



How to Quote New Business

(using PUP Quick Quote)

RLI[®]

DIFFERENT WORKS

RLI PERSONAL UMBRELLA • WWW.RLIPUP.COM

Log in to RLI's Portal at myportal.rlicorp.com using your registered E-mail and Password.



Log in to your account

Email Address

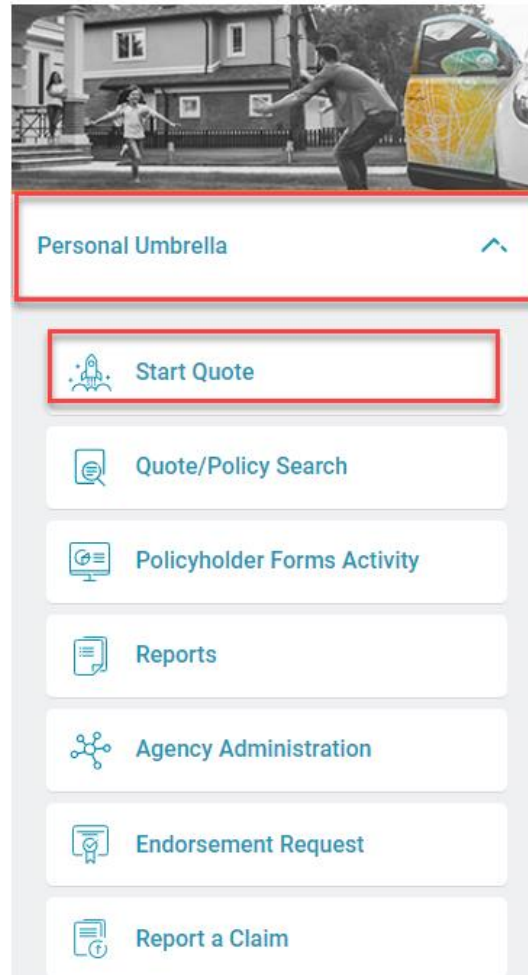
Password

LOG IN

[FORGOT PASSWORD?](#)

Welcome to the RLI Portal

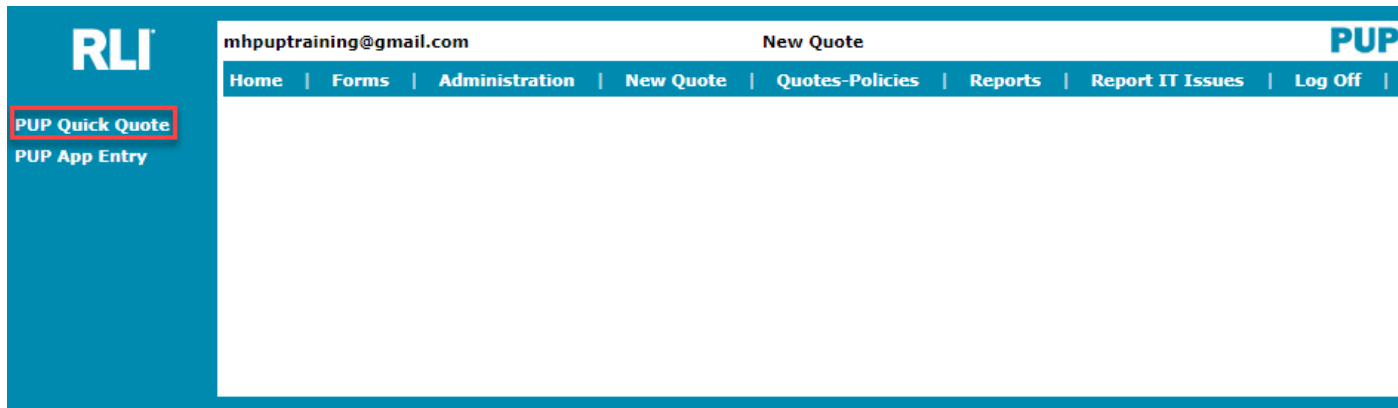
To start a new quote, click on the “Personal Umbrella” box, and then select “Start Quote” from the drop-down list.



Most users will be able to select the quote preference from the 2 options in the left margin. To begin a new quote, select either “PUP Quick Quote” or “PUP App Entry”

Both options will allow you to complete a full PUP application, however the PUP Quick Quote option breaks the application into sections and allows the rating questions to be asked first in order to get a premium quote before answering additional underwriting questions.

This instruction set will use “PUP Quick Quote.”



Enter the applicant's residential zip code and the effective date, and then select "Continue"

The effective date can be typed (MM/DD/YYYY) or you can select a date using the calendar icon.

The system will allow you to select an effective date up to 3 days in the past and up to 60 days into the future.

The screenshot displays the RLI PUP system interface. The top navigation bar includes the RLI logo on the left and the PUP logo on the right. Below the navigation bar, the user's email address, mhpuptraining@gmail.com, is displayed. The main navigation menu contains links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The State/Zip section is highlighted, showing a form with two input fields for Zip Code (containing 61517) and Effective Date (MMDDYYYY) (containing 02/02/2024). A calendar icon is visible next to the date field. A Continue button is located at the bottom right of the form.

Complete the questions on the Premium Options page, then click “Rate.”

(There are additional instructions for the questions on the “Premium Options” page on the following slides.)

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

Premium Options

State / Zip

State: Zip Code: Effective Date(MMDDYYYY):

Administrator

Producer Number: [Get SubAgent List](#)

SubAgent

SubAgent:

Other Info

Named Insured

NOTE: Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC. If the first, middle and last name consists of more than 26 characters total, we will process the policy using the first and middle initials and the full last name.

First Name Middle Initial Last Name

Second Named Insured

First Name Middle Initial Last Name

Rating Questions

1. How many **automobiles** are licensed for road use in **your** household?
2. How many residential properties in **your** household?
3. How many watercraft, OTHER than personal watercraft (WaveRunners, Jet Skis, etc.), are in **your** household?
4. How many personal watercraft (Jet Skis, WaveRunners etc.) in **your** household?
5. What is the total number of **drivers**? (Include **drivers** with a learner's permit or valid driver's license)
6. How many **drivers** are under the age of 22? (Include **drivers** with a learner's permit)
7. How many **drivers** are age 70 and over?
- 7a. Are any **drivers** age 80 or older?
8. How many moving violations have ALL **drivers** had within the last 3 years? Include DWI/DUI violations within the last 5 years.
9. How many **at-fault accidents** have all **drivers** had in the last 3 years?
10. How many antique, classic or collectible automobiles are owned (titled or registered to) by you or any member of your household? (Max. of 25)
11. Of the number of residential properties from question 2, how many residential properties owned by or rented to you or any member of your household are located outside of the U.S. (including its territories and possessions) or Canada? (Max. of 5)
12. How many acres of land owned or leased (including partial ownership)?
13. How many **drivers** have been licensed less than one year, have a learner's permit, or have a non-U.S. driver's license?
- 14a. How many driving incidents have all drivers ages 21 and under had within the last 3 years?
- 14b. How many driving incidents have all drivers ages 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?

Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?

Automobile Liability

Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all **automobiles** that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by you or any member of your household? If you elect to purchase Excess Uninsured/Underinsured Motorist (UM/UIM) coverage, 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 an **automobile** covered under a Commercial Automobile Liability.

LIMIT A	LIMIT B	LIMIT C
\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$500,000 Combined Single Limit per occurrence Note: Limit A is ALWAYS REQUIRED if any driver has an alcohol related incident.	\$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Combined Single Limit per occurrence Note: The choice of Limit B results in a higher premium.	\$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence Note: Limit C is available only if ALL drivers are between age 22 and 69. Limit C is NOT available if any response makes the risk PUP Special, Excess UM/UIM is not available if you maintain Limit C. The choice of Limit C results in a higher premium.

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


1. Producer and Sub-Producer numbers will be prefilled.
2. Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC. If the first, middle and last name consists of more than 28 characters total, we will process the policy using the first and middle initials and the full last name.

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Premium Options

State/Zip
State: IL Zip Code: 61517 Effective Date(MMDDYYYY): 02/02/2024 

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

SubAgent
SubAgent: 99999

Other Info

Named Insured
NOTE: Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC. If the first, middle and last name consists of more than 28 characters total, we will process the policy using the first and middle initials and the full last name.

First Name MIKE Middle Initial Last Name TEST

Second Named Insured
First Name Middle Initial Last Name

Rating Questions

Questions 1 through 15 are the rating questions. To see a more comprehensive description of an application question, hover your cursor over the question.

You must answer all rating questions. You cannot leave an answer of zero blank. You must type the zero.

The applicant must accept or reject the optional UM/UIM coverage.

Rating Questions	
1. How many automobiles are licensed for road use in your household?	<input type="text"/>
How many automobiles (i.e., cars, motorcycles, motorhomes, etc.) are owned (titled or registered to), rented, leased, or regularly operated by you or any member of your household? "Automobile" means a car, van, pickup truck, motorcycle, moped, or motorhome that is licensed for road use. Include company vehicles provided for your use, or for use by a member of your household. All vehicles licensed for road use need to be counted regardless of individual insurance.	
4. Those that reside in a recreational vehicle (RV) full-time should count their RV as a vehicle and not a residence. Do not count antique/classic/collectible vehicles covered under a collector automobile policy (see question 10).	
5. What is the total number of drivers ? (Include drivers with a learner's permit or valid driver's license)	<input type="text"/>
6. How many drivers are under the age of 22? (Include drivers with a learner's permit)	<input type="text"/>
7. How many drivers are age 70 and over?	<input type="text"/>
7a. Are any drivers age 80 or older?	<input type="text"/>
8. How many moving violations have ALL drivers had within the last 3 years? Include DWI/DUI violations within the last 5 years.	<input type="text"/>
9. How many at-fault accidents have all drivers had in the last 3 years?	<input type="text"/>
10. How many antique, classic or collectible automobiles are owned (titled or registered to) by you or any member of your household? (Max. of 25)	<input type="text"/>
11. Of the number of residential properties from question 2, how many residential properties owned by or rented to you or any member of your household are located outside of the U.S. (including its territories and possessions) or Canada? (Max. of 5)	<input type="text"/>
12. How many acres of land owned or leased (including partial ownership)?	<input type="text"/>
13. How many drivers have been licensed less than one year, have a learner's permit, or have a non- U.S. driver's license?	<input type="text"/>
14a. How many driving incidents have all drivers ages 21 and under had within the last 3 years?	<input type="text"/>
14b. How many driving incidents have all drivers ages 80 and over had within the last 3 years?	<input type="text"/>
15. How many alcohol/drug related driving incidents have all drivers had in the last 5 years?	<input type="text"/>
Do you elect to purchase Excess Uninsured/Underinsured Motorists coverage?	<input type="text"/>

Next you must elect the underlying auto limits that the applicant agrees to maintain.

Note:

1. The basic underlying limits, Limit A, are 500/500 or 500 combined single limit.
2. All households with a DUI in the household, are required to maintain limit A 500/500/50 or 500 combined single limit.
3. For a higher premium, the insured can maintain 250/500/50 or 300/300 or 300 combined single limit.
4. Some risks have the ability to buy back limit from underlying auto limits of 100/300. However, limit C, 100/300, is not an option if there is a driver over 70 in the household, if the risk falls into RLI's standard II or PUP Special rating tier, or if the insured has chosen to accept the excess uninsured/under insured motorist coverage.

All of this information is noted in the table under the question in the rater, and on the next slide.

Automobile Liability

Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all **automobiles** that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by you or any **member of your household**? If you elect to purchase Excess Uninsured/Underinsured Motorist (UM/UIM) coverage, 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 an **automobile** covered under a Commercial Automobile Liability.

LIMIT A	LIMIT B	LIMIT C
<p style="text-align: center;">\$500,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$500,000 Combined Single Limit per occurrence</p> <p>Note: Limit A is ALWAYS REQUIRED if any driver has an alcohol related incident.</p>	<p style="text-align: center;">\$250,000 Bodily Injury per person/ \$500,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence OR \$300,000 Combined Single Limit per occurrence</p> <p>Note: The choice of Limit B results in a higher premium.</p>	<p style="text-align: center;">\$100,000 Bodily Injury per person/ \$300,000 Bodily Injury per occurrence/ \$50,000 Property Damage per occurrence</p> <p>Note: Limit C is available only if ALL drivers are between age 22 and 69. Limit C is NOT available if any response makes the risk Standard II; and/or if any response makes the risk PUP Special. Excess UM/UIM is not available if you maintain Limit C. The choice of Limit C results in a higher premium.</p>
<p>If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local brokering agent.</p>		

- After answering all of the questions on the Premium Options page select “Rate” to generate RLI’s coverage options and the corresponding policy premiums.

Automobile Liability

Which of the following MINIMUM REQUIRED LIMITS OF AUTOMOBILE LIABILITY do all **drivers** agree to maintain as a condition of coverage for all **automobiles** that are owned (titled or registered to), leased, rented, operated or acquired during the policy period by you or any **member of your household**? If **you** elect to purchase Excess Uninsured/Underinsured Motorist (UM/UIM) coverage, 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 an **automobile** covered under a Commercial Automobile Liability.

A - 500/500/50 or 500 CSL ▼

LIMIT A

\$500,000 Bodily Injury per person/
\$500,000 Bodily Injury per occurrence/
\$50,000 Property Damage per occurrence
OR
\$500,000 Combined Single Limit per
occurrence

Note: Limit A is **ALWAYS REQUIRED** if any **driver** has an alcohol related incident.

LIMIT B

\$250,000 Bodily Injury per person/
\$500,000 Bodily Injury per occurrence/
\$50,000 Property Damage per occurrence
OR
\$300,000 Bodily Injury per person/
\$300,000 Bodily Injury per occurrence/
\$50,000 Property Damage per occurrence
OR
\$300,000 Combined Single Limit per
occurrence

Note: The choice of Limit B results in a higher premium.

LIMIT C

\$100,000 Bodily Injury per person/
\$300,000 Bodily Injury per occurrence/
\$50,000 Property Damage per occurrence

Note: Limit C is available only if **ALL drivers** are between age 22 and 69. Limit C is **NOT** available if any response makes the risk Standard II; and/or if any response makes the risk PUP Special. Excess UM/UIM is not available if you maintain Limit C. The choice of Limit C results in a higher premium.

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

Rate

✖ Cancel Transaction

After you click “Rate”, you will have the ability to:

1. Generate a quote letter for your applicant.
2. Print the application (it will only include application answers that have completed at the time you click on this option).
3. You may save and close the quote.
4. Or select a limit and click “Continue” to continue to complete the application.

You will be able to select these options at any time throughout the application going forward.

Premium Options

<input type="radio"/> 1 Million	\$ 318	Rating Tier Preferred	MIKE TEST 3835495
<input type="radio"/> 2 Million	\$ 442		
<input type="radio"/> 3 Million	\$ 535		
<input type="radio"/> 5 Million	\$ 651		

Excess UM/UIM coverage with \$1 million limits is included at a cost of \$163. [Click Here to remove Excess UM/UIM coverage](#)

Rate **Quote Letter** **Save & Close** **Save** **Continue**

Once you have selected “Rate”, and the available limits and their corresponding premiums are displayed, select the limit and click “Continue” to continue to complete the application process.

Note:

There are still questions remaining on the next page, Underwriting Questions, that could disqualify an applicant from coverage.

Premium Options

<input checked="" type="radio"/> 1 Million	\$ 318	Rating Tier Preferred	MIKE TEST 3835495
<input type="radio"/> 2 Million	\$ 442		
<input type="radio"/> 3 Million	\$ 535		
<input type="radio"/> 5 Million	\$ 651		

Excess UM/UIM coverage with \$1 million limits is included at a cost of \$163. [Click Here to remove Excess UM/UIM coverage](#)

Rate **Quote Letter** **Save & Close** **Save** **Continue**

Next answer RLI's underwriting questions and click "Continue."
An answer of "yes" to any one of the underwriting questions would make the applicant ineligible.

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Quote
Quote: 3835495

Underwriting Questions

16. Have **you** or any other **driver** had an arrest, citation or conviction for reckless driving, careless driving, negligent driving and/or had a driver's license suspended (for reasons other than driving under the influence of alcohol or drugs), revoked or refused in the last 5 years? No ▼

17. Have **you** or any **member of your household** been indicted, charged with or convicted of a felony within the last 5 years? No ▼

18. Are you or any member of your household recognized nationally or locally as a celebrity or famous person (i.e., professional entertainer, athlete, media personality, etc.) and/or hold a position as an appointed or elected political figure at the federal or state level? No ▼

19. Have **you** or any **member of your household** had a liability loss greater than \$50,000 in the past 5 years or are **you** or any **member of your household** aware of any facts, circumstances, incidents, or accidents that could give rise to a claim or lawsuit, whether valid or not, which might directly or indirectly involve **you** or any **member of your household**? No ▼

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? No ▼

21. Has any one **driver** had more than 3 moving violations within the last 3 years? (Include DWI/DUI **incidents** within the last 5 years) No ▼


22. Has any one **driver** ages 21 and under and/or 80 and over had more than one driving **incident** within the past 3 years? No ▼

23. Do you elect to purchase or reject Excess UM/UIM coverage? Residents of FL, LA, NH, VT and WV: Submission of a state mandated form supersedes any response you may make to this Question 23. (If you wish to change your answer to this question, please return to the rating section and change it there) Purchase ▼

Quote Letter Save & Close Save Continue

Next the applicant must agree to maintain the minimum required limits of liability, then click “Continue.”

The chart outlines the minimum required underlying limit of liability.



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Quote

Quote: **3835495**

Limits Of Liability

Limits of Liability

24. Do you and all members of your household agree to maintain the MINIMUM REQUIRED LIMITS OF LIABILITY coverage outlined below as a condition of coverage? Yes

<p>PRIMARY RESIDENCE ONLY - REQUIRE HOMEOWNERS OR COMPREHENSIVE PERSONAL LIABILITY \$300,000 per occurrence</p> <p>SEASONAL, SECONDARY OR RENTAL PROPERTIES REQUIRE PREMISES LIABILITY OR COMPREHENSIVE PERSONAL LIABILITY \$300,000 per occurrence</p> <p><small>Residential properties that are covered under a commercial or other non-personal premises liability policy are excluded from coverage</small></p>	<p>FARMOWNERS OR FARM COMPREHENSIVE PERSONAL LIABILITY <small>(Required only if you or a member of your household own a farm which is not covered by your homeowners policy.)</small></p> <p>\$300,000 per occurrence</p> <p>RECREATIONAL VEHICLES <small>(Including snowmobiles, ATVs, golf carts, etc.)</small></p> <p><small>(Required only if you or a member of your household own or acquire a recreational vehicle during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.)</small></p> <p>\$100,000 Combined Single Limit per occurrence <small>(325,000 in Texas)</small> -OR- \$100,000 Bodily Injury per person/\$300,000 Bodily Injury per occurrence/\$25,000 Property Damage per occurrence</p>	<p>WATERCRAFT <small>(Including boats, personal watercraft, jet skis and canoes)</small></p> <p><small>(Required only if you or a member of your household own or acquire a watercraft of this size during the policy period which is not covered by your homeowners or personal liability policy for the following limits of liability.)</small></p> <p>\$300,000 Combined Single Limit per occurrence -OR- \$250,000/500,000/100,000 -OR- or \$300,000/300,000/100,000</p> <p>NOTE: The RLI Personal Umbrella does not provide coverage for watercraft exceeding 45 ft and/or 50 mph. This exclusion does not apply to personal watercraft.</p>
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If you are unsure what underlying coverage limits you are carrying, OR are required to carry, we suggest contacting your local insurance agent.

Quote Letter
 Save & Close
 Save
 Continue

Next you will enter each member of the household's information.
Date of Birth entry format is (MM/DD/YYYY.)

Always click "Save Member" once you have finished entering a member of household's information before you select another option to avoid losing the information you have entered.

RLI is asking for all members of the household over the age of 14 to be entered.

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Quote
Quote: 3835495

Members Of Household

Complete the following for all drivers AND members of your household ages 14 and older. Individuals listed below are for determining policy eligibility; if a policy is issued, coverage for each is determined pursuant to the policy provisions.

Results 1-1 of 1

Member Number	Name	DOB	Age	License Number	St	Rel. Viol.	DUIs	Acc.
1						0	0	0

Editing Member Number: 1

First Name: MIKE Middle Initial: Last Name: TEST
Date of Birth: 01/01/1980 Licensed/Permitted? Yes License Number: 123
State: ILLINOIS Relationship to Insured: Policyholder
of Violations (include DUI/DWI): 0 # At Fault Accidents: 0 Operator w/DUI/DWI? No

Save Member Delete Member Cancel
Add Member Done
Continue

After selecting “Save Member,” you can choose to add another member of the household, or click continue to go to the next page of the application.

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Quote
Quote: 3835495

Members Of Household

Complete the following for all drivers AND members of your household ages 14 and older. Individuals listed below are for determining policy eligibility; if a policy is issued, coverage for each is determined pursuant to the policy provisions.

Results 1-1 of 1

Member Number	Name	DOB	Age	License Number	St	Rel. Viol.	DUIs	Acc.
1	MIKE TEST	1/1/1980	44	123	IL	1	0	0

Add Member **Done**

Continue

The final part of the application is the applicants address and contact information. Complete the contact information being asked.

Note: An insured's phone number or email **must** be entered. To use an eSignature and Online Payment option, there must be an email address provided.

At this point you have the option to generate a quote letter, print the application, save and close the quote, save the quote, or to continue and submit the application.

The screenshot displays the RLI PUP application interface. On the left is a blue sidebar with navigation links: Premium Options, Underwriting Questions, Limits of Liability, Members of Household, and Address Information (highlighted). The main content area shows the user's email (mhpupttraining@gmail.com) and the PUP logo. A navigation bar includes Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The form is titled 'Quote' with a quote number of 3835495. The 'Primary Address' section includes fields for Address1, Address2, City (BRIMFIELD), State (ILLINOIS), and Zip Code (61517). A red box highlights the 'Phone Number' and 'E-Mail' fields. Below these are dropdown menus for 'Same As Mailing?' (Yes) and 'RV Full timer' (No). At the bottom, another red box highlights four buttons: 'Quote Letter', 'Save & Close', 'Save', and 'Continue'. A link for 'Third-Party Addresses' is also visible.

****Note:**

If you need to correct or change the application, this needs to be done prior to binding the application. Navigate the application using the page names in the left margin. Make the changes and then click on “Rate” again to update coverage options and premiums.

If you add drivers, be sure to go back into the Members of Household section to enter their details prior to submitting the application.

The screenshot displays the RLI PUP application interface. The top navigation bar includes the RLI logo, the email address **mhpuptraining@gmail.com**, and the PUP logo. Below this is a menu with links: **Home**, **Forms**, **Administration**, **New Quote**, **Quotes-Policies**, **Reports**, **Report IT Issues**, and **Log Off**. The main content area is divided into sections: **Quote** (Quote: 3835495) and **Confirmation**. The Confirmation section contains the text "Please Select a Signature Option:" followed by a dropdown menu. At the bottom of the Confirmation section are five buttons: **Quote Letter**, **Print App**, **Save & Close**, **Save**, and **Bind**. On the left side, a vertical navigation menu lists several sections: **Premium Options**, **Underwriting Questions**, **Limits of Liability**, **Members of Household**, **Address Information**, and **Confirmation**. The **Confirmation** section in this menu is highlighted with a red border.

Next select a signature option from the drop down box and click “Bind”.

The screenshot displays the RLI PUP web application interface. On the left is a blue sidebar with the RLI logo and a menu of options: Premium Options, Underwriting Questions, Limits of Liability, Members of Household, Address Information, and Confirmation. The top navigation bar includes the user email 'mhpupttraining@gmail.com' and the PUP logo, along with links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The main content area is titled 'Confirmation' and shows 'Quote: 3835495'. Below this, it prompts the user to 'Please Select a Signature Option:' with a dropdown menu. A red box highlights the dropdown menu, and another red box highlights the 'Bind' button among other action buttons: Quote Letter, Print App, Save & Close, Save, and Bind.