

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 inquires 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

Password:______

Administrator Name:

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: <u>www.rlicorp.com</u>.

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

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

- 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 8 your account via the self-service password.

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RLI Personal Umbrella Policy System (PUP Access)	*	▲
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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".
- 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.
- 7. Log Off Will log you out of "PUP Access" and return you back to the "Community Home Page".

CHAPTER 2

"Forms"



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.



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".



1. 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.



- 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.



- 1. To update the status of a particular form, click on the box in front of the desired form.
- 2. 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 from generated.

Queued — The form will generate that evening.

3. 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"



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.
- 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.

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1. How many motorized vehicles licensed for road use in your household?	
2. How many residential properties in your household?	
3. How many watercraft, other than personal watercraft (canoes, jet skis, etc.), in your how	isehold?
4. How many personal watercraft (canoes, jet skis, etc.) in your household?	
5. What is the number of drivers? (Include drivers with a learners permit.)	
6. How many drivers under the age of 22? (Include drivers with a learners permit.)	
7. How many drivers are age 70 and over?	
8. How many moving violations have all drivers had within the last 3 years? Include DWI/I	DUI violations
within the last 5 years/3 year M I.	
10. How many antique classic and/or collectible vehicles are in your household?	
11. How many properties outside coverage territory?	
12. How many acres of timberland or land which is farmed?	
13. How many drivers have been licensed less than one year?	
14. How many driving incidents have all drivers ages 20-21 and/or age 80 and over had	l within the last
3 years? 15 How many alcohol/drug related driving incidents have all drivers had in the last 5 year	are/2ure in MT2
Are the underlying limits for any vehicle equal to (but not less than) 100/300?	
If underlying limits for ALL vehicles are at least 250/500, answer this question "No". If underlying limits for even one vehicle equals 100/300, answer this question "Yes".	
Auto limits equal to 100/300 are acceptable for select risks but result in a higher premium	n.
Rate Cancel Transaction	_
Done	
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- **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".
- 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 <u>ANY</u> auto in the household.
- 6. Rate Click the "Rate" button to obtain the premium(s).

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 How many residential properties in your household? How many watercraft, other than personal watercraft (canoes, jet skis, etc.), in your household? 	1 Preferred 0 Preferred
 How many personal watercraft (canoes, jet skis, etc.) in your household? What is the number of drivers? (Include drivers with a learners permit.) 	0 Preferred 2 Preferred
 How many drivers under the age of 22? (Include drivers with a learners permit.) How many drivers are age 70 and over? 	0 Preferred 0 Preferred
 How many moving violations have all drivers had within the last 3 years? Include DWI/DUI violations within the last 5 years/3 year MT. 	0 Preferred
 How many at fault accidents have all drivers had in the last 3 years? How many antique, classic and/or collectible vehicles are in your household? 	0 Preferred
11. How many properties outside coverage territory?	
13. How many drivers have been licensed less than one year?	0
14. How many driving incidents have all drivers ages 20-21 and/or age 80 and over had within the last 3 years?	
15. How many alcohol/drug related driving incidents have all drivers had in the last 5 years/3yrs in MT? Are the underlying limits for any vehicle equal to (<u>but not less than</u>) 100/300? If underlying limits for ALL vehicles are at least 250/500, answer this question "No". If underlying limits for even one vehicle equals 100/300, answer this question "Yes". Auto limits equal to 100/300 are acceptable for select risks but result in a higher premium.	
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"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.

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	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 druge), revoked or refused in the last 5 years/3 year in MTP (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? B. 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.) B. 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 \$25,0000 in the last 5 years? D. Does any other member of your household or person residing in your household have a Personal without the last 5 years? D. Doy ou or any member of your household or person residing in your household have a Personal we policy with RLI Insurance Company other than this policy? D. Doy ou or any member of your household or in partial ownership) 6 or more residential properties that are covered under a Commercial General Liability Policy or other on-personal Premises Liability Policy as they are excluded from coverage. Has any one driver had more than 3 moving violations within the last 3 years? Has any one driver ages 20-21 and/or age 80 and over had more than one driving incident within the past 3 years? 	
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"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.



"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.

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"Member Of Household" Screen

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

- Editing Member Number "X" Complete each field for all members. 1.
- Save Member- Click this button to save the information once each 2. member's information has been entered.
- **Delete Member** Click this button if a member's information is incorrect. 3. 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.
- **Cancel** Click this button if you do not want to edit a selected member. 4.
- **Next -** Once all members have been included and the questions have 5. 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.

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"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. Confirmation This is where you will select how the policy will be signed and paid. The next page will show you the four options for answering this question.
- 2. This group of buttons perform the same functions as on the previous pages.
- 3. Submit for Review If your insured has selected to provide a wet signature and check for payment, you would use this button to submit you risk to your administrator. In this case, before the risk can be bound by your administrator, they will need the signed RLI application and full payment. Contact your administrator for instructions on their workflow.



"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 ³¹ and full annual premium prior to binding.

CHAPTER 4

"Quotes - Policies"

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

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	1519967	**	MATTS TEST	LA	10/5/2009	\$1,046	QUOTE	Quote Rated	\$1,000,000			
	1519944	**	RICHARD P WELCH	PA	10/13/2009	\$720	QUOTE	eSig e-mailed	\$1,000,000			
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	1519876	**	KYLE D BATTS	тх	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			
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	1519809	**	DOUGLAS L CUNEY	PA	10/28/2009	\$1,123	QUOTE	Ouote 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			
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	1519677	**	RANDY FOLLOWUP	IL	10/2/2009	\$0	QUOTE	Quote Rated	\$0			
	1519676	**	FOLLOWUP TEST	IL	10/1/2009	\$0	QUOTE	Quote Rated	\$0			
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	1519635	**	KYLE D BATTS	TX	10/1/2009	\$295	QUOTE	Pending	\$1,000,000			
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"Repository" Screen

1. 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.

34 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.



"Repository" Screen

- 1. Search section- Enter the criteria in the appropriate field(s) to locate the policy or quote that is being sought.
- 2. Search button Click this button once the criteria has been established to query the database.
- 3. Working List: Recent Transactions Select the policy or quote desired by clicking on the policy or quote found in the listing.
- 4. 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.

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"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.
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Rating Questions		
1. How many motorized vehicles licensed for road use in your household?	2	
How many residential properties in your household?	1	
 How many watercraft, other than personal watercraft (canoes, jet skis, etc.), in your household? 	0	
4. How many personal watercraft (canoes, jet skis, etc.) in your household?	0	
 What is the number of drivers? (Include drivers with a learners permit) 	2	
 How many drivers under the age of 22? (Include drivers with a learners permit.) 	0	
7. How many drivers are age 70 and over?	0	
8. How many moving violations have all drivers had within the last 3 years? Include DWI/DUI violations		
within the last 5 years/3 year MT.	5	
How many at fault accidents have all drivers had in the last 3 years?	0	
10. How many antique, classic and/or collectible vehicles are in your household?	0	
11. How many properties outside coverage territory?	0	
12. How many acres of timberland or land which is farmed?	0	
13. How many drivers have been licensed less than one year?	0	
14. How many driving incidents have all drivers ages 20-21 and/or age 80 and over had within the last		
3 years?	<u>lo</u>	
15. How many alcohol/drug related driving incidents have all drivers had in the last 5 years/3yrs in MT?	0	
Are the underlying limits for any vehicle equal to (<u>but not less than</u>) 100/300?	No v	
If underlying limits for ALL vehicles are at least 250/500, answer this question "No".		
Auto limits equal to 100/300 are acceptable for select risks but result in a higher premium.		
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Once "Load" is selected, the quote will appear with the information entered previously.

 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".

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	1519892	**	MICHAEL C CREEKMORE	MA	10/31/2009	\$1,150	QUOTE	MVR Error	\$1,000,000				
	1519884	**	JAMES VEE	VI	10/13/2009	\$1,085	QUOTE	Quote Rated	\$1,000,000				
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	1519677	**	RANDY FOLLOWUP	IL	10/2/2009	\$0	QUOTE	Quote Rated	\$0				
	1519676	**	FOLLOWUP TEST	IL ND	10/1/2009	\$0	QUOTE	Quote Rated	\$0				
	1519635	**	KYLE D BATTS	TX	10/1/2009	\$295	OUOTE	eSig e-mailed	\$1,000,000				
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	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				-
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"Repository" Screen

- 1. 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.
- 2. Search button Click the "Search" button to display the desired policy.
- 3. Once your policy is listed click on the line with the policy you wish to work with. This will highlight the policy line.
- 4. Policy Inquiry Click on the "Policy Inquiry" button once the policy has been highlighted.



"Policy Inquiry" Screen

1. 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.

- a. 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.)
- 3. Should this be adequate for your needs, you can go to the next policy by entering your criteria into the "Search" field(s).

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Insured First Name		Insured Last Name:				
Search)	I See All Terms					
Policy Detail for PUP240 Insured Name: SCOTT E	5219 Members of Household	<u>Mailing Check/Claim Not</u>	es Forms			
Policy's current status i	s Bound.					
B Term: 10/7/2009 to 10/7/2010	New Issue - End Date: Bound 10/7/2009	Tier: Limit: Preferred \$1,000,000	Modified By: scott.combs@ 9/24/2009	rlicorp.com -		
☐ Tr Date: Use 9/24/2009 score	r: Sent: Applica	tion (actual Signature), NEWD	C - Agency Type:	Tr Number:		
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Policy: PUP2405219						
Primary:	Producer: 48936/T Subproducer: 50712/S	est Agency				
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(309)692-1000 scott.combs@rlicorp.c	om					
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N 22. One driver with N 23. Under 20 with	more than 3 moving violations?					
N 24. 20/21 and/or 1	30+ with multiple incidents					
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"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. 40

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	Primary: SCOTT E TEST	Producer: Subproducer:	48936/Test Agency 50712/Subproducer 1								
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"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)

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SCOTT E TEST Subproducer: 34395/1est Agency SCOTT E TEST Subproducer: 30713/Subproducer 2		
MARIE L COMBS Contact 1 Test Contact 123 MAIN STREET Phone/Fax: (800)326-1754		
PEORIA, LI 61615 Altimity: (309)622-1000		
scott.combs@ritcorp.com		
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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		
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"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.

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"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.

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		AMEND	PUP118	1	PA	4/24/2007		4/25/2007	4/25/2007		
		AMEND	PUP320	1	PA	4/24/2007		4/25/2007	4/25/2007		
		AMEND	PUA437	1	PA	4/24/2007		4/25/2007	4/25/2007		
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	Dur	plicate	Close							Show Notes	
LI	4	4 5)						Tuesday, M	arch 11, 2008	

"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 45 with review.

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"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.

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"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.

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N 18. Target Risk Occupation/Profession? N 19. Any personal liability claims ≥ 25.0002	
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N 22. Moving Violations per Driver	
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"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.

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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.

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	N 19, Any personal inability claims > 25,0007 N 20, Already have Personal Umbrella with RLI?		
	N 21. More than 5 properties rented to others? N 22. Moving Violations per Driver		
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"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"

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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.									
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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" 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 Nonrenewal 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. 58
- 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.
- 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?"

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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"

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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

 Once you click on the "Marketing Materials" link, you will directed to this screen. For PDF files of the brochures, click on the first link. There are also a couple 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.


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.

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Home Business Insurance System (eRLI Access)	<u>Get A New H</u>	ome Business Insurance	(HBI) Quote				
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- 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

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Unique User ID Set-Up Screen

- 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 email address. This is the username you will use from this point on when accessing the RLI PUP Access system.
- Security Question At the same time, you will sign-up for selfservice 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.
- 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.

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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

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Forgot Password

1. Forgot Password – In the event you forget the password associated with your username, click on this link.



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.

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Password Reset

- 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

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1	• PUP Special exposure charges business submissions effective 1	are now approved in all states except AK, SC, and 0-1-09 in these 3 states ONLY.	I VA. Continue to hold	d new
	 A revised new business applicate posted the (08/09) version of the you might want to delay that for version submitted for business et as of that date. However, this neclear to the user. The quick quoter has the ability Additional upgrades are being m PUP Special exposure charges with acceptability for PUP Special. 	tion is being created for PUP Special business. In the PUP new business application OR sent hard cop a week or so. PLEASE NOTEFor audit purpose ffective 10-1-09 WILL BE ACCEPTED in states wi wer version will contain some additional language y to quote out 60 days in advance until PUP Special to include PUP Special underwriting logic. Foi II receive a message that their rate and eligibility VR activity for each driver should be carefully rev	the event that you have ies out to your subpr s, any "PUP 276 (08/ here PUP Special is app e that might make it m al logic can be update now, risks eligible or need to be reviewed y iewed with respects to	ave not 'oducers, 09)" proved tore ed. nly with with an o
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"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



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.

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From:	0 no-Reply@rlicorp.com	1				Sent: Thu 10/20/2011 9:23
To:	🖲 Timothy Flanagan					
Сс						
Subject:	Electronically Sign you	r Personal Umbrella application				

Your UserName: timothy.flanagan@rlicorp.com

Click on the link below to access your personal umbrella application. It is important that you take the time to verify your application prior to signing. Once we have received notice that you have completed the signature process, we will finalize your application. Please do not reply to this message; this is an automated email and is not set up to provide a response. If you encounter any problems, please call your agent for assistance. Thank you.

https://ebiz.rlicorp.com/AppPupCustomerAuthorization/SecureSignIn.aspx?info=qjpJOCPTM9oeV5NbpUzd%2fqx8JBuDV6EL

RLI Insurance Company Sign By: 10/25/2011 Quote ID: 2778764

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 to continue the E-Signature process.

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	Home Forms Administration New Latent Quotes- Quote Transaction Policies Reports	Need Help?	Log Off									
	Here are the login credentials to give to the customer.											
	Login Information Login ID: 2752193 Password: 52f3rK8N URL: http://www.myrli.com Continue to Repository											
©2005 - 2011 RLI		Friday, Sej	ntember 30, 2011									

E-Signature Instructions

Regardless if the Insured clicks on the e-mail link or goes to the 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.

tflanaga		PUP
Named App	licant(s)	
TIMOTHY FLA	NAGAN	
Address		
*** IMPOR Please verify your identi	TANT NOTICE *** that the address listed below is your residential address and that all fields are correct. This data w ty. If this information is incorrect, please contact your agent.	ill be used to verify
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Thank you for site to review that will be u other than vo application. Y your applicat process.	In your interest in purchasing a Personal Umbrella policy with RLI Insurance Company. You have been by your application, electronically sign and submit payment for your policy premium. You will be asked sed to validate that you are authorized to sign the application. This information will NOT be saved or erification. Once you have completed the signature process, an email will be sent with an electronic of your will be required to submit payment for your policy after signing your application. Your account w ion has met final approval and your policy has been bound. Please click the "Continue" button below	en directed to this web d to enter information used for any purpose copy of your signed ill not be charged until to begin the signature
This applicat which was is who falsely r	on must be verified and signed personally by the named applicant(s) or it is invalid. RLI reserves th sued based on an application signed and submitted by an individual other than the named applicant(egister as the applicant or submit this application on his/her behalf are subject to prosecution for fra	e right to void any policy s). Note that individuals ud.
This process Continue	requires Adobe Reader. If you do not have Adobe Reader installed, you can get it <u>here</u> .	

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.

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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 " <u>Cance</u> " below. Otherwise, check the box below to agree and click " <u>Continue</u> ".	
Legal Name: Other Required Information:	
First Name: RICHARD Middle Name: P Last Name: WELCH Suffix (if any): Image: Social Security Number: Image: Social Sec	
I confirm that the above personal information is my own and I agree that RLI may verify my personal identity.	
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		exceeding these limitations are excluded from coverage. (Do not count canoes, jet skis, waverunners or other personal watercraft. See question 4.)	0				<u> </u>
		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				
£		 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				
		How many drivers are age 70 and over? Response not considered when determining the rating tier for applicants in Maine.	0				
		 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 <u>at fault</u> accidents have all drivers in your household had in the last 3 years?	0			1	
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		* If there are drivers age 70 and over AND an answer to questions 8 or 9 falls column the risk is not eligible	under the Sta	ndard II (N/.	A in HI) or the PUI	P Spenal	
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		rage 1 of 5 pages			NBS 🧲	PUP 276 (09/09)	
		Please fully complete and print the Application, obtain the insured's signature an	d forward it to	o your Progra	am Administrator f	or processing.	
		QUESTIONS Please print the response clearly on the line provided. If the question	1 is unanswer	ed or the res	sponse is greater t	han the maximum	
Sp.		10 - 15 number indicated, the risk is not eligible. PUP Special charge(s) app question 12).	oly if any ans	wer to quest	ions 11-15 is grea	ter than 0 (640 for	
		10. How many antique, classic and/or collectible vehicles are owned by you or any me	mber of your	household?	(Max. of 25)	0	
Ø		11. How many residential properties owned or rented by you or any member of your ho	usehold are lo	ocated outsid	e of the U.S. (inclu	uding 0	•
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[_		Page 3 of 5 pages			OR	COMMER		υe:	5	PUP 2	76 (09/09)	
		Please fully o	complete and print the Appli	cation, obtain	the insured	d's signature and forward	d it to you	ur Program Ad	ministrator for	processir	ng.	
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E-Signature Results

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



2nd "Continue Screen"

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



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.

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	- Unpaid Billed Balance Information					
	Total Billed as of Today: \$272.00					
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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.

Total Billed as of Today: \$152.00		
Payment Method		
Oredit/Debit		
Electronic Funds Transfer		
Caud Information		
Name on Card		
* CHAD FAKINGTON		
Card Type		
*		
Card Number Please enter Card Number without	CVV	
hyphens or spaces.	* 🗌 🙆	
Expiration Date		
* • •		
Must match the billing address for t	he card.	
Address 1		
* 123 FAKE STREET		
Address 2		
Address 3		
Address 3		
Address 3 City	State ZIP Code	
Address 3 City * PEORIA	State ZIP Code * IL - * 61604	
Address 3 City PEORIA Phone	State ZIP Code • IL • 61604 Ext	
Address 3 City * PEORIA Phone	State ZIP Code • IL • 61604 Ext	
Address 3 City * PEORIA Phone *	State ZIP Code * IL * 61604 Ext	
Address 3 City PEORIA Phone Email A city	State ZIP Code * IL * 61604 Ext Infirmation 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.

Total Billed as of Today: \$152.00			 	
Payment Method				
Credit/Dehit				
 Electronic Funds Transfer 				
Bank Information			 	
Routing Number				
*				
Account Number				
*				
Account Type				
*				
Name				
* CHAD FAKINGTON				
Must match the address for the b	oank account.			
Address 1				
* 123 FAKE STREET				
Address 2				
Addross 2				
Addiess 5				
City	State	ZIP Code		
* PEORIA	* IL -	* 61604		
Phone	Ext			
*				
Email				

"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."

Payment Information Please confirm your Card Payment of \$583.00						
Card Information	on					
Card Type:	Visa					
Card Number:	******************************					
CVV:	123					
Expiration Date:	02/13					
Name:	MICHAEL CREEKMORE 800 SOUTHBRIDGE ST WORCESTER, MA 01610					
Phone:	(309) 472-3194					
Email:	efrantz@rlicorp.com					
By checking here you agree to our Terms and Conditions. Pay Now Go Back						

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[®] easypa 🕏 Print this page A confirmation email has been sent to 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

Transaction Status – Email to Insured

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

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	Laurie Whitake	ř.
	From: Sent: To: Subject:	Web Payments Queue [webpayments@rlicorp.com] Wednesday, February 17, 2010 1:48 PM Laurie Whitaer RLI Insurance Confirmation for Payment Number 76180457021710
	You have authorized	d RLI to charge your account ending in 4448 .
	Account Holder Nan Total Amount:	ne: JOSEPH DEMARTINE \$360.00
	Card Type:	Visa
	Last 4 Digits of Acco	ount Number: 4448
	Product Information	u da se
	1. PUP0371333 Con	tract/Policy Premium: \$360.00
	Your account will be	e charged on or after : 02/17/2010
	Payment Requested	: 02/17/2010
	Payment Confirmati	on Number: 76180457021710
	- This is a one time - Please write down	charge to your account. 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.

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.

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	1518606	SCOTT COMBS		CA	10/7/2009	\$0	Ouote Rated	1	\$0		
	1517677	SCOTT E TEST		IL	10/2/2009	\$717	Ouote Rated	1	\$1,000,000		
	1517674	ROB TEST		IL	10/7/2009	\$152	Quote Rated	1	\$1,000,000		
	1517639	PAT TST		IL	10/2/2009	\$517	eSig Pendin	g	\$1,000,000		
	1517634	PB APP		IL	10/2/2009	\$631	Quote Rated	Í.	\$1,000,000		
	1517633	PB TEST		IL	10/2/2009	\$517	Quote Rated	1	\$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 HATZE	LL	ТХ	8/21/2009	\$432	New Quote	Paid	\$2,000,000		
	1517478	MICHAEL A DENT		ТХ	8/20/2009	\$145	New Quote	Paid	\$1,000,000		
	1517467	NEIL B SCRANTO	N	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 LEMOIN	E	CA	8/20/2009	\$236	New Quote	Paid	\$1,000,000		
	1517513	TRACY N WALLAC	CH	IX	10/2/2009	\$468	eSig Failed		\$2,000,000		
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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.

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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.