were mailed a particular form.

**Process Date** - By entering a date in this field, the system will give you all the forms that populated with that particular process date.

2. **Search** – Once the criteria has been entered, click “Search”.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy  
 https://ebiz.rlicorp.com/AppRlienetPup/MailingMaintenanceForm.aspx

File Edit View Favorites Tools Help

**RLI** 48936-50713 Mailing Maintenance **PUP**

Home | Forms | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Quote Id:  Policy Number:   
 Insured First Name:  Insured Last Name:   
 Form Type:  Effective Date:   
 Endorsement Number:  Endorsement Date:   
 Form Status:  Process Date:

Update Status Cancel Policy Inquiry Report Problem Search

| Name                                  | Policy     | Eff Date   | Endst. # | Endst. Date | Form                      | Process Date | View | Form Status          |
|---------------------------------------|------------|------------|----------|-------------|---------------------------|--------------|------|----------------------|
| <input type="checkbox"/> SCOTT E TEST |            | 10/6/2009  | 0        | 10/6/2009   | Quote Letter              | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> SCOTT E TEST |            | 10/6/2009  | 0        | 10/6/2009   | Application               | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> JOHN TEST    |            | 9/24/2009  | 0        | 9/24/2009   | Quote Letter              | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> JOHN TEST    |            | 9/24/2009  | 0        | 9/24/2009   | Application               | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> JOE SAMPLE   |            | 10/14/2009 | 0        | 10/14/2009  | Application               | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> JOE SAMPLE   |            | 10/14/2009 | 0        | 10/14/2009  | Quote Letter              | 8/18/2009    |      | <input type="text"/> |
| <input type="checkbox"/> TEST E TEST  | PUP1127832 | 10/7/2009  | 0        | 10/7/2009   | New Business Policy Forms | 8/17/2009    |      | <input type="text"/> |
| <input type="checkbox"/> TEST E TEST  |            | 10/7/2009  | 0        | 10/7/2009   | Quote Letter              | 8/17/2009    |      | <input type="text"/> |
| <input type="checkbox"/> TEST E TEST  |            | 10/7/2009  | 0        | 10/7/2009   | Application               | 8/17/2009    |      | <input type="text"/> |
| <input type="checkbox"/> TEST E TEST  |            | 10/7/2009  | 0        | 10/7/2009   | Application               | 8/17/2009    |      | <input type="text"/> |
| <input type="checkbox"/> TEST E TEST  |            | 10/7/2009  | 0        | 10/7/2009   | Quote Letter              | 8/17/2009    |      | <input type="text"/> |

©2005 - 2009 RLI Thursday, August 20, 2009

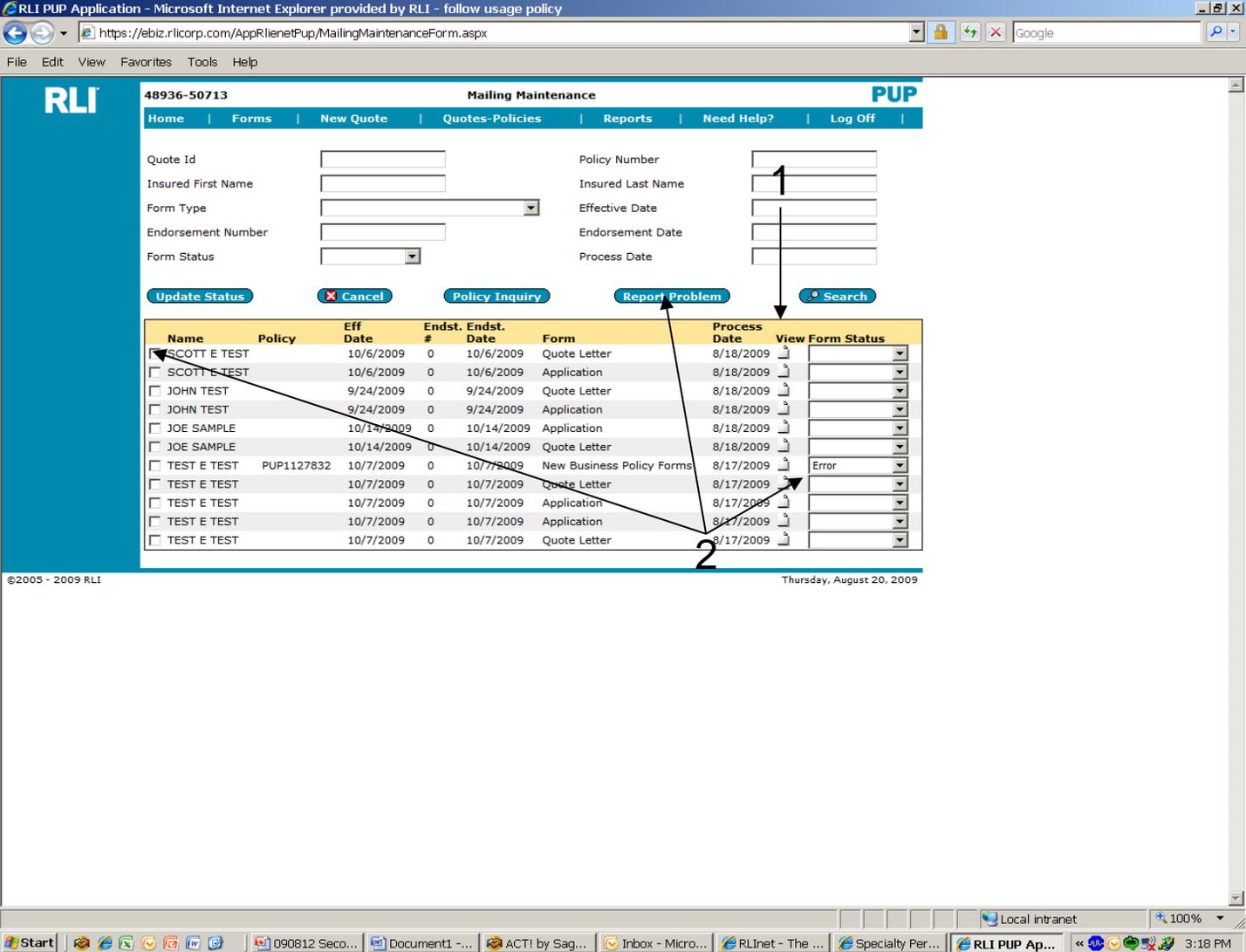
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Start 090812 Seco... Document1 -... ACTI by Sag... Inbox - Micro... RLInet - The ... Specialty Per... RLI PUP Ap... 3:09 PM

## “Mailing Maintenance” Screen

- To open the PDF, click on the icon under the “View” column for the desired form.

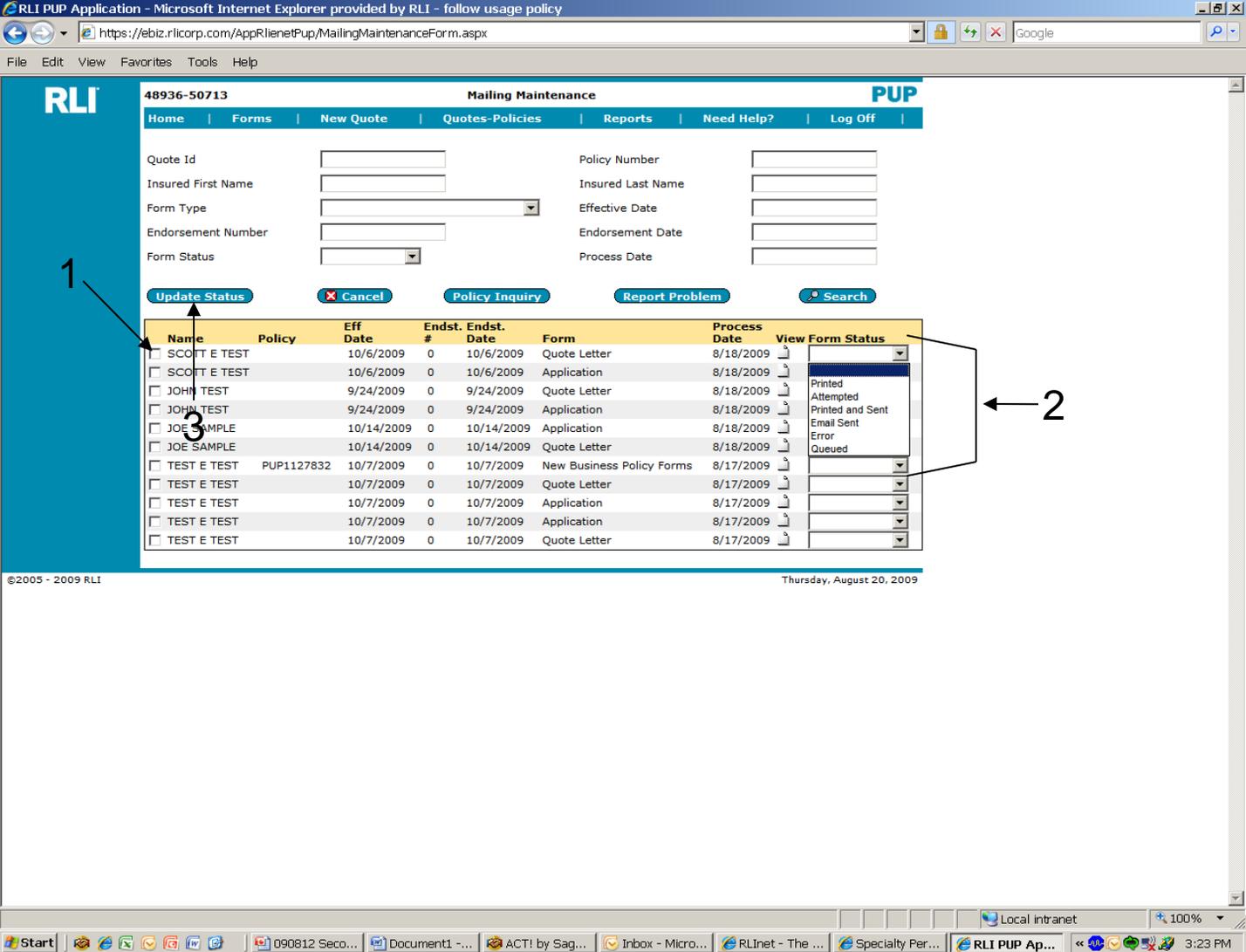
**NOTE:** If you are looking for a form that is not under the “Forms” tab, then it may have been generated prior to 5/08. In this case, you can order a duplicate from the Mailing Screen in Policy Inquiry. It will be mailed to your administrator the next business day.



## “Mailing Maintenance” Screen

1. To open the PDF, click on the icon under the “View” column for the desired form.
2. If the form has an “Error” status, you may check the box in front of the item, and then click on “Report Problem”.

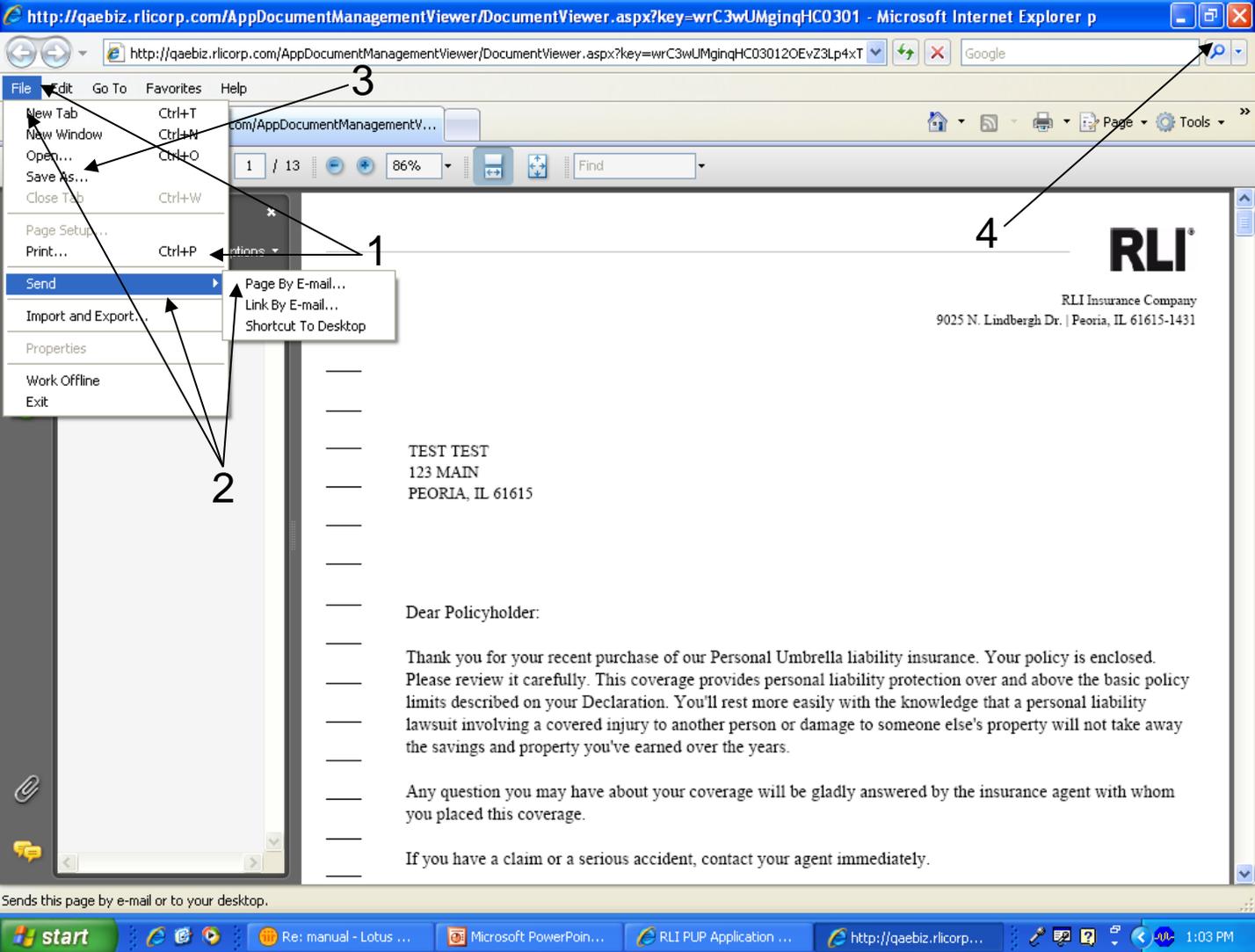
**Note:** If you are looking for a form that is not under the “Forms” tab, then it may have been generated prior to this new system. In this case, you can order a duplicate from the Mailing Screen in Policy Inquiry via “eRLI Access” (page 45). It will be sent to your administrator the next business day.



## “Mailing Maintenance” Screen

- To update the status of a particular form, click on the box in front of the desired form.
- Click on the down arrow under “Form Status”. A drop down box will appear with the following options:  
**Printed**  
**Attempted** — The second part of the Error status below will show that the form encountered some sort of problem.  
**Printed and Sent**  
**E-mail sent**  
**Error**— The system automatically populates this if there is a problem with the particular form generated.  
**Queued** — The form will generate that evening.
- Next click on “Update Status.” This will update the form’s status to what was chosen under #2 and will be available for future reference.

**Note: The “Form Status” is only populated by you, the user, with the exception of “Error” and “Queued”.**



Once the form has loaded it can be printed, e-mailed or saved.

1. **Print** - To print the document, click on “File” and then select “Print.”
2. **E-Mail** - To email the document, click on “File,” select “Send,” and then select “Page By E-mail.” This will automatically send the attachment to a new e-mail.
3. **Save As** – To save this document, click on “Save As” and select the location to which you wish to save the document.
4. Close this window once your document has been printed, emailed or saved by clicking on the red “X”.

# **CHAPTER 3**

“New Quotes”

Specialty Personal Lines - Microsoft Internet Explorer provided by RLI - follow usage policy

https://portal.rlicorp.com/portal/server.pt

File Edit View Favorites Tools Help

Specialty Personal Lines

My Home Welcome to the RLI Portal! My Account Log Off

Help Search: Everywhere

**RLI** Specialty Personal Lines Home

You are logged in as: 48936-50713  
Your agency name: Subproducer 2  
[Change Password](#)



**RLI PUP Alert**

- **Effective immediately, DO NOT input ANY RLI Personal Umbrella business with an effective date of 10-1-09 OR LATER in the states of Alaska, Colorado, Florida, New York, South Carolina or Virginia until further notice. Because PUP Special IS NOT approved in these 6 states, we will "sit tight" and hope for an approval so that we can offer the program as of 10-1-09 in these 6 states. All other states are now approved and the system is updated and compatible for entry out 60 days in advance. Thanks for your assistance in this transition. As soon as we hear from any of these 6 states we will let you know.**

**RLI Personal Umbrella Policy System (PUP Access)**

[Get A New PUP Quote](#)      [Quote - Policy Look-up](#)      [Quote - Policy Form Look-up](#)      [Run a PUP Report](#)

**Home Business Insurance System (eRLI Access)**

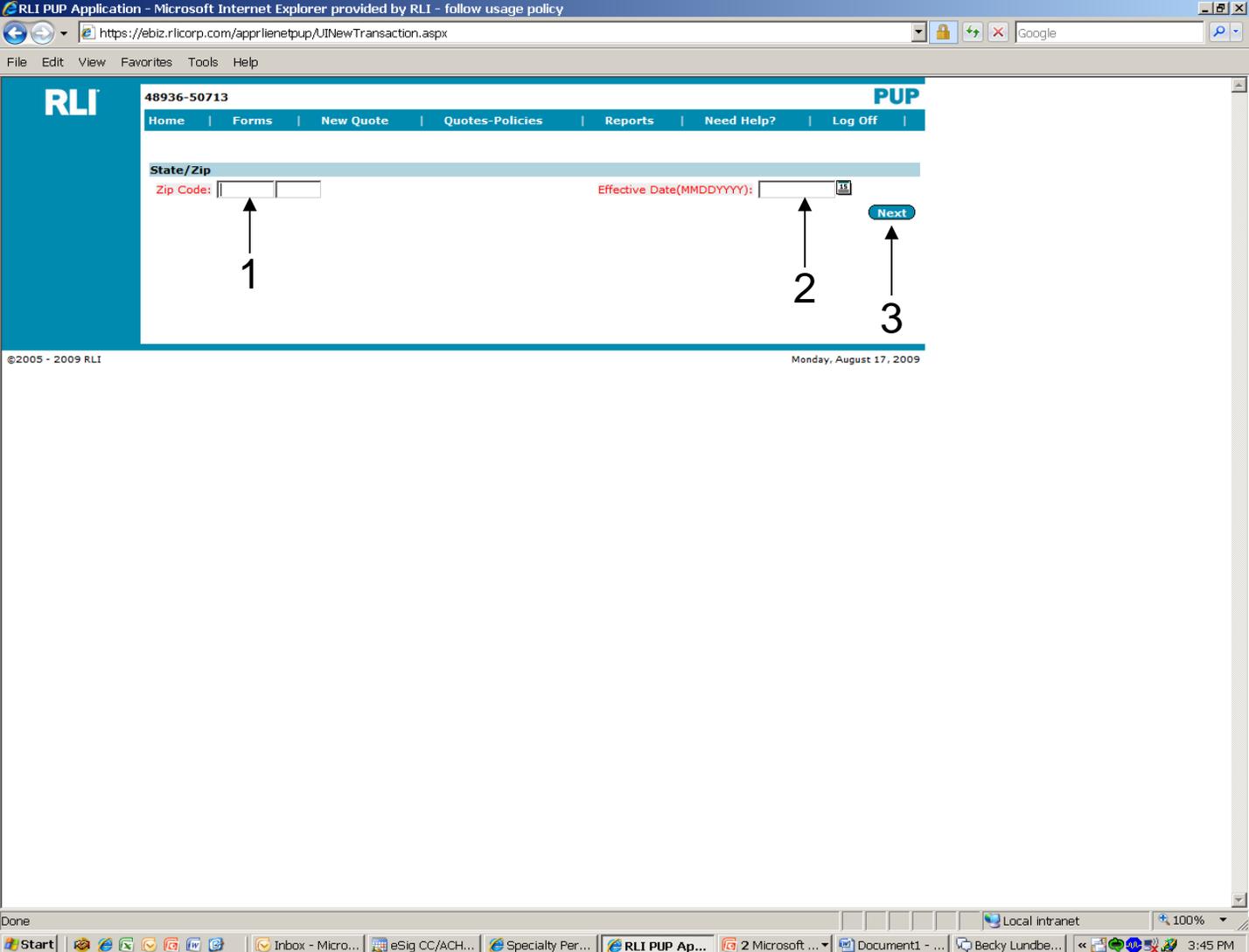
[Get A New Home Business Insurance \(HBI\) Quote](#)

**Marketing Materials**    [PUP Sample Forms](#)    [HBI Sample Forms](#)    [System Manuals](#)  
[PUP Rate Lookup](#)    [PUP FAQs](#)    [Help](#)

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Start    Inbox - Micr...    eSig CC/ACH...    Specialty P...    RLI PUP Appl...    2 Microsoft...    Document1 -...    Becky Lundb...    3:38 PM

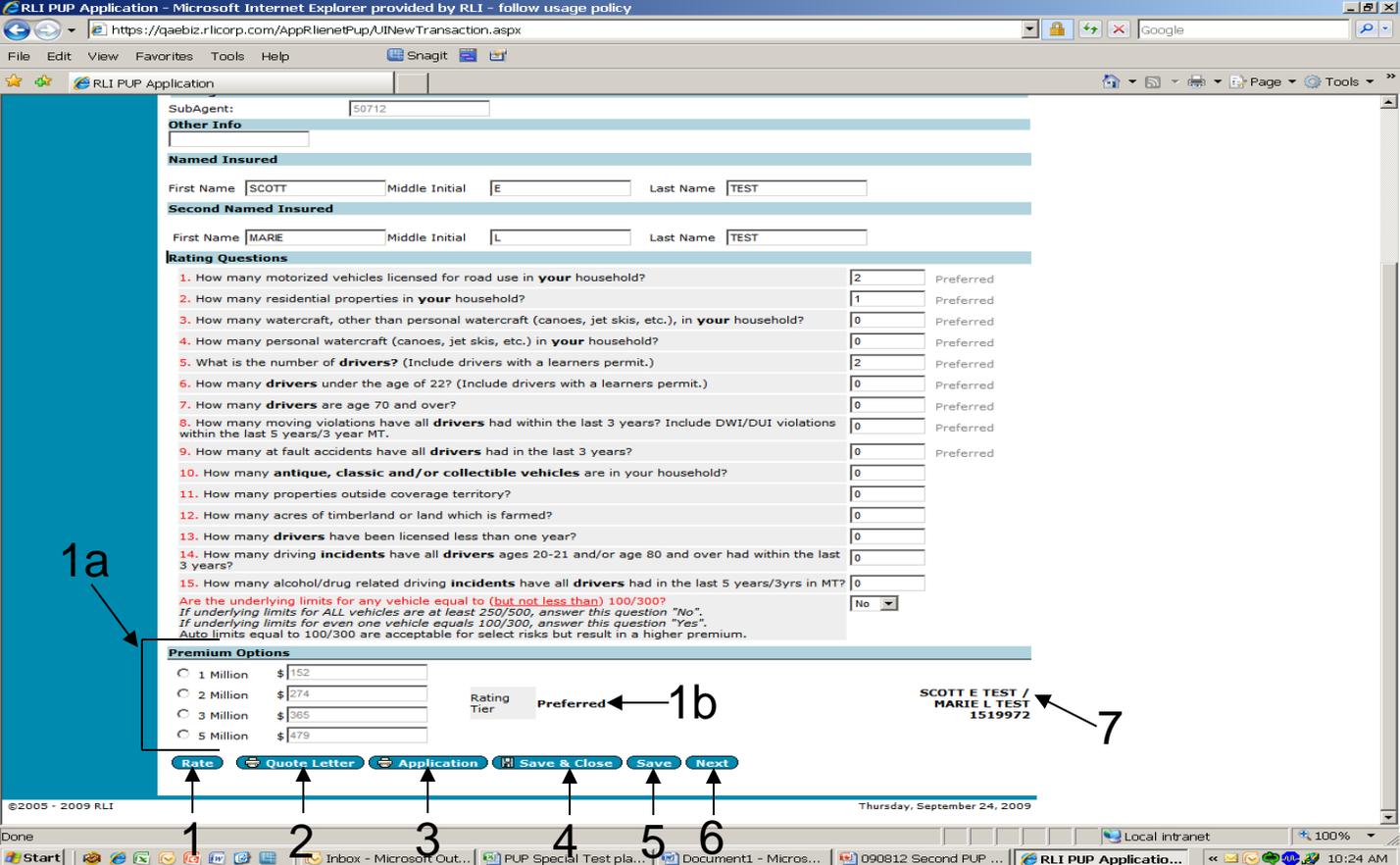
1. **New Quote** – From the “Community Home Page”, click on the “Get a New PUP Quote” link.



Once you click on “Get a New PUP Quote” you begin the quoting process on this screen.

1. **Zip Code** - Enter the zip code where the named insured resides.
2. **Effective Date** – There are two ways to enter the effective date. One is to click on the calendar tab next to the effective date box, and select the appropriate date. The other way is to type in the appropriate date. You may only enter an effective date which is 3 days back from the entry date or 60 days forward.
3. **Next** – After selecting the date, click on the “Next” button to move to the next screen.

1. **Administrator** - The “Administrator” number will automatically display.
2. **SubAgent** – Your “SubAgent” (subproducer) number will automatically display.
3. **Named Insured** – Complete the information for the “Named Insured” and if necessary, the “Second Named Insured”.
4. **Rating Questions** – These questions are in an abbreviated format. To view the question in it’s entirety, hold the cursor over the question and the full question will display.
5. **Underlying Auto Limits** - The final question references the underlying auto limits maintained by all members of the household on ANY auto in the household.
6. **Rate** – Click the “Rate” button to obtain the premium(s).



### “Premium Options” Screen

1. **Rate** - Once you have clicked on the “Rate” button, the following fields will be populated and the quote number will be assigned.
  - a. **Premium Options** – You must select the coverage limit desired before you can move forward with the quote/application process.
  - b. **Rating Tier** – This will provide detail of the rating tier for which your risk qualifies based on risk characteristics.
2. **Quote Letter** – This button will generate a letter with a premium indication based on the information entered during the quick quote process.
3. **Application** – This button will generate a *partially completed* application based on the questions answered.
4. **Save & Close** – This button allows you to save the information entered and exit from the quote.
5. **Save** – This button will save the quote information entered and keep the current quote active.
6. **Next** – This button will always save the currently entered information and take you to the next page of the quote/application screens.
7. The applicant’s name and quote number are displayed here.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/UINewTransaction.aspx

File Edit View Favorites Tools Help

RLI PUP Application

scombs@rlicorp.com PUP

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Premium Options

Underwriting Questions

Address Information

Quote: 1519972

**Underwriting Questions**

16. Have **you** or any other **driver** had an arrest, citation or conviction for reckless driving, careless driving (with 4 points in FL), 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/3 year in MT? (Careless or negligent driving N/A in SC.)

17. Have **you** or any **member of your household** been indicted, charged with or convicted of a felony within the last 5 years?

18. Do **you** or any **member of your household** have an occupation of a professional entertainer or athlete, media personality, or an appointed or elected federal or state political figure? (N/A for political figures in FL, OR and TX.)

19. Have **you** or any **member of your household** had any personal liability or personal auto bodily injury liability claims for which payment by **your** insurance company exceeded \$25,000 in the last 5 years?

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. Do **you** or any **member of your household** own (including partial ownership) 6 or more residential properties rented to others that are **not** occupied in whole or in part at any time 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 Premises Liability Policy as they are excluded from coverage.**

22. Has any one **driver** had more than 3 moving violations within the last 3 years? (Include DWI/DUI incidents within the last 5 years/3 years MT)

23. Has any **driver** under the age of 20 had a driving **incident** within the last 3 years?

24. Has any one **driver** ages 20-21 and/or age 80 and over had more than one driving **incident** within the past 3 years?

Quote Letter Application Save & Close Save Next

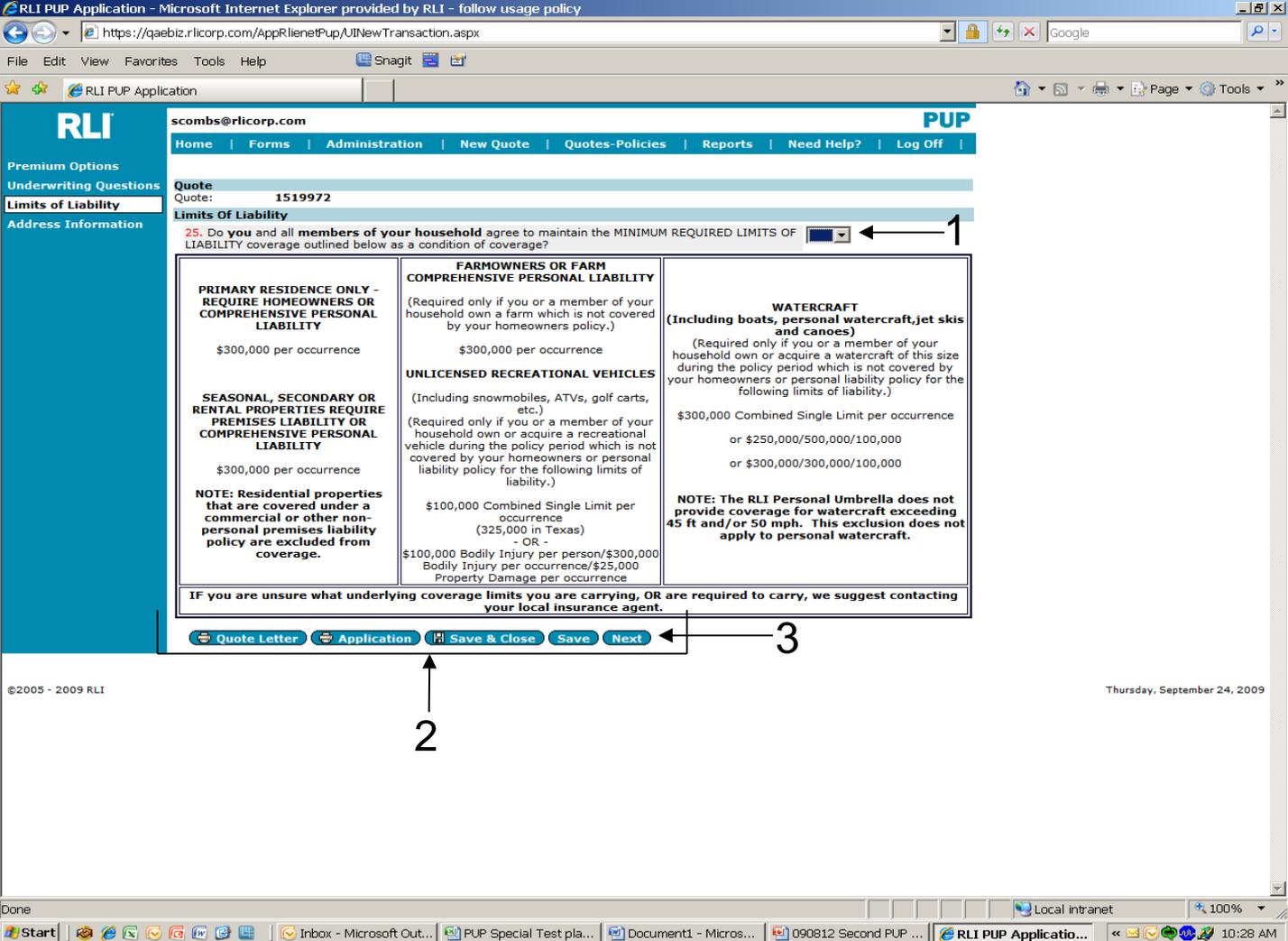
©2005 - 2009 RLI Thursday, September 24, 2009

Done Local intranet 100%

Start Inbox - Microsoft Out... PUP Special Test pla... Document1 - Micros... 090812 Second PUP ... RLI PUP Applicatio... 10:27 AM

## “Underwriting Questions” Screen

1. **Underwriting Questions** - Answer each question.
2. This group of buttons perform the same functions as on the previous page.
3. **Next** - Once all questions have been answered, click the “Next” button to proceed to the next screen.



## “Limits Of Liability” Screen

1. Answer the question affirming that all members of the household agree to maintain the minimum required underlying limits throughout the policy term.
2. This group of buttons perform the same functions as on the previous pages.
3. **Next** - Once all questions have been answered, click the “Next” button to proceed to the next screen.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/UINewTransaction.aspx

File Edit View Favorites Tools Help Snagit

RLI PUP Application

scombs@rlicorp.com PUP

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Premium Options  
Underwriting Questions  
Limits of Liability  
**Automobile Liability**  
Address Information

Quote: 1519972  
Automobile Liability

|   |  |   |
|---|--|---|
| <p><b>LIMIT A</b></p> <p>\$500,000 Bodily Injury per person/<br/>\$500,000 Bodily Injury per occurrence/<br/>\$50,000 Property Damage per occurrence/<br/>-OR-<br/>\$500,000 Combined Single Limit per occurrence</p> <p><b>Limit A is ALWAYS REQUIRED if there are drivers under the age of 22 in the household - OR- if the answer to Question 15 &gt; 0 - OR- in Kansas and Massachusetts if there are drivers with six years or less driving experience in the household.</b></p> | <p><b>LIMIT B</b></p> <p>\$250,000 Bodily Injury per person/<br/>\$500,000 Bodily Injury per occurrence/<br/>\$50,000 Property Damage per occurrence/<br/>-OR-<br/>\$300,000 Bodily Injury per person/<br/>\$300,000 Bodily Injury per occurrence/<br/>\$50,000 Property Damage per occurrence/<br/>-OR-<br/>\$300,000 Combined Single Limit per occurrence/<br/>(\$325,000 in Texas)</p> <p><b>Limits B and C are available options ONLY if all drivers in the household are age 22 and over. Limit C is NOT available if UM/UIM is purchased; and/or if there are any drivers age 70 or over in the household; and/or if any response to Questions 1-9 falls under the Standard II column (N/A in HI); and/or if any response to Questions 1-9 falls under the Pup Special column.</b></p> | <p><b>LIMIT C</b></p> <p>\$100,000 Bodily Injury per person/<br/>\$300,000 Bodily Injury per occurrence/<br/>\$50,000 Property Damage per occurrence/<br/><b>The choice of Limit C results in a higher premium.</b></p> |
|---|--|---|

If you are unsure what underlying coverage limits you are carrying, or are required to carry, we suggest contacting your local insurance agent.

26. Which of the above MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do you and ALL members of your household agree to maintain as a condition of coverage for all licensed vehicles which are owned, leased, rented, operated, or acquired during the policy period? If you elect to purchase Uninsured/Underinsured Motorist (UM/UIM) coverage in the states of FL, IN, LA, NH, VT or WV; 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.

Quote Letter Application Save & Close Save Next

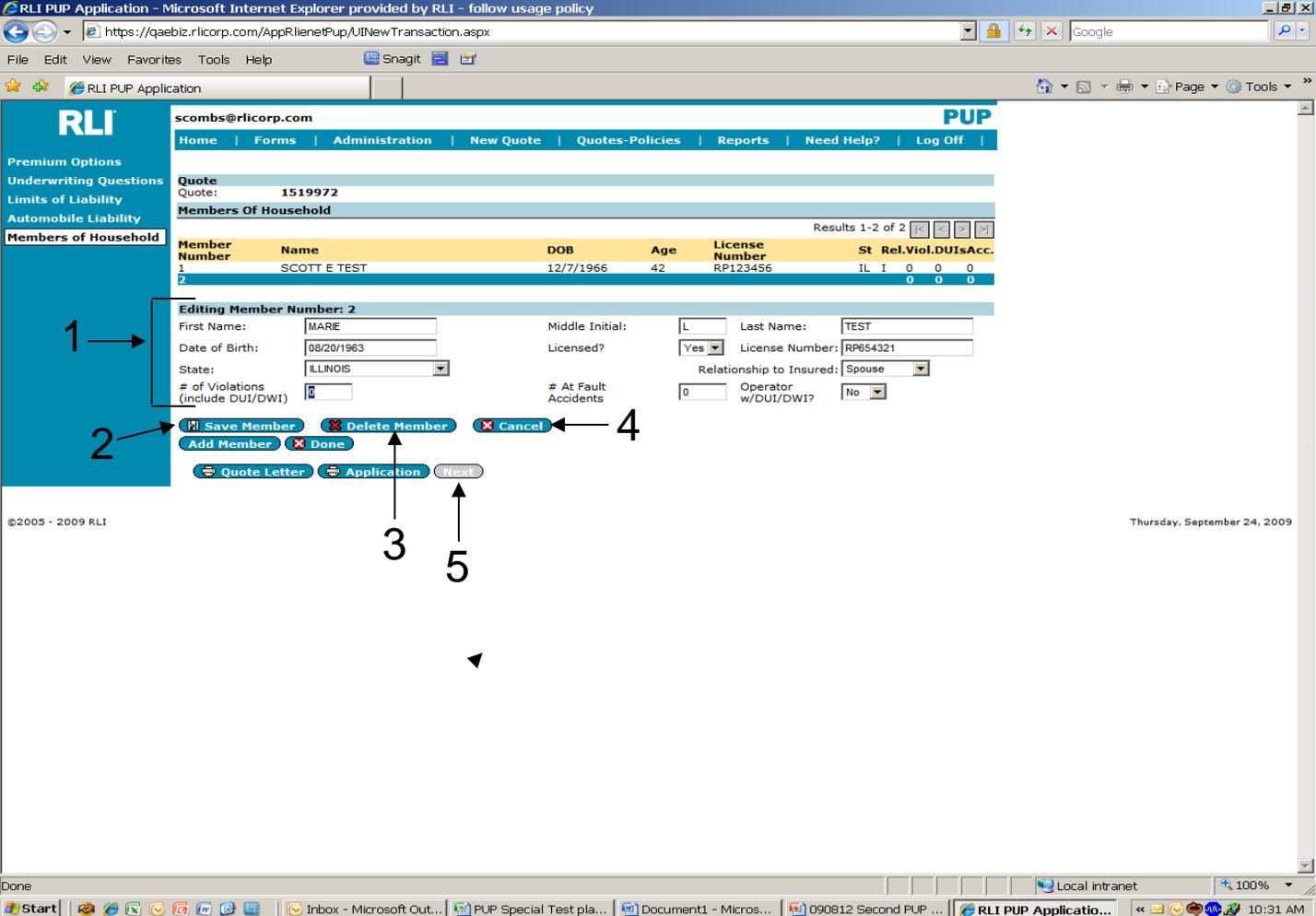
©2005 - 2009 RLI Thursday, September 24, 2009

## “Automobile Liability” Screen

1. Answer the question by selecting the appropriate underlying auto limit the insured agrees to maintain for all members of the household.

**Note: This question must be answered regardless of whether or not there is a driver and/or a vehicle in the household.**

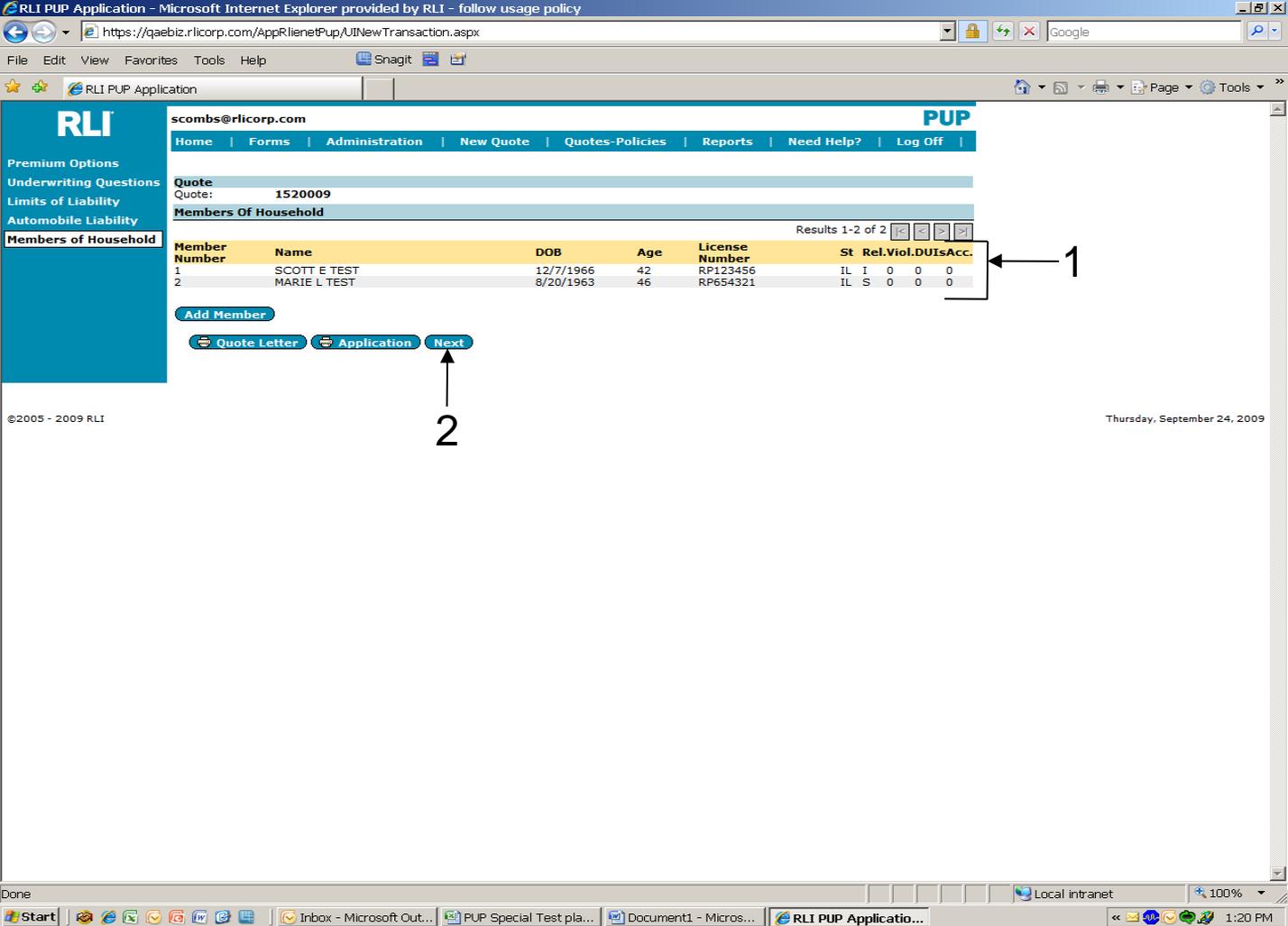
2. This group of buttons perform the same functions as on the previous pages.
3. **Next** - Once all questions have been answered, click the “Next” button to proceed to the next screen.



## “Member Of Household” Screen

All household members ages 14 and older must be disclosed here.

1. **Editing Member Number “X”** – Complete each field for all members.
2. **Save Member**- Click this button to save the information once each member’s information has been entered.
3. **Delete Member**– Click this button if a member’s information is incorrect. This deletes the current information and allows you to start over. Remember that if you completely delete a driver thus decreasing the total number of drivers, you must first decrease the number of drivers stated in question #5 on the “Premium Options” screen.
4. **Cancel** – Click this button if you do not want to edit a selected member.
5. **Next** - Once all members have been included and the questions have been answered, click the “Next” button to proceed to the next screen.

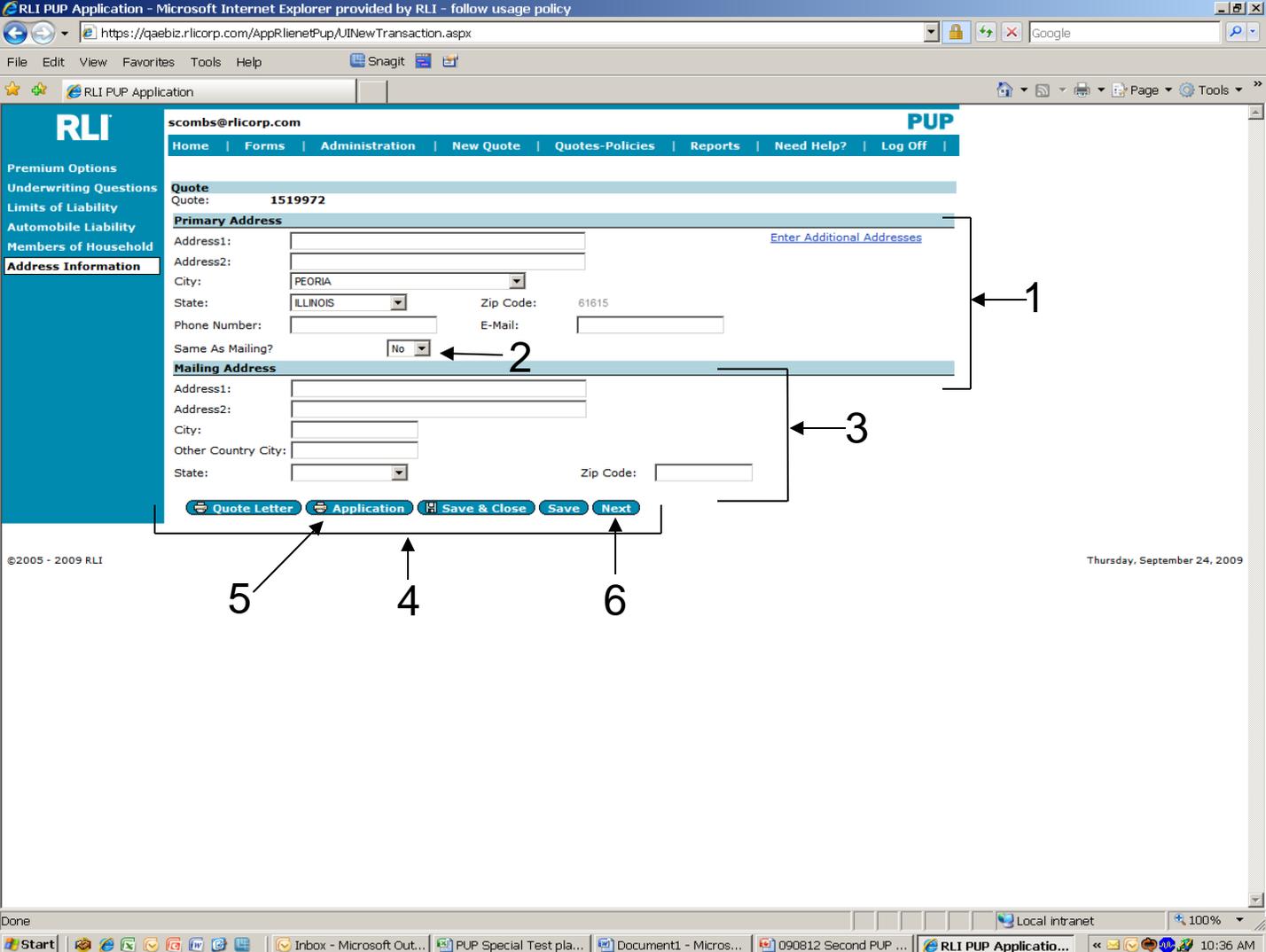


## “Member Of Household” Screen

Once all household members have been disclosed the screen will change.

1. Once each member of the household has been listed, they will show within this section.
2. **Next** - Once all members have been added, click the “Next” button to proceed to the next screen.

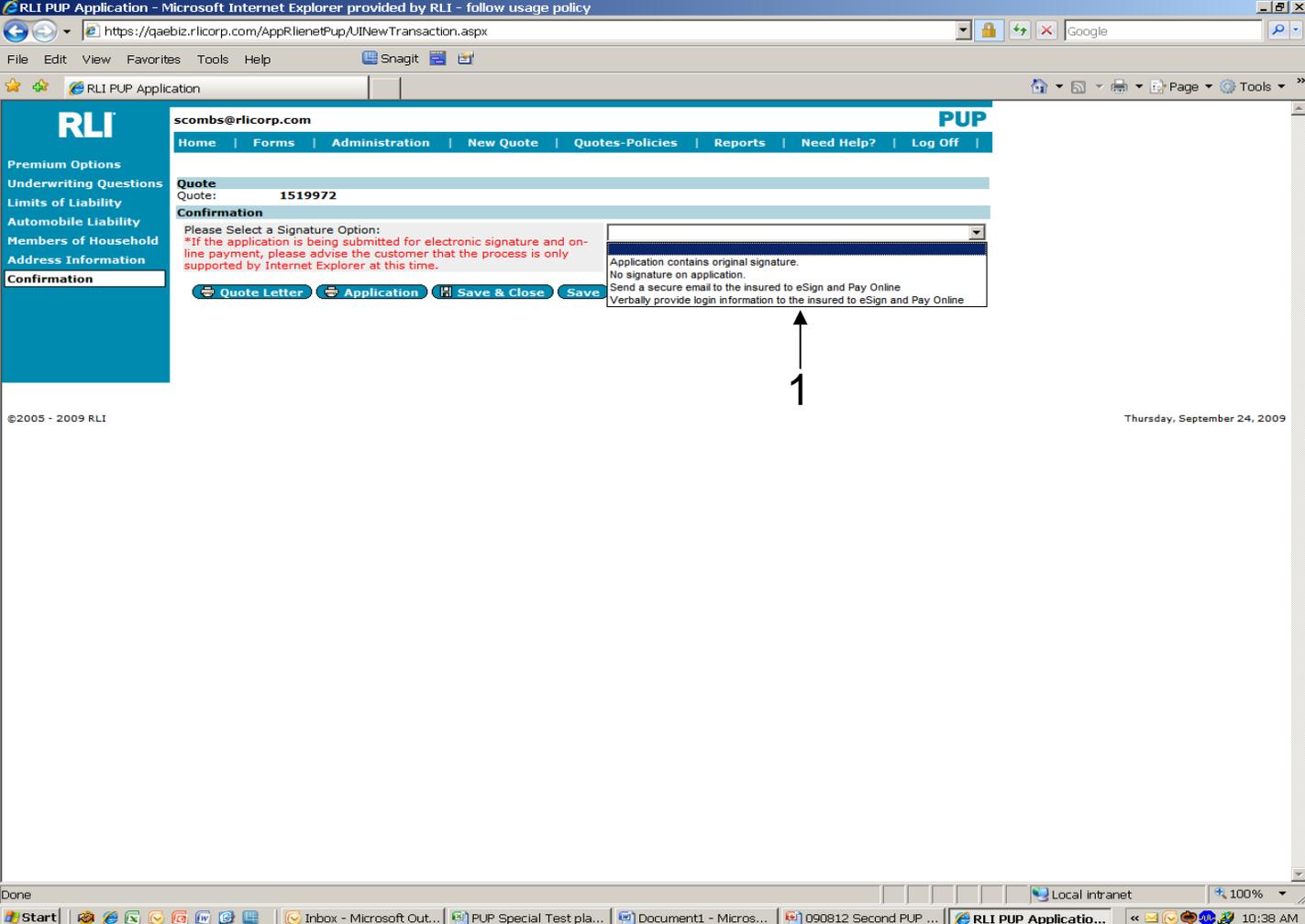
**Note: The number of drivers answered on question #5 must equal the number of household members input here with a YES in the license/permit column.**



## “Address Information” Screen

1. **Primary Address** – Complete each field for the insured’s primary address.
2. **Same As Mailing** - If the mailing address is different than the primary address then answer “No” and complete the “Mailing Address” section.
3. **Mailing Address** – Complete all the fields for the mailing address.
4. This group of buttons perform the same functions as on the previous pages.
5. **Application** - By printing the “Application” from this screen, the entire application is complete and ready for the insured’s signature, or you can continue to the next screen to have the application signed and paid electronically.
6. **Next** - Once all questions have been answered, click the “Next” button to proceed to the next screen.





## “Confirmation” Screen

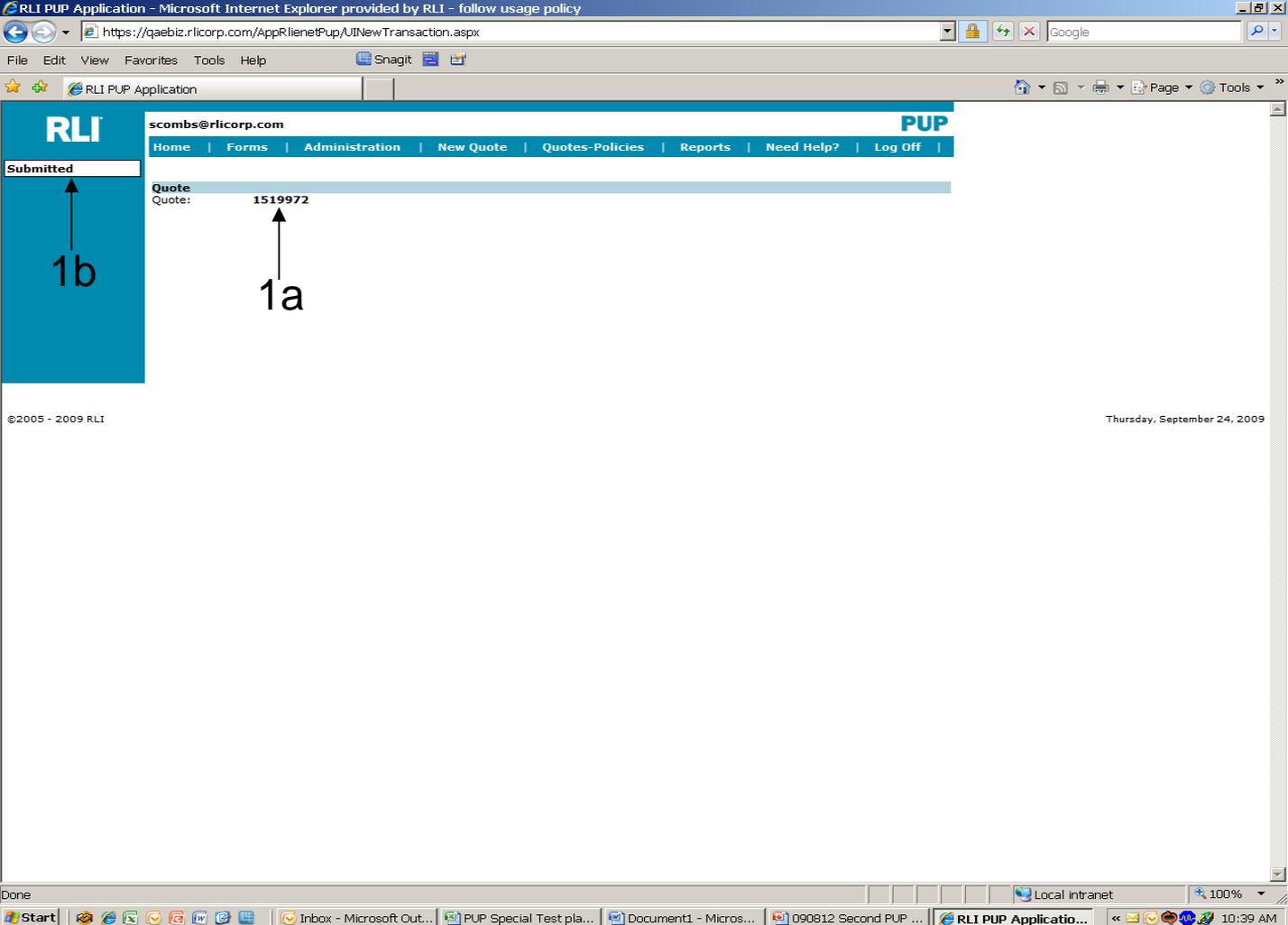
1. In order to complete the sales transaction for an insured’s policy, you have three methods for completion.

**Application contains original signature** – You would make this selection if the insured has chosen to provide a wet signature and check payment for their policy.

**No signature on application** – If you do not have a signature and payment, you should never submit the risk to your administrator. Print the application for signature and then submit to your administrator.

**Send a secure email to the insured to eSign and Pay Online** – This is the first of two methods by which you can have the application signed and paid for electronically. Once the insured receives the e-mail, they will provide their electronic signature and payment and once they have completed this step, the policy is automatically sent to your administrator for binding.

**Verbally provide login information to the insured to eSign and Pay Online** – This is the second method the insured can select to electronically complete the purchase of their policy. Simply follow the on-screen directions and the insured can access RLI’s secure website directly without receiving an e-mail.



## “Submitted” Screen

1. Once “Submit for Review” is selected on the previous screen –
  - a. The quote number will display, and
  - b. “Submitted” will show in the upper left side.

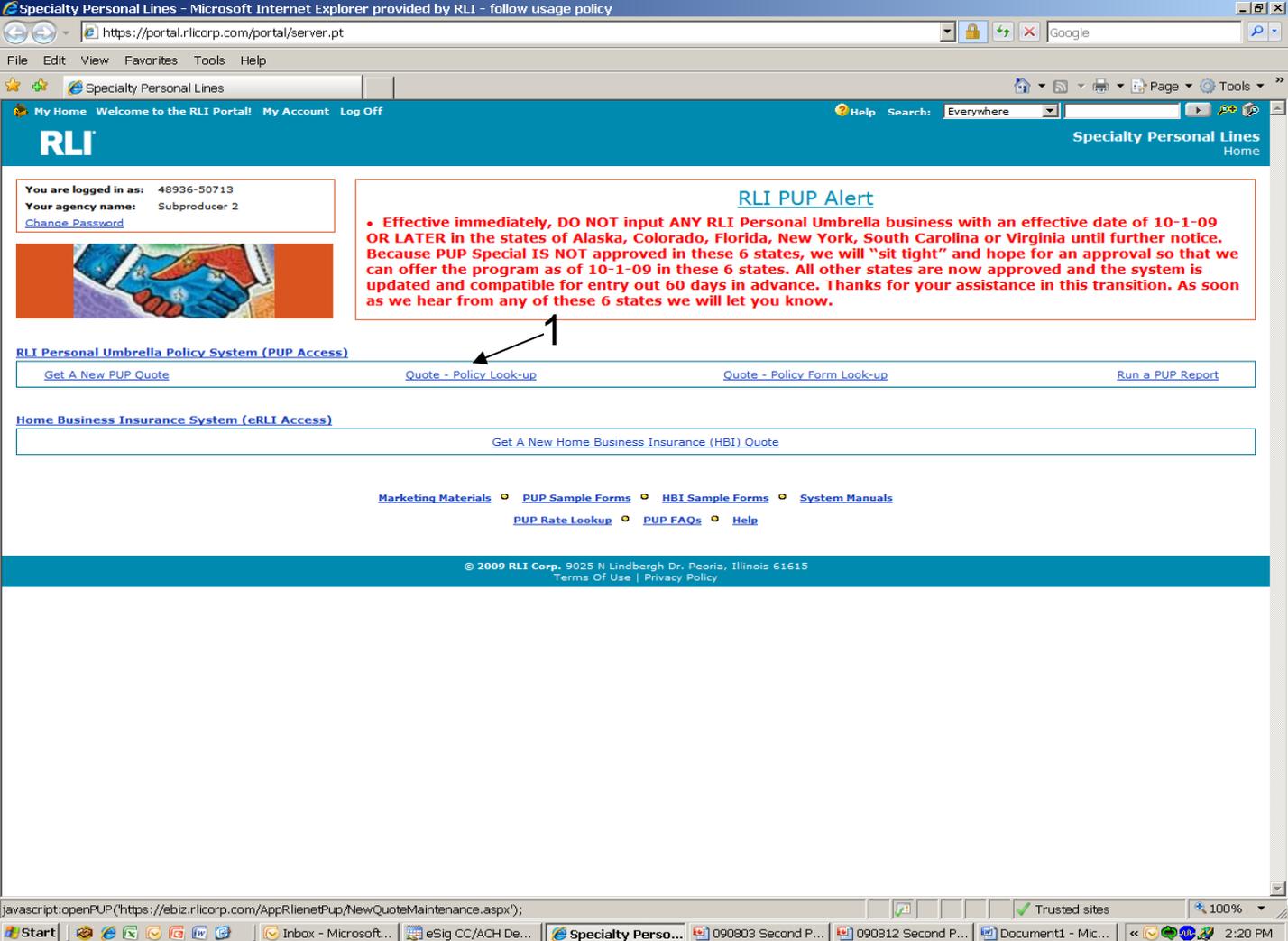
Your administrator will provide direction on what your next steps should be to complete the process. RLI requires that the administrator have a legible, signed and complete RLI application with full annual payment before they request the quote to be bound.

Once the policy is bound by RLI, a policy number with a “PUP” prefix is assigned. All policy information and policy documents can be found in the “Quotes - Policies” area of “PUP Access”.

**Note: All RLI applications require the insured’s signature<sup>31</sup> and full annual premium prior to binding.**

# **CHAPTER 4**

“Quotes – Policies”



1. **Quotes – Policies Look-up** – From the “Community Home Page”, click on this option to view an existing quote or a specific policy.

**Repository**

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | 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:

[Search](#) [Policy Inquiry](#)

**Working List: Recent Transactions**

[Load](#) [Forms](#) [Print List](#)

| Quote # | Policy #   | Name                 | St | Eff Dte    | Premium | Type     | Status                  | Limit       |
|---------|------------|----------------------|----|------------|---------|----------|-------------------------|-------------|
| 1519972 | **         | SCOTT E TEST         | IL | 10/7/2009  | \$152   | QUOTE    | New Quote was Submitted | \$1,000,000 |
| 1519967 | **         | MATTS TEST           | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519944 | **         | MIKITO FUJII         | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519960 | **         | RICHARD P WELCH      | PA | 10/13/2009 | \$720   | QUOTE    | eSig e-mailed Pending   | \$1,000,000 |
| 1519941 | **         | BONITA PARDUE        | WV | 10/15/2009 | \$512   | QUOTE    | eSig Complete           | \$1,000,000 |
| 1519951 | PUP2405208 | JAMES T DICKERSON    | FL | 10/23/2009 | \$636   | NEWISSUE | Bound                   | \$3,000,000 |
| 1519950 | PUP2405207 | BONITA B PARDUE      | WV | 10/15/2009 | \$571   | NEWISSUE | Bound                   | \$3,000,000 |
| 1519943 | **         | BRENDA RIGGS         | VT | 10/3/2009  | \$1,151 | QUOTE    | MVR Error               | \$1,000,000 |
| 1519942 | **         | BONITA PARDUE        | WV | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519912 | **         | DAWN M SILVERTHORN   | IL | 10/31/2009 | \$422   | QUOTE    | eSig e-mailed Pending   | \$1,000,000 |
| 1519907 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519906 | **         | CON CONNECTICUT      | CT | 10/5/2009  | \$1,132 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519894 | **         | CHARLES CALIFORNIA   | CA | 10/6/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519892 | **         | MICHAEL C CREEKMORE  | MA | 10/31/2009 | \$1,150 | QUOTE    | MVR Error               | \$1,000,000 |
| 1519884 | **         | JAMES VEE            | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519881 | **         | JOHN VEE             | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519879 | PUP2405201 | KEITH BARRETT        | ND | 10/21/2009 | \$351   | NEWISSUE | Bound                   | \$2,000,000 |
| 1519876 | **         | KYLE D BATTS         | TX | 11/1/2009  | \$653   | QUOTE    | eSig e-mailed Pending   | \$1,000,000 |
| 1519864 | **         | KIMBERLY FITZPATRICK | NH | 10/5/2009  | \$413   | QUOTE    | New Quote Paid          | \$1,000,000 |
| 1519836 | **         | ROGER STANLEY        | MI | 11/21/2009 | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519835 | **         | ROGER STANLEY        | MI | 11/22/2009 | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519809 | **         | DOUGLAS L CUNEY      | PA | 10/28/2009 | \$1,123 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519808 | **         | KIMBERLY FITZPATRICK | NH | 10/2/2009  | \$708   | QUOTE    | New Quote Paid          | \$3,000,000 |
| 1519794 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$633   | QUOTE    | eSig e-mailed Pending   | \$5,000,000 |
| 1519803 | **         | ERIC GOBBLE          | IL | 10/1/2009  | \$201   | QUOTE    | eSig Pending            | \$1,000,000 |
| 1519729 | **         | MARIE L TEST         | IL | 10/7/2009  | \$152   | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519678 | **         | BECKY RANDY          | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519677 | **         | RANDY FOLLOWUP       | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519676 | **         | FOLLOWUP TEST        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519628 | **         | KEITH E BARRETT      | ND | 10/1/2009  | \$988   | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519635 | **         | KYLE D BATTS         | TX | 10/1/2009  | \$295   | QUOTE    | eSig e-mailed Pending   | \$1,000,000 |
| 1519622 | **         | MATTHEW DOYLE        | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519621 | **         | MATT DOYLE           | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |

## “Repository” Screen

- Working List** – When you click on the “Quote-Policy Look-Up” link, it will automatically bring up “Recent Transactions”. This includes both quotes and policies.

You can filter by these 7 options. Those include -

**Quotes** – To search for quotes, click “Quotes”.

**Policies** – To search for policies, click “Policies”.

**Recent Transactions** – Previously outlined.

**eSignature** – This will filter quotes with any status relating to the esignature process.

**Payments Pending** – This will filter those quotes due to status of “web payment pending”.

**Failed Payments** – This will filter those quotes with an attempted electronic payment with has failed for any reason.

**Expired Authorization** – This will filter those quotes which have exceeded the 7 day authorization period.

**Note:** If a button is blue it is active. If the button is grey it is not active. These buttons will be described in further detail in the coming pages.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow us here

https://qaebiz.rlicorp.com/AppRlienetPup/Repository.aspx

File Edit View Favorites Tools Help Snagit

RLI PUP Application

**RLI** **Repository** **PUP**

scombs@rlicorp.com

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Quotes  
Policies  
Recent Transactions  
eSignature  
Payments Pending  
Failed Payments  
Expired Authorization

**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:

← 1

2 → **Search** **Policy Inquiry** 4

Working List: Recent Transactions

**Load** **Forms** **Print List**

Results 1-50 of 100

| Quote # | Policy #   | Name                 | St | Eff Dte    | Premium | Type     | Status                  | Limit       |
|---------|------------|----------------------|----|------------|---------|----------|-------------------------|-------------|
| 1519972 | **         | SCOTT E TEST         | IL | 10/7/2009  | \$152   | QUOTE    | New Quote was Submitted | \$1,000,000 |
| 1519967 | **         | MATTS TEST           | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519944 | **         | MIKITO FUJII         | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519960 | **         | RICHARD P WELCH      | PA | 10/13/2009 | \$720   | QUOTE    | eSig e-mailed           | \$1,000,000 |
| 1519941 | **         | BONITA PARDUE        | WV | 10/15/2009 | \$512   | QUOTE    | eSig Complete           | \$1,000,000 |
| 1519951 | PUP2405208 | JAMES T DICKERSON    | FL | 10/23/2009 | \$636   | NEWISSUE | Bound                   | \$3,000,000 |
| 1519950 | PUP2405207 | BONITA B PARDUE      | WV | 10/15/2009 | \$571   | NEWISSUE | Bound                   | \$3,000,000 |
| 1519943 | **         | BRENDA RIGGS         | VT | 10/3/2009  | \$1,151 | QUOTE    | MVR Error               | \$1,000,000 |
| 1519942 | **         | BONITA PARDUE        | WV | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519912 | **         | DAWN M SILVERTHORN   | IL | 10/31/2009 | \$422   | QUOTE    | eSig e-mailed           | \$1,000,000 |
| 1519907 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519906 | **         | CON CONNECTICUT      | CT | 10/5/2009  | \$1,132 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519894 | **         | CHARLES CALIFORNIA   | CA | 10/6/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519892 | **         | MICHAEL C CREEKMORE  | MA | 10/31/2009 | \$1,150 | QUOTE    | MVR Error               | \$1,000,000 |
| 1519884 | **         | JAMES VEE            | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519881 | **         | JOHN VEE             | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519879 | PUP2405201 | KEITH BARRETT        | ND | 10/21/2009 | \$351   | NEWISSUE | Bound                   | \$2,000,000 |
| 1519876 | **         | KYLE D BATTS         | TX | 11/1/2009  | \$653   | QUOTE    | eSig e-mailed           | \$1,000,000 |
| 1519864 | **         | KIMBERLY FITZPATRICK | NH | 10/5/2009  | \$413   | QUOTE    | New Quote Paid          | \$1,000,000 |
| 1519836 | **         | ROGER STANLEY        | MI | 11/21/2009 | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519835 | **         | ROGER STANLEY        | MI | 11/22/2009 | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519809 | **         | DOUGLAS L CUNEY      | PA | 10/28/2009 | \$1,123 | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519808 | **         | KIMBERLY FITZPATRICK | NH | 10/2/2009  | \$708   | QUOTE    | New Quote Paid          | \$3,000,000 |
| 1519794 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$633   | QUOTE    | eSig e-mailed           | \$5,000,000 |
| 1519803 | **         | ERIC GOBBLE          | IL | 10/1/2009  | \$201   | QUOTE    | eSig Pending            | \$1,000,000 |
| 1519729 | **         | MARIE L TEST         | IL | 10/7/2009  | \$152   | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519678 | **         | BECKY RANDY          | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519677 | **         | RANDY FOLLOWUP       | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519676 | **         | FOLLOWUP TEST        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519628 | **         | KEITH E BARRETT      | ND | 10/1/2009  | \$988   | QUOTE    | Quote Rated             | \$1,000,000 |
| 1519635 | **         | KYLE D BATTS         | TX | 10/1/2009  | \$295   | QUOTE    | eSig e-mailed           | \$1,000,000 |
| 1519622 | **         | MATTHEW DOYLE        | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |
| 1519621 | **         | MATT DOYLE           | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated             | \$0         |

3 →

Done

Local intranet 100%

Start | Inbox - Microsoft Out... | PUP Special Test pla... | Document1 - Micros... | 090812 Second PUP ... | RLI PUP Applicatio... | 10:41 AM

## “Repository” Screen

- Search** section- Enter the criteria in the appropriate field(s) to locate the policy or quote that is being sought.
- Search** button – Click this button once the criteria has been established to query the database.
- Working List: Recent Transactions** - Select the policy or quote desired by clicking on the policy or quote found in the listing.
- Load** – Click this button once the policy or quote has been highlighted, to load the data.

**Note: If a button is blue it is active. If a button is grey it is not active.**

**Repository**

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | 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:

Working List: Recent Transactions

Results 1-50 of 100

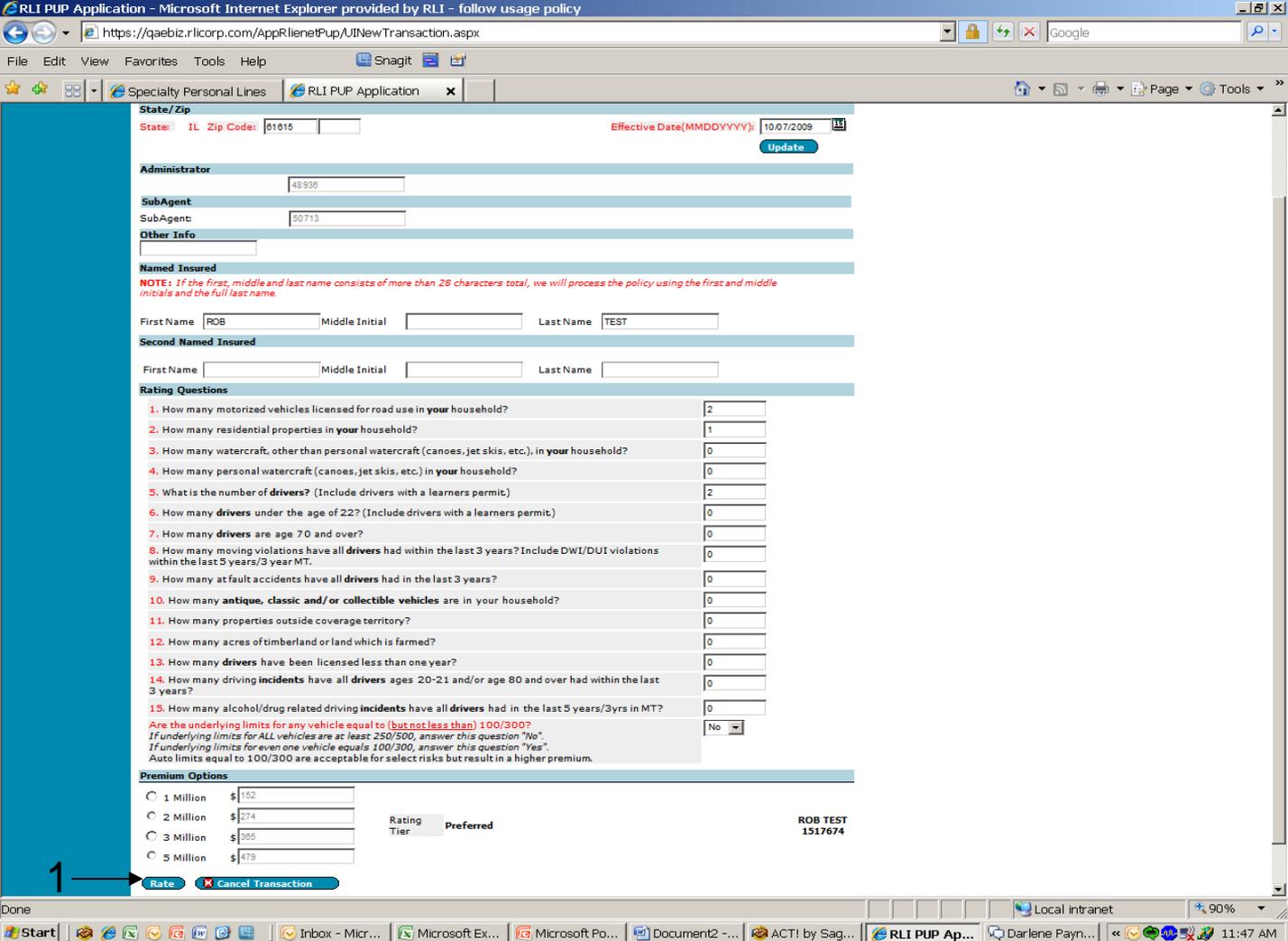
| Quote # | Policy #   | Name                 | St | Eff Dte    | Premium | Type     | Status         | New Quote was Submitted | Limit       |
|---------|------------|----------------------|----|------------|---------|----------|----------------|-------------------------|-------------|
| 1519972 | **         | SCOTT E TEST         | IL | 10/7/2009  | \$152   | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519967 | **         | MATTS TEST           | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519944 | **         | MIKITO FUJII         | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519960 | **         | RICHARD P WELCH      | PA | 10/13/2009 | \$720   | QUOTE    | eSig e-mailed  | Pending                 | \$1,000,000 |
| 1519941 | **         | BONITA PARDUE        | WV | 10/15/2009 | \$512   | QUOTE    | eSig Complete  | \$1,000,000             | \$1,000,000 |
| 1519951 | PUP2405208 | JAMES T DICKERSON    | FL | 10/23/2009 | \$636   | NEWISSUE | Bound          | \$3,000,000             | \$3,000,000 |
| 1519950 | PUP2405207 | BONITA B PARDUE      | WV | 10/15/2009 | \$571   | NEWISSUE | Bound          | \$3,000,000             | \$3,000,000 |
| 1519943 | **         | BRENDA RIGGS         | VT | 10/3/2009  | \$1,151 | QUOTE    | MVR Error      | \$1,000,000             | \$1,000,000 |
| 1519942 | **         | BONITA PARDUE        | WV | 11/3/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519912 | **         | DAWN M SILVERTHORN   | IL | 10/31/2009 | \$422   | QUOTE    | eSig e-mailed  | Pending                 | \$1,000,000 |
| 1519907 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519906 | **         | CON CONNECTICUT      | CT | 10/5/2009  | \$1,132 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519894 | **         | CHARLES CALIFORNIA   | CA | 10/6/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519892 | **         | MICHAEL C CREEKMORE  | MA | 10/31/2009 | \$1,150 | QUOTE    | MVR Error      | \$1,000,000             | \$1,000,000 |
| 1519884 | **         | JAMES VEE            | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519881 | **         | JOHN VEE             | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519879 | PUP2405201 | KEITH BARRETT        | ND | 10/21/2009 | \$351   | NEWISSUE | Bound          | \$2,000,000             | \$2,000,000 |
| 1519876 | **         | KYLE D BATTS         | TX | 11/1/2009  | \$653   | QUOTE    | eSig e-mailed  | Pending                 | \$1,000,000 |
| 1519864 | **         | KIMBERLY FITZPATRICK | NH | 10/5/2009  | \$413   | QUOTE    | New Quote Paid | \$1,000,000             | \$1,000,000 |
| 1519836 | **         | ROGER STANLEY        | MI | 11/21/2009 | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519835 | **         | ROGER STANLEY        | MI | 11/22/2009 | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519809 | **         | DOUGLAS L CUNEY      | PA | 10/28/2009 | \$1,123 | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519808 | **         | KIMBERLY FITZPATRICK | NH | 10/2/2009  | \$708   | QUOTE    | New Quote Paid | \$3,000,000             | \$3,000,000 |
| 1519794 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$633   | QUOTE    | eSig e-mailed  | Pending                 | \$5,000,000 |
| 1519803 | **         | ERIC GOBBLE          | IL | 10/1/2009  | \$201   | QUOTE    | eSig Pending   | \$1,000,000             | \$1,000,000 |
| 1519729 | **         | MARIE L TEST         | IL | 10/7/2009  | \$152   | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519678 | **         | BECKY RANDY          | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519677 | **         | RANDY FOLLOWUP       | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519676 | **         | FOLLOWUP TEST        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519628 | **         | KEITH E BARRETT      | ND | 10/1/2009  | \$988   | QUOTE    | Quote Rated    | \$1,000,000             | \$1,000,000 |
| 1519635 | **         | KYLE D BATTS         | TX | 10/1/2009  | \$295   | QUOTE    | eSig e-mailed  | Pending                 | \$1,000,000 |
| 1519622 | **         | MATTHEW DOYLE        | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |
| 1519621 | **         | MATT DOYLE           | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated    | \$0                     | \$0         |

## “Repository” Screen

Once a signed application with payment is received in your office from the insured, you will need to submit the application and payment to your administrator. By reviewing the paperwork you receive, determine if the insured has made changes to any part of the quote in the system by looking for any changes that have been made to the paper app.

1. Select the desired quote by clicking on the specific line within the list. It will turn blue once it has been highlighted.
2. **Load** - Click on the “Load” button when the signed application along with the premium is received.

**Note:** If the quote’s effective date is more than 3 days old, you will need to load the quote and change the date.



Once “Load” is selected, the quote will appear with the information entered previously.

1. **Rate** – If everything is correct, continue through the quote by pressing the tab key and then “Rate”. Once you have selected the correct limit, you may continue through the remaining screens to verify everything is correct until you reach the “Confirmation” screen, as covered on slide 30.

**Note: If any changes were made to the application, each change must be initialed by the insured. Amend the answers within the quote in “PUP Access” and then “Rate”.**

**Repository**

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | 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:

[Search](#) [Policy Inquiry](#)

Working List: Recent Transactions

[Load](#) [Forms](#) [Print List](#)

Results 1-50 of 100

| Quote # | Policy #   | Name                 | St | Eff Dte    | Premium | Type     | Status                | Limit       |
|---------|------------|----------------------|----|------------|---------|----------|-----------------------|-------------|
| 1519972 | PUP2405219 | SCOTT E TEST         | IL | 10/7/2009  | \$152   | NEWISSUE | Bound                 | \$1,000,000 |
| 1519967 | **         | MATTS TEST           | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519944 | **         | MITKO FUJII          | LA | 10/5/2009  | \$1,046 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519960 | **         | RICHARD P WELCH      | PA | 10/13/2009 | \$720   | QUOTE    | eSig e-mailed Pending | \$1,000,000 |
| 1519941 | **         | BONITA PARDUE        | WV | 10/15/2009 | \$512   | QUOTE    | eSig Complete         | \$1,000,000 |
| 1519951 | PUP2405208 | JAMES T DICKERSON    | FL | 10/23/2009 | \$636   | NEWISSUE | Bound                 | \$3,000,000 |
| 1519950 | PUP2405207 | BONITA B PARDUE      | WV | 10/15/2009 | \$571   | NEWISSUE | Bound                 | \$3,000,000 |
| 1519943 | **         | BRENDA RIGGS         | VT | 10/3/2009  | \$1,151 | QUOTE    | MVR Error             | \$1,000,000 |
| 1519942 | **         | BONITA PARDUE        | WV | 11/3/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519912 | **         | DAWN M SILVERTHORN   | IL | 10/31/2009 | \$422   | QUOTE    | eSig e-mailed Pending | \$1,000,000 |
| 1519907 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519906 | **         | CON CONNECTICUT      | CT | 10/5/2009  | \$1,132 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519894 | **         | CHARLES CALIFORNIA   | CA | 10/6/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519892 | **         | MICHAEL C CREEKMORE  | MA | 10/31/2009 | \$1,085 | QUOTE    | MVR Error             | \$1,000,000 |
| 1519884 | **         | JAMES VEE            | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519881 | **         | JOHN VEE             | VT | 10/13/2009 | \$1,085 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519879 | PUP2405201 | KEITH BARRETT        | ND | 10/21/2009 | \$351   | NEWISSUE | Bound                 | \$2,000,000 |
| 1519876 | **         | KYLE D BATTS         | TX | 11/1/2009  | \$653   | QUOTE    | eSig e-mailed Pending | \$1,000,000 |
| 1519864 | **         | KIMBERLY FITZPATRICK | NH | 10/5/2009  | \$413   | QUOTE    | New Quote Paid        | \$1,000,000 |
| 1519836 | **         | ROGER STANLEY        | MI | 11/21/2009 | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519825 | **         | ROGER STANLEY        | MI | 11/22/2009 | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519809 | **         | DOUGLAS L CUNEY      | PA | 10/28/2009 | \$1,123 | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519808 | **         | KIMBERLY FITZPATRICK | NH | 10/2/2009  | \$708   | QUOTE    | New Quote Paid        | \$3,000,000 |
| 1519794 | **         | CHERYL GOBBLE        | IL | 10/1/2009  | \$633   | QUOTE    | eSig e-mailed Pending | \$5,000,000 |
| 1519803 | **         | ERIC GOBBLE          | IL | 10/1/2009  | \$201   | QUOTE    | eSig Pending          | \$1,000,000 |
| 1519729 | **         | MARIE L TEST         | IL | 10/7/2009  | \$152   | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519678 | **         | BECKY RANDY          | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519677 | **         | RANDY FOLLOWUP       | IL | 10/2/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519676 | **         | FOLLOWUP TEST        | IL | 10/1/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519628 | **         | KEITH E BARRETT      | ND | 10/1/2009  | \$988   | QUOTE    | Quote Rated           | \$1,000,000 |
| 1519635 | **         | KYLE D BATTS         | TX | 10/1/2009  | \$295   | QUOTE    | eSig e-mailed Pending | \$1,000,000 |
| 1519622 | **         | MATTHEW DOYLE        | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519621 | **         | MATT DOYLE           | FL | 11/3/2009  | \$0     | QUOTE    | Quote Rated           | \$0         |
| 1519605 | **         | MATT DOYLE           | FL | 10/13/2009 | \$1,631 | QUOTE    | Quote Rated           | \$1,000,000 |

## “Repository” Screen

- Search** section - Enter the criteria in the appropriate field(s) to locate the policy that is being requested. You may search by a number of different criteria.
- Search** button – Click the “Search” button to display the desired policy.
- Once your policy is listed then click on the line with the policy you wish to work with. This will highlight the policy line.
- Policy Inquiry** - Click on the “Policy Inquiry” button once the policy has been highlighted.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/PolicyInquiry.aspx?qry=VB%2baEcmYa2xIRt0TMSep3J4oxytWFIZsJm53pUXUIYA%3d

File Edit View Favorites Tools Help

RLI PUP Application

scombs@rlicorp.com Policy Inquiry PUP

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Search

Policy Number: PUP2405219

Insured First Name: \_\_\_\_\_ Insured Last Name: \_\_\_\_\_

Search See All Terms

Policy Detail for PUP2405219 Members of Household Mailing Check/Claim Notes Forms

Insured Name: SCOTT E TEST

Policy's current status is Bound.

|          |                        |                   |                    |           |  |              |        |             |              |                                     |
|----------|------------------------|-------------------|--------------------|-----------|--|--------------|--------|-------------|--------------|-------------------------------------|
| B Term:  | 10/7/2009 to 10/7/2010 | New Issue - Bound | End Date:          | 10/7/2009 | Tier:  | Preferred    | Limit: | \$1,000,000 | Modified By: | scott.combs@rlicorp.com - 9/24/2009 |
| Tr Date: | 9/24/2009              | User:             | scombs@rlicorp.com | Sent:     | Application (actual Signature), NEWDEC - 9/22/2009 | Agency Type: | A      | Tr Number:  | 1            |                                     |

Premium: \$152.00 Base: \$152.00 100/300: \$0.00 UMUIM: \$0.00 Payment Type: Check

©2005 - 2009 RLI Thursday, September 24, 2009

Done Local intranet 100%

Start Inbox - Microsoft Out... PUP Special Test pla... Document1 - Micros... 090812 Second PUP ... RLI PUP Applicatio... 10:52 AM

## “Policy Inquiry” Screen

- Once the policy has been retrieved, summary information for each policy term will be displayed for the 4 most recent policy terms, with the most recent policy term’s information at the top.

**Note: the policy status will be noted in red for quick reference.**

- To display additional policy periods, if applicable, click on “See All Terms”.
- + - To see additional policy details, click the small “+”. (See next page for detail.)
  - Should this be adequate for your needs, you can go to the next policy by entering your criteria into the “Search” field(s).

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/App/RIenetPup/PolicyInquiry.aspx?qry=VB%2baEcmYaZxIRt0TMSep3J4oxytWFIZsJm53pUXUIYA%3d

File Edit View Favorites Tools Help Snagit

RLI PUP Application

**Search**

Policy Number:

Insured First Name:  Insured Last Name:

See All Terms

**Policy Detail for PUP2405219** [Members of Household](#) [Mailing](#) [Check/Claim](#) [Notes](#) [Forms](#)

**Insured Name: SCOTT E TEST**

**Policy's current status is Bound.**

**B Term:** 10/7/2009 to 10/7/2010 **New Issue - Bound** **End Date:** 10/7/2009 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** scott.combs@rlicorp.com - 9/24/2009

**Tr Date:** 9/24/2009 **User:** scombs@rlicorp.com **Sent:** Application (actual Signature), NEWDEC - 9/22/2009 **Agency Type:** A **Tr Number:** 1

**Premium:** \$152.00 **Base:** \$152.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Payment Type:** Check

**Policy:** PUP2405219

**1** → **PRIMARY:** SCOTT E TEST  
MARIE L TEST  
123 MAIN ST  
PEORIA, IL 61615  
(309)692-1000  
scott.combs@rlicorp.com

**2** → **Producer:** 48936/Test Agency  
**Subproducer:** 50712/Subproducer 1  
**Contact:** Test Contact  
**Phone/Fax:** (800)526-1754  
**Affinity:**

| Policy Limit | Base  | 100300 | UMUIM | Total | Premium |
|--------------|-------|--------|-------|-------|---------|
| \$1,000,000  | \$152 | \$0    | \$0   | \$152 |         |
| \$2,000,000  | \$274 | \$0    | \$0   | \$274 |         |
| \$3,000,000  | \$365 | \$0    | \$0   | \$365 |         |
| \$5,000,000  | \$479 | \$0    | \$0   | \$479 |         |

**3** →

**4** →

2 1. Number of vehicles owned  
1 2. Number of residential properties owned  
0 3. Number of watercraft  
0 4. Number of personal watercraft owned  
2 5. Number of drivers  
0 6. Number of drivers under 22  
0 7. Number of drivers over 70  
0 8. Number of moving violations  
0 9. Number of at fault accidents  
0 10. Number of antique/classic vehicles?  
0 11. Number of properties outside coverage terr?  
0 12. Number of acres  
0 13. Number of drivers Licensed < 1 year  
0 14. Incidents for age 20-21 and/or 80 and older?  
0 15. Number DUI or DWI  
N Enter yes/no to 100/300 auto limits? (In quick quote area)  
N 16. Reckless/Careless/Susp in last 5 years?  
N 17. Felony within last 5 years?  
N 18. Target Risk Occupation/Profession?  
N 19. Any personal liability claims > 25,000?  
N 20. Already have Personal Umbrella with RLI?  
N 21. More than 5 properties rented to others?  
N 22. One driver with more than 3 moving violations?  
N 23. Under 20 with incident  
N 24. 20/21 and/or 80+ with multiple incidents  
Y 25. Agree to maintain all other limits?  
Y 26. Agree to maintain \$500/500 auto limits?  
N 26. Agree to maintain \$250/500 auto limits?  
N 26. Agree to maintain \$100/300 auto limits?  
Y Application include the Applicant's original signature?

Done Local intranet 100%

Start Inbox - Microsoft Out... PUP Special Test pla... Document1 - Micros... 090812 Second PUP ... RLI PUP Applicatio... 10:53 AM

## “Policy Inquiry” Screen

When you click the “+” symbol, some of the details include the following:

1. Insured’s primary address and any other addresses on file.
2. Producer (Administrator) and Subproducer (SubAgent) Information
3. Premiums by policy limit
4. Underwriting questions and answers

**Note: Additional information may be included depending on the status displayed. Much of the information shown at the top of the inquiry screen is primarily used for internal processing by RLI associates. Many of these fields are outlined on the next page.**

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/PolicyInquiry.aspx?qry=VB%2baEcmYaZxIRtDTMSep3J4oxytWFIZsJm53pUXUIYA%3d

File Edit View Favorites Tools Help

RLI PUP Application

**Search**

Policy Number:

Insured First Name:  Insured Last Name:

See All Terms

**Policy Detail for PUP2405219** [Members of Household](#) [Mailing](#) [Check/Claim](#) [Notes](#) [Forms](#)

**Insured Name: SCOTT E TEST**

**Policy's current status is Bound.**

**B Term:** 10/7/2009 to 10/7/2010 **New Issue - Bound** **End Date:** 10/7/2009 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** scott.combs@rlicorp.com - 9/24/2009

**Tr Date:** 9/24/2009 **User:** scombs@rlicorp.com **Sent:** Application (actual Signature), NEWDEC - 9/23/2009 **Agency Type:** A **Tr Number:** 1

**Premium:** \$152.00 **Base:** \$152.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Payment Type:** Check

**Policy:** PUP2405219

**Primary:** SCOTT E TEST  
MARIE L TEST  
123 MAIN ST  
PEORIA, IL 61615  
(309)692-1000  
scott.combs@rlicorp.com

**Producer:** 48936/Test Agency  
**Subproducer:** 50712/Subproducer 1  
**Contact:** Test Contact  
**Phone/Fax:** (800)526-1754  
**Affinity:**

| Policy Limit | Base  | 100300 | UMUIM | Total Premium |
|--------------|-------|--------|-------|---------------|
| \$1,000,000  | \$152 | \$0    | \$0   | \$152         |
| \$2,000,000  | \$274 | \$0    | \$0   | \$274         |
| \$3,000,000  | \$365 | \$0    | \$0   | \$365         |
| \$5,000,000  | \$479 | \$0    | \$0   | \$479         |

2 1. Number of vehicles owned  
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0 4. Number of personal watercraft owned  
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0 6. Number of drivers under 22  
0 7. Number of drivers over 70  
0 8. Number of moving violations  
0 9. Number of at fault accidents  
0 10. Number of antique/classic vehicles?  
0 11. Number of properties outside coverage terr?  
0 12. Number of acres  
0 13. Number of drivers Licensed < 1 year  
0 14. Incidents for age 20-21 and/or 80 and older?  
0 15. Number DUI or DWI  
N Enter yes/no to 100/300 auto limits? (In quick quote area)  
N 16. Reckless/Careless/Susp in last 5 years?  
N 17. Felony within last 5 years?  
N 18. Target Risk Occupation/Profession?  
N 19. Any personal liability claims > 25,000?  
N 20. Already have Personal Umbrella with RLI?  
N 21. More than 5 properties rented to others?  
N 22. One driver with more than 3 moving violations?  
N 23. Under 20 with incident  
N 24. 20/21 and/or 80+ with multiple incidents  
Y 25. Agree to maintain all other limits?  
Y 25. Agree to maintain \$500/500 auto limits?  
N 26. Agree to maintain \$250/500 auto limits?  
N 26. Agree to maintain \$100/300 auto limits?  
Y Application include the Applicant's original signature?

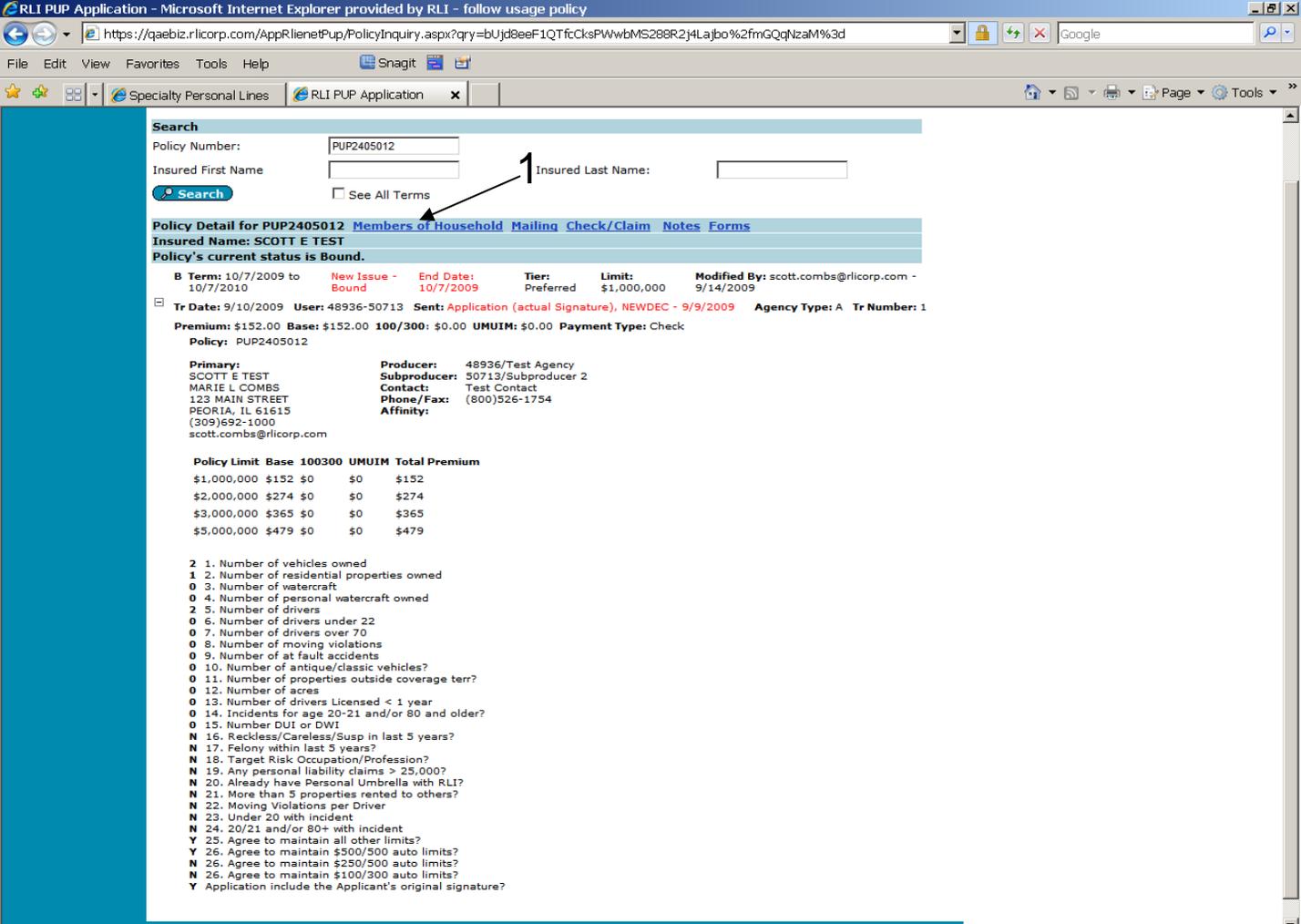
Done

Local intranet 100%

Start | Inbox - Microsoft Out... | PUP Special Test pla... | Document1 - Micros... | 090812 Second PUP ... | RLI PUP Applicatio... | 10:53 AM

## “Policy Inquiry” Screen

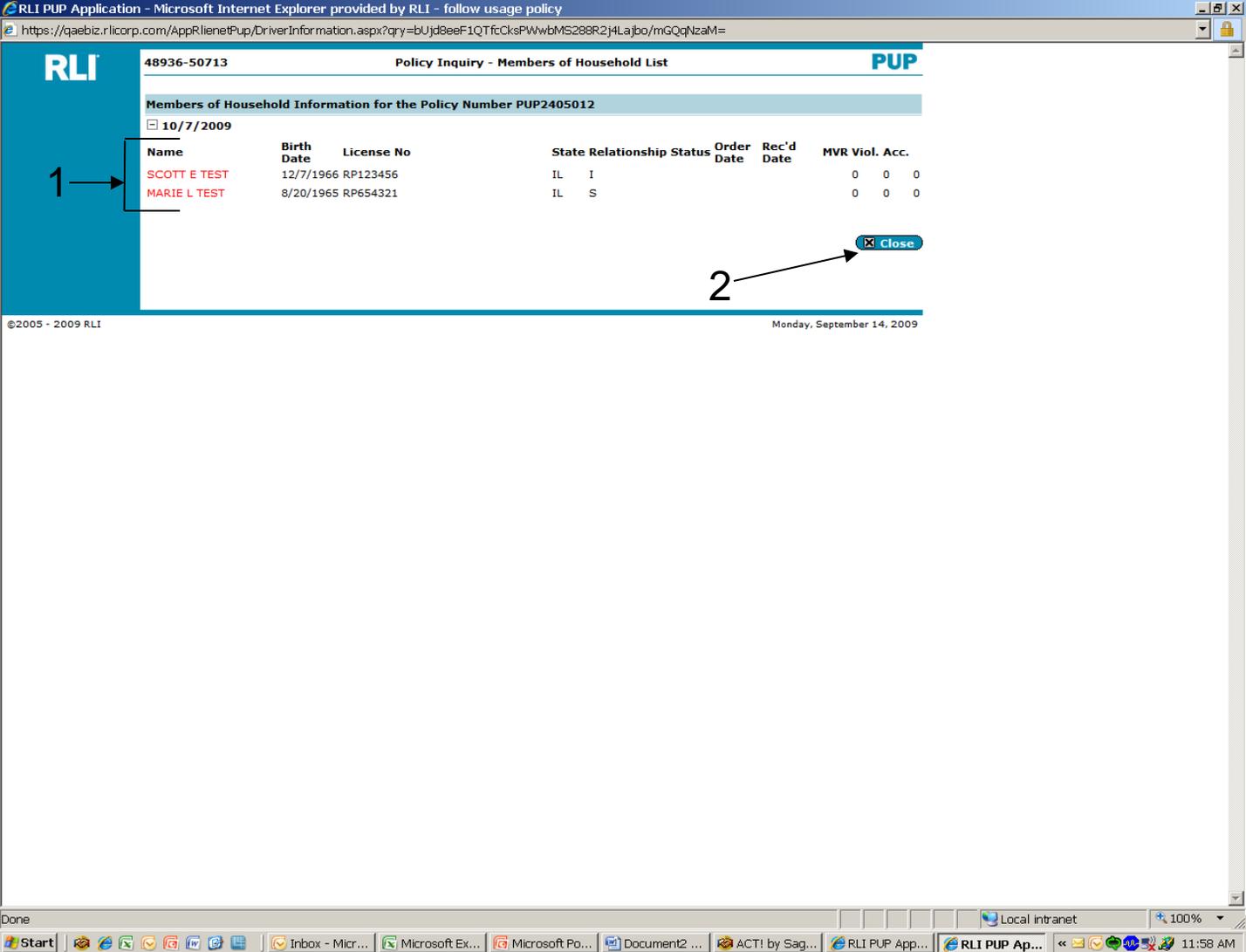
- Additional information will appear in this section, depending on the policy status. Most fields displayed are used for internal processing by RLI associates. Some of the examples are -
  - Modified by:** Reflects the user who entered a transaction or that the system generated the transaction with the word “process”.
  - Retro Y/N:** Indicates a transaction has been reversed.
  - Tr Date:** Reflects the transaction process or entry date.
  - User:** Reflects the user who processed the transaction.
  - Agency type:** “A” = Account Current (payment via check) or “D” = Direct Bill (payment via credit card or ACH)



## “Policy Inquiry” Screen – Members of the Household

All members of the household listed on the policy can be found under the “Members of Household” link.

1. **Members of Household** - Click on this link and a pop-up window will appear.



## “Policy Inquiry ” Screen - Members Of Household List

1. Each member of the household will be listed.
2. After reviewing the member’s information that is available, close the pop-up screen by clicking the “Close” button.

**Note: Due to our contract with the MVR provider, the only MVR activity that will appear in the PUP Access system are the violations, DUI and at-fault accidents that were input during the quoting process.**

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/PolicyInquiry.aspx?qry=BUjd8eef1QTfcCksPWwbMS28R2j4Lajbo%2fmGQqNzaM%3d

File Edit View Favorites Tools Help Snagit

Specialty Personal Lines RLI PUP Application x Page Tools

**Search**

Policy Number:

Insured First Name:

Insured Last Name:

See All Terms

**Policy Detail for PUP2405012** [Members of Household](#) [Mailing](#) [Check/Claim](#) [Notes](#) [Forms](#)

**Insured Name: SCOTT E TEST**

**Policy's current status is Bound.**

**B Term:** 10/7/2009 to 10/7/2010 **New Issue - Bound** **End Date:** 10/7/2009 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** scott.combs@rlicorp.com - 9/14/2009

**Tr Date:** 9/10/2009 **User:** 48936-50713 **Sent:** Application (actual Signature), NEWDEC - 9/9/2009 **Agency Type:** A **Tr Number:** 1

**Premium:** \$152.00 **Base:** \$152.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Payment Type:** Check

**Policy:** PUP2405012

**Primary:** SCOTT E TEST  
MARIE L COMBS  
123 MAIN STREET  
PEORIA, IL 61615  
(309)692-1000  
scott.combs@rlicorp.com

**Producer:** 48936/Test Agency  
**Subproducer:** 50713/Subproducer 2  
**Contact:** Test Contact  
**Phone/Fax:** (800)526-1754  
**Affinity:**

| Policy Limit | Base  | 100300 | UMUIM | Total Premium |
|--------------|-------|--------|-------|---------------|
| \$1,000,000  | \$152 | \$0    | \$0   | \$152         |
| \$2,000,000  | \$274 | \$0    | \$0   | \$274         |
| \$3,000,000  | \$365 | \$0    | \$0   | \$365         |
| \$5,000,000  | \$479 | \$0    | \$0   | \$479         |

2 1. Number of vehicles owned  
1 2. Number of residential properties owned  
0 3. Number of watercraft  
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0 11. Number of properties outside coverage terr?  
0 12. Number of acres  
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0 15. Number DUI or DWI  
N 16. Reckless/Careless/Susp in last 5 years?  
N 17. Felony within last 5 years?  
N 18. Target Risk Occupation/Profession?  
N 19. Any personal liability claims > 25,000?  
N 20. Already have Personal Umbrella with RLI?  
N 21. More than 5 properties rented to others?  
N 22. Moving Violations per Driver  
N 23. Under 20 with incident  
N 24. 20/21 and/or 80+ with incident  
Y 25. Agree to maintain all other limits?  
Y 26. Agree to maintain \$500/500 auto limits?  
N 26. Agree to maintain \$250/500 auto limits?  
N 26. Agree to maintain \$100/300 auto limits?  
Y Application include the Applicant's original signature?

63005 3000 RLI Made: September 14, 2009

Done Local intranet 100%

Start Start Microsoft Excel Microsoft Power Document2 - Mi ACT1 by Sage Pr RLI PUP Applic 11:10 AM

## “Policy Inquiry” Screen - Mailing

The “Mailing” link provides information on when a particular form was mailed and to whom. You may also order duplicates from the mailing screen.

1. **Mailing** - Click on “Mailing” and a pop-up window will appear.

http://qaebiz.rlicorp.com/AppRlienetPup/MailingHistory.aspx - Windows Explorer provided by RLI - follow using policy



00995-00000      Mailing History

| Policy Number | Effective Date | <a href="#">Hide Details</a> |  |
|---------------|----------------|------------------------------|--|
| PUP1045869    | 5/26/2008      |                              |  |

Endorsement Number: 1

| Dup                      | Document Type | Form ID                | Seq No. | State | Process Date | Admin Date | Producer Date | Insured Date | Dup/Manual |
|--------------------------|---------------|------------------------|---------|-------|--------------|------------|---------------|--------------|------------|
| <input type="checkbox"/> | LONGQUE       | <a href="#">PUP207</a> | **      |       | 2/18/2008    |            |               | 2/19/2008    |            |

PUP1045869      5/26/2007      [Hide Details](#) ← 2

Endorsement Date: 5/26/2007      Endorsement Number: 0

| Dup                      | Document Type | Form ID                 | Seq No. | State | Process Date | Admin Date | Producer Date | Insured Date | Dup/Manual |
|--------------------------|---------------|-------------------------|---------|-------|--------------|------------|---------------|--------------|------------|
| <input type="checkbox"/> | RENDEC        | <a href="#">PUP310</a>  | 1       | PA    | 4/24/2007    |            | 4/25/2007     | 4/25/2007    |            |
| <input type="checkbox"/> | AMEND         | <a href="#">PUP118</a>  | 1       | PA    | 4/24/2007    |            | 4/25/2007     | 4/25/2007    |            |
| <input type="checkbox"/> | AMEND         | <a href="#">PUP320</a>  | 1       | PA    | 4/24/2007    |            | 4/25/2007     | 4/25/2007    |            |
| <input type="checkbox"/> | AMEND         | <a href="#">PUA437</a>  | 1       | PA    | 4/24/2007    |            | 4/25/2007     | 4/25/2007    |            |
| <input type="checkbox"/> | AMEND         | <a href="#">PRIVNOT</a> | 1       | PA    | 4/24/2007    |            | 4/25/2007     | 4/25/2007    |            |

Endorsement Number: 1

| Dup                      | Document Type | Form ID                | Seq No. | State | Process Date | Admin Date | Producer Date | Insured Date | Dup/Manual |
|--------------------------|---------------|------------------------|---------|-------|--------------|------------|---------------|--------------|------------|
| <input type="checkbox"/> | RENBILL       | <a href="#">PUP600</a> | **      |       | 2/27/2007    |            |               | 2/28/2007    |            |
| <input type="checkbox"/> | LONGQUE       | <a href="#">PUP207</a> | **      |       | 2/15/2007    |            |               | 2/16/2007    |            |

PUP1045869      5/26/2006      [Details](#) ← 1

    3

NOTES:      [Show Notes](#)

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## “Mailing History” Screen

This screen will only have forms listed if they were generated prior to 5/08.

1. **Details** - If you need to order a duplicate of a form from a prior term, click on the “Details” button. (This has been done above for the 2007 term.)
2. **Hide Details** - If you wish to not see the details once you have opened them, you can click on the “Hide Details” button.
3. **Dup** - Select the desired form to be duplicated by checking the box to the left of the document that you want to order.
4. **Duplicate** - Click on the “Duplicate” button. This will generate a form to be mailed out to your administrator’s office the next business day.
5. **Close** - Close window by clicking the “Close” button when complete with review. 45

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/PolicyInquiry.aspx?qry=bUjd8eef1QTfcCksPWwbMS28R2j4Lajbo%2fmGQgNzaM%3d

File Edit View Favorites Tools Help Snagit

Specialty Personal Lines RLI PUP Application

**Search**

Policy Number:  Insured Last Name:

Insured First Name:

See All Terms

**Policy Detail for PUP2405012** [Members of Household](#) [Mailing](#) [Check/Claim](#) [Notes](#) [Forms](#)

**Insured Name: SCOTT E TEST**

**Policy's current status is Bound.**

**B Term:** 10/7/2009 to 10/7/2010 **New Issue - Bound** **End Date:** 10/7/2009 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** scott.combs@rlicorp.com - 9/14/2009

**Tr Date:** 9/10/2009 **User:** 48936-50713 **Sent:** Application (actual Signature), NEWDEC - 9/9/2009 **Agency Type:** A **Tr Number:** 1

**Premium:** \$152.00 **Base:** \$152.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Payment Type:** Check

**Policy:** PUP2405012

**Primary:** SCOTT E TEST  
MARIE L COMBS  
123 MAIN STREET  
PEORIA, IL 61615  
(309)692-1000  
scott.combs@rlicorp.com

**Producer:** 48936/Test Agency  
**Subproducer:** 50713/Subproducer 2  
**Contact:** Test Contact  
**Phone/Fax:** (800)526-1754  
**Affinity:**

| Policy Limit | Base  | 100300 | UMUIM | Total Premium |
|--------------|-------|--------|-------|---------------|
| \$1,000,000  | \$152 | \$0    | \$0   | \$152         |
| \$2,000,000  | \$274 | \$0    | \$0   | \$274         |
| \$3,000,000  | \$365 | \$0    | \$0   | \$365         |
| \$5,000,000  | \$479 | \$0    | \$0   | \$479         |

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0 13. Number of drivers Licensed < 1 year  
0 14. Incidents for age 20-21 and/or 80 and older?  
0 15. Number DUI or DWI  
N 16. Reckless/Careless/Susp in last 5 years?  
N 17. Felony within last 5 years?  
N 18. Target Risk Occupation/Profession?  
N 19. Any personal liability claims > 25,000?  
N 20. Already have Personal Umbrella with RLI?  
N 21. More than 5 properties rented to others?  
N 22. Moving Violations per Driver  
N 23. Under 20 with incident  
N 24. 20/21 and/or 80+ with incident  
Y 25. Agree to maintain all other limits?  
Y 26. Agree to maintain \$500/500 auto limits?  
N 26. Agree to maintain \$250/500 auto limits?  
N 26. Agree to maintain \$100/300 auto limits?  
Y Application include the Applicant's original signature?

63005 3000 RLI

Done Local intranet 100%

Start InBox - Microsof... Microsoft Excel -... Microsoft Power... Document2 - Mi... ACT1 by Sage Pr... RLI PUP Applic... 11:10 AM

## “Policy Inquiry” Screen – Check/Claim

The “Check/Claim” link provides renewal payment information and any reported claims for a specific policy.

1. **Check/Claim** - Click on “Check/Claim” and a pop-up window will appear.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

http://qaebiz.rlicorp.com/AppRLItenetPUP/PolicyClaim.aspx

**RLI** **Policy Claim Information** **PUP**

Home | Forms | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

1 → **Claim Information**  
No Claim Information Available for PUP

2 → **Check Information**  
Results 1-3 of 3

| Effective Date | Received Date | Processed Date | Status    | Bill Type    | Check Number | Amount Received |
|----------------|---------------|----------------|-----------|--------------|--------------|-----------------|
| 5/25/2007      | 4/3/2007      | 4/4/2007       | Processed | Renewal Bill | 0000001843   | \$339.00        |
| 5/25/2006      | 4/14/2006     | 4/17/2006      | Processed | Renewal Bill | 0000001703   | \$336.00        |
| 5/25/2005      | 3/25/2005     | 3/28/2005      | Processed | Renewal Bill | 0000001533   | \$193.00        |

3 → **Billing History**  
You are not authorized to view Billing History for PUP

4 →

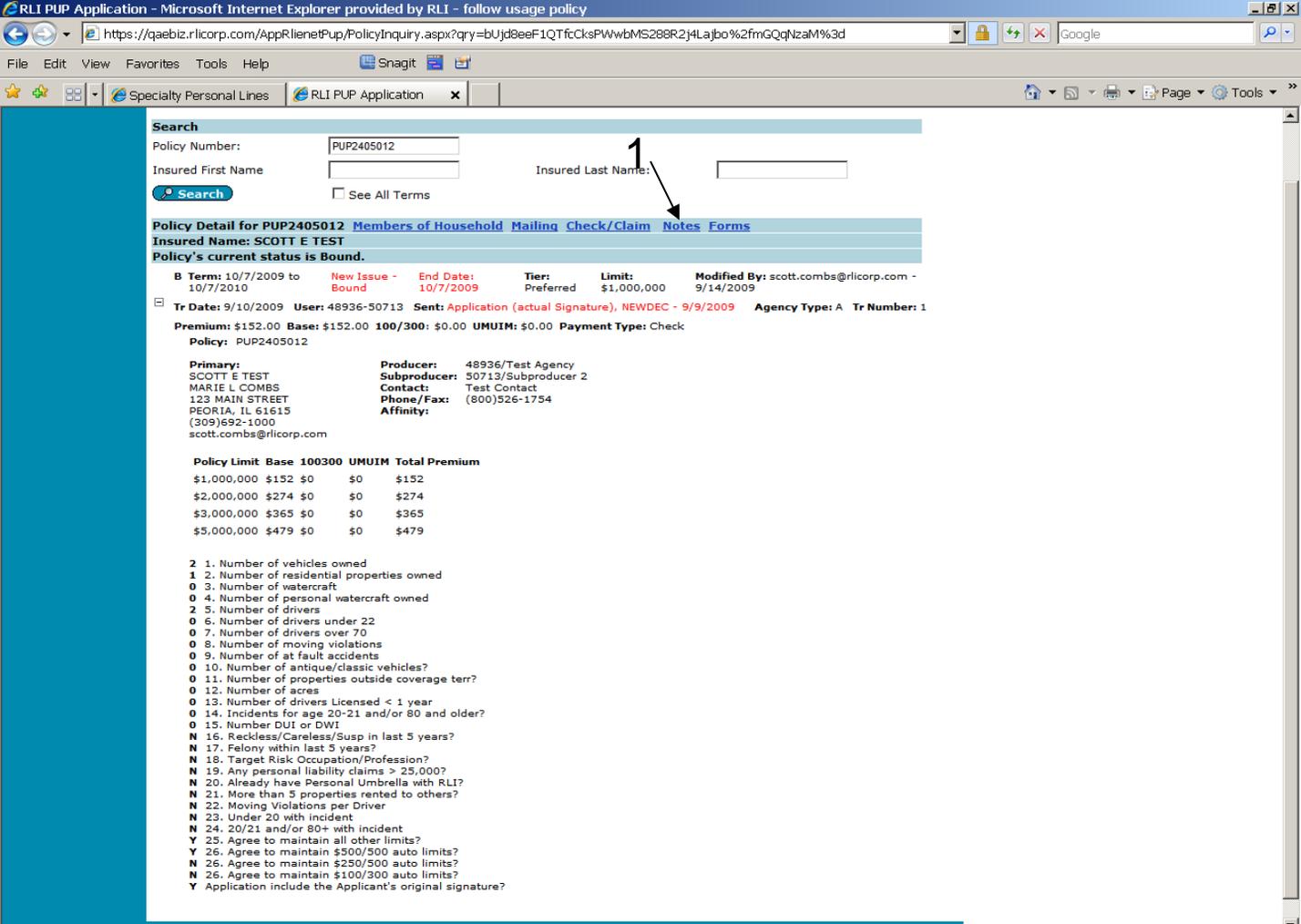
©2005 - 2008 RLI Friday, March 14, 2008

Start | Applications | 3 PCSWS.EXE | Application - ... | RLI PUP Appli... | RLI PUP Ap... | New Memo - ... | Local intranet | 100% | 1:10 PM

## “Policy Claim Information” Screen

1. **Claim Information** - Is displayed at the top of the screen and will provide brief information, (if applicable) on any claim(s).
2. **Check Information** - Provides renewal payment information. The check number and dollar amount is displayed, if applicable.
3. **Billing History** – This information will not be available to you. You can obtain this data from your administrator.
4. **Close** – Click on the “Close” button when you are finished with your review.

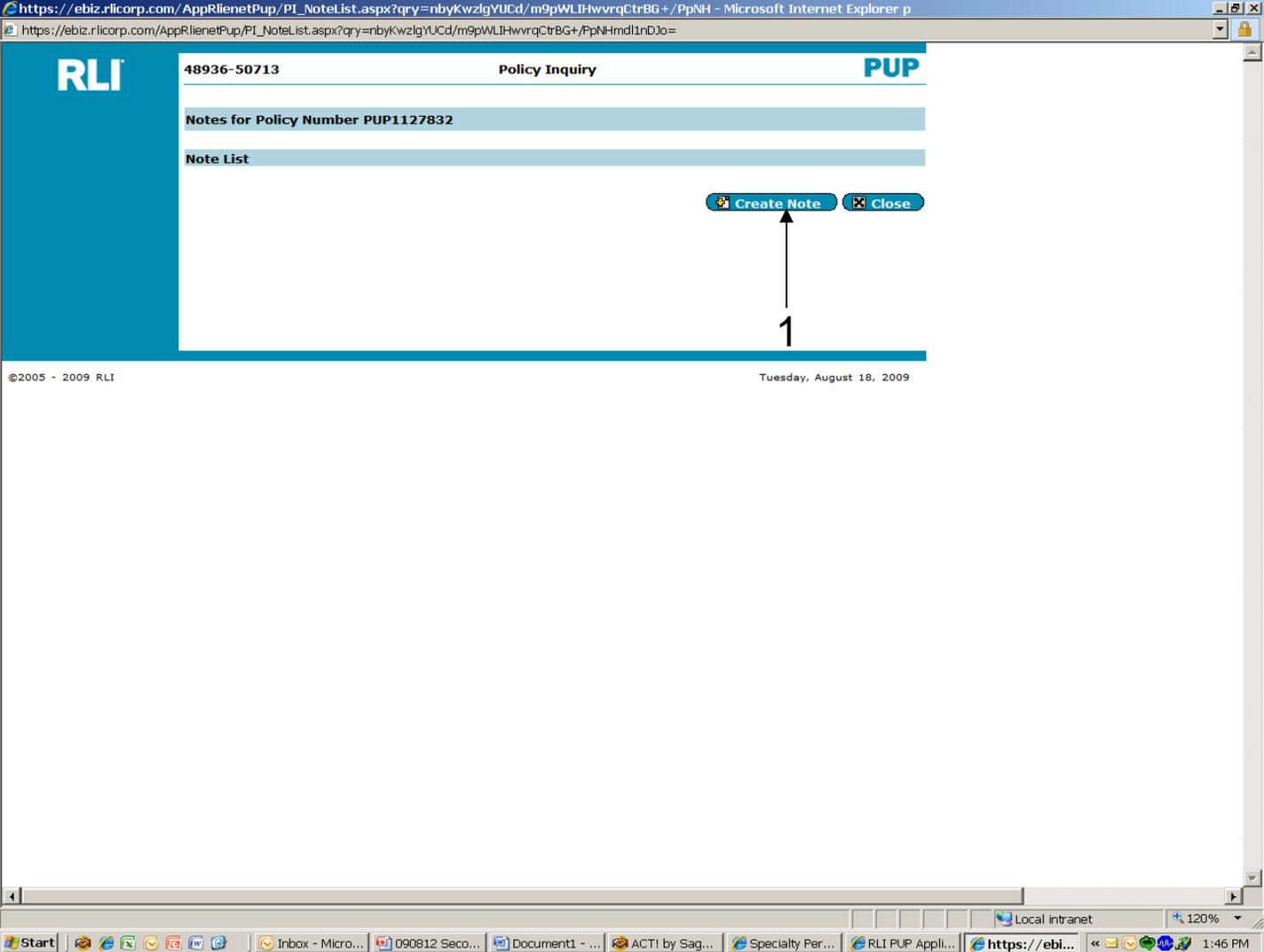
**Note: If there is no information listed it is likely new business and there is no information since this would be an account current policy. This screen is usually used to check the status of payment received on renewal policies.**



## “Policy Inquiry” Screen – Notes

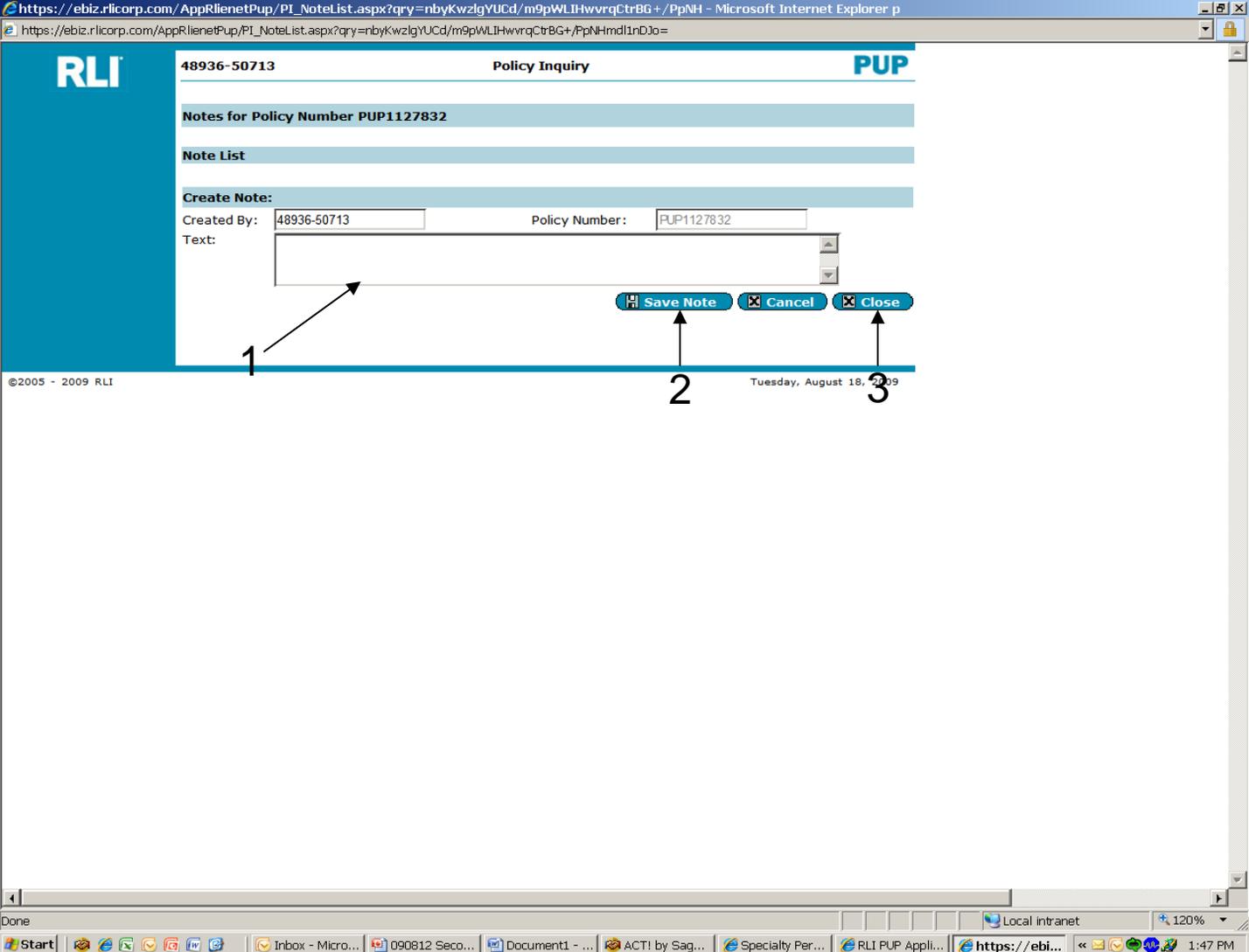
The “Notes” link is where you can add a note and/or view prior comments on a policy. These notes are available to anyone with the appropriate access to inquire on policies – including you, anyone using your specific log-in, your administrator and RLI employees.

1. **Notes** - Click on “Notes” and a pop-up window will appear.



## Creating Notes

1. Click on "Create Note."



## “Policy Inquiry” “Note List” Screen

1. **Text** - Type your note in the “Text” box. This is a good place to document a phone discussion, as an example.
2. **Save Note** – Once you have entered your desired note, click on the “Save Note” button.
3. **Close** – After you save your note, click on the “Close” button.

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/PolicyInquiry.aspx?qry=BUjd8eeF1QTfcCkSPWwbMS28R2j4Lajbo%2fmGQqNzaM%3d

File Edit View Favorites Tools Help

Specialty Personal Lines RLI PUP Application

Search

Policy Number:

Insured First Name:

Insured Last Name:

See All Terms

**Policy Detail for PUP2405012** [Members of Household](#) [Mailing](#) [Check/Claim](#) [Notes](#) [Forms](#)

**Insured Name: SCOTT E TEST**

**Policy's current status is Bound.**

**B Term:** 10/7/2009 to 10/7/2010 **New Issue - Bound** **End Date:** 10/7/2009 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** scott.combs@rlicorp.com - 9/14/2009

**Tr Date:** 9/10/2009 **User:** 48936-50713 **Sent:** Application (actual Signature), NEWDEC - 9/9/2009 **Agency Type:** A **Tr Number:** 1

**Premium:** \$152.00 **Base:** \$152.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Payment Type:** Check

**Policy:** PUP2405012

**Primary:** SCOTT E TEST  
MARIE L COMBS  
123 MAIN STREET  
PEORIA, IL 61615  
(309)692-1000  
scott.combs@rlicorp.com

**Producer:** 48936/Test Agency  
**Subproducer:** 50713/Subproducer 2  
**Contact:** Test Contact  
**Phone/Fax:** (800)526-1754  
**Affinity:**

| Policy Limit | Base  | 100300 | UMUIM | Total Premium |
|--------------|-------|--------|-------|---------------|
| \$1,000,000  | \$152 | \$0    | \$0   | \$152         |
| \$2,000,000  | \$274 | \$0    | \$0   | \$274         |
| \$3,000,000  | \$365 | \$0    | \$0   | \$365         |
| \$5,000,000  | \$479 | \$0    | \$0   | \$479         |

2 1. Number of vehicles owned  
1 2. Number of residential properties owned  
0 3. Number of watercraft  
0 4. Number of personal watercraft owned  
2 5. Number of drivers  
0 6. Number of drivers under 22  
0 7. Number of drivers over 70  
0 8. Number of moving violations  
0 9. Number of at fault accidents  
0 10. Number of antique/classic vehicles?  
0 11. Number of properties outside coverage terr?  
0 12. Number of acres  
0 13. Number of drivers Licensed < 1 year  
0 14. Incidents for age 20-21 and/or 80 and older?  
0 15. Number DUI or DWI  
N 16. Reckless/Careless/Susp in last 5 years?  
N 17. Felony within last 5 years?  
N 18. Target Risk Occupation/Profession?  
N 19. Any personal liability claims > 25,000?  
N 20. Already have Personal Umbrella with RLI?  
N 21. More than 5 properties rented to others?  
N 22. Moving Violations per Driver  
N 23. Under 20 with incident  
N 24. 20/21 and/or 80+ with incidents?  
Y 25. Agree to maintain all other limits?  
Y 26. Agree to maintain \$500/500 auto limits?  
N 26. Agree to maintain \$250/500 auto limits?  
N 26. Agree to maintain \$100/300 auto limits?  
Y Application include the Applicant's original signature?

Done Monday, September 14, 2009

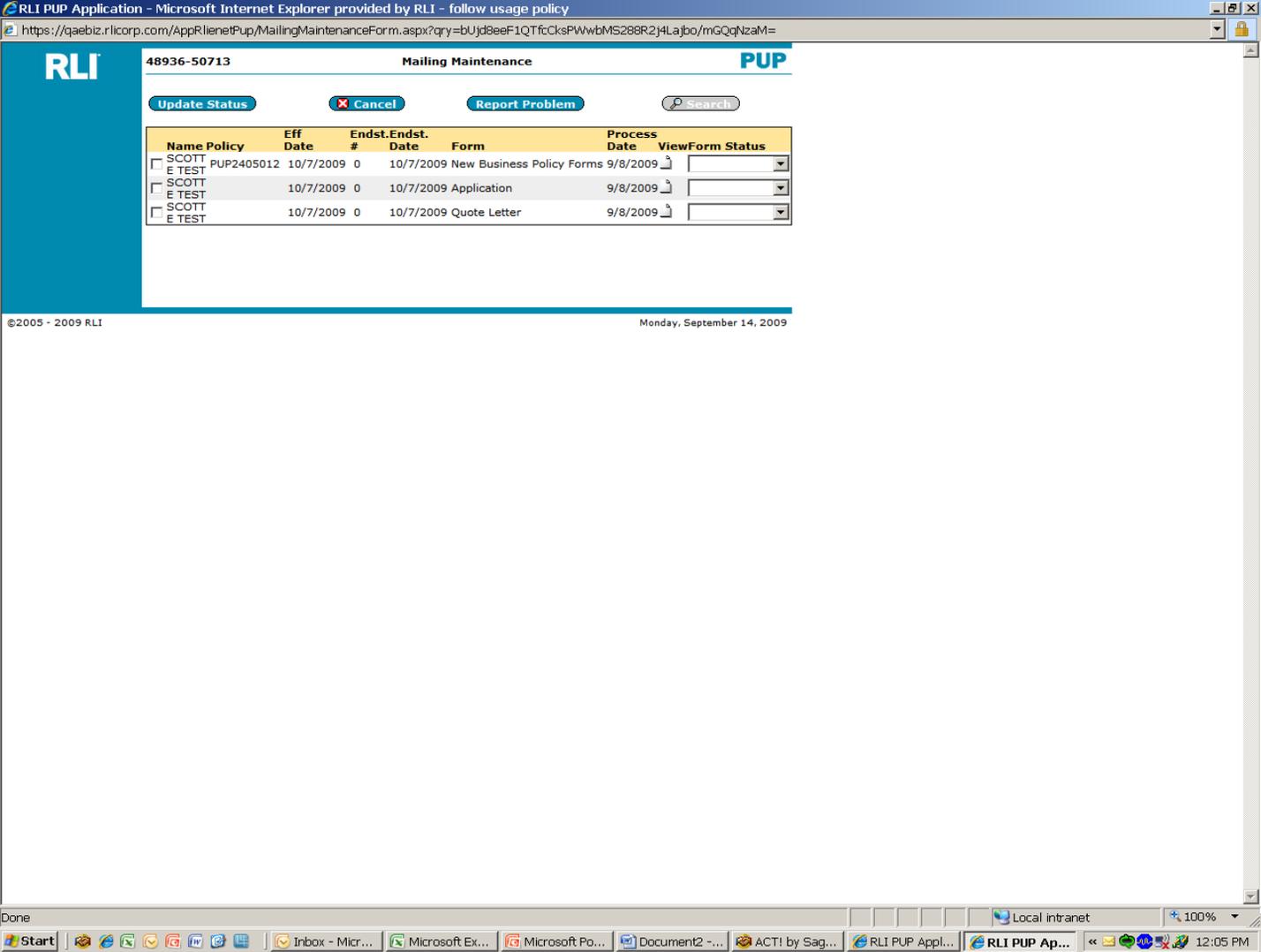
Local intranet 100%

Start | Inbox - Microsof... | Microsoft Excel -... | Microsoft Power... | Document2 - Mi... | ACTI by Sage Pr... | RLI PUP Applic... | 11:10 AM

## “Policy Inquiry” Screen – Forms

The “Forms” link will take you to where the policy forms for a particular policy can be obtained.

1. **Forms** - Click on “Forms” and a pop-up window will appear.



## “Mailing Maintenance” Screen

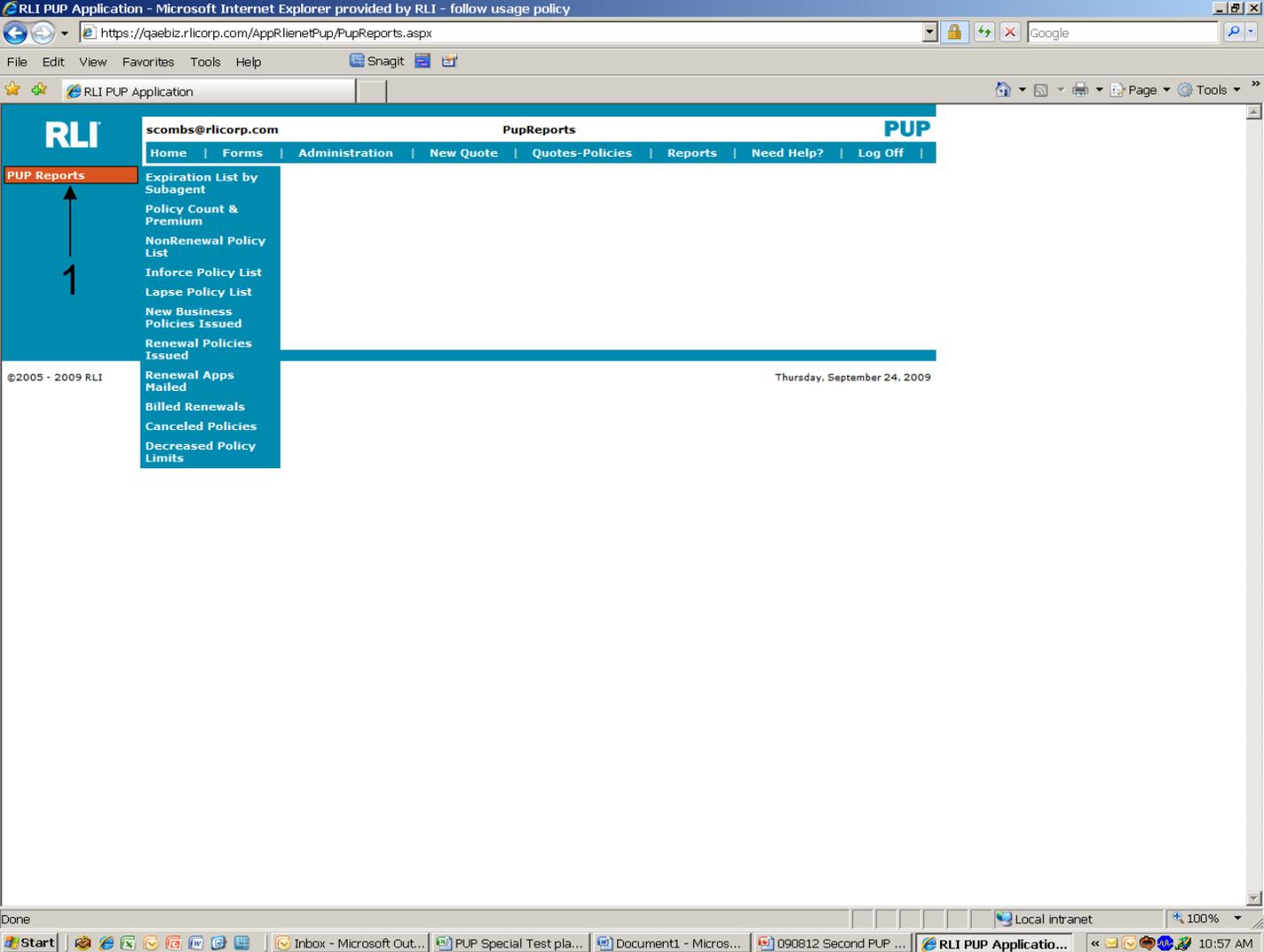
The functionality of the “Forms” area is the same as explained in Chapter 2.

# **CHAPTER 5**

## **“Reports”**

The screenshot shows the RLI Specialty Personal Lines portal. At the top, there is a navigation bar with "My Home", "Welcome to the RLI Portal!", "My Account", and "Log Off". A search bar is also present. The main content area features a blue header with the RLI logo and "Specialty Personal Lines Home". Below the header, there is a login box on the left and a large red-bordered alert box on the right. The alert box contains the following text: "RLI PUP Alert" followed by a bullet point: "Effective immediately, DO NOT input ANY RLI Personal Umbrella business with an effective date of 10-1-09 OR LATER in the states of Alaska, Colorado, Florida, New York, South Carolina or Virginia until further notice. Because PUP Special IS NOT approved in these 6 states, we will 'sit tight' and hope for an approval so that we can offer the program as of 10-1-09 in these 6 states. All other states are now approved and the system is updated and compatible for entry out 60 days in advance. Thanks for your assistance in this transition. As soon as we hear from any of these 6 states we will let you know." Below the alert, there are two main sections: "RLI Personal Umbrella Policy System (PUP Access)" and "Home Business Insurance System (eRLI Access)". The PUP Access section contains four links: "Get A New PUP Quote", "Quote - Policy Look-up", "Quote - Policy Form Look-up", and "Run a PUP Report". The eRLI Access section contains one link: "Get A New Home Business Insurance (HBI) Quote". Below these sections, there is a "Marketing Materials" section with links to "PUP Sample Forms", "HBI Sample Forms", "System Manuals", "PUP Rate Lookup", "PUP FAQs", and "Help". At the bottom of the page, there is a footer with copyright information: "© 2009 RLI Corp, 9025 N Lindbergh Dr. Peoria, Illinois 61615" and links for "Terms Of Use" and "Privacy Policy". A black arrow points to the "Run a PUP Report" link, with the number "1" below it.

1. **Reports** – From the “Community Home Page”, click on the “Run a PUP Report” link to access reports.



## “PupReports” Screen

1. **PUP Reports** - Hover on “PUP Reports”, on the left-hand side, and a list of available reports will be provided.

These reports allow you to manage your RLI PUP business, improve retention by saving policies that are about to non-renew/lapse for nonpayment or to insert yourself into the renewal process.

PUP Expiration List by Subagent - Microsoft Internet Explorer provided by RLI - follow usage policy  
https://qaebiz.rlicorp.com/AppRlienetPupReports/PUP\_EXPIRING\_POLICY\_SELECT.aspx

File Edit View Favorites Tools Help Snagit

PUP Expiration List by Subagent

RLI PUP Reports

48936-50712 PUP Reports PUP

Home | Forms | Administration | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

**PUP Expiration List by Subagent**

SubAgent: 50712

\*Beginning Expiration Date (MM/DD/YYYY)

\*Ending Expiration Date (MM/DD/YYYY)

©2005 - 2009 RLI Thursday, September 24, 2009

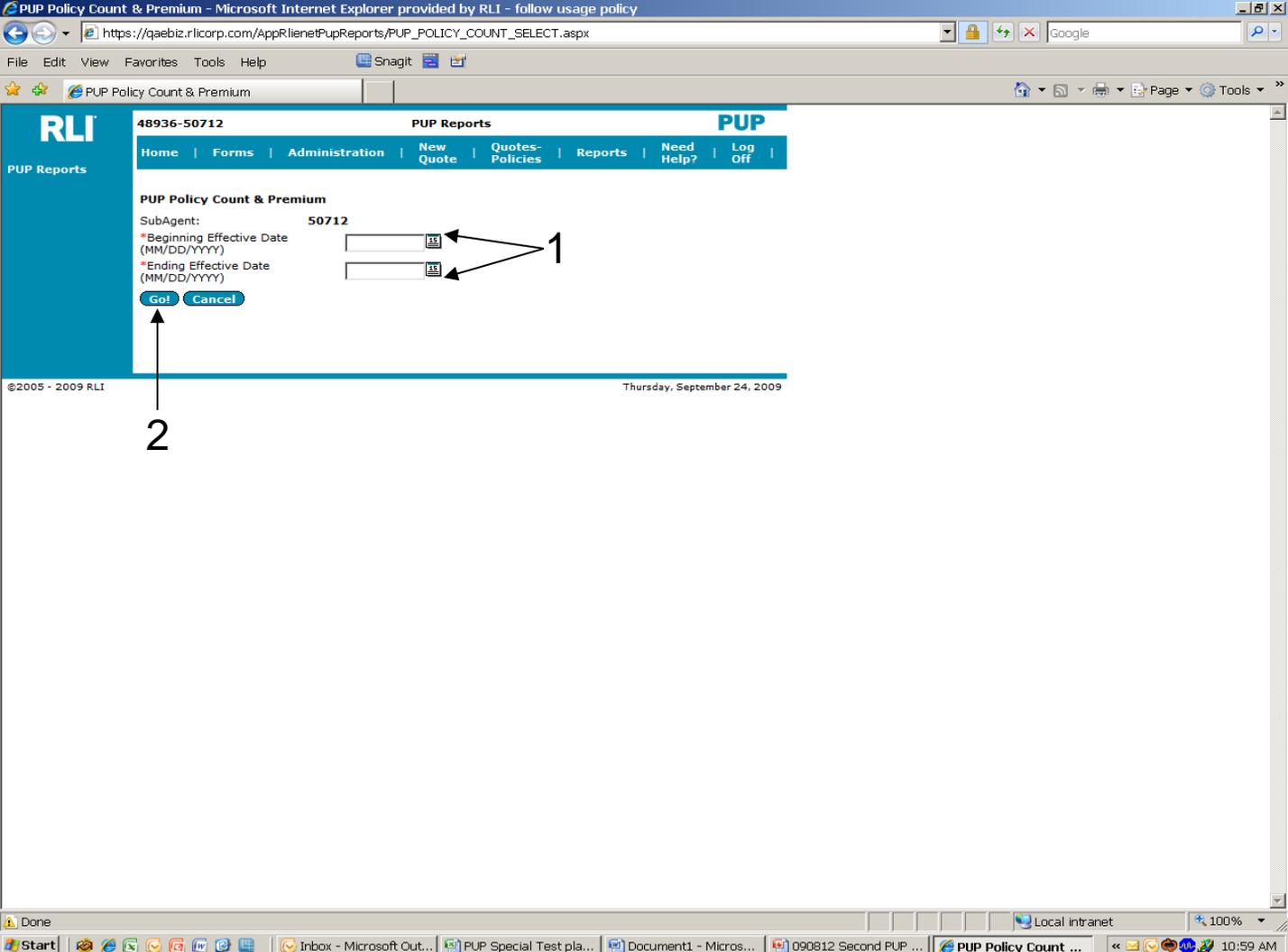
Done Local intranet 100%

Start | Inbox - Microsoft Out... | PUP Special Test pla... | Document1 - Micros... | 090812 Second PUP ... | PUP Expiration List... | 10:58 AM

## “PUP Expiration List by Subagent” Report

You could run this report each month to know which policies will be renewing.

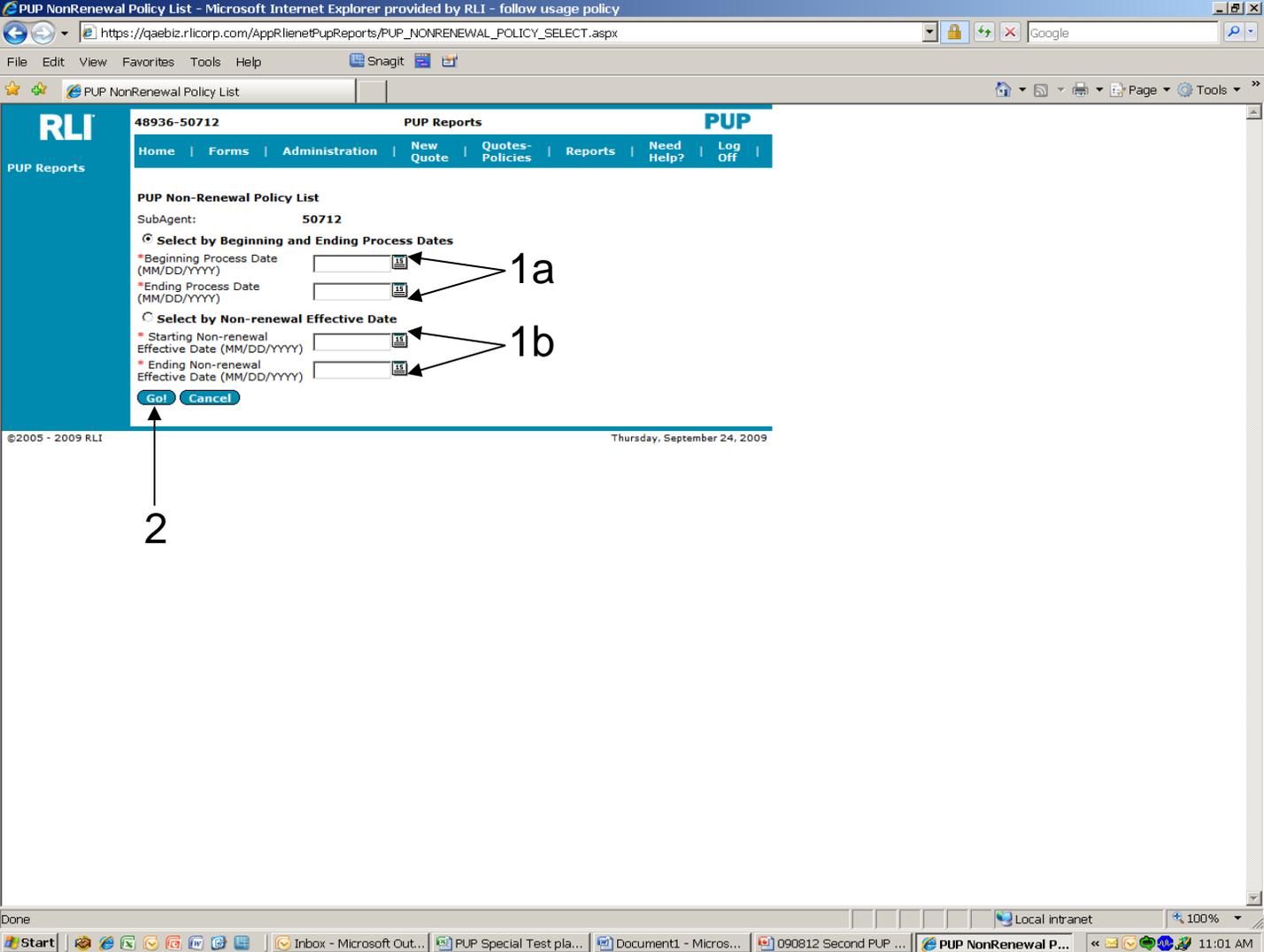
1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be selected by clicking on the calendar or by entering the desired dates.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Policy Count & Premium” Report

This report can be run to track production.

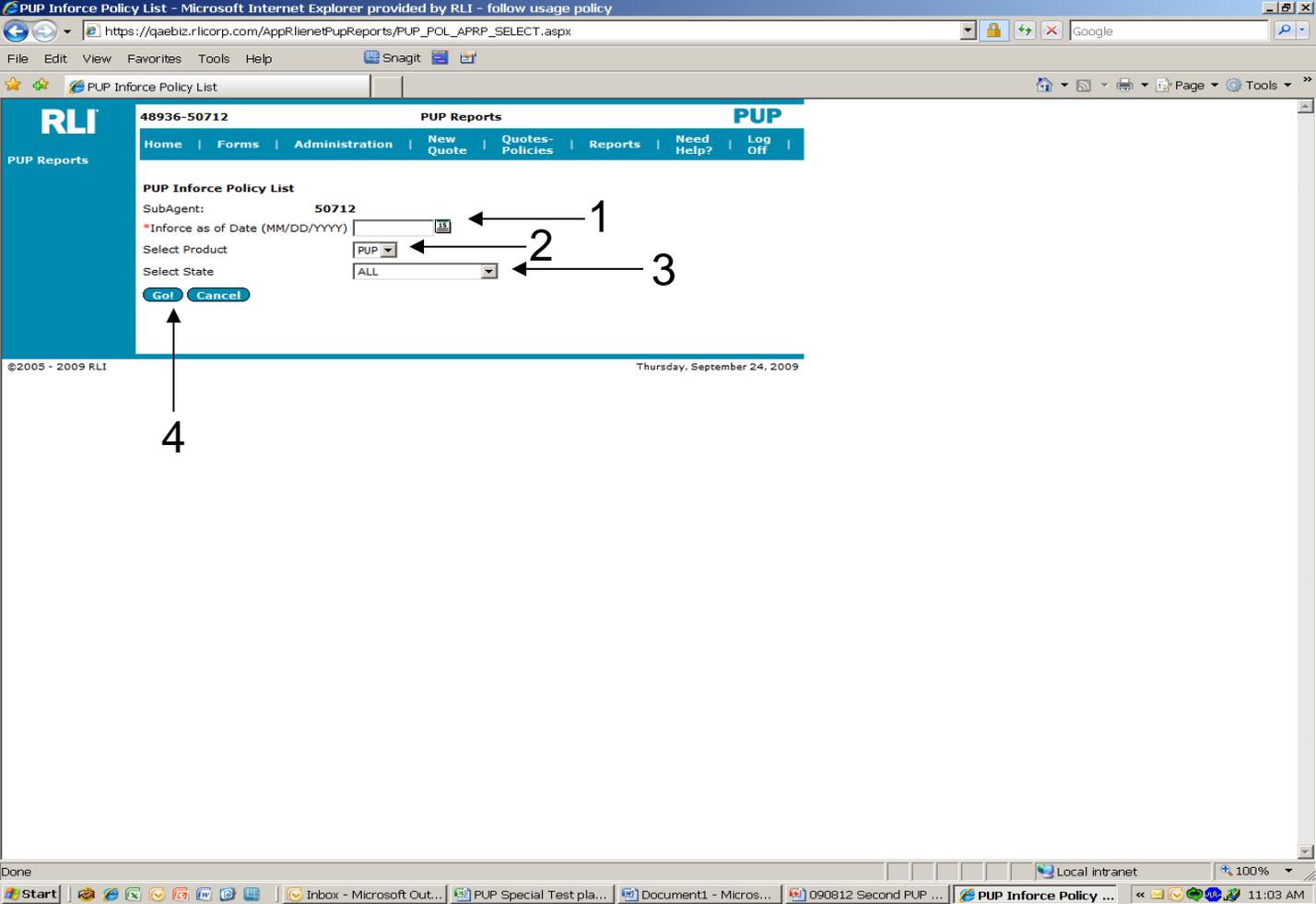
1. Enter the “Beginning Expiration Date” and the “Ending Expiration Date”.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Non-Renewal Policy List” Report

This report could be run to know who will be receiving non-renewal notices within the next few days (before the insured gets the notice).

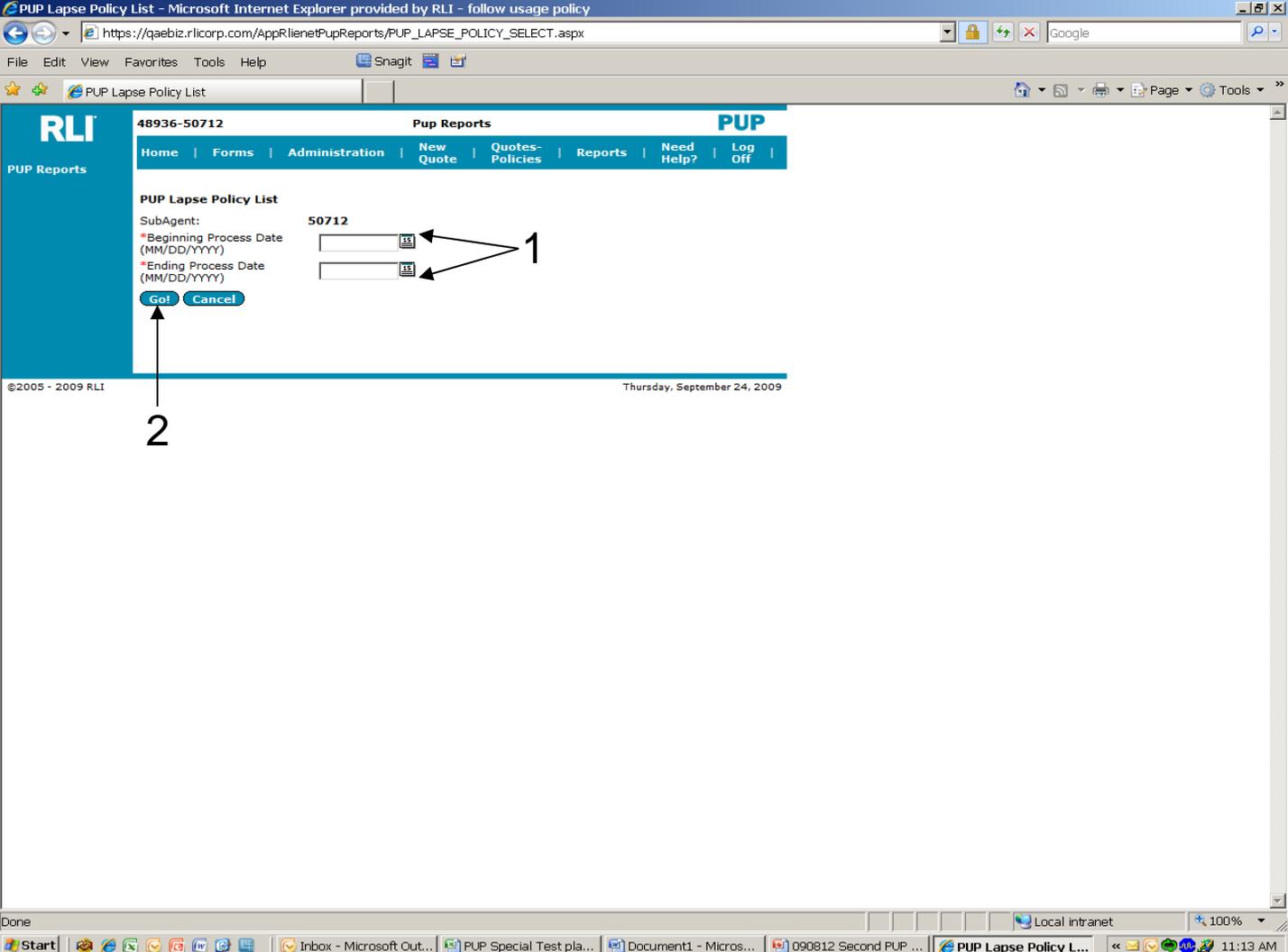
1. You may select from two different date searches.
  - a) One option is to “Select by Beginning and Ending Process Dates” by clicking the radio button next to this option. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired dates.
  - b) The second option is to “Select by Starting and Ending Non-renewal Effective Date. To use this method, click on the radio button next to this option, and enter the “Starting and Ending Non-Renewal Effective Date” by clicking on the calendar or by entering the desired date.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Inforce Policy List” Report

This listing will show all your PUP policies.

1. The “Inforce as of Date” can be selected either by clicking on the calendar or entering the desired dates.
2. Select “PUP” from the drop down list.
3. Select the desired state from the drop down list.
4. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Lapse Policy List” Report

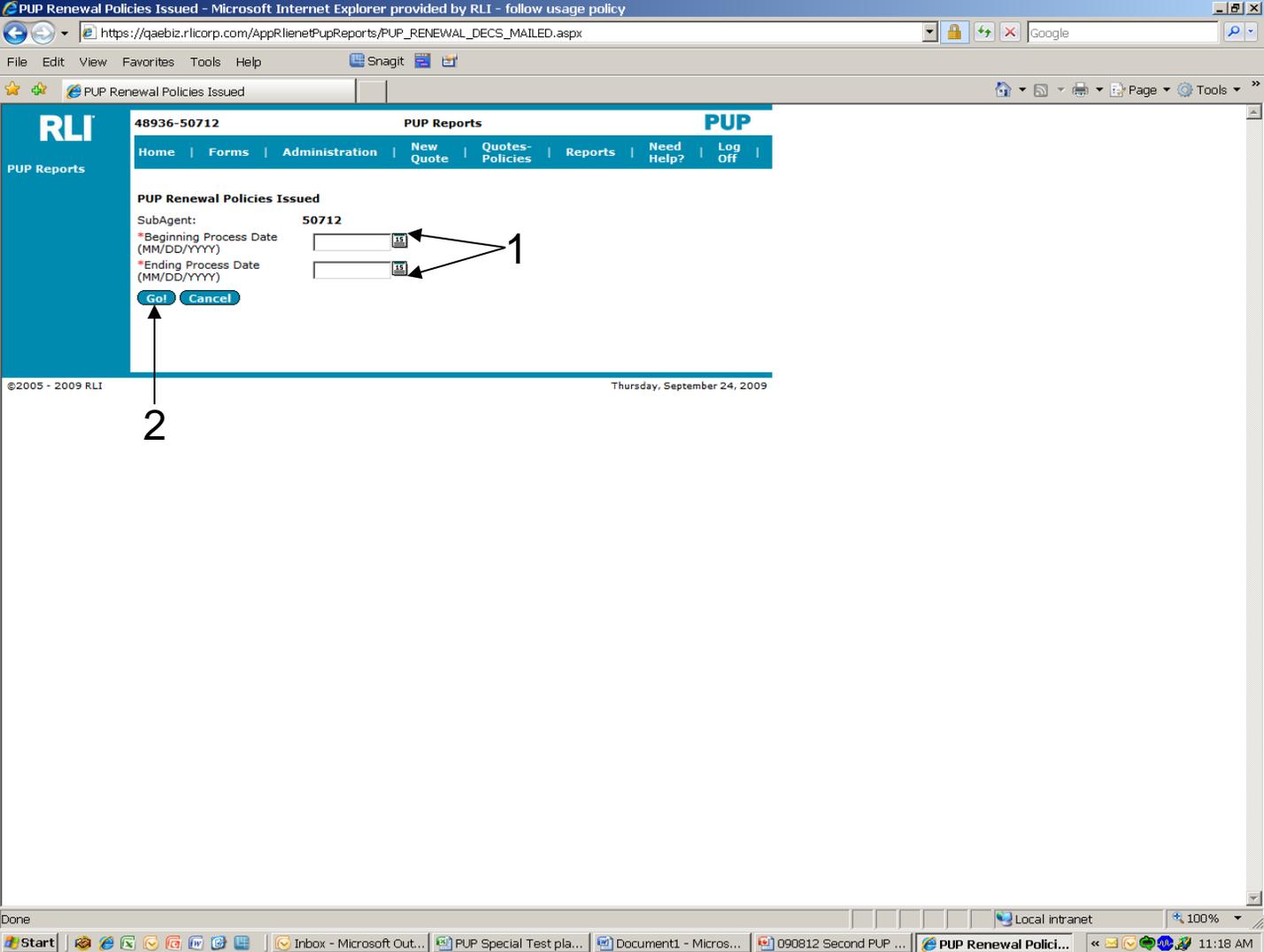
This report shows lapsed policies and can be used to contact the insureds to remind them of the need for payment.

1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired dates.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.

## “PUP New Business Policies Mailed” Report

This report enables the user to know which quotes have been bound, issued and mailed.

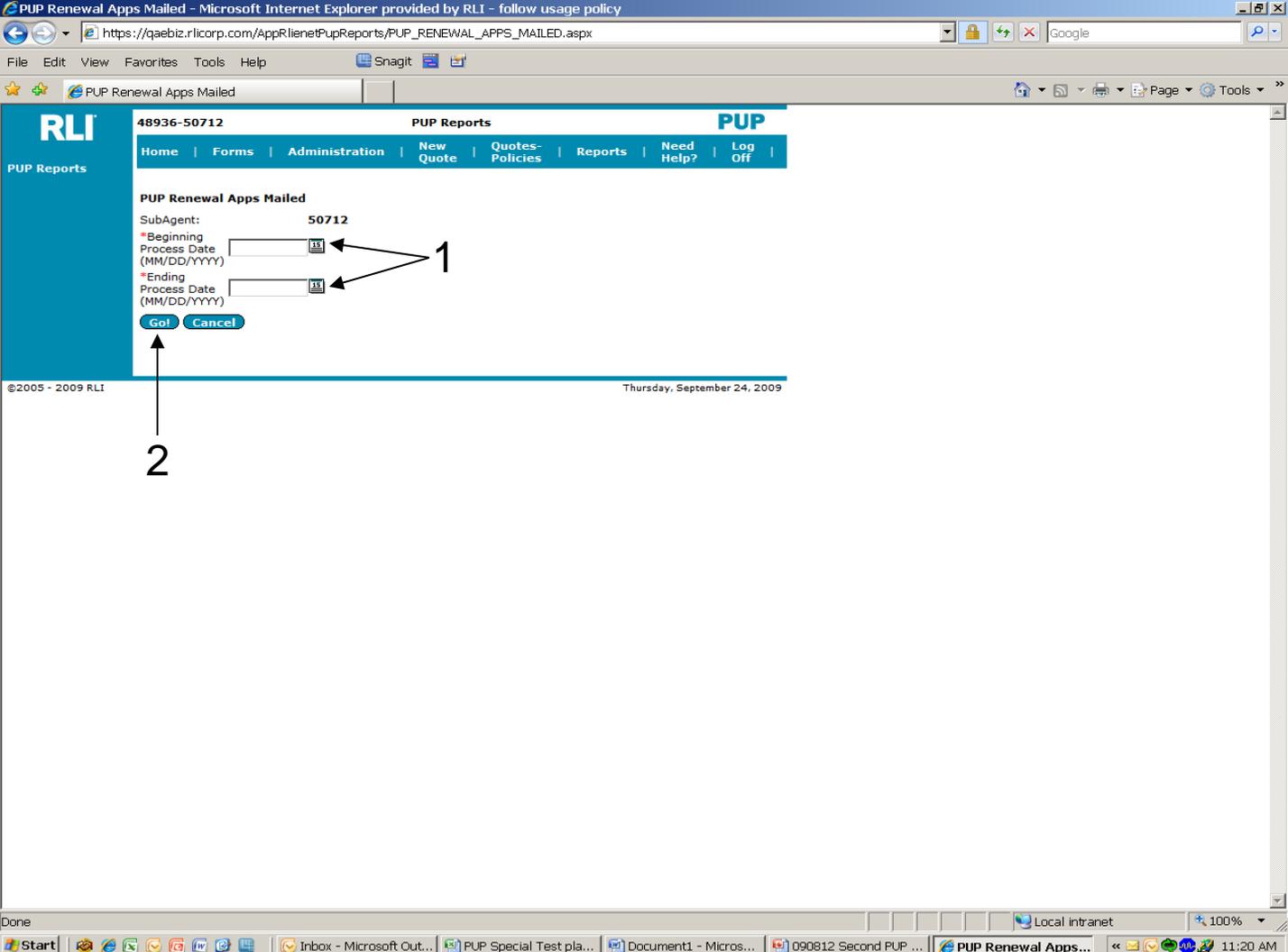
1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired dates.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Renewal Policies Mailed” Report

This report can be used to help manage the renewal process enabling the user to know which renewal policies have paid, issued and mailed.

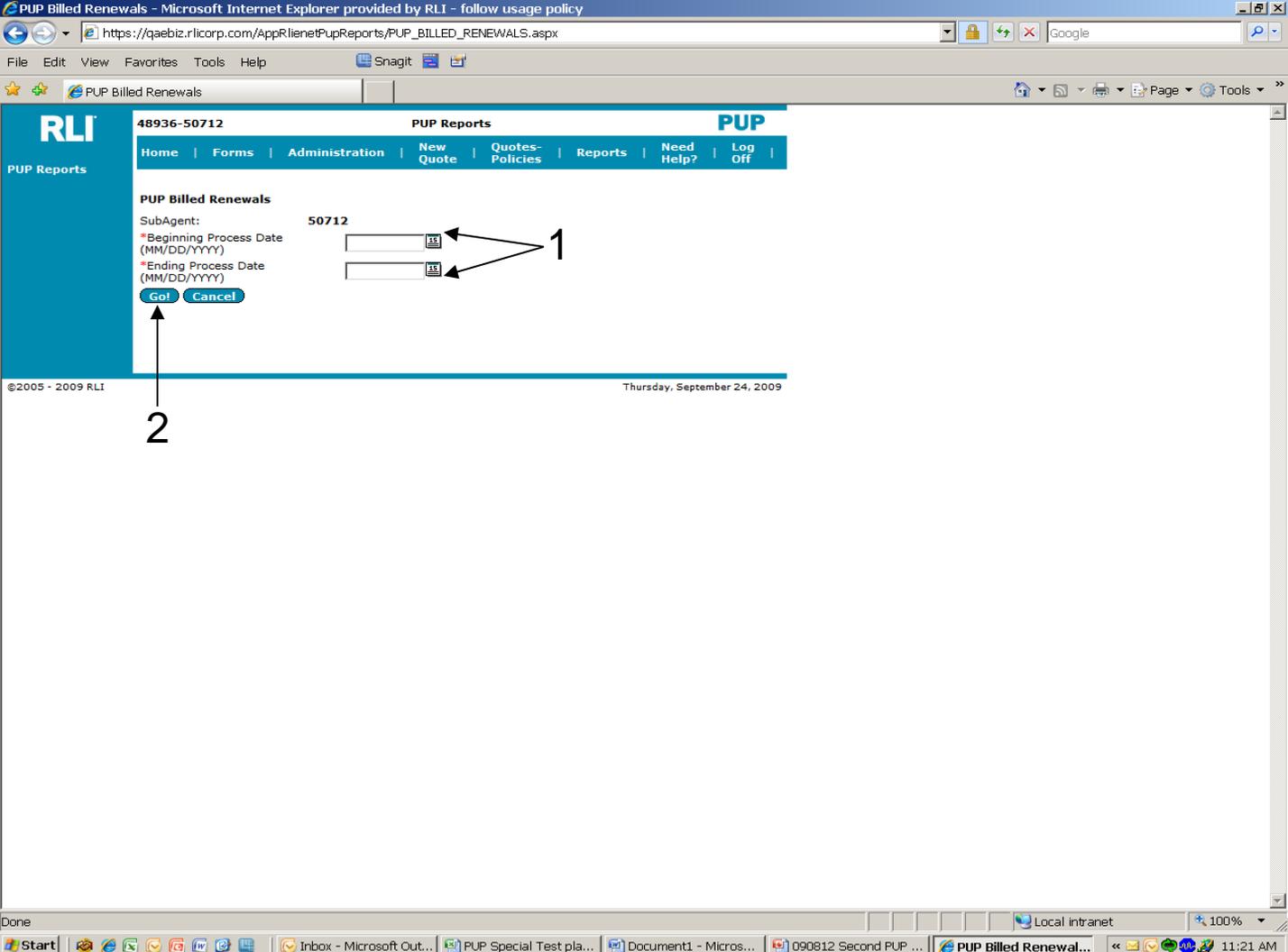
1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired date.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Renewal Apps Mailed” Report

This report shows which renewal applications have been mailed to the insured.

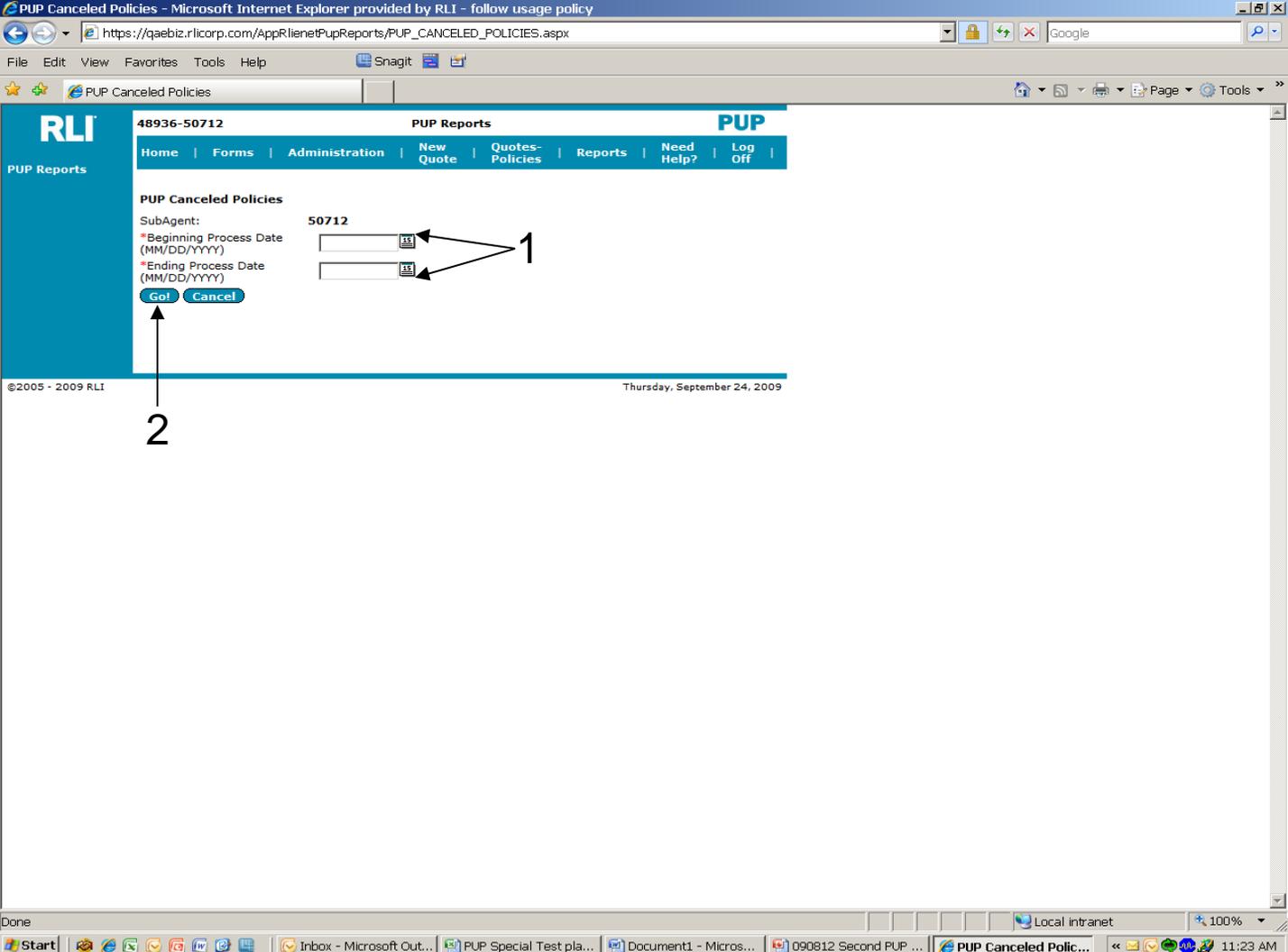
1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired date.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Billed Renewals” Report

This report can be used to improve retention. The insureds have returned their questionnaire and are eligible. They just need to be reminded to pay their bill.

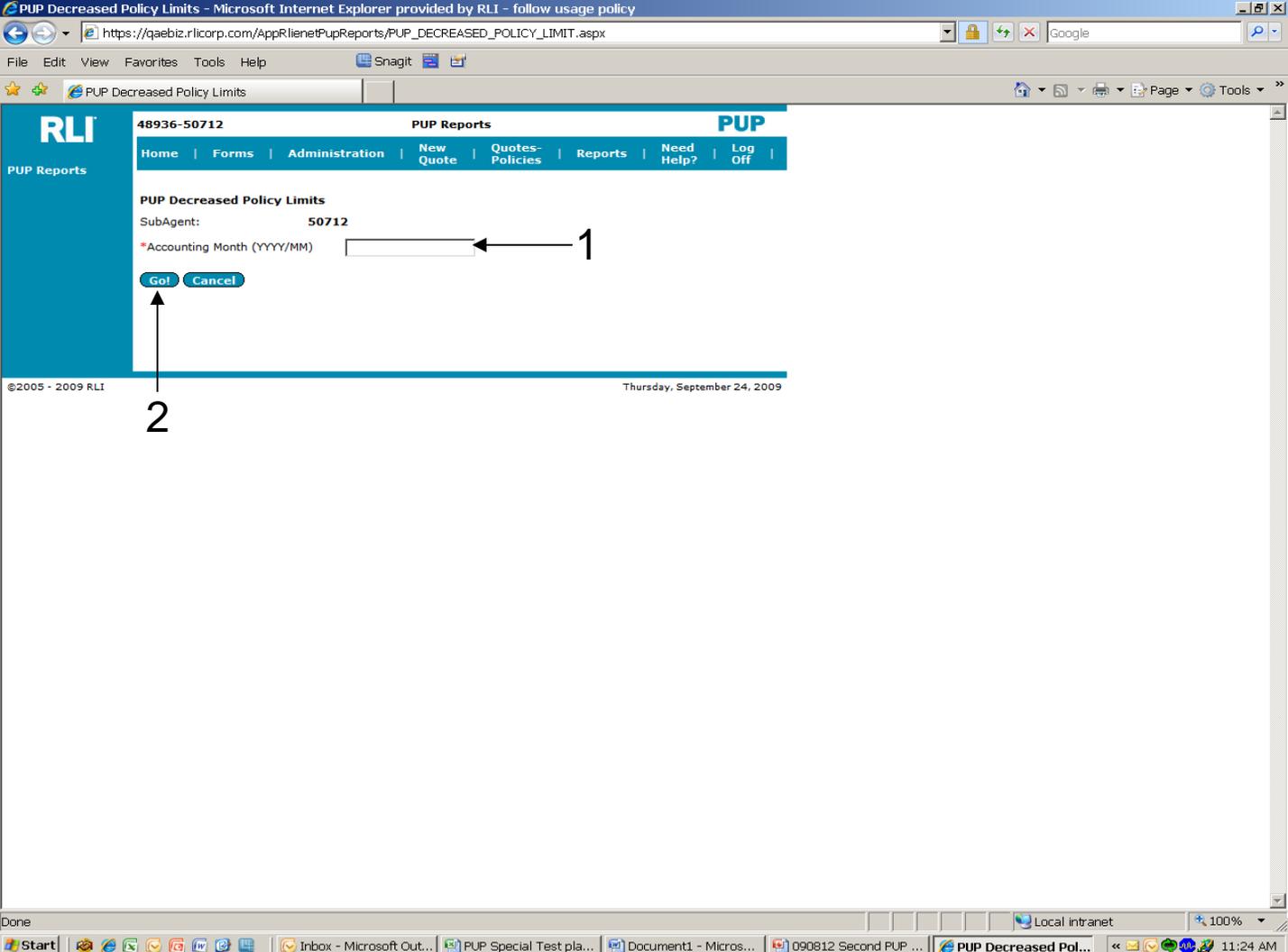
1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired date.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



## “PUP Canceled Policies” Report

This report could be used to contact previous insureds to find out why they cancelled.

1. Both the “Beginning Expiration Date” and the “Ending Expiration Date” can be either selected by clicking on the calendar or by entering the desired date.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.



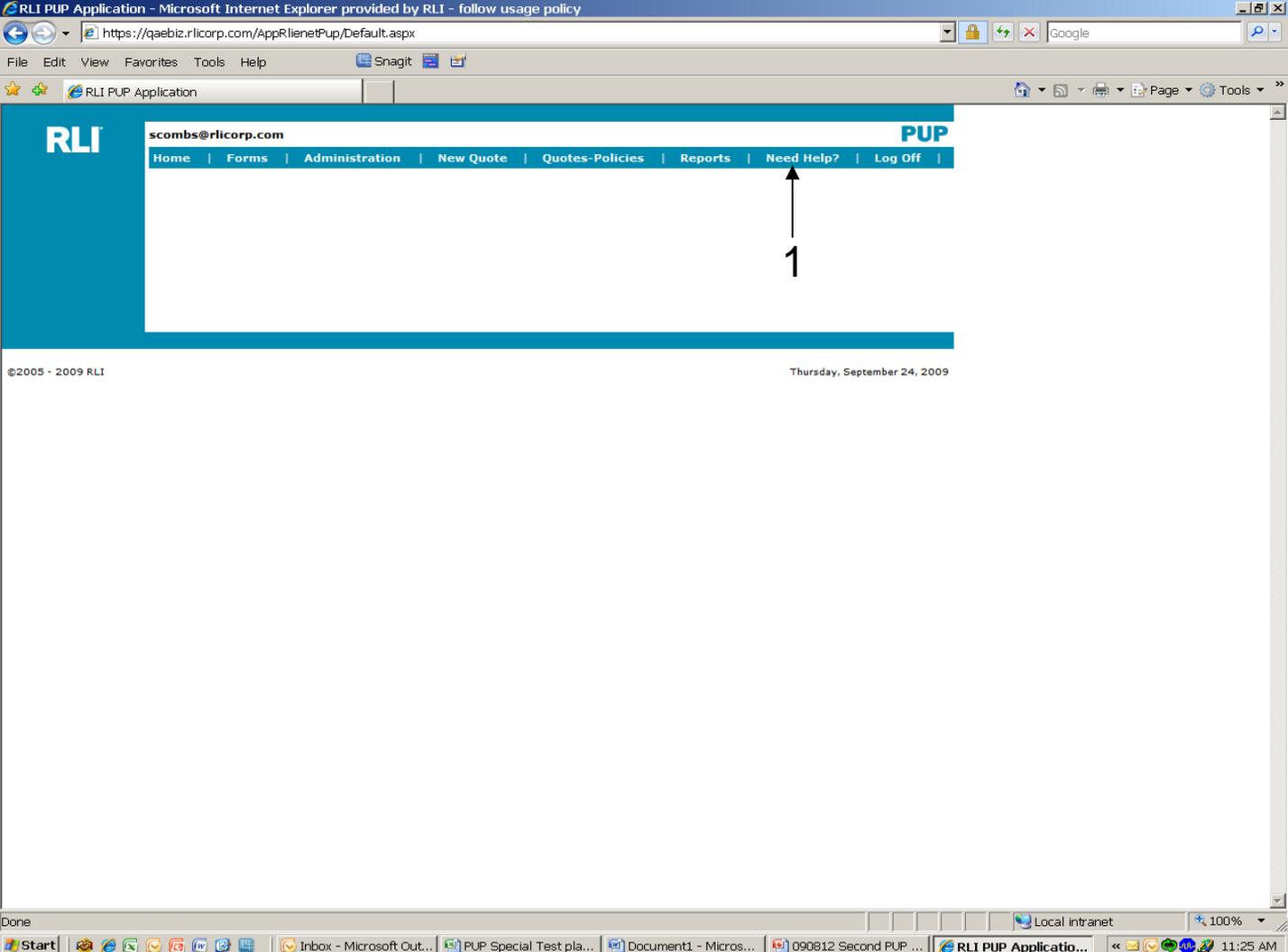
## “PUP Decreased Policy Limits” Report

This report shows which insureds chose to decrease the limit of coverage from the previous year.

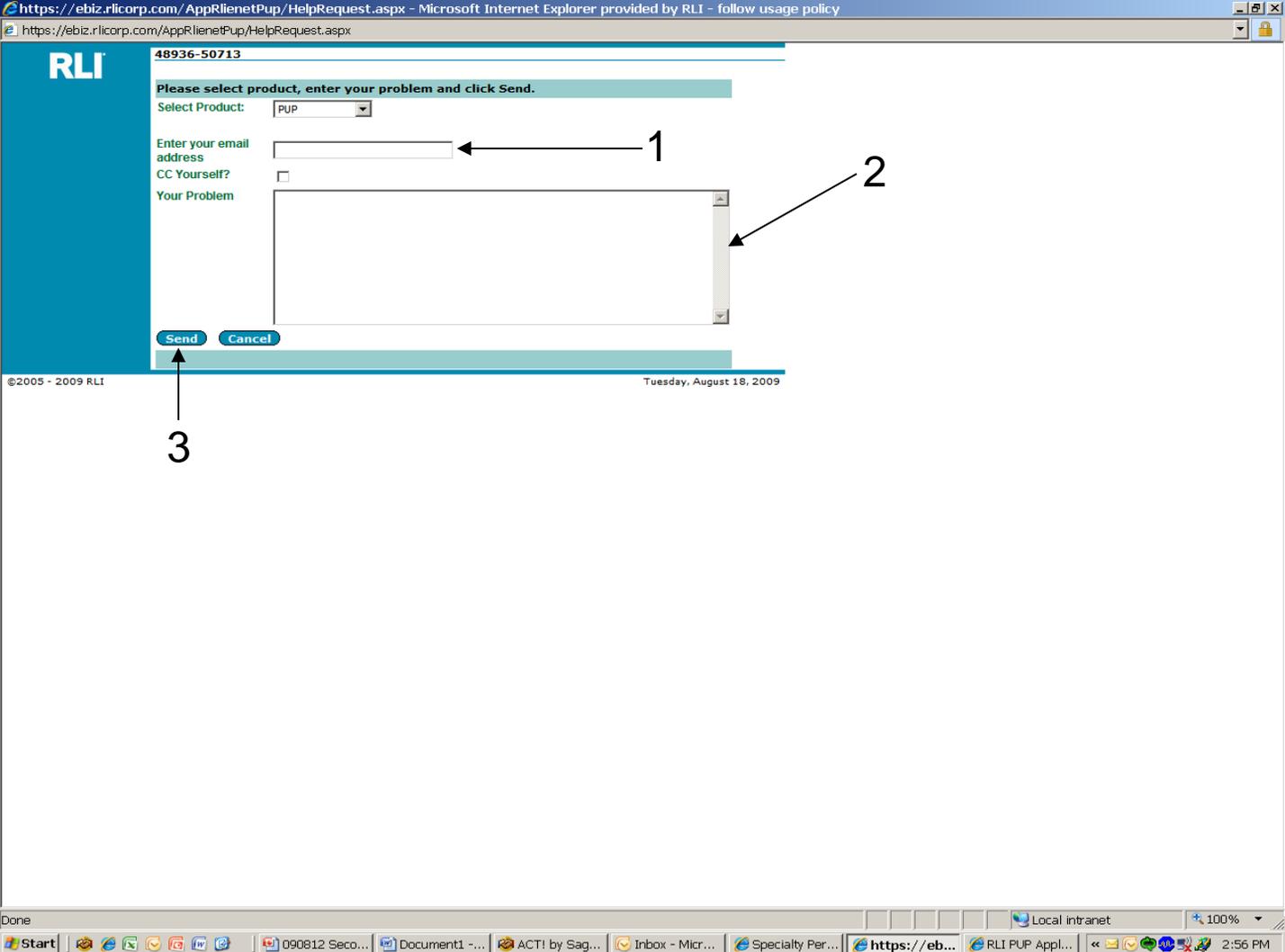
1. Fill in the “Accounting Month”.
2. **Go** - Once you click on the “Go” button, an Excel spreadsheet will open with the desired data.

# **CHAPTER 6**

“Need Help?”



1. **Need Help?** – From the “PUP Access” Home page, click on this tab if you would like to send an e-mail to request specific help.



1. Enter the e-mail address to which the response should be sent.
2. Explain your question or the problem you are encountering.
3. Click “Send.”

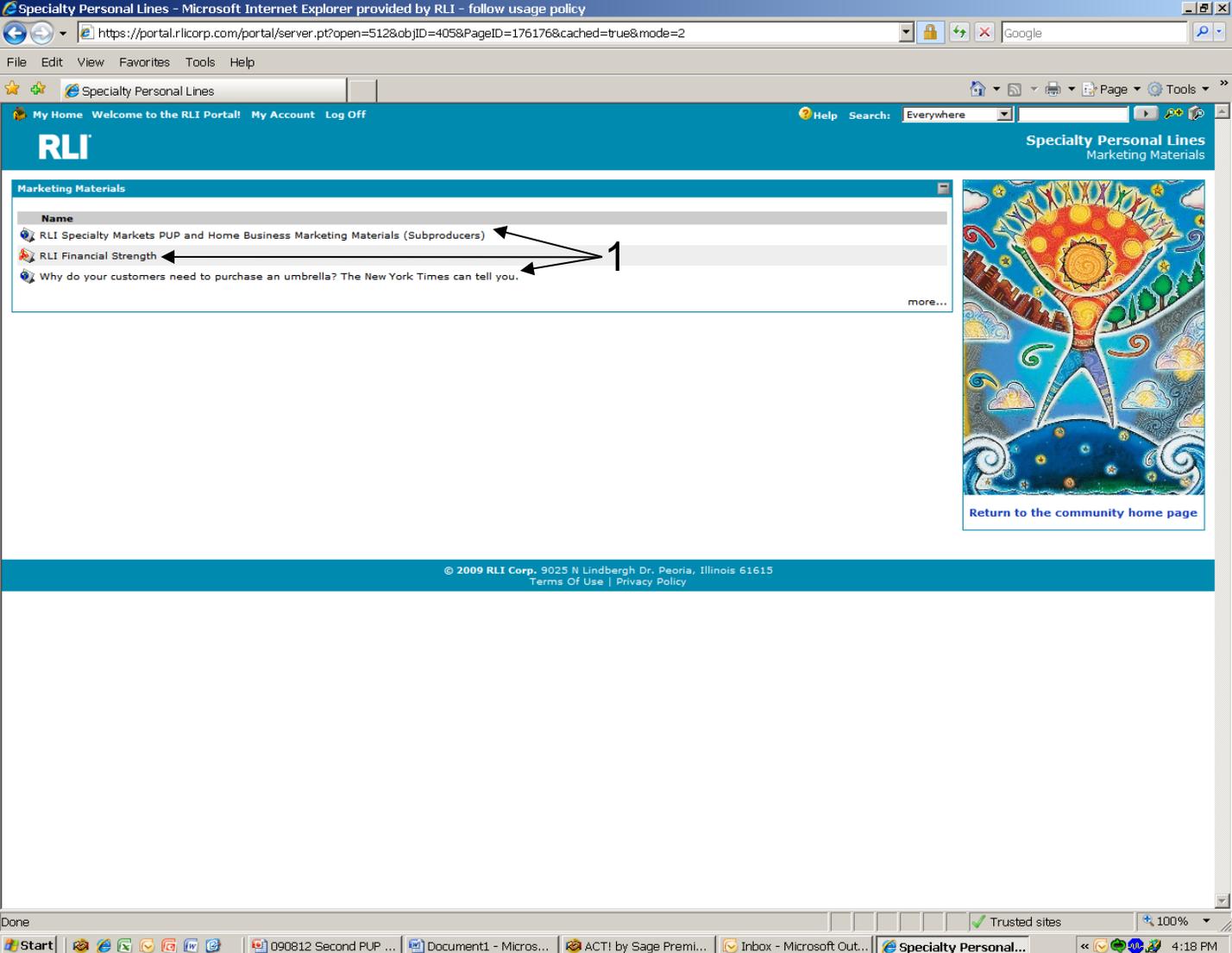
**Note: Every effort will be made to review and respond to on-line inquiries within 24 hours. Please remember to check this manual for procedural questions or contact you administrator.**

# **CHAPTER 7**

“RLI Specialty Markets  
Community Home Page”



1. On the next few pages, the various links at the bottom of the “Community Home Page” will be outlined in more detail.



## “Marketing Materials” Screen

1. Once you click on the “Marketing Materials” link, you will be directed to this screen. For PDF files of the brochures, click on the first link. There are also a couple of articles you can utilize as proof sources when talking to your insureds.

The marketing materials can be placed as a link on your website. They can all be personalized with your specific contact information, saved and/or printed.

RLI Specialty Markets PUP and @Home Marketing Materials

http://my.rlicorp.com/Products/SM\_materials\_agents.asp

File Edit View Favorites Tools Help

RLI Specialty Markets PUP and @Home Marketing Mat...

Page Tools



**RLI**  
DIFFERENT WORKS

RLI Specialty Markets  
PUP and @Home Marketing Materials



The promotional materials on this page were designed to help you market RLI's Personal Umbrella Policy (PUP) and @Home business protection.

**TO PLACE AN ORDER:**  
You can request the items you need directly from your Program Administrator. Quantities on most items are limited.

Some items can be downloaded NOW for you to print as many copies you need. To customize: click anywhere in customizable area (box at lower right) and enter your information.



Item Name: PUP Consumer Brochure:  
One-page PDF

Audience: Prospective insureds

Description: Immediately available for administrators and agents to customize and print. Contains overview and benefits of RLI's personal umbrella coverage. Can be used as a handout. Contains a customizable text area for your address/contact information.

Size: 8.5" x 11" single-sided.

[▶ CUSTOMIZE and PRINT NOW!](#) (PDF, 155 kb)

---

Do you run a small business out of your home?

Will your homeowners insurance cover you when...

- You business equipment is stolen or your equipment is damaged?
- You accidentally break into the home next to you?
- Your guests call your home their home?
- A loved one slips, trips or falls on your property and is injured?
- A business visitor calls your home?

Most homeowners and renters policies do not cover liability or damage to property from business activities.

RLI's Home Business Insurance can be as little as \$100 per year!

Protect your home-based business!



Item Name: Home Business Insurance Brochure:  
One-page PDF

Audience: Prospective insureds

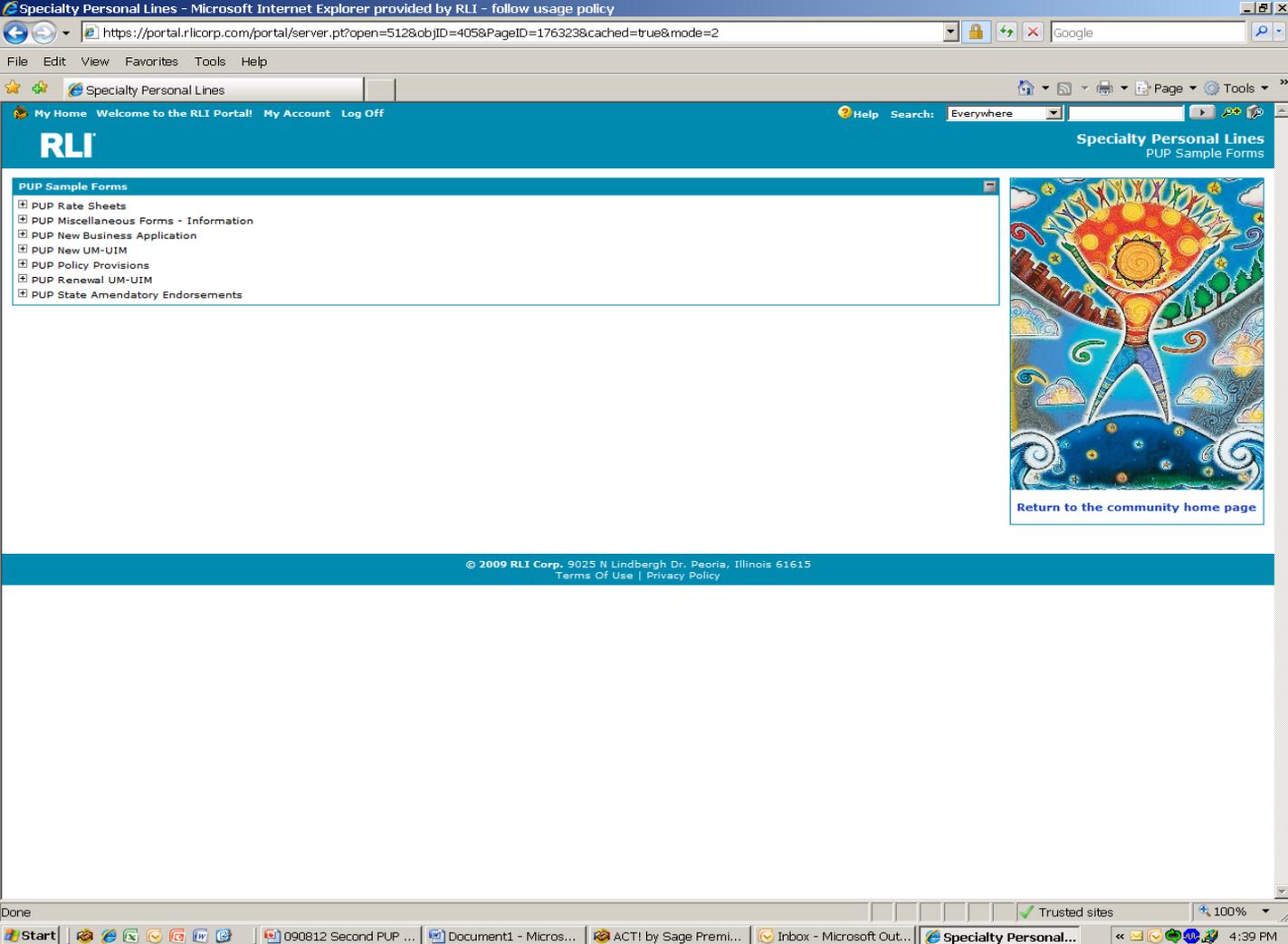
Description: Immediately available for administrators and agents to customize and print. Contains overview and benefits of RLI's Home Business Insurance. Can be used as a handout. Contains a customizable text area for your address/contact

Local intranet 100%

start New Memo - Lotus N... PCSWS.EXE 3 Internet Explorer Microsoft PowerPoi... 11:56 AM

Once you have clicked on “Marketing Materials”, a new window will open with several documents that may be customized and used immediately.

1. To print, click on “Customize and Print Now”. This will open a PDF file and allow you to add your agency address, etc. You can then print them in your office with your customization.

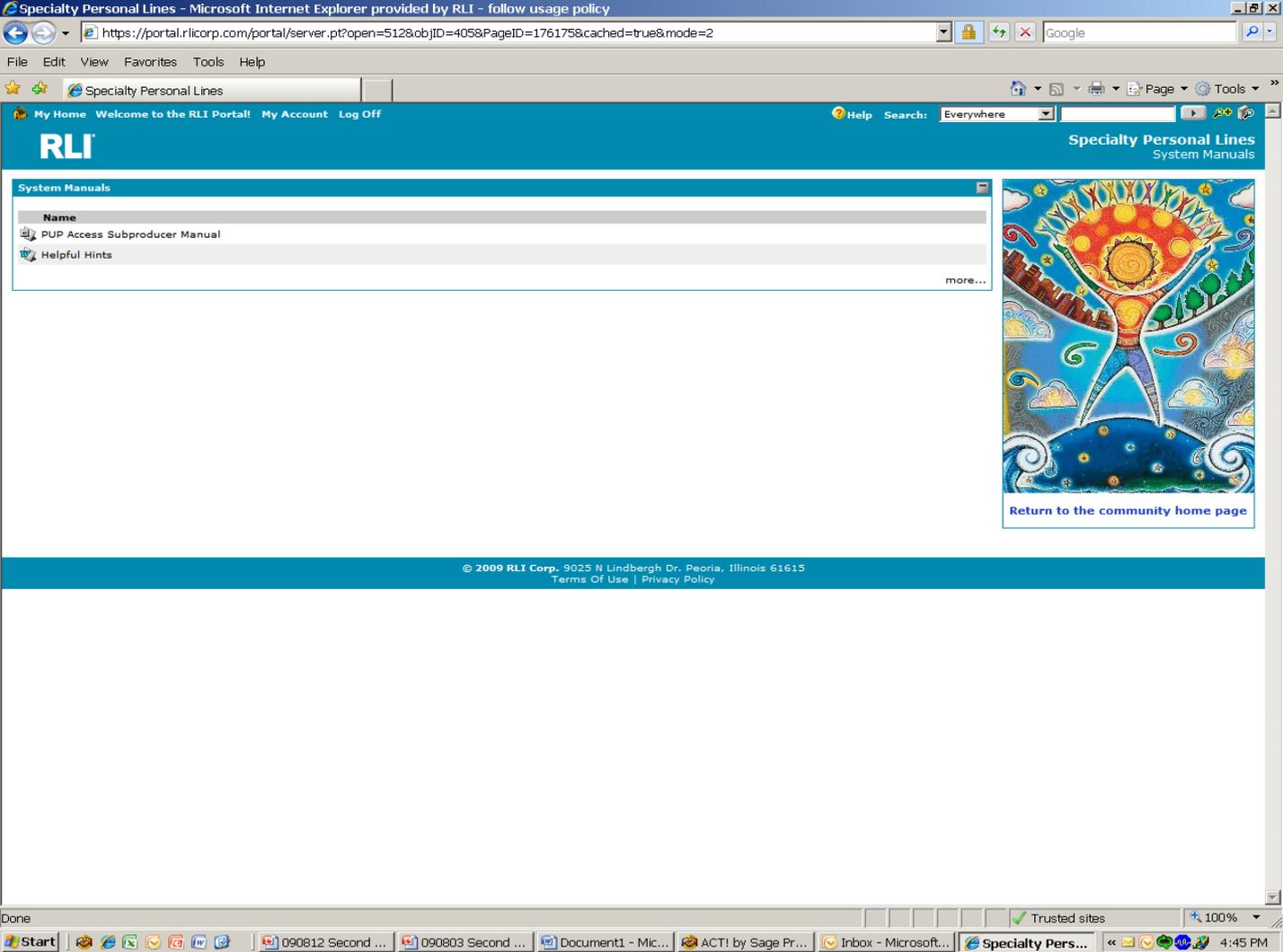


## “PUP Sample Forms” Screen

You can select a number of various sample forms by clicking on the “PUP Sample Forms” link from the home page. Click on the desired folder to access the form. These are blank forms and not specific to a particular insured. These forms can be placed on your website to reduce phone calls and provide easy access to your customers. Always make sure you keep them updated.

**Keep in mind that policy specific PDFs of each individual policy form is available in Policy Inquiry.**

“HBI Sample Forms” is another link on the “Community Home Page” that will operate in a similar fashion as this screen for the Home Business Insurance product forms.



## “System Manuals” Screen

This manual along with the helpful hints can prove to be valuable resources and we encourage their use for detailed information on the PUP Access system. Utilizing the on-line manuals may answer many of your day-to-day questions. We encourage you to acquaint yourself with these valuable tools.

The screenshot shows the RLI Specialty Personal Lines portal. At the top, there is a navigation bar with the RLI logo and 'Specialty Personal Lines Home'. Below this, a user is logged in as '48936-50713' with the agency name 'Subproducer 2'. A prominent red-bordered box contains an 'RLI PUP Alert' with the following text: 'Effective immediately, DO NOT input ANY RLI Personal Umbrella business with an effective date of 10-1-09 OR LATER in the states of Alaska, Colorado, Florida, New York, South Carolina or Virginia until further notice. Because PUP Special IS NOT approved in these 6 states, we will "sit tight" and hope for an approval so that we can offer the program as of 10-1-09 in these 6 states. All other states are now approved and the system is updated and compatible for entry out 60 days in advance. Thanks for your assistance in this transition. As soon as we hear from any of these 6 states we will let you know.'

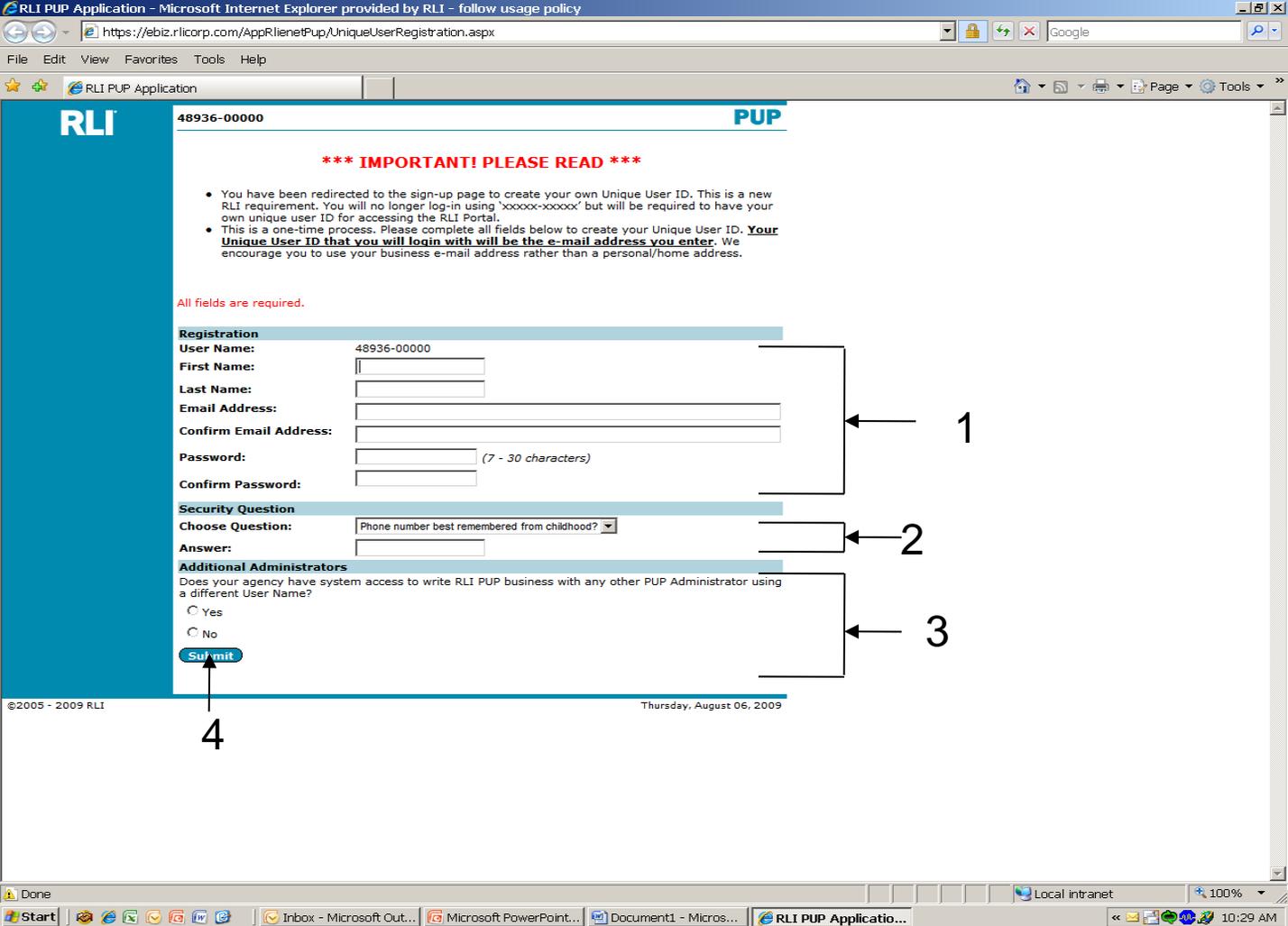
Below the alert, there are sections for 'RLI Personal Umbrella Policy System (PUP Access)' and 'Home Business Insurance System (eRLI Access)'. The PUP Access section includes links for 'Get A New PUP Quote', 'Quote - Policy Look-up', 'Quote - Policy Form Look-up', and 'Run a PUP Report'. The eRLI Access section includes a link for 'Get A New Home Business Insurance (HBI) Quote'.

A navigation menu lists 'Marketing Materials', 'PUP Sample Forms', 'HBI Sample Forms', and 'System Manuals'. Under 'PUP Sample Forms', there are links for 'PUP Rate Lookup', 'PUP FAQs', and 'Help'. Three arrows point from the numbers 1, 2, and 3 below to these three links respectively. The footer contains copyright information for RLI Corp. in Peoria, Illinois, and links for 'Terms Of Use' and 'Privacy Policy'.

1. **PUP Rate Lookup** – This is the same link we encourage you to place on your website for potential customers to obtain a rate and complete an application without the need to have a sign-on for PUP Access.
2. **PUP FAQs** – This is your resource for the most commonly asked questions about the product.
3. **Help** – This was previously covered in chapter 6.

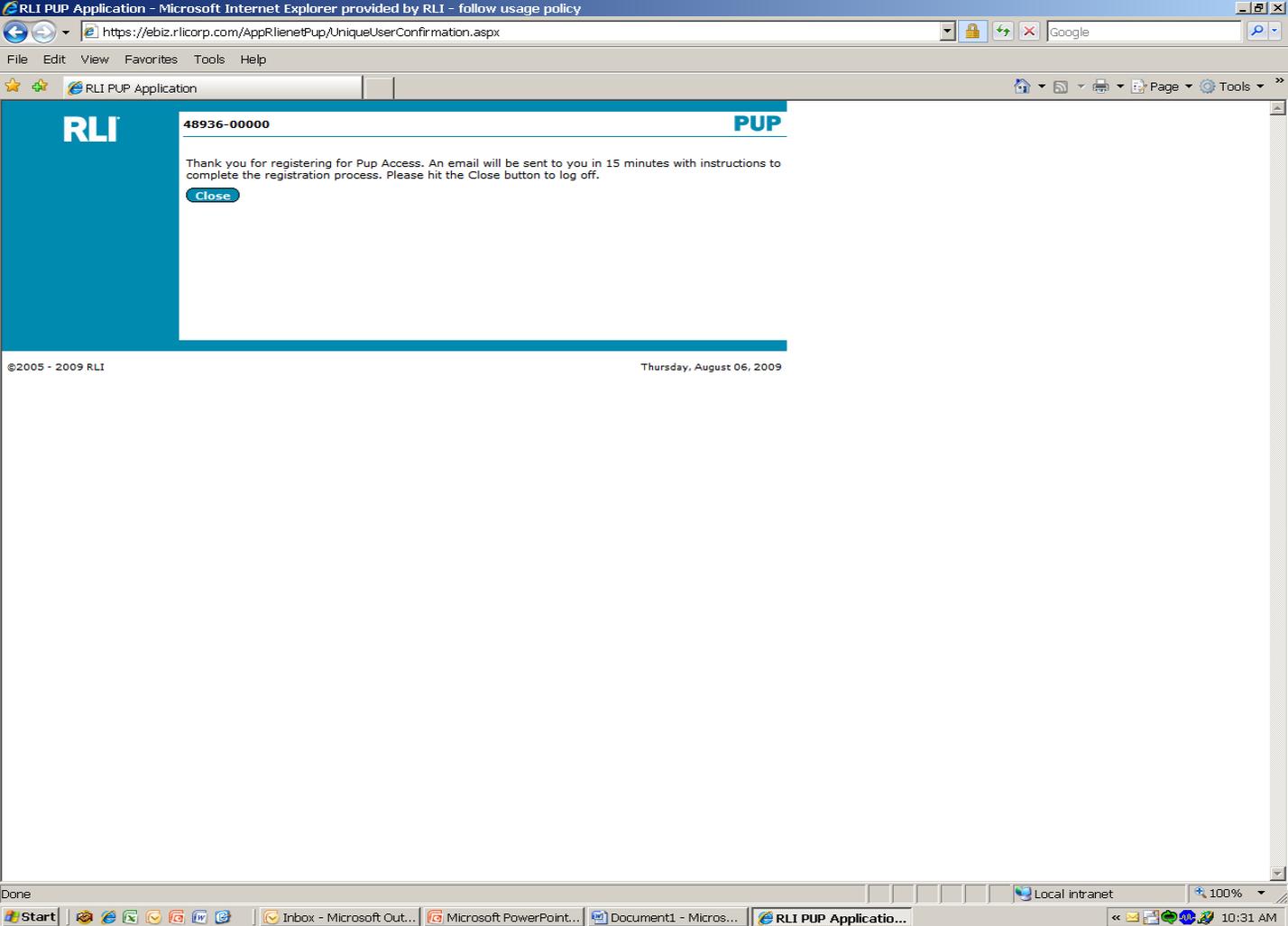
# **CHAPTER 8**

## Unique User ID



## Unique User ID Set-Up Screen

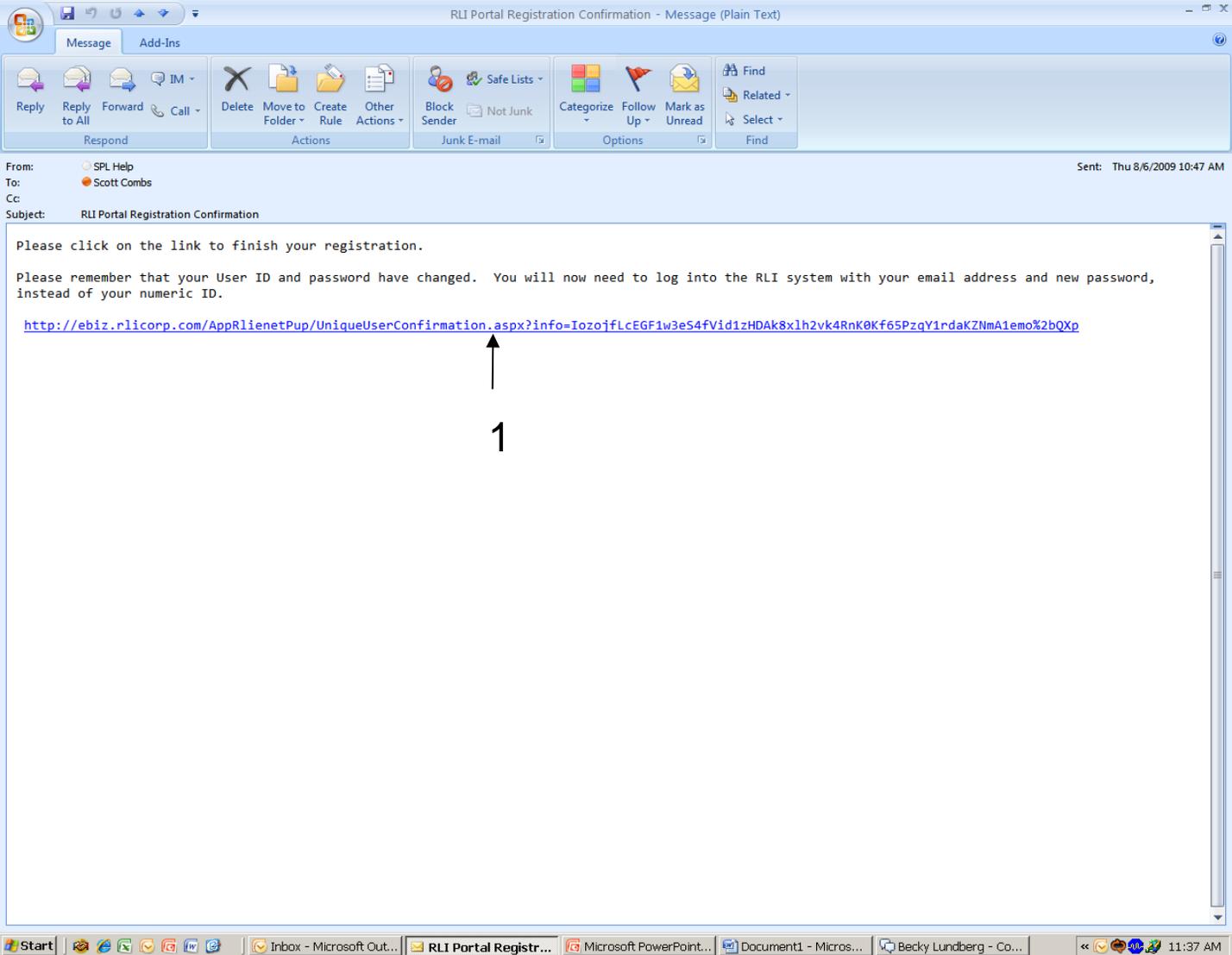
- 1. Registration** – After you initial log-on, using your assigned numeric username and password, you will be prompted to create your own unique user ID. The username you pick, should be your work e-mail address. This is the username you will use from this point on when accessing the RLI PUP Access system.
- 2. Security Question** – At the same time, you will sign-up for self-service password. By answering your “Security Question”, you will allow yourself the ability to unlock and retrieve your password in the future without the need to contact your administrator.
- 3. Additional Administrators** – This section is designed for subproducers who may have chosen to work with two different administrators for access to the RLI product group. Administrators can disregard this section.
- 4. Submit** – Click this button once all fields are complete.



## Confirmation Screen

This screen will display once you click the “Submit” button to verify you have completed the unique user ID sign-up process. You will now need to wait for an e-mail from RLI to verify the sign-up process before you can re-enter the PUP Access system.

**The e-mail generation can take up to 15 minutes. Please do not try to re-enter the system without the verification e-mail being received.**

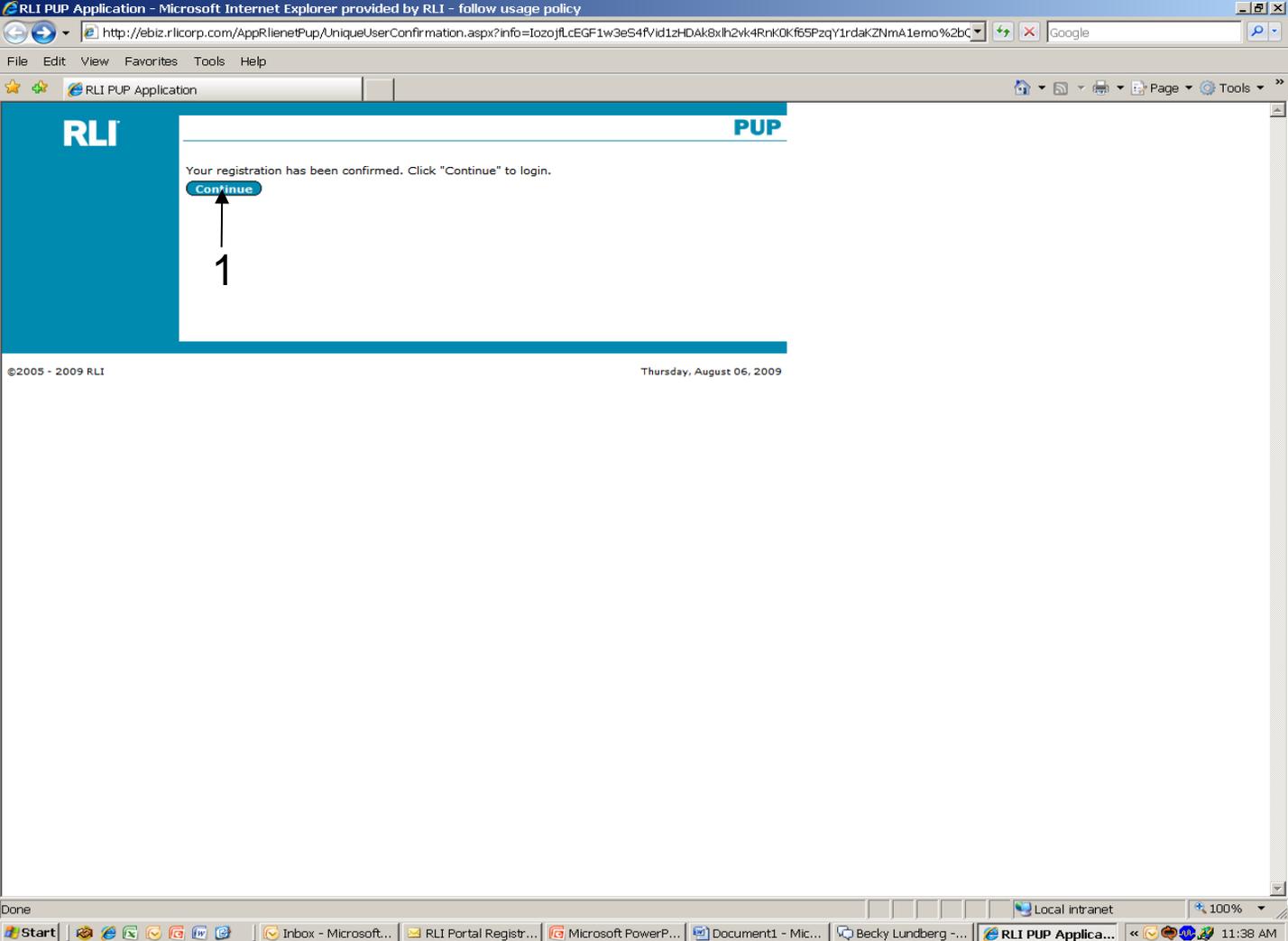


## Confirmation E-Mail

This is the e-mail you will receive approximately 15 minutes after the completion of the unique user ID set-up process.

1. Simply click on this link and the system will then recognize your new username and password as created.

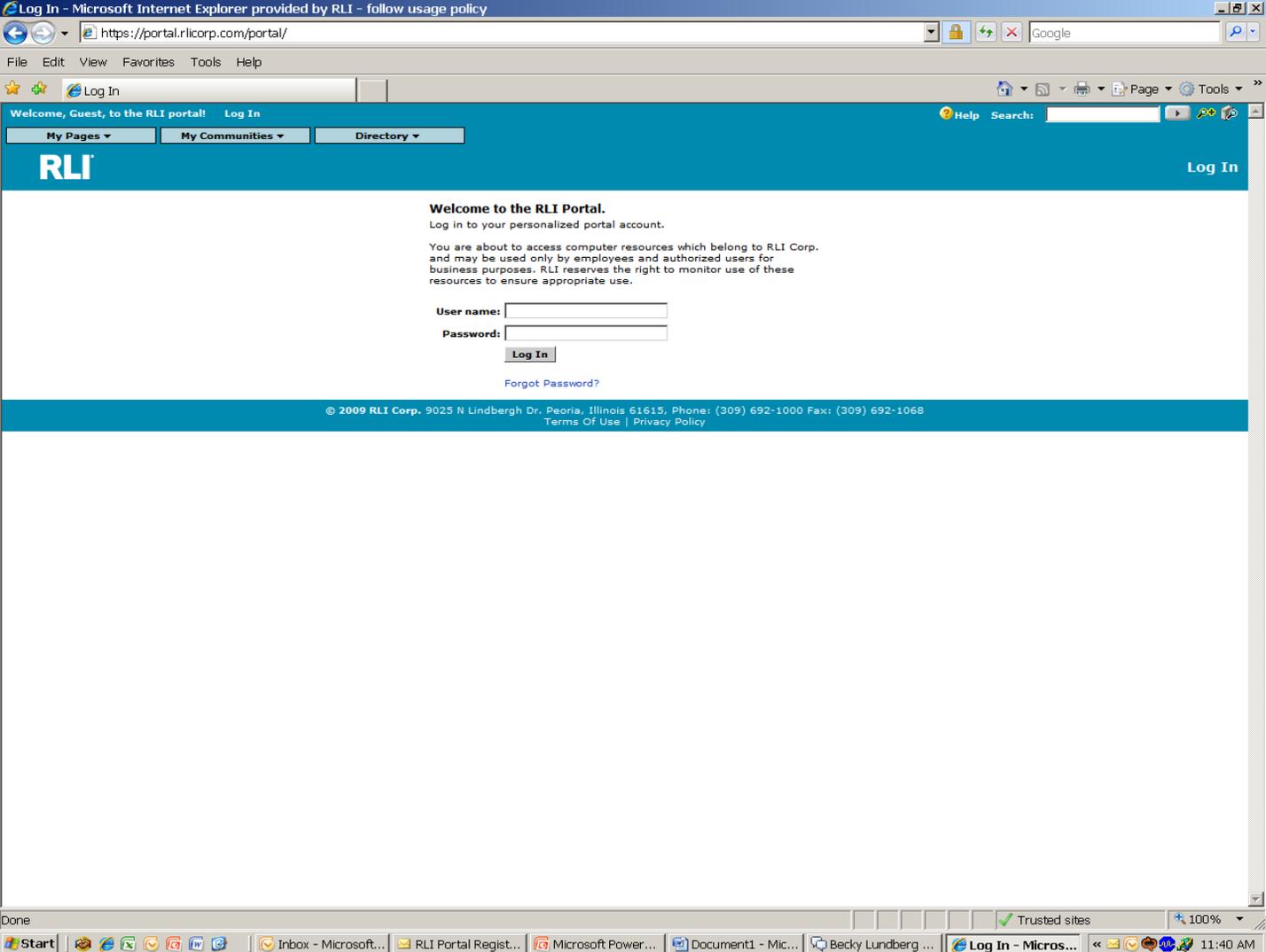
**Please Note: you will no longer use the numeric username and password provided to you by your administrator.**



## Confirmation Of Registration screen

Once you click on the link within your e-mail, you will be confirmed that you have properly set-up your unique user ID.

1. Continue – Click this button to move onto the sign-in screen.



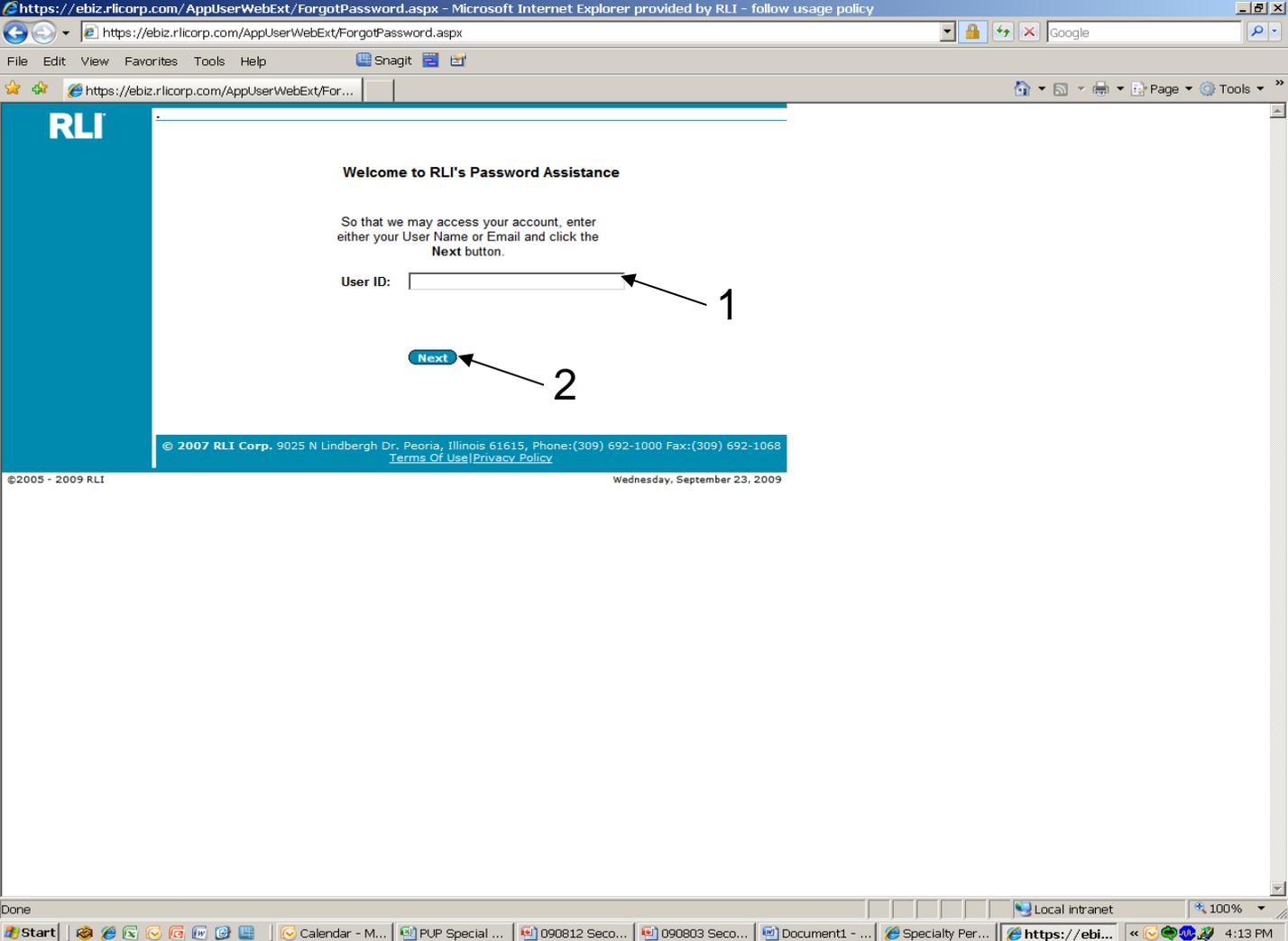
## Portal Sign-On screen

You are now directed back to the portal sign-on screen where you will now use your e-mail address and new password to enter the PUP Access system.

# Chapter 9

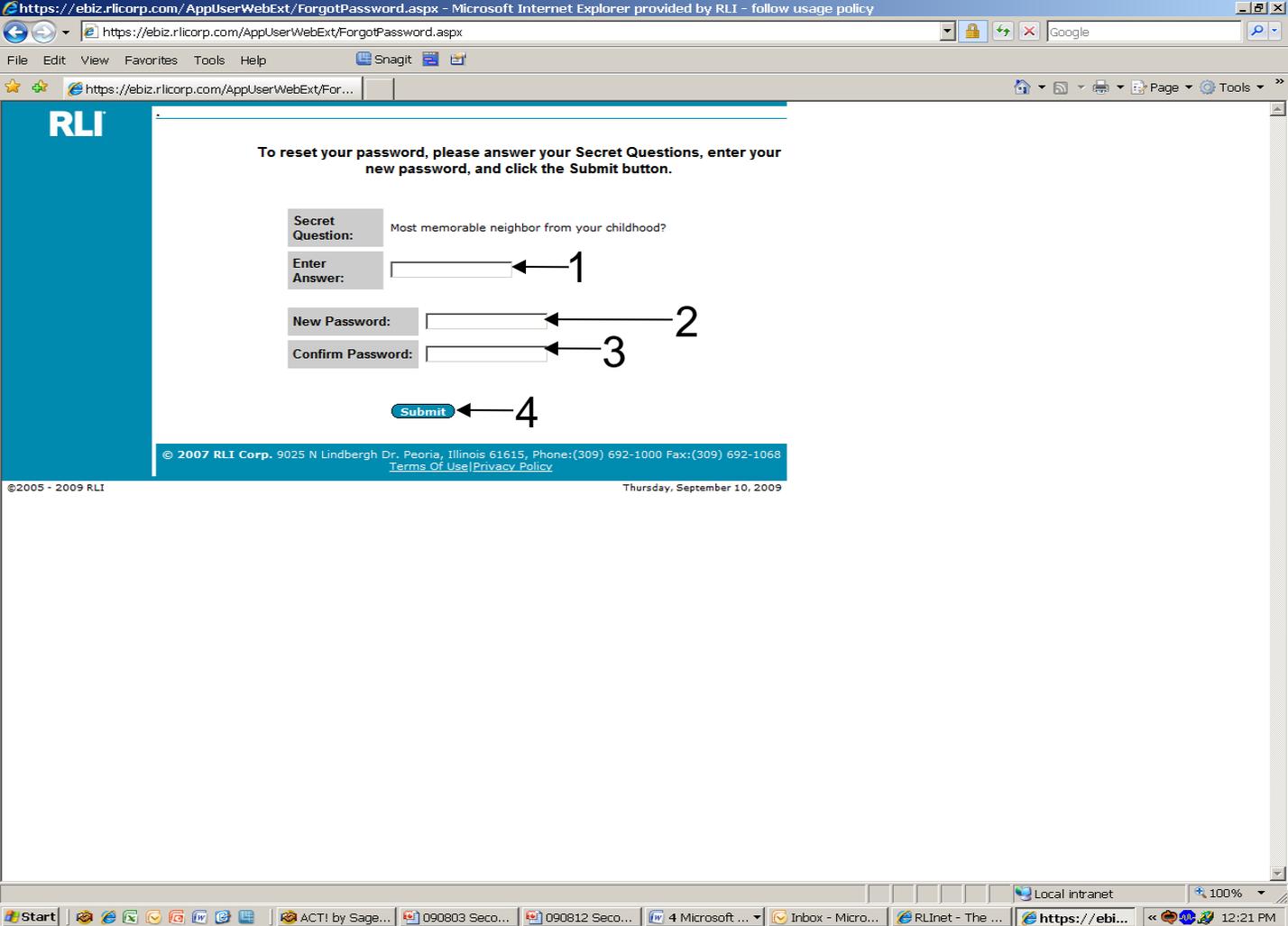
## Self-Service Password





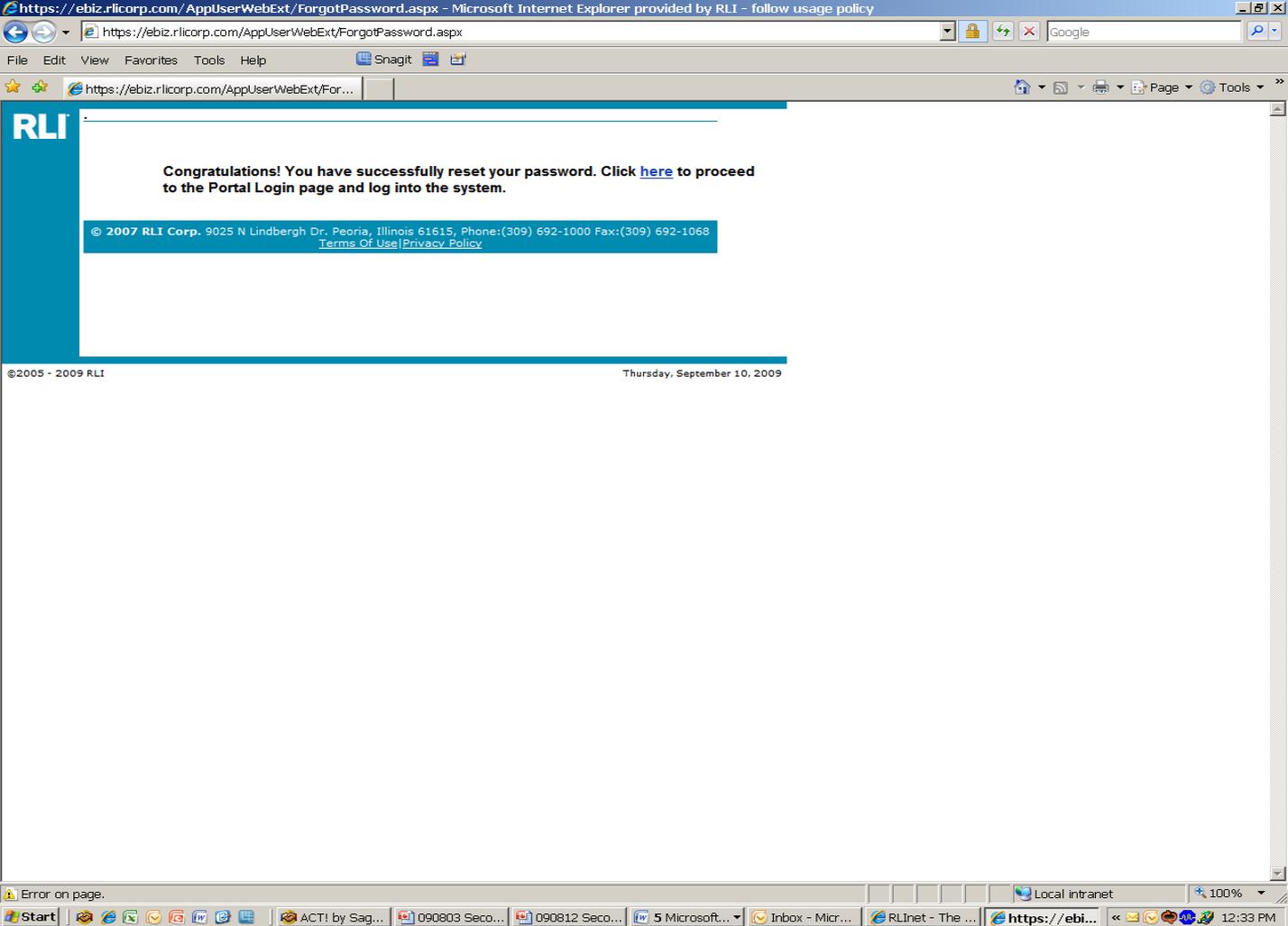
## RLI's Password Assistance – Self-Service Password

1. **User ID** – Input your User ID in this box to identify yourself. This should be your Unique User ID.
2. **Next** – click this button to move to the next screen.



## Password Reset

1. **Secret question** – The secret question and answer was completed during your Unique User ID sign-up process. Complete your secret answer.
2. **New Password**– Input the new password you would like, provided it is at least 7 digits long, contains letters and numbers and isn't the same as one of your prior 10 passwords.
3. **Confirm Password** – Simply retype your new password.
4. **Submit** – Click on this button once all fields have been completed.



## Password Reset

Once you clicked on the “Submit” button, you will receive this confirmation screen. Additionally, you will receive an e-mail to confirm your password has been reset.

Click on the “here” link to sign into to the Community Home Page.

# Chapter 10

## Change Password

Specialty Personal Lines - Microsoft Internet Explorer followed by RLI - follow usage policy

https://portal.rlicorp.com/portal/server.pt

File Edit View Favorites Tools Help Snagit

Specialty Personal Li... x RLI PUP Application

My Home Welcome to the RLI Portal! My Account Log Off Help Search: Everywhere Page Tools

**RLI** Specialty Personal Lines Home

You are logged in as: scott.combs@rlicorp.com  
[Change Password](#) | [Agent Administration](#)

**RLI PUP Alert**

- You will be receiving frequent emails from us labeled "RLI PUP Alerts". It is vital that you take the time to review the information and ask whatever questions that might arise. Please share this information with all RLI personal umbrella users.
- The PUP ALERT message sent last Friday contained a link that is not working. Help Desk is researching the error and will provide a solution. The link below titled 'click here' contains the same information.
- Please [click here](#) for an RLI PUP Alert updated Friday, August 28. It contains an overview of the status of PUP Special in your state and information on RLI apps and rate sheets.
- PUP Special exposure charges are now approved in all states except AK, SC, and VA. Continue to hold new business submissions effective 10-1-09 in these 3 states ONLY.
- A revised new business application is being created for PUP Special business. In the event that you have not posted the (08/09) version of the PUP new business application OR sent hard copies out to your subproducers, you might want to delay that for a week or so. PLEASE NOTE---For audit purposes, any "PUP 276 (08/09)" version submitted for business effective 10-1-09 WILL BE ACCEPTED in states where PUP Special is approved as of that date. However, this newer version will contain some additional language that might make it more clear to the user.
- The quick quoter has the ability to quote out 60 days in advance until PUP Special logic can be updated. Additional upgrades are being made to include PUP Special underwriting logic. For now, risks eligible only with PUP Special exposure charges will receive a message that their rate and eligibility need to be reviewed with an RLI application and ratesheet. MVR activity for each driver should be carefully reviewed with respects to acceptability for PUP Special.
- **\$1 Million is the ONLY available limit for PUP Special**

**RLI Personal Umbrella Policy System (PUP Access)**

[Get A New PUP Quote](#) [Quote - Policy Look-up](#) [Quote - Policy Form Look-up](#) [Run a PUP Report](#)

**Home Business Insurance System (eRLI Access)**

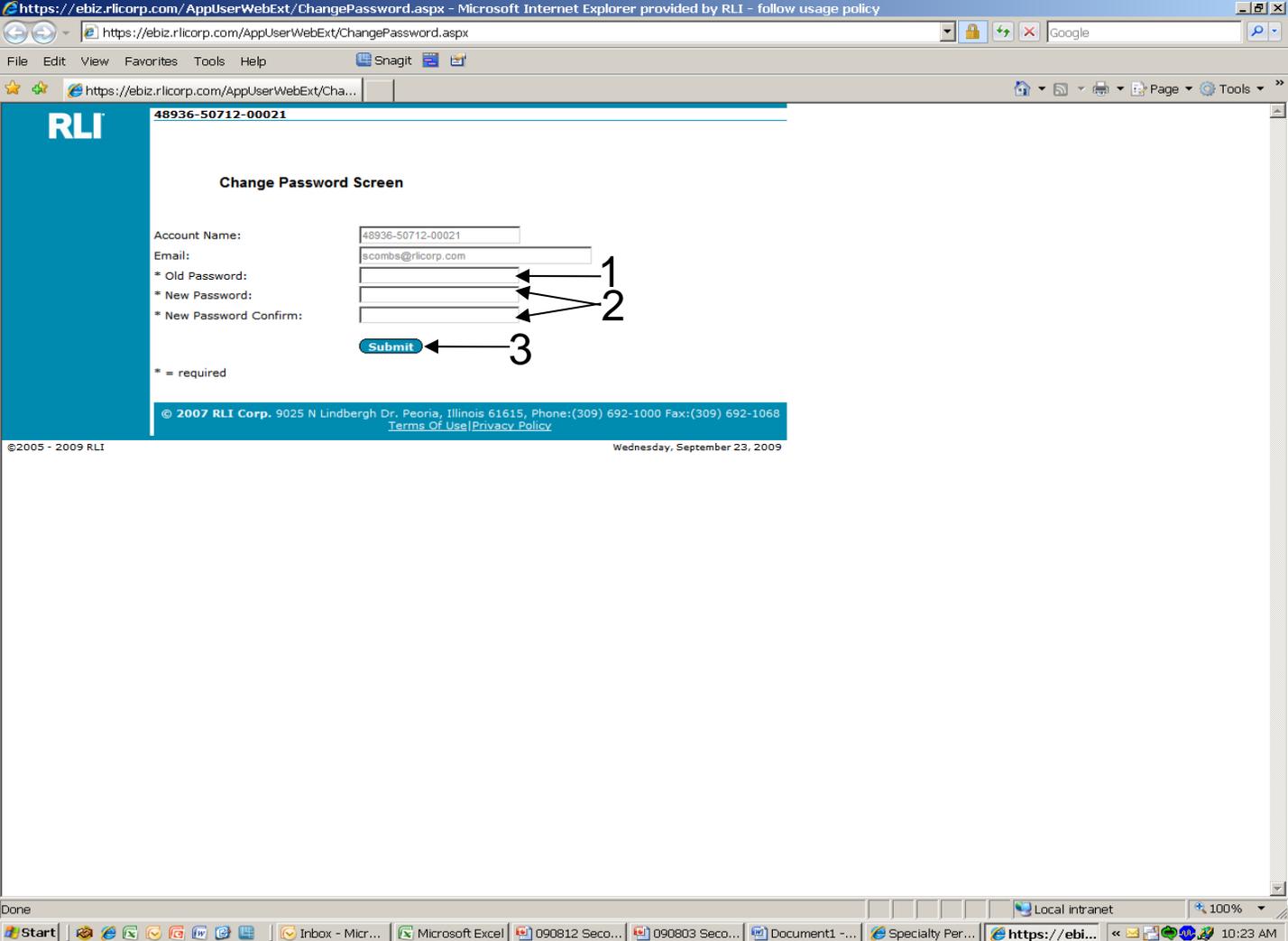
[Get A New Home Business Insurance \(HBI\) Quote](#) [Request a PUP Endorsement](#) [Request a HBI Endorsement](#)

[Marketing Materials](#) | [PUP Sample Forms](#) | [HBI Sample Forms](#) | [Reference Manuals](#) | [System Manuals](#)  
[PUP Rate Lookup](#) | [Producer / Subproducer List](#) | [PUP FAQs](#) | [Help](#)

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[Terms Of Use](#) | [Privacy Policy](#)

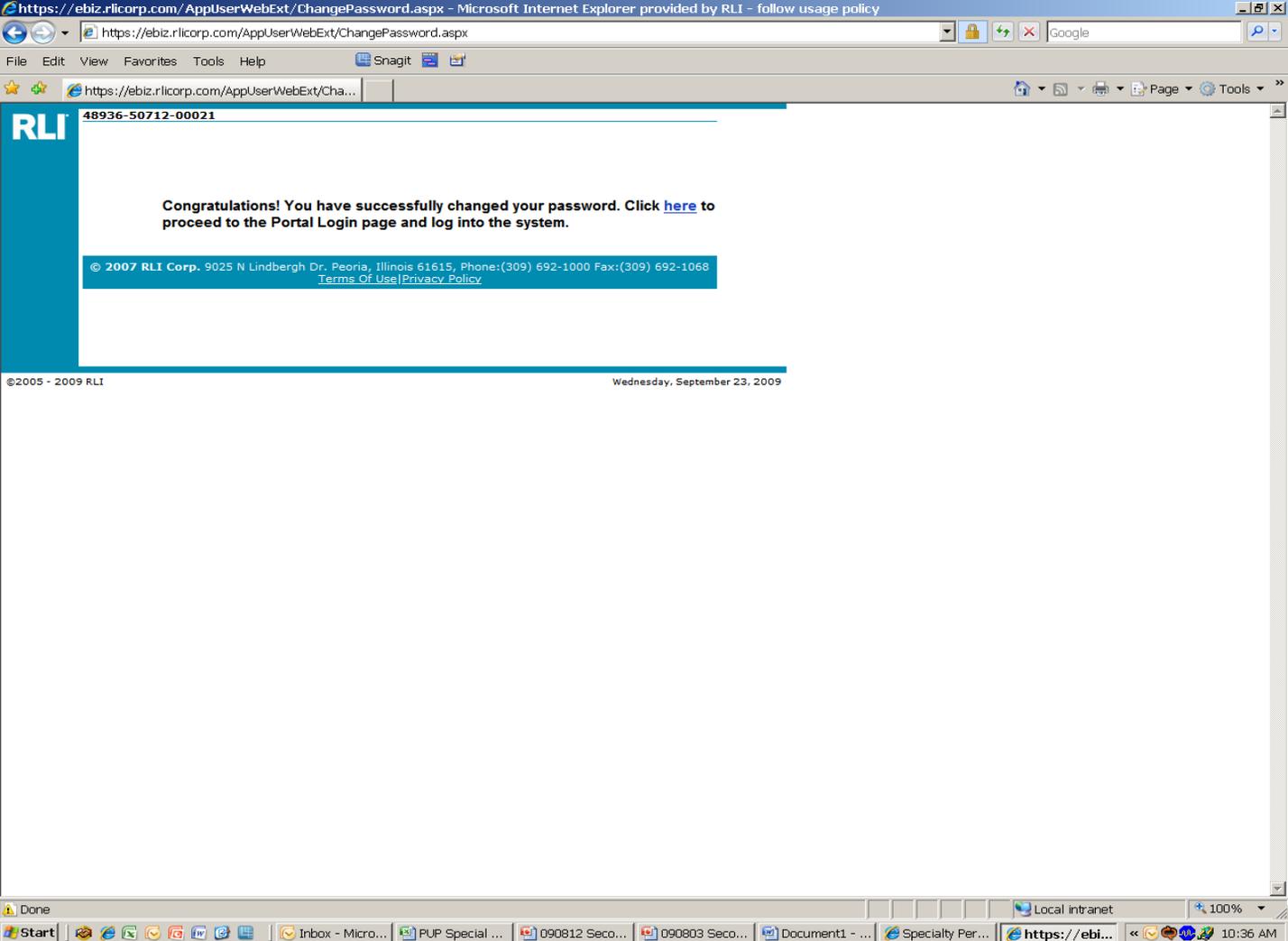
## “Change Password”

1. **Change Password** – Click on this link to change your password should you need to do so.



## Change Password Screen

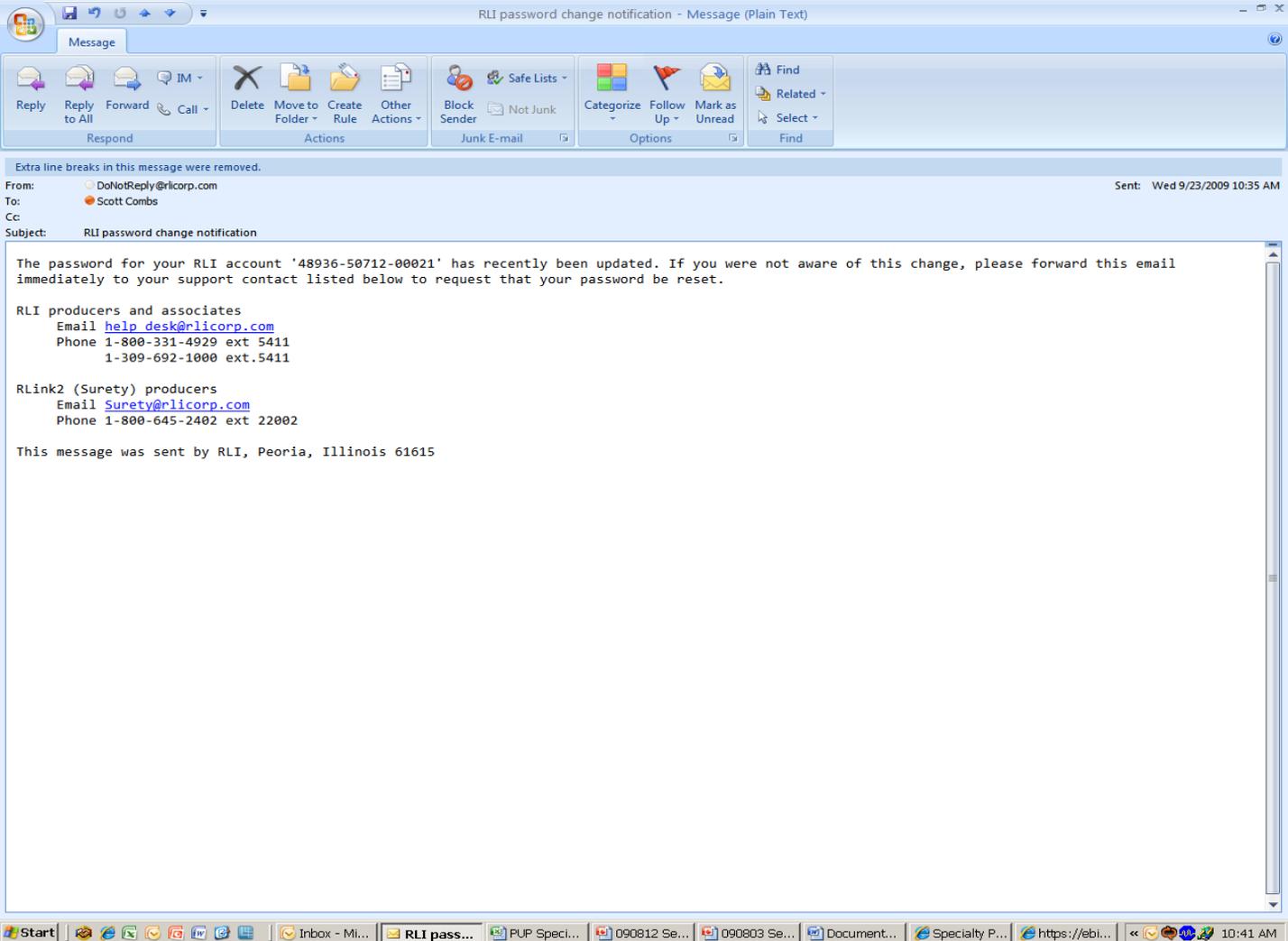
1. **Old Password** – Input the current password used with your Unique User ID.
2. **New Password** – Input the password you would like to use and then re-enter it for verification purposes.
3. **Submit** – Click the Submit button to complete the password change process.



### Success Message

Once the Submit button has been clicked on and the system has accepted the new password, this message will display with a link to the Portal to log back in using your Unique User ID and the newly created password.

Click on the “here” link to sign into to the Community Home Page.



## Confirmation E-Mail

Once a password change has been successfully completed, you will always receive this e-mail. If you did not intend to change your password, please follow the directions within the e-mail.

# Chapter 11

## E Signature Process

# Begin the E Signature Process Here

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy

https://qaebiz.rlicorp.com/AppRlienetPup/UIINewTransaction.aspx

File Edit View Favorites Tools Help Snagit

RLI PUP Application

RLI PUP

scombs@rlicorp.com

Home | Forms | New Quote | Quotes-Policies | Reports | Need Help? | Log Off

Premium Options

Underwriting Questions

Limits of Liability

Automobile Liability

Members of Household

Address Information

Confirmation

Quote

Quote: 1519333

Confirmation

Please Select a Signature Option:

\*If the application is being submitted for electronic signature and on-line payment, please advise the customer that the process is only supported by Internet Explorer at this time.

Application contains original signature.  
No signature on application.  
Send a secure email to the insured to eSign and Pay Online  
Verbally provide login information to the insured to eSign and Pay Online

Quote Letter Application Save & Close Save

@2005 - 2009 RLI

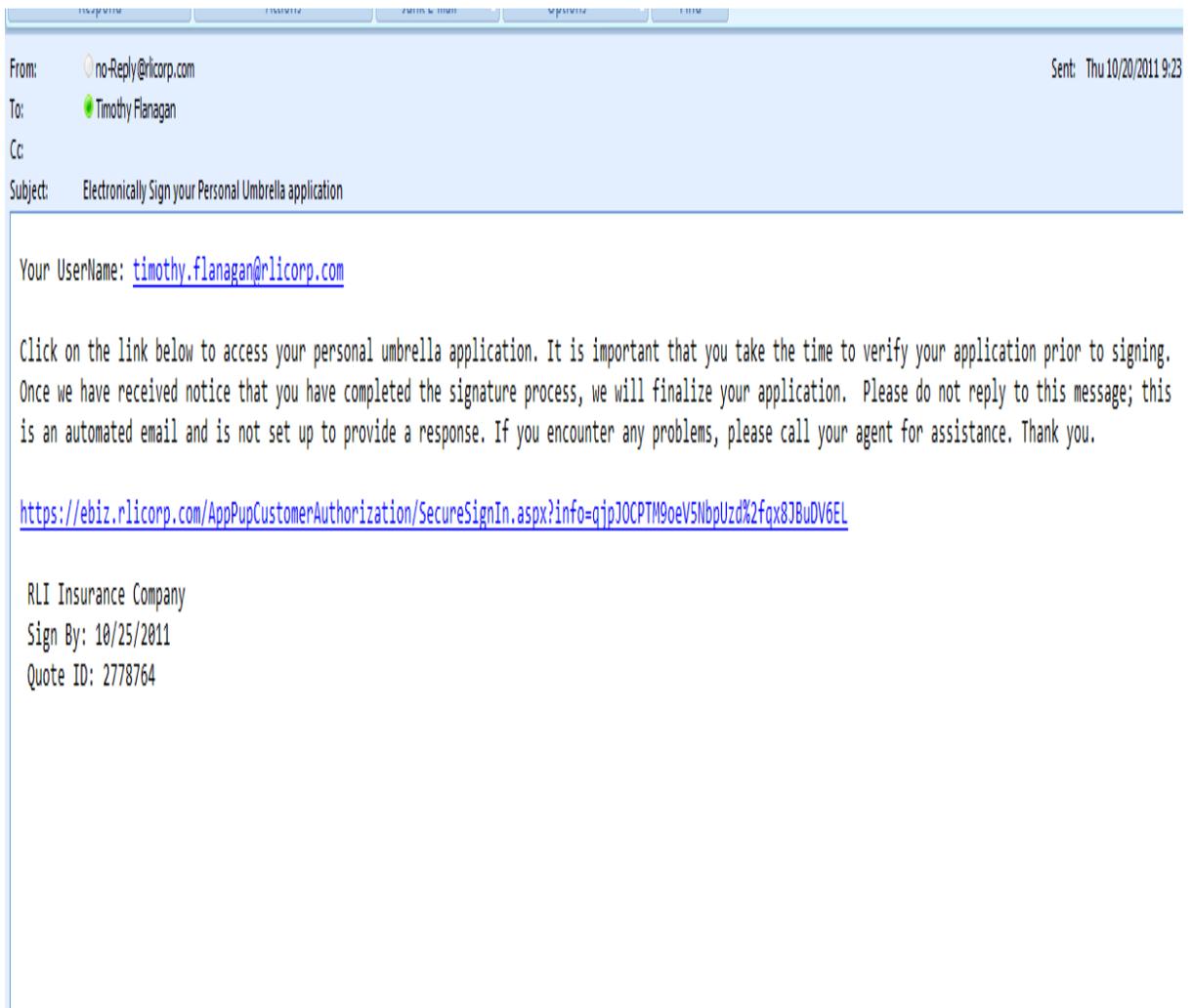
Wednesday, September 16, 2009

Done Local intranet 100%

Start Document in UAT\_T... Document3 - Micros... Inbox - Microsoft Out... Microsoft PowerPoint... RLI PUP Applicatio... 2:39 PM

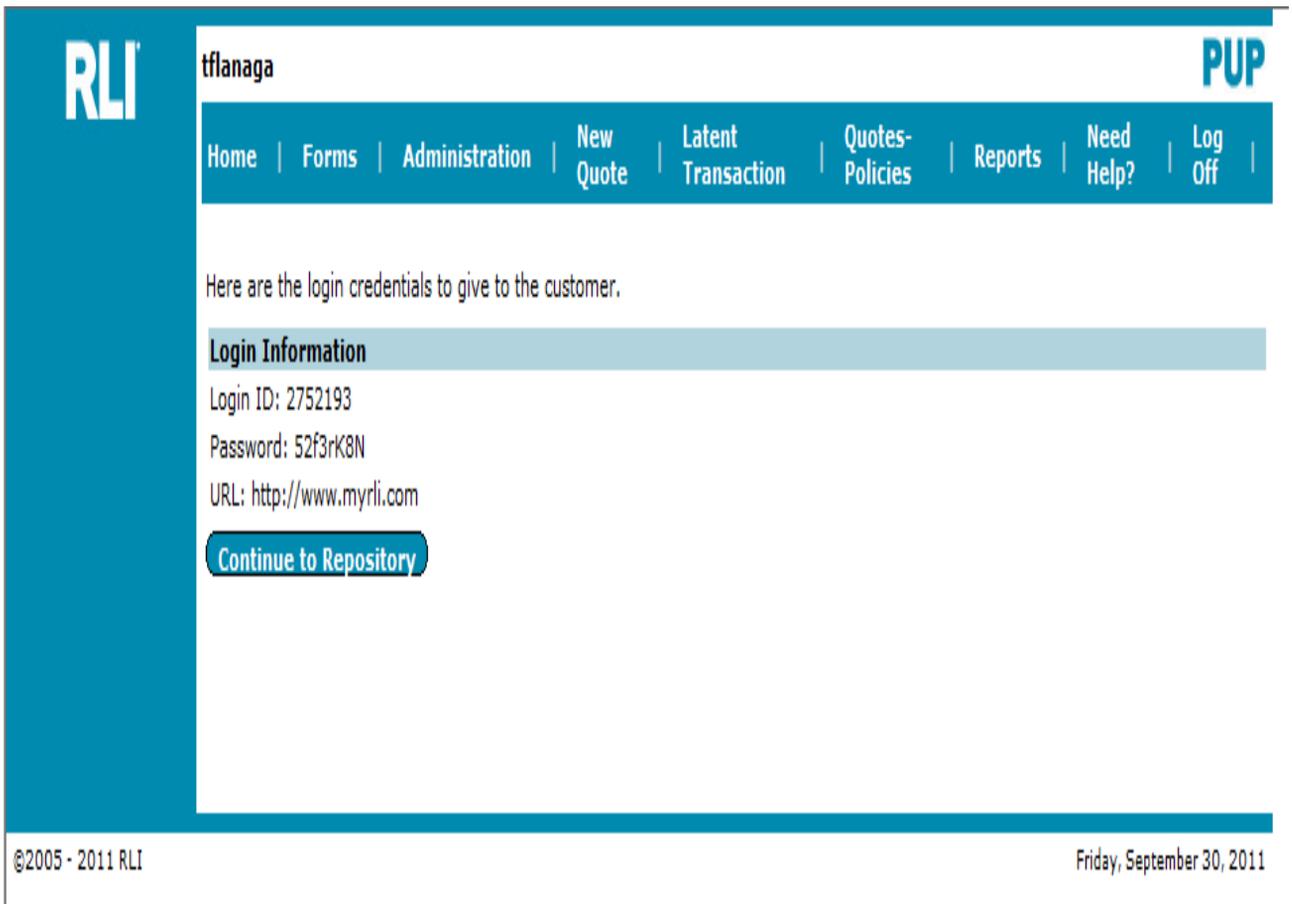
## OPTION 1: Send a **secure email** to the Insured to E-Sign and Pay Online

This is a copy of the e-mail your Insured will receive. The Insured has 5 days to complete the E-Signature and Electronic Payment. The Insured opens the email, and then clicks on the secure link to continue the E-Signature process.



## OPTION 2: Verbally provide login information to the Insured to E-Sign and Pay Online

This is the screen that will be displayed to the Agent if the “Verbal” option is chosen, so that the Agent can provide the Login ID, Password, and Website address to the Insured. The Insured then logs onto [www.myrli.com](http://www.myrli.com) to continue the E-Signature process.



The screenshot shows the RLI PUP portal interface. On the left is a blue vertical bar with the RLI logo. The top right corner displays the user 'tflanaga' and the role 'PUP'. A horizontal navigation menu contains links for Home, Forms, Administration, New Quote, Latent Transaction, Quotes-Policies, Reports, Need Help?, and Log Off. Below the menu, a message states: 'Here are the login credentials to give to the customer.' A light blue box titled 'Login Information' contains the following details: Login ID: 2752193, Password: 52f3rK8N, and URL: http://www.myrli.com. A blue button labeled 'Continue to Repository' is positioned below the information. The footer of the page includes the copyright notice '©2005 - 2011 RLI' on the left and the date 'Friday, September 30, 2011' on the right.

## E-Signature Instructions

Regardless if the Insured clicks on the e-mail link or goes to the [myrli.com](http://myrli.com) website directly, this is the first screen that appears to begin the E-Signature and payment process.

**Named Applicant(s)** – The only person(s) that may electronically sign the application are listed here.

|  |  |   |
|--|--|---|
|  | <p>tflanaga</p> <p><b>Named Applicant(s)</b><br/>TIMOTHY FLANAGAN</p> <p><b>Address</b><br/><b>*** IMPORTANT NOTICE ***</b><br/>Please verify that the address listed below is your residential address and that all fields are correct. <b>This data will be used to verify your identity.</b> If this information is incorrect, please contact your agent.</p> <p>123 FAKE STREET<br/>PEORIA, IL 61614</p> <p><b>eSignature Instructions</b><br/>Thank you for your interest in purchasing a Personal Umbrella policy with RLI Insurance Company. You have been directed to this web site to review your application, electronically sign and submit payment for your policy premium. You will be asked to enter information that will be used to validate that you are authorized to sign the application. This information will NOT be saved or used for any purpose other than verification. Once you have completed the signature process, an email will be sent with an electronic copy of your signed application. You will be required to submit payment for your policy after signing your application. Your account will not be charged until your application has met final approval and your policy has been bound. Please click the "Continue" button below to begin the signature process.</p> <p>This application must be verified and signed personally by the named applicant(s) or it is invalid. RLI reserves the right to void any policy which was issued based on an application signed and submitted by an individual other than the named applicant(s). Note that individuals who falsely register as the applicant or submit this application on his/her behalf are subject to prosecution for fraud.</p> <p>This process requires Adobe Reader. If you do not have Adobe Reader installed, you can get it <a href="#">here</a> .</p> <p><input type="button" value="Continue"/></p> |  |
|--|--|---|

## Real Time Signer Identification

This screen is used to verify the identity of the Named Insured. This is the data the Named Insured will need to complete for the verification process. This information is not stored and is simply used in a one-time process to ensure the Named Insured is the signer of the document.

1. **The Named Insured must place a checkmark in this box before they can continue.**
2. **Continue** – Once all the fields have been completed, the Named Insured clicks this button to have the verification process completed and move forward.
3. **Note:** If the verification fails, it will be indicated on this screen. The Named Insured will have one additional try in the event that something was keyed incorrectly.

RLI Electronic Signature Services – Microsoft Internet Explorer provided by RLI – follow usage policy

http://qa1esign1.rlicorp.com/Prontosvr2/Actions/ActionAuthenticationPup.asp?ps\_enqs=1000645312&ps\_action=ActionAuthenticationPup&ps\_actno=1&... Google

File Edit View Favorites Tools Help Snagit

RLI PUP Application RLI Electronic Signat... x

RLI PERSONAL UMBRELLA POLICY

### Electronic Signature Service

#### Real Time Signer Identification

This transaction **requires** that your personal identity be verified prior to signing. You understand that by clicking on the "Continue" button below, you authorize us to confirm your identity to avoid fraudulent transactions in your name. This inquiry will **not** be considered an inquiry for credit purposes and will not affect your credit report. The information supplied on this page will only be used for the purpose of verifying your identity.

You must be at least 18 year old and a US resident to submit identification information. If you do not meet these requirements, or if you **do not wish** to provide this information, please click "Cancel" below. Otherwise, check the box below to agree and click "Continue".

| Legal Name:                                      | Other Required Information:                                   |
|--|---|
| First Name: <input type="text" value="RICHARD"/> | Year of Birth (YYYY): <input type="text" value="1969"/>       |
| Middle Name: <input type="text" value="P"/>      | Last 4 Digits of Social Security Number: <input type="text"/> |
| Last Name: <input type="text" value="WELCH"/>    |   |
| Suffix (if any): <input type="text"/>            |   |

I confirm that the above personal information is my own and I agree that RLI may verify my personal identity.

RLI DIFFERENT WORKS

Done Local intranet 100%

Start | Inboxes - Microsoft Ou... | PUP Special Test pla... | Document1 - Micros... | Microsoft PowerPoin... | RLI Electronic Sig... | 9:14 AM

https://qaebiz.rlicorp.com/AppDocumentManagementViewer/DocumentViewer.aspx?key=cA1TXXeF...

File Edit Go To Favorites Help

Page 1 of 5 pages

|  |   |  |  |  |  |
|--|---|--|--|--|--|
| exceeding these limitations are excluded from coverage. (Do not count canoes, jet skis, waverunners or other personal watercraft. See question 4.) | 0 |  |  |  |  |
| 4. How many jet skis, waverunners or other personal watercraft are owned or regularly operated by you or any member of your household?             | 0 |  |  |  |  |
| 5. What is the number of drivers? (Include drivers with a learner's permit.)   | 0 |  |  |  |  |
| 6. How many drivers are under the age of 22? (Include drivers with a learner's permit and refer to the definition of "driver" on page 5.)          | 0 |  |  |  |  |
| 7. How many drivers are age 70 and over? Response not considered when determining the rating tier for applicants in Maine.                         | 0 |  |  |  |  |
| 8. How many moving violations have all drivers had within the last 3 years? (Include DWI/DUI incidents within the last 5 years/3 years MT.)        | 0 |  |  |  |  |
| 9. How many at fault accidents have all drivers in your household had in the last 3 years?   | 0 |  |  |  |  |

\* If there are drivers age 70 and over AND an answer to questions 8 or 9 falls under the Standard II (N/A in HI) or the PUP Special column, the risk is not eligible.

\*\* \$1 Million is the ONLY available limit for PUP Special.

NOT LICENSED FOR COMMERCIAL USE

Page 1 of 5 pages PUP 276 (09/09)

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

**QUESTIONS** Please print the response clearly on the line provided. If the question is unanswered or the response is greater than the maximum number indicated, the risk is not eligible. PUP Special charge(s) apply if any answer to questions 11-15 is greater than 0 (640 for question 12).

10 - 15

10. How many antique, classic and/or collectible vehicles are owned by you or any member of your household? (Max. of 25) ..... 0

11. How many residential properties owned or rented by you or any member of your household are located outside of the U.S. (including its territories and possessions), Puerto Rico or Canada? (Max. of 5) ..... 0

Unknown Zone

https://qaebiz.rlicorp.com/AppDocumentManagementViewer/DocumentViewer.aspx?key=cA1TXXeF...

File Edit Go To Favorites Help

Page 2 of 5 pages

|  |   |   |
|--|---|---|
| \$300,000 per occurrence   | by your homeowners policy.)   | (Required only if you or a member of your household own or acquire a watercraft during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.) |
| SEASONAL, SECONDARY OR RENTAL PROPERTIES REQUIRE PREMISES LIABILITY OR COMPREHENSIVE PERSONAL LIABILITY                                      | \$300,000 per occurrence  | \$300,000 Combined Single Limits<br>-OR-<br>\$250,000/\$500,000/100,000<br>-OR-<br>\$300,000/\$300,000/100,000  |
| \$300,000 per occurrence   | UNLICENSED RECREATIONAL VEHICLES (Including snowmobiles, ATVs, golf carts, etc.)  | NOTE: The RLI Personal Umbrella does not provide coverage for watercraft exceeding 45 ft and/or 50 mph. The exclusion does not apply to personal watercraft.  |
| NOTE: Residential properties that are covered under a commercial or other non-personal premises liability policy are excluded from coverage. | (Required only if you or a member of your household own or acquire an unlicensed recreational vehicle during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.) |   |
|  | \$100,000 Combined Single Limit per occurrence (\$325,000 in Texas)<br>-OR-<br>\$100,000/\$300,000/\$25,000   |   |

If you are unsure what underlying coverage limits you are carrying, or are required to carry, we suggest contacting your local insurance agent.

NOT LICENSED FOR COMMERCIAL USE

Page 2 of 5 pages PUP 276 (09/09)

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

|  |   |   |
|--|---|---|
| <b>QUESTION 26</b>   | Please carefully read question 26 and respond by selecting one limit (A, B, or C) in the box provided. You MUST agree to maintain one of the three limits outlined in question 26, regardless of whether you currently own, lease, rent or operate a vehicle. If left unanswered, the risk is not eligible. | <b>Option A, B, or C Selected Below</b> |
| 26. Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do you and all members of your household agree to maintain as a condition of coverage for all licensed vehicles, which are owned, leased, rented, operated or acquired during the policy period? If you elect to purchase Uninsured/Underinsured Motorist (UM/UMI) coverage in the states of FL, IN, LA, NH, VT, WI or WV, the Required Basic UM/UMI 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. |   | C                                       |
| Limit A  | Limit B   | Limit C                                 |

Unknown Zone



## E-Signature Results

This screen will display after the application has been electronically signed. The Insured then clicks “Continue.”

The screenshot shows a web interface with a blue header bar. On the left is the RLI logo, and on the right is the text 'PUP'. Below the header, the name 'tflanaga' is displayed. A light blue bar contains the heading 'eSignature Results'. Below this, a message reads: 'Thank you for electronically signing your application for a Personal Umbrella Policy with RLI. An email has been sent to you to confirm that you have completed the electronic signature process.' A 'Continue' button is positioned below the message. At the bottom left, the text '@2005 - 2011 RLI' is visible, and at the bottom right, the date 'Friday, September 30, 2011' is shown.

## 2<sup>nd</sup> “Continue Screen”

This screen will display and the Insured then clicks “Continue” again.

The screenshot shows a web interface with a blue header bar. On the left is the RLI logo, and on the right is the text 'PUP'. Below the header, the name 'tflanaga' is displayed. A 'Continue' button is positioned in the main content area. At the bottom left, the text '@2005 - 2011 RLI' is visible, and at the bottom right, the date 'Monday, December 05, 2011' is shown.

## Payment Options

Here is where the Insured 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 to continue.

**RLI easypay**

**Unpaid Billed Balance Information**

Total Billed as of Today: \$272.00

**Payment Method**

Credit/Debit

Electronic Funds Transfer

Cancel

[Browser Requirements](#) | [Terms and Conditions](#) | [Support](#)

Done Local intranet | Protected Mode: Off 100%

## OPTION 1: Credit/Debit Card Information

This is the screen that will need to be completed to pay the premium with a credit or debit card.

### Unpaid Billed Balance Information

Total Billed as of Today: \$152.00

---

### Payment Method

Credit/Debit  
 Electronic Funds Transfer

---

### Card Information

Name on Card  
\* CHAD FAKINGTON

Card Type  
\*

Card Number  
Please enter Card Number without hyphens or spaces.  
\*  CVW \*

Expiration Date  
\*

**Must match the billing address for the card.**

Address 1  
\* 123 FAKE STREET

Address 2

Address 3

City State ZIP Code  
\* PEORIA \* IL \* 61604

Phone Ext  
\*

Email  
\*  A confirmation email will be sent to this address.

## OPTION 2: Bank Account Information

This is the screen that will need to be completed for an Electronic Funds Transfer.

### Unpaid Billed Balance Information

Total Billed as of Today: \$152.00

### Payment Method

Credit/Debit  
 Electronic Funds Transfer

### Bank Information

Routing Number  
\*  ?

Account Number  
\*  ?

Account Type  
\*

Name  
\* CHAD FAKINGTON

Must match the address for the bank account.

Address 1  
\* 123 FAKE STREET

Address 2

Address 3

|          |       |          |
|----------|-------|----------|
| City     | State | ZIP Code |
| * PEORIA | * IL  | * 61604  |

Phone  
\*

Ext

Email  
\*  A confirmation email will be sent to this address.

Done

Local intranet | Protected Mode: Off

100%

## “Pay Now” Payment Screen

The payment is now ready for processing. (The Insured may click “**Go Back**” to make any changes or corrections). The Insured checks the box to agree to the “**Terms and Conditions**”, then clicks “**Pay Now.**”

**RLI easypay**

**Payment Information**

Please confirm your Card Payment of **\$583.00**

**Card Information**

Card Type: Visa  
Card Number: \*\*\*\*\*4448  
CVV: 123  
Expiration Date: 02/13  
Name: MICHAEL CREEKMORE  
800 SOUTHBRIDGE ST  
WORCESTER, MA 01610  
Phone: (309) 472-3194  
Email: efrantz@ricorp.com

By checking here you agree to our [Terms and Conditions](#).

[Pay Now](#) [Go Back](#)

[Browser Requirements](#) | [Terms and Conditions](#) | [Support](#)

## Transaction Status – On Screen Notice

When the payment has been submitted, the Insured will receive a receipt of authorization on screen and also an email (see next slide). This page may be printed as a receipt. The Insured then clicks the “**Finish**” button to exit. If the Insured does not click the “**Finish**” button and simply closes this screen, the payment will still be processed. **Please note: this payment may take at least one business day to appear in the Insured’s credit card or bank account.**



**RLI easypay**

 [Print this page](#)

A confirmation email has been sent to [efrantz@rlicorp.com](mailto:efrantz@rlicorp.com).

**Please note this payment will take at least one business day to reflect on your account.**

You have authorized RLI to charge your account ending in 4448.

Authorization Information:

|                                  |                   |
|----------------------------------|-------------------|
| Account Holder Name:             | MICHAEL CREEKMORE |
| Total Amount:                    | \$583.00          |
| Card Type:                       | Visa              |
| Last 4 Digits of Account Number: | 4448              |

Product Information:

1. 1732101 Contract/Policy Premium: \$583.00

Your account will be authorized on or after : **11/21/2011**

Authorization Requested: **11/21/2011**

Authorization Confirmation Number: **34650413112111**

- This is a one time authorization to your account.
- Please write down the authorization confirmation number or print this page for future reference.

For any questions, please contact customer support at **866-302-7925**

[Finish](#)

[Browser Requirements](#) | [Terms and Conditions](#) | [Support](#)

## Transaction Status – Email to Insured

After the payment has been submitted, the Insured will receive an email with the receipt of authorization.



The image shows a screenshot of a web browser window displaying an email print preview. The window title is "Print Preview" and the address bar shows "Page Setup... Print... Close". The email content is as follows:

**Laurie Whitaker**

---

**From:** Web Payments Queue [webpayments@rlcorp.com]  
**Sent:** Wednesday, February 17, 2010 1:48 PM  
**To:** Laurie Whitaker  
**Subject:** RLI Insurance Confirmation for Payment Number 76180457021710

You have authorized RLI to charge your account ending in **4448**.

Authorization Information:

Account Holder Name: **JOSEPH DEMARTINE**  
Total Amount: **\$360.00**  
Card Type: **Visa**  
Last 4 Digits of Account Number: **4448**

Product Information:

1. PUP0371333 Contract/Policy Premium: **\$360.00**

Your account will be charged on or after : **02/17/2010**  
Payment Requested: **02/17/2010**  
Payment Confirmation Number: **76180457021710**

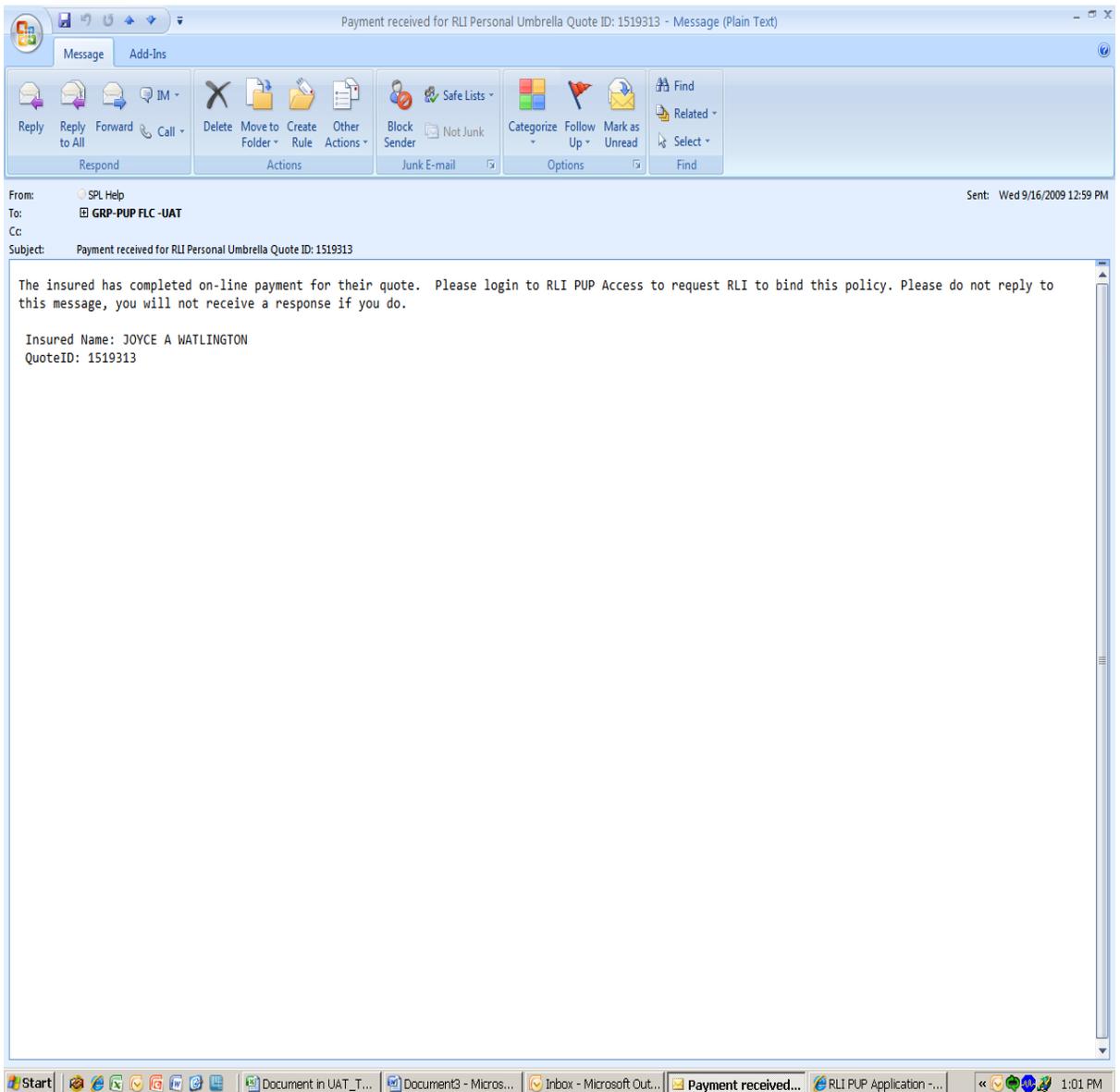
- This is a one time charge to your account.  
- Please write down the payment confirmation number or print this page for future reference.

For any questions , please contact your agent.

## Administrator Alert E-mail

Once the Insured has completed the e-signature and payment process, this e-mail will be sent to the **Administrator** as an alert to retrieve the quote and bind it to RLI. **This e-mail will be sent to the email address on record as the Main Contact for RLI.**

**Note to Administrator: There is no indication sent to the sub-producer once the process has been completed.**



## Quote “Repository” Screen

1. After receipt of the Administrator Alert email, the Administrator will need to enter the quote repository and retrieve the quote that is ready to be bound. Paid E Signature quotes have a status of **“New Quote Paid”**. This is the indicator, beyond the alert e-mails, that a policy is ready to be bound. Use the ‘STATUS’ drop down box to select **NEW QUOTE PAID** and search. This will show all policies currently in this status.
2. **Bind** – This button will be available once the **“New Quote Paid”** is highlighted. The highlighted quote does not need to be loaded in order to bind the policy. Simply click the **Bind** button and the policy will be sent to RLI for final approval and release.

**Note: With the introduction of electronic signature and payments, these policies will not be subject to the RLI Application Audit. RLI electronically stores the new business application. All signed applications are available in the Forms Repository.**

The screenshot shows the RLI Quote Repository interface. At the top, there is a navigation bar with links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Need Help?, and Log Off. The user is logged in as scott.combs@rlicorp.com. A search form is visible with fields for Policy Number, Quote ID, Insured Name, and Status. A red arrow points to the Status dropdown menu, which is currently set to 'New Quote Paid'. A black arrow points to the 'Bind' button in the 'Working List: Quotes' section. Another black arrow points to the 'New Quote Paid' status in the table below. The table lists various quotes with columns for Quote #, Name, St, Eff Dte, Premium, Status, and Limit. The quote with ID 1519313 is highlighted in blue.

**Status drop down**

**2. READY TO BIND**

**1**

| Quote #        | Name                      | St        | Eff Dte          | Premium      | Status                | Limit              |
|----------------|---------------------------|-----------|------------------|--------------|-----------------------|--------------------|
| 1519316        | MATHEW J DOYLE            | FL        | 10/7/2009        | \$778        | New Quote Paid        | \$1,000,000        |
| 1519315        | PARVIN S VAFAKHAH         | VA        | 10/7/2009        | \$211        | New Quote Paid        | \$1,000,000        |
| 1519314        | LAUREI TEST               | FL        | 10/1/2009        | \$0          | Quote Rated           | \$0                |
| <b>1519313</b> | <b>JOYCE A WATLINGTON</b> | <b>NC</b> | <b>10/7/2009</b> | <b>\$127</b> | <b>New Quote Paid</b> | <b>\$1,000,000</b> |
| 1519311        |                           | NC        | 10/7/2009        | \$0          | Quote Saved           | \$0                |
| 1519308        | D E                       | NC        | 10/10/2009       | \$0          | Quote Rated           | \$0                |
| 1519307        | D E                       | NC        | 10/10/2009       | \$0          | Quote Rated           | \$0                |
| 1519290        | JOHN Q                    | CT        | 10/7/2009        | \$895        | Quote Rated           | \$1,000,000        |
| 1519267        | R TEST                    | CT        | 10/7/2009        | \$645        | Quote Rated           | \$1,000,000        |
| 1519281        | ROB ROY                   | IL        | 10/7/2009        | \$631        | Quote Rated           | \$1,000,000        |
| 1519255        | EDWARD COMBS              | CA        | 10/7/2009        | \$353        | Quote Rated           | \$1,000,000        |
| 1519265        |                           | ID        | 10/7/2009        | \$0          | Quote Saved           | \$0                |
| 1519257        | JON JOHNSON               | CT        | 10/7/2009        | \$701        | Quote Rated           | \$1,000,000        |
| 1519256        | JON JOHNSON               | CT        | 10/7/2009        | \$0          | Quote Rated           | \$0                |
| 1518606        | SCOTT COMBS               | CA        | 10/7/2009        | \$0          | Quote Rated           | \$0                |
| 1517677        | SCOTT E TEST              | IL        | 10/2/2009        | \$717        | Quote Rated           | \$1,000,000        |
| 1517674        | ROB TEST                  | IL        | 10/7/2009        | \$152        | Quote Rated           | \$1,000,000        |
| 1517639        | PAT TST                   | IL        | 10/2/2009        | \$517        | eSig Pending          | \$1,000,000        |
| 1517634        | PB APP                    | IL        | 10/2/2009        | \$631        | Quote Rated           | \$1,000,000        |
| 1517633        | PB TEST                   | IL        | 10/2/2009        | \$517        | Quote Rated           | \$1,000,000        |
| 1517530        | PAMELA PARKS              | IL        | 8/25/2009        | \$206        | New Quote Paid        | \$1,000,000        |
| 1517522        | PAMELA PARKS              | IL        | 8/22/2009        | \$206        | New Quote Paid        | \$1,000,000        |
| 1517482        | JANE W SHEETS             | TX        | 8/20/2009        | \$145        | eSig Failed           | \$1,000,000        |
| 1517521        | MAUREEN HATZELL           | TX        | 8/21/2009        | \$432        | New Quote Paid        | \$2,000,000        |
| 1517478        | MICHAEL A DENT            | TX        | 8/20/2009        | \$145        | New Quote Paid        | \$1,000,000        |
| 1517467        | NEIL B SCRANTON           | IL        | 8/20/2009        | \$152        | New Quote Paid        | \$1,000,000        |
| 1517514        | PAMELA PARKS              | IL        | 8/20/2009        | \$371        | New Quote Paid        | \$2,000,000        |
| 1517473        | DONYA BARKER              | TX        | 8/20/2009        | \$218        | New Quote Paid        | \$1,000,000        |
| 1517475        | LINDA A LEMOINE           | CA        | 8/20/2009        | \$236        | New Quote Paid        | \$1,000,000        |
| 1517513        | TRACY N WALLACH           | TX        | 10/2/2009        | \$468        | eSig Failed           | \$2,000,000        |
| 1517512        | TRACY N WALLACH           | TX        | 10/1/2009        | \$260        | eSig Failed           | \$1,000,000        |
| 1517511        | LILLIE R THOMAS           | CA        | 8/20/2009        | \$236        | eSig e-mailed Pending | \$1,000,000        |
| 1517448        | ANNA M BOLAND             | TX        | 8/20/2009        | \$145        | eSig Failed           | \$1,000,000        |
| 1517510        | PAMELA PARKS              | IL        | 8/20/2009        | \$371        | New Quote Paid        | \$2,000,000        |
| 1517509        | STEVEN A BLANC            | IL        | 8/20/2009        | \$274        | New Quote Paid        | \$1,000,000        |
| 1517508        | MICHAEL A DENT            | TX        | 8/20/2009        | \$261        | New Quote Paid        | \$2,000,000        |
| 1517464        | MATTIE P BOYD             | TX        | 8/20/2009        | \$145        | eSig Failed           | \$1,000,000        |
| 1517472        | JOYCE A COMBS             | IL        | 8/20/2009        | \$127        | New Quote Paid        | \$1,000,000        |

# Example of the Status Search Options

RLI PUP Application - Microsoft Internet Explorer provided by RLI - follow usage policy  
 https://ebiz.rlicorp.com/AppRlienetPup/Repository.aspx

File Edit View Favorites Tools Help

**RLI**
**Repository**
**PUP**

Home | Forms | Administration | **New Quote** | Latent Transaction | Quotes-Policies | Reports | Need Help? | Log Off

Quotes

Policies

**Recent Transactions**

NonRenew Review

Hold Processing

Critical NonRenewal

Special State Exception

Agent Error

Underwriter Review

Review Multi-Policy Discount

Suspended Questionnaires

Pending UM Notification

Interface Errors

MVR's

Pending Youthful MVR's

Transaction In Process

Original Apps

Transaction Browse

Print Errors

eSignature

Payments Pending

Failed Payments

Expired Authorization

Non-Interfaced

**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:

Producer Number:

SubAgent:

**Working List: Recent Transaction**

| Quote # | Policy #   | Name                       | LockBox Error                    |
|---------|------------|----------------------------|----------------------------------|
| 2752198 | **         | STEVE                      | MVR Error                        |
| 2743870 | **         | ALEXA                      | MVR has been Ordered             |
| 2743872 | **         | JOSEF                      | MVR has been Received            |
| 2752197 | **         | PHILLI                     | MVR needs to be Ordered          |
| 2752196 | **         | SAMU                       | New Quote Paid                   |
| 2740948 | **         | ALEXA                      | New Quote was Declined           |
| 2752195 | PUP1169016 | ALAN                       | New Quote was Submitted          |
| 2752194 | PUP1169015 | WILLI                      | Nonrenewal Has been Rescinded    |
| 2752193 | **         | TJMO                       | Policy has been Canceled         |
| 2750038 | PUP0322722 | JERAL                      | Policy has been Endorsed         |
| 2752188 | **         | PHILLI                     | Policy has been Nonrenewed       |
| 2752167 | **         | RICHA                      | Policy Nonrenewed - Resubmitted  |
| 2752185 | **         | SHAJU                      | Policy Remains Nonrenewed        |
| 2752189 | **         | TJMO                       | Printer Error                    |
| 2752192 | **         | FRANI                      | Processing Error - Contact RLI   |
| 2752177 | **         | STEVEN BENDO               | Questionnaire has been Suspended |
| 2752168 | **         | RICHARD JOY                | Questionnaire Renewed            |
| 2752191 | PUP1157480 | MATTHEW J BATSCHOLET       |                                  |
| 2751181 | PUP1130106 | MAUREEN SOMERVILLE         |                                  |
| 2752190 | PUP1131201 | MICHAEL BACHARACH          |                                  |
| 2752187 | **         | DANIEL BIRCK               |                                  |
| 2752186 | PUP1156932 | SYROS WESTRA               |                                  |
| 2752184 | PUP1081436 | JOSEPH V JOHNSON           |                                  |
| 2751933 | PUP1171935 | CLARENCE E PHILLIPS, IIIMS |                                  |
| 2752183 | PUP1057736 | MARTIN TOMMER              |                                  |
| 2752182 | PUP1111768 | AXEL HASSE                 |                                  |
| 2752181 | PUP1136737 | PHILIP SNYDER              |                                  |
| 2752180 | PUP1007711 | RONALD OSBURN              |                                  |
| 2752179 | PUP1055835 | ISAAC BARRETT              |                                  |
| 2696607 | PUP1105906 | PAMELA S GOULD             |                                  |
| 2752178 | PUP0266630 | ARNE E OAS                 |                                  |
| 2752175 | PUP1083401 | ROBERT LANZ                |                                  |
| 2752176 | PUP1135307 | DIANE KMITTEL              |                                  |

Results 1-50 of 100

| Type     | Status                     | Limit       |
|----------|----------------------------|-------------|
| QUOTE    | Quote Rated                | \$0         |
| QUOTE    | New Quote Paid             | \$2,000,000 |
| QUOTE    | Quote Rated                | \$0         |
| QUOTE    | Quote Rated                | \$0         |
| QUOTE    | Quote Rated                | \$1,000,000 |
| QUOTE    | eSig e-mailed Pending      | \$5,000,000 |
| DNOC     | Policy has been Canceled   | \$2,000,000 |
| DNOC     | Policy has been Canceled   | \$1,000,000 |
| QUOTE    | eSig Pending               | \$1,000,000 |
| QUOTE    | Final Bill Sent            | \$0         |
| QUOTE    | Quote Rated                | \$1,000,000 |
| QUOTE    | Quote Rated                | \$2,000,000 |
| QUOTE    | eSig e-mailed Pending      | \$1,000,000 |
| QUOTE    | Quote Rated                | \$1,000,000 |
| QUOTE    | Quote Billed               | \$0         |
| REN      | Bound                      | \$1,000,000 |
| CANEX    | Policy has been Canceled   | \$1,000,000 |
| QUOTE    | Quote Rated                | \$0         |
| QUOTE    | Quote Billed               | \$0         |
| QUOTE    | Quote Billed               | \$0         |
| NEWISSUE | Bound                      | \$1,000,000 |
| QUOTE    | Quote Billed               | \$0         |
| QUOTE    | Policy has been Nonrenewed | \$0         |
| QUOTE    | Quote Billed               | \$0         |
| QUOTE    | Quote Billed               | \$0         |
| QUOTE    | Quote Billed               | \$0         |

Done

Local intranet | Protected Mode: Off

## Verification Dialog Box

After the “Bind” button is clicked, this box appears to ensure that the policy is ready to be bound.

Once the electronically submitted application has been bound, business returns to the normal workflows for policy document delivery.

Remember, the Sub Producer will still not know the policy has been bound unless they check the status in their Policy Repository or the Administrator has delivered the policy documents.

The screenshot displays the RLI PUP Application interface in Microsoft Internet Explorer. The browser address bar shows the URL: <https://qaebiz.rlicorp.com/AppRlienetPup/Repository.aspx>. The page header includes the RLI logo, the user email `scott.combs@rlicorp.com`, and the title "Repository PUP". A navigation menu contains links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Need Help?, and Log Off.

The main content area features a search form with fields for Policy Number, Effective Date, Quote ID, Expiration Date, Insured First Name, Insured Last Name, Second Insured First Name, and Second Insured Last Name. There are also dropdown menus for Status and State, and input fields for Producer Number (4938) and SubAgent. A "Search" button and a "Policy Inquiry" link are present.

Below the search form is a "Working List: Quotes" section with "Load", "Bind", "Forms", and "Print List" buttons. A table of quotes is displayed, with the following columns: Quote #, Name, State, Effective Date, Premium, and Status. The table contains 30 rows of data, including entries for R TEST, ROB ROY, EDWARD COMBS, JON JOHNSON, JON JOHNSON, SCOTT COMBS, SCOTT E TEST, ROB TEST, PAT TST, PB APP, PB TEST, PAMELA PARKS, PAMELA PARKS, JANE W SHEETS, MAUREEN HATZELL, MICHAEL A DENT, NEIL B SCRANTON, PAMELA PARKS, DONYA BARKER, LINDA A LEMOINE, TRACY N WALLACH, TRACY N WALLACH, LILLIE R THOMAS, ANNA M BOLAND, PAMELA PARKS, STEVEN A BLANC, MICHAEL A DENT, and MATTIE P BOYD.

A "Windows Internet Explorer" dialog box is overlaid on the table, containing the text: "Do you really want to bind coverage with RLI? By doing so, you agree to providing the full annual premium and a signed original application when requested by RLI." The dialog has "OK" and "Cancel" buttons. An arrow points from the "Bind" button in the interface to the dialog box.

The taskbar at the bottom shows the Start button, several open applications (Document in UAT\_T..., Document3 - Micros..., Inbox - Microsoft Out..., Speciality Personal Li..., RLI PUP Applicatio...), and the system clock showing 2:12 PM on 8/20/2009.

## **PUP Access Quotes-Policies Repository: E-Signature 'STATUS' Definitions**

- ✓ **eSig e-mailed Pending** - The email with the secured Log-In link was sent to the applicant.
- ✓ **eSig Pending** - The Log-In information was given to the applicant verbally.
  - ✓ **eSig Complete** - The applicant has signed the application, but has not completed the electronic payment process.
- ✓ **New Quote Paid** - The applicant has now signed the application and paid the premium due. The policy is ready to be submitted to RLI for binding by the administrator.