

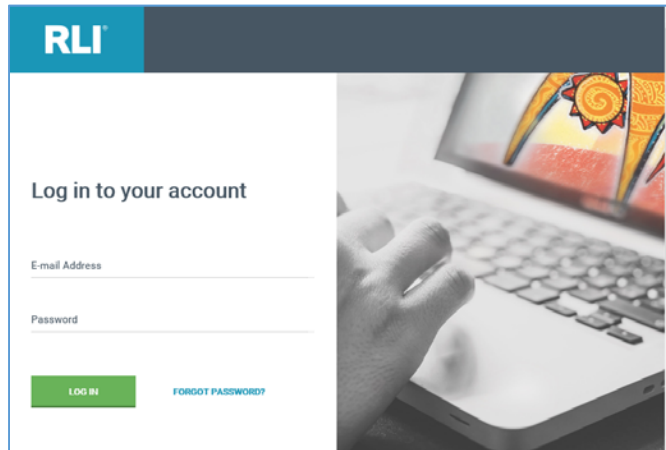
## RLI Portal – Personal Umbrella

RLI has a new and improved portal. Note that the PUP Access System has not changed. Only the RLI Portal has changed.

### Navigating the New Portal:

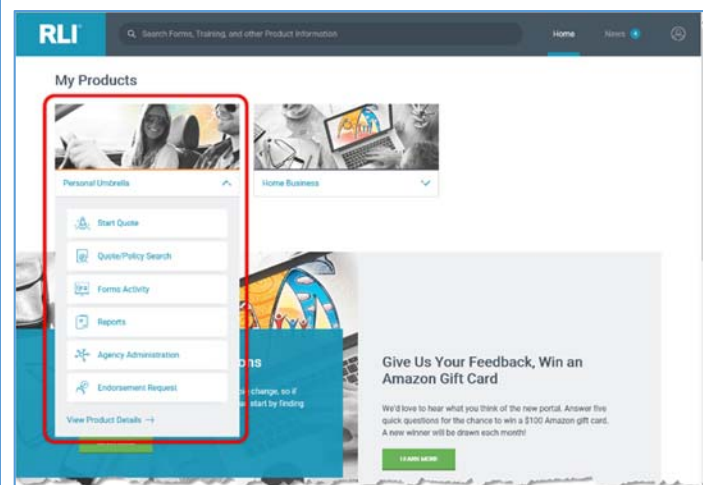
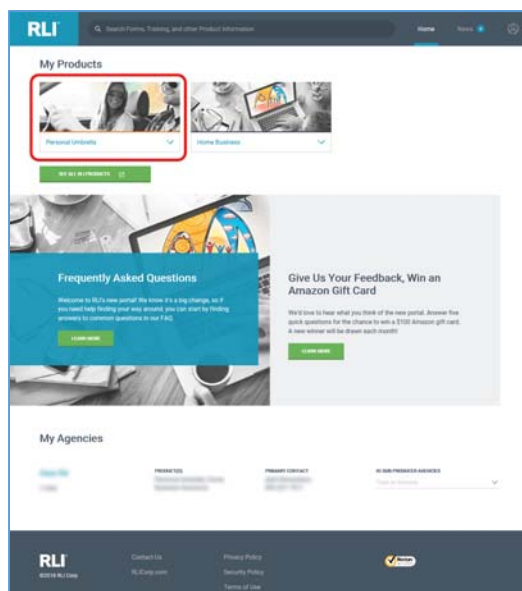
Open your internet browser and go to [myportal.rlicorp.com](http://myportal.rlicorp.com).

Once there, enter your registered E-mail Address and Password and select “LOG IN”.

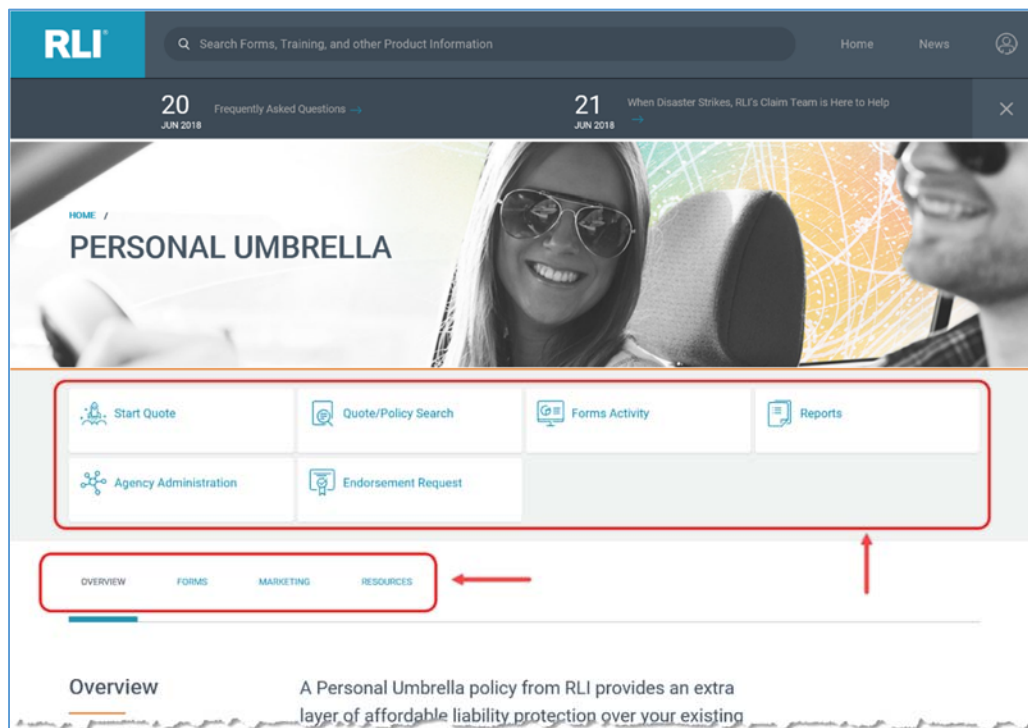


Depending on the types of policies you place with RLI, you will either be directed to the RLI Portal’s Home Page to select a product, or taken directly to the Personal Umbrella Home Page.

If taken to the RLI Home Page, click on the “Personal Umbrella” box to see a drop down menu of action items.



If taken directly to the Personal Umbrella Home Page, you will see the same menu items towards the top of the page.



Your Personal Umbrella options are:

Click **“Start Quote”** to start a new quote.

Click **“Quote/Policy Search”** to find and open an existing quote or policy.

Click **“Forms Activity”** to find and open forms for existing quotes and policies.

Click **“Reports”** to access and run production reports.

Click **“Agency Administration”** to access the Administration section of RLI’s PUP Access system.

Click **“Endorsement Request”** to submit specific endorsement requests.

Click **“View Product Details”** to access the Personal Umbrella Home page of the RLI Portal where you will have access to all PUP resources and information (e.g. Product overview, sample forms, marketing material, resources/instructional material – documents and demo videos etc.).

Click **“OVERVIEW”** for a summary of RLI’s Personal Umbrella product.

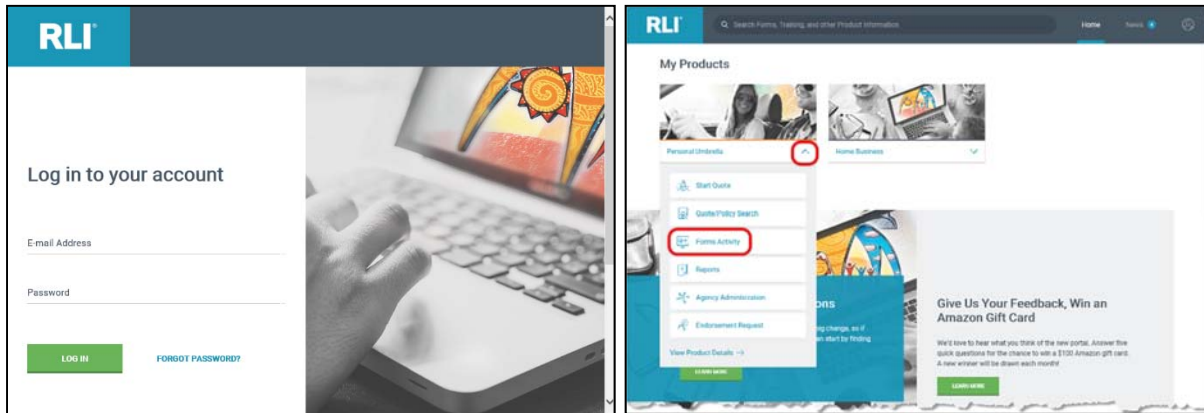
Click **“FORMS”** to view sample policy forms.

Click **“MARKETING”** to access customizable marketing materials.

Click **“RESOURCES”** to access how-to documents, portal instructions, informational videos and demonstration videos.

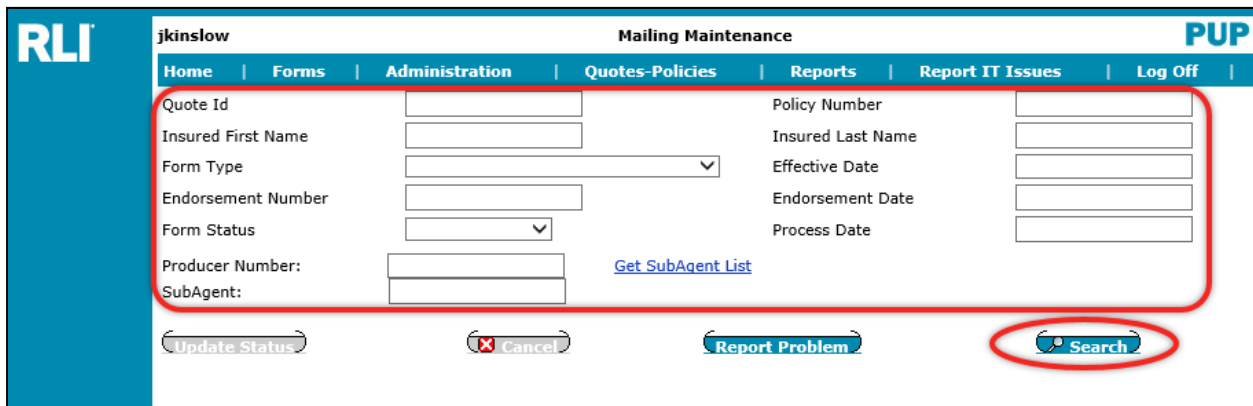
## How to look up policy forms

Log in to RLI’s portal at [myportal.rlicorp.com](http://myportal.rlicorp.com) using your registered E-mail and Password. Once logged in select the “Forms Activity” button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).

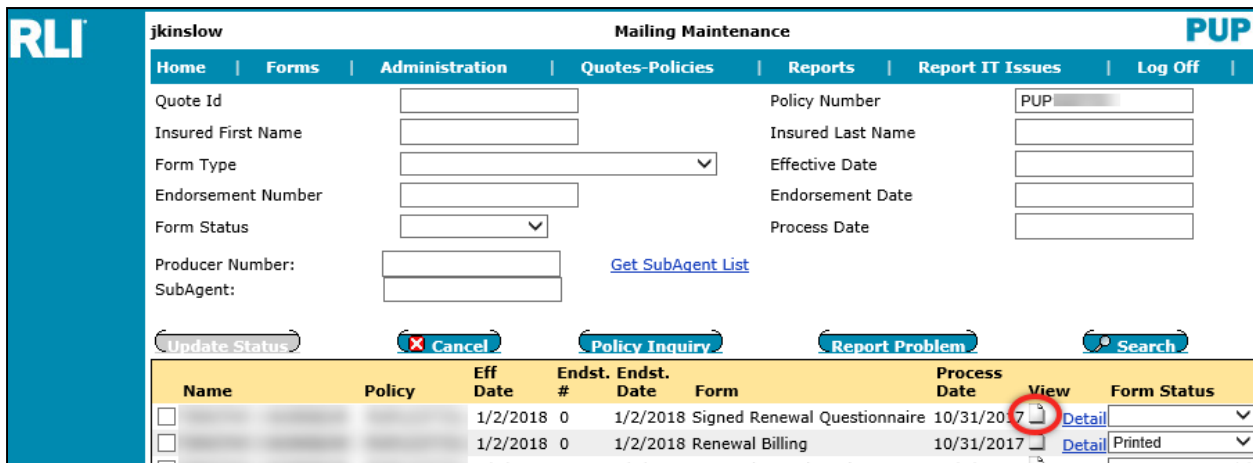


You will be taken to PUP Access. PUP Access is not changing. The following steps are unchanged.

Enter your search criteria and click “Search.”

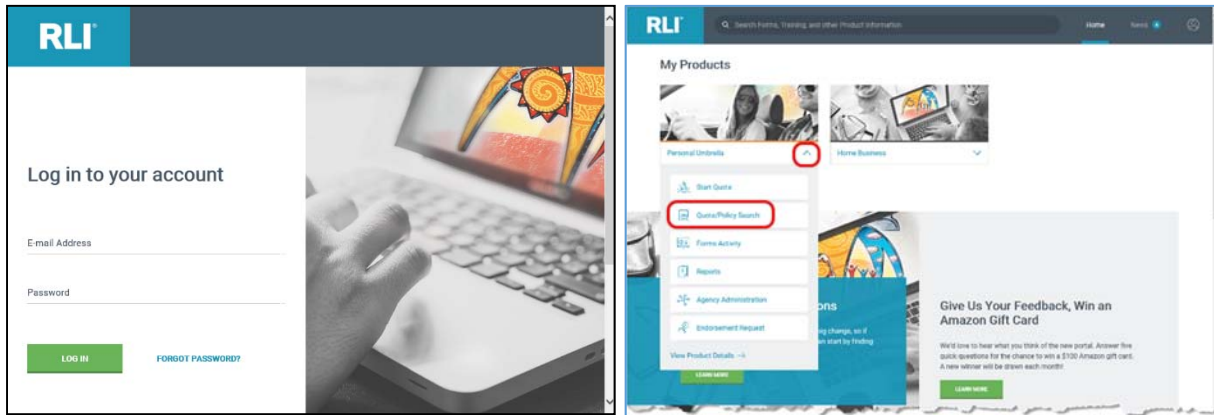


All forms will be listed in the table. To open a form, click on the appropriate document icon.



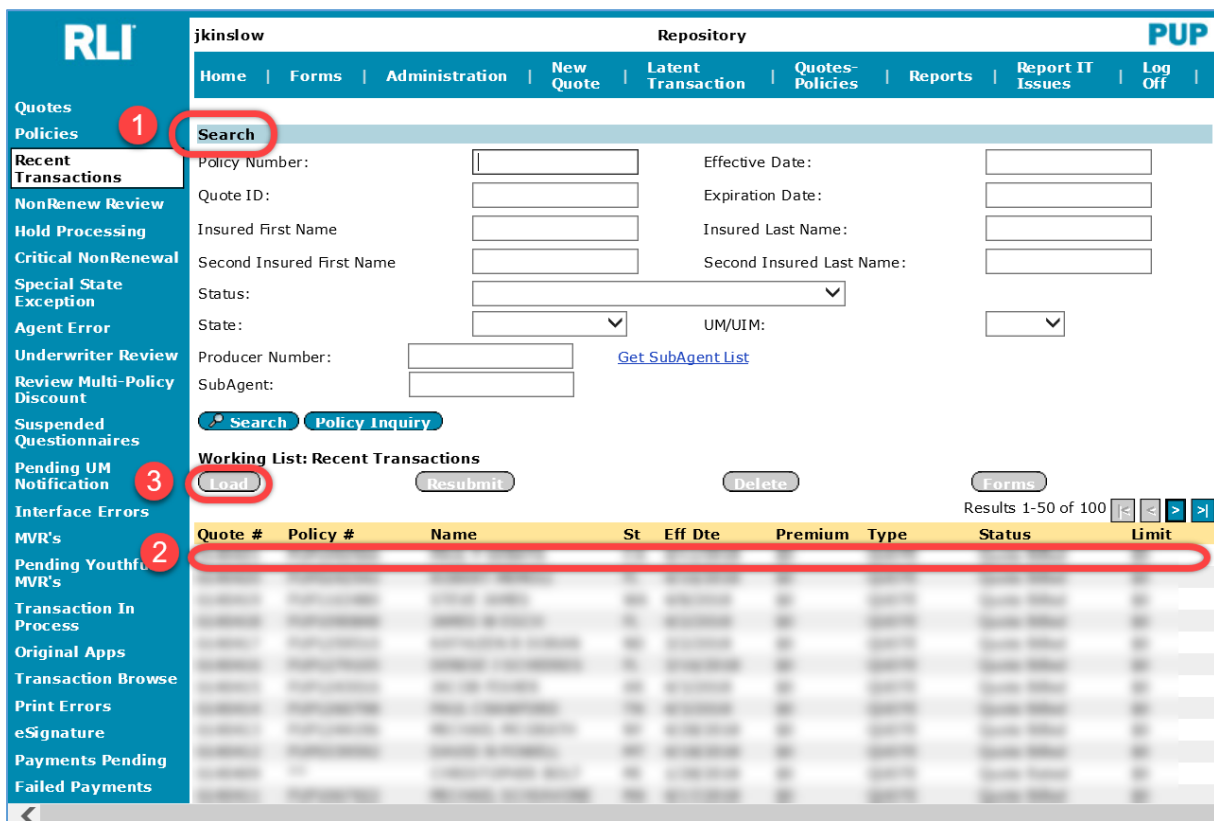
### How to open an existing quote

Log in to RLI’s portal at [myportal.rlicorp.com](http://myportal.rlicorp.com) using your registered E-mail and Password. Once logged in select the “Quote/Policy Search” button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).



You will be taken to PUP Access. PUP Access is not changing. The following steps are unchanged.

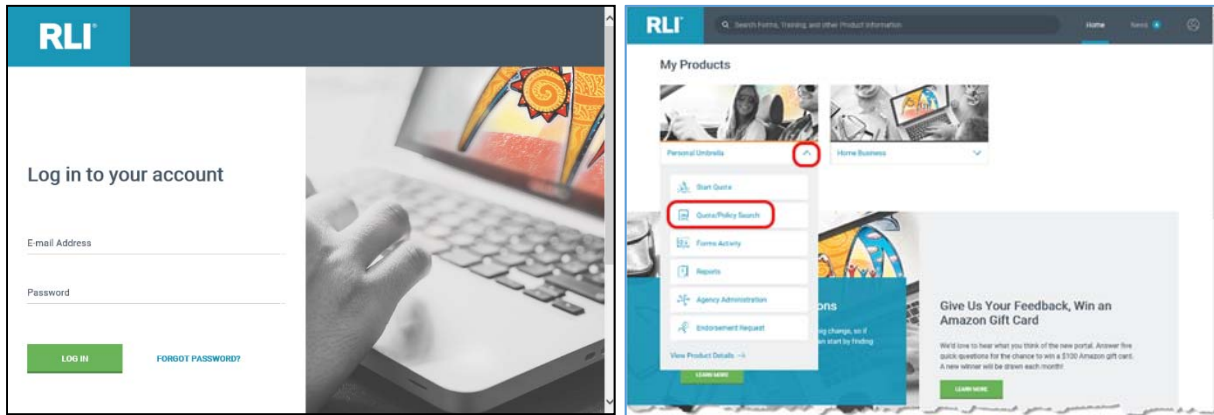
1. Enter your search criteria and click “Search.”
2. Click on the specific quote in the results table to highlight it.
3. Then click “Load” to open the quote.



Once in the quote, you will need to click “Rate” to refresh coverage options and premiums.

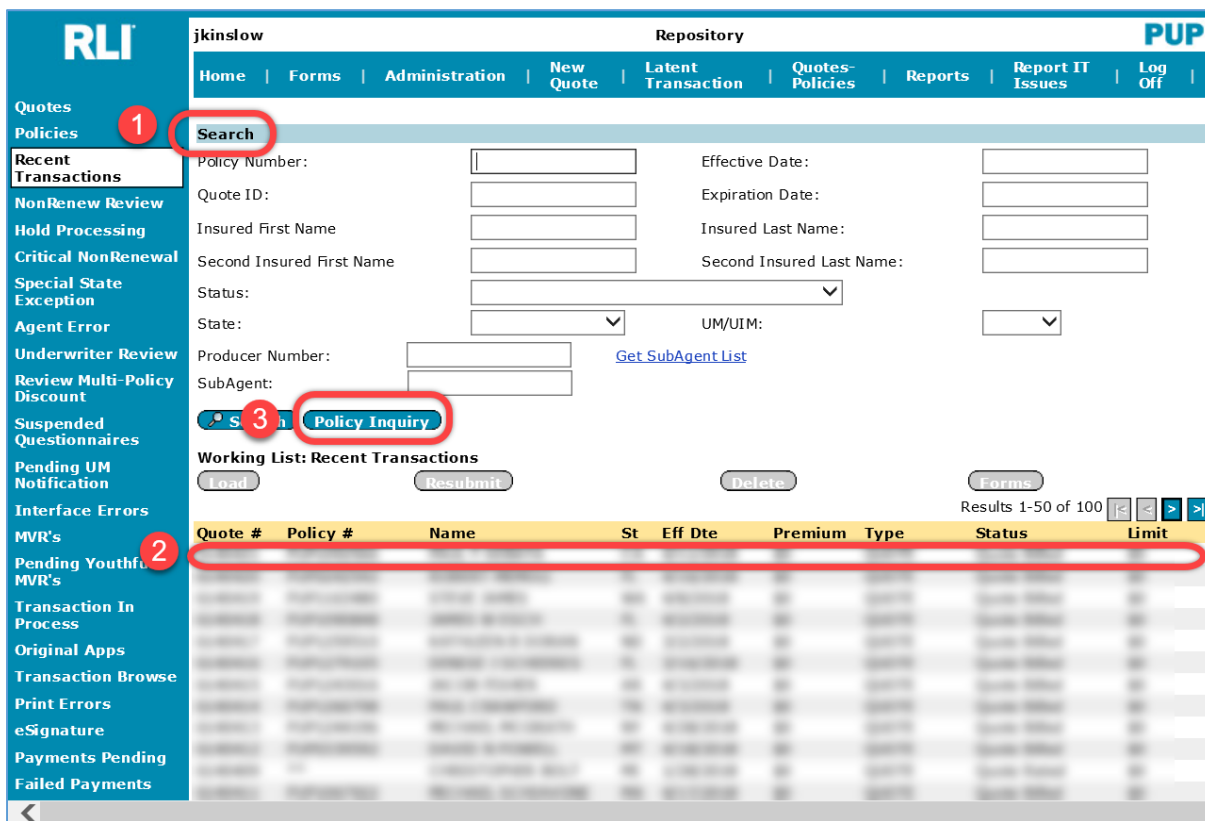
## Policy Inquiries

Log in to RLI’s portal at [myportal.rlicorp.com](http://myportal.rlicorp.com) using your registered E-mail and Password. Once logged in select the “Quote/Policy Search” button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).



You will be taken to PUP Access. PUP Access is not changing. The following steps are unchanged.

1. Enter your search criteria and click “Search.”
2. Click on the specific policy in the results table to highlight it.
3. Then click “Policy Inquiry” to open the policy.



All policy terms will be listed.

Expand a policy term to see additional policy information by clicking on the expand button “+”.

Use the blue hyperlinks to view the “Members of Household” and “Forms”.

**RLI** Jasmine.Kinslow@rlicorp.com Policy Inquiry **PUP**

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

**Search**  
 Policy Number: PUP2424626  
 Insured First Name:  Insured Last Name:   
  See All Terms

**Policy Detail for PUP2424626** [Members of Household](#) [Billing](#) [Payments/Claims](#) [Comments](#) [Documents](#) [Notes](#)  
[Forms](#)

**Insured Name: JESSICA SMITH**  
**Policy's current status is Quote Billed.**

**U Term:** 6/4/2019 to 6/4/2020 **Quote Billed** **Tier:** Preferred **Limit:** \$0 **Modified By:** PROCESS - 6/22/2018

<b>Tr Date:</b> 6/15/2018	<b>User:</b> CaaS	<b>Sent:</b> Renewal Billing - 6/16/2018	<b>Due Date:</b> 6/4/2019	<b>Agency Type:</b> D	<b>Tr Number:</b> 3
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**B Term:** 6/4/2018 to 6/4/2019 **New Issue - Bound** **End Date:** 6/4/2018 **Tier:** Preferred **Limit:** \$1,000,000 **Modified By:** jkinslow - 6/4/2018

<b>Tr Date:</b> 6/4/2018	<b>User:</b> jkinslow	<b>Sent:</b> Application (actual Signature), NEWDEC - 11/16/2018	<b>Agency Type:</b> A	<b>Tr Number:</b> 1
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**Premium:** \$155.00 **Base:** \$155.00 **100/300:** \$0.00 **UMUIM:** \$0.00 **Commission:** \$0.00 **Payment Type:** Check  
**Policy:** PUP2424626

**Primary:** JESSICA SMITH  
 9025 N LINDBERGH DR  
 PEORIA, IL 61615  
 jasmine.kinslow@rlicorp.com

**Producer:** 48936/Test Agency [Producer Detail](#)  
**Subproducer:** 50712/Subproducer 1  
**Contact:** Test Indv  
**Phone/Fax:** (309)692-1000/(309)692-1000  
**Affinity:**  
**RV Full timer:** No

Policy Limit	Base	100300	UMUIM	Total	Premium
\$1,000,000	\$155	\$0	\$0	\$155	
\$2,000,000	\$279	\$0	\$0	\$279	
\$3,000,000	\$372	\$0	\$0	\$372	
\$5,000,000	\$488	\$0	\$0	\$488	

1 1. Number of licensed vehicles?  
 1 2. Number of residential properties owned or rented?  
 0 3. Number of watercraft?  
 0 4. Number of personal watercraft?  
 1 5. Number of drivers  
 0 6. Number of drivers under 22  
 0 7. Number of drivers over 70  
 N Are any drivers in your household age 80 or older?  
 0 8. Number of moving violations  
 0 9. Number of at fault accidents  
 0 10. Number of antique classic, and/or collectible vehicles?  
 0 11. Number of residential properties owned or rented outside the US (including US territories and possessions), Canada, or Puerto Rico?  
 0 12. Number of acres of land?  
 0 13. Number of drivers Licensed < 1 year  
 0 14. Incidents for age 21 and under and/or 80 and older?  
 0 15. Total number of DUI/DWI  
 N Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?  
 N 16. Reckless/Careless Driving or Suspension in last 5 years?  
 N 17. Felony within last 5 years?  
 N 18. Target Risk Occupation/Profession?  
 N 19. Any personal liability claims > 50,000?  
 N 20. Already have Personal Umbrella with RLI?  
 N 21. One driver with more than 3 moving violations?  
 N 22. 21 and under and/or 80+ with multiple incidents  
 Y 24. Agree to maintain required Residential, Watercraft, RV coverage?  
 N Agree to maintain \$500/500 auto limits?  
 Y Agree to maintain \$250/500 auto limits?  
 N Agree to maintain \$100/300 auto limits?  
 Y Application include the Applicant's original signature?

### Common RLI PUP Statuses

#### New Business & Renewal Statuses

Status	Definition
Quote Rated	A quote has been rated but no further action has been taken.
Payment Pending	Agent selected signature option 'Signed App, Pay Now' and Payment has not completed its process in RLI's system. This process should not take more than 15 minutes.
MVR has been Ordered	MVR's are ordered for submissions with youthful drivers or DUIs. While MVRs are received almost instantly for most states, some states take up to 3 days to deliver an MVR to RLI. [HI, CA, WA]
MVR has been Received	MVR's are ordered for submissions with youthful drivers or DUIs. This status means that RLI has received the MVR and the underwriter is reviewing the submission.
New Quote Paid	The applicant has signed the application and paid the premium due. The policy is ready to be submitted to RLI for binding by the Program Administrator.
New Issue – Bound	The status of a new business policy when first bound.
Renewal Questionnaire Mailed	At 90 to 60 days prior to renewal, a renewal application is sent to the insured. This status indicates that a renewal questionnaire has been mailed to the insured.
Quote Billed	Once RLI receives the renewal questionnaire back from the insured, a bill is sent to the insured.
Final Bill Sent	10 days prior to the policy expiration, RLI will send a final bill to the insured for the renewal policy premium if payment has not yet been received.
Renewal Bound	Once the bill has been paid RLI will bind the renewal. This status indicates that the renewal has been bound and a renewal policy issued.

#### eSignature Statuses

Status	Definition
eSig e-mailed Pending	The email with the secure login link was sent to the applicant.
eSig Pending	The login information was given to the applicant verbally.
eSig Expired	The email link or the verbal login information expires after 7 days. The applicant did not finish the electronic signature and online payment process prior to this expiration, OR the administrator neglected to bind the policy once payment had been applied and notification was sent to the administrator.
eSig Complete	The applicant has signed the application, but has not yet completed the electronic payment process.