



Pay Now, eSign Email (RLI PUP Administrators Only)

**RLI**<sup>®</sup>

DIFFERENT WORKS

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

The screenshot shows the RLI PUP web application interface. The top navigation bar includes links for Home, Forms, Administration, New Quote, Quotes-Policies, Reports, Report IT Issues, and Log Off. The user's email address, shpuptraining@gmail.com, is displayed in the top right. The main content area is titled 'Confirmation' and shows the quote number 3531771. Below this, there is a section for selecting a signature option, with buttons for 'Quote Letter', 'Print App', 'Save & Close', and 'Save'. A dropdown menu is open, showing three options: 'Send a secure email to the insured to eSign and Pay Online', 'Verbally provide login information to the insured to eSign and Pay Online', and 'Pay Now, eSign email'. The sidebar on the left contains a list of menu items: Premium Options, Underwriting Questions, Limits of Liability, Members of Household, Address Information, and Confirmation (which is highlighted).

- **Pay Now, eSign Email:** The Administrator collects payment authorization prior to the client receiving an email link to eSign. Once signed, the Administrator is notified and submits the application for binding in the RLI system.



## Pay Now, eSign Email

- Review the signed application and verify that all responses in the system are accurate.
- Select the signature option “Pay Now, eSign email”

The screenshot shows the RLI PUP system interface. The user is logged in as shpuptraining@gmail.com. The system displays the 'Confirmation' step, where the user is prompted to 'Please Select a Signature Option:'. A dropdown menu is open, showing two options: 'Send a secure email to the insured to eSign and Pay Online' and 'Pay Now, eSign email'. A red arrow points to the 'Pay Now, eSign email' option. The interface also includes a navigation menu on the left with options like 'Premium Options', 'Underwriting Questions', 'Limits of Liability', 'Members of Household', 'Address Information', and 'Confirmation'. The top navigation bar includes 'Home', 'Forms', 'Administration', 'New Quote', 'Quotes-Policies', 'Reports', 'Report IT Issues', and 'Log Off'.

- After selecting “Bind”, you will see the following message:

Redirecting to payment portal, if this takes longer than 5-10 seconds, click [here](#). If the problem persists, please contact Support.

## Online Payment Options

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

### Amount Due

**\$1,697.00**

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

- Pay with Credit Card  
 Pay with Electronic Check

QUICK QUOTE 

American Express MasterCard Discover Visa

Card Number

CVV

Expiration

Cardholder Name

SUBMIT

### Amount Due

**\$1,697.00**

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

- Pay with Credit Card  
 Pay with Electronic Check

QUICK QUOTE

BANK NAME

\*\*\*\*\*

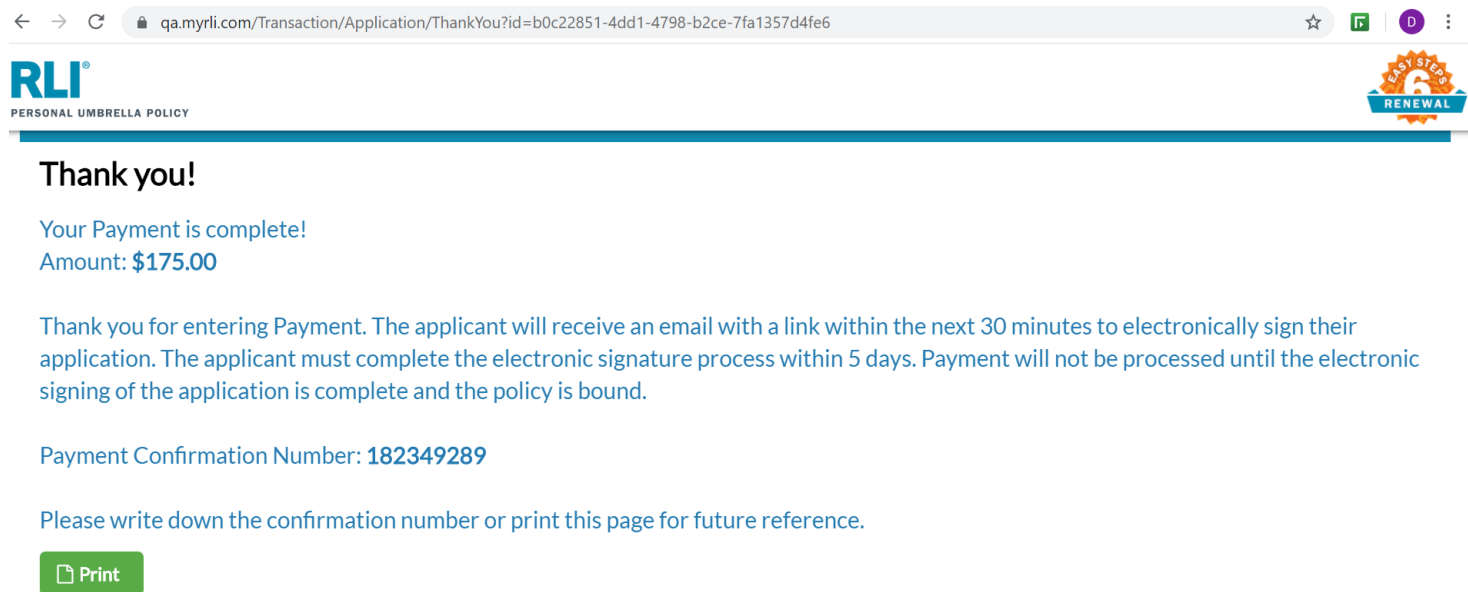
Routing Number

Account Number

Name on Account

# Pay Now, eSign Email

- Once payment authorization has been made, you will see this screen, detailing the next steps:



The screenshot shows a web browser window with the address bar displaying 'qa.myqli.com/Transaction/Application/ThankYou?id=b0c22851-4dd1-4798-b2ce-7fa1357d4fe6'. The RLI logo and 'PERSONAL UMBRELLA POLICY' are visible in the top left. A 'RENEWAL' badge with 'LAST STEP' and the number '6' is in the top right. The main content area features a blue header with the text 'Thank you!' followed by 'Your Payment is complete!' and 'Amount: \$175.00'. Below this, a paragraph explains that the applicant must complete the electronic signature process within 5 days for payment to be processed. A 'Payment Confirmation Number: 182349289' is displayed. At the bottom, there is a green 'Print' button.

- Please note that payment has only been authorized at this point; the client still must electronically sign and the policy must be bound.

## Pay Now, eSign Email

- The client will receive an automated email from [pup.esign@rlicorp.com](mailto:pup.esign@rlicorp.com) with a unique link to review and sign their application



Thank you for your interest in an RLI Personal Umbrella Policy. We wanted to let you know that payment authorization has been applied to your submission.

### NEXT STEPS

In order to complete the application process, please review all the information and sign your application by clicking on the link below. Your completed signature is required by 11/01/2022. Upon receiving notice of your signed application, we will finalize your submission.

**Please note: If anything on your application is incorrect, exit the application without signing it and contact your agent.**

Thank you for your business!

<https://qa.myrli.com/welcome/authentication/landing?info=%2b8G3yOJn2u6sd0XOGokre7ny12RjwxRS>

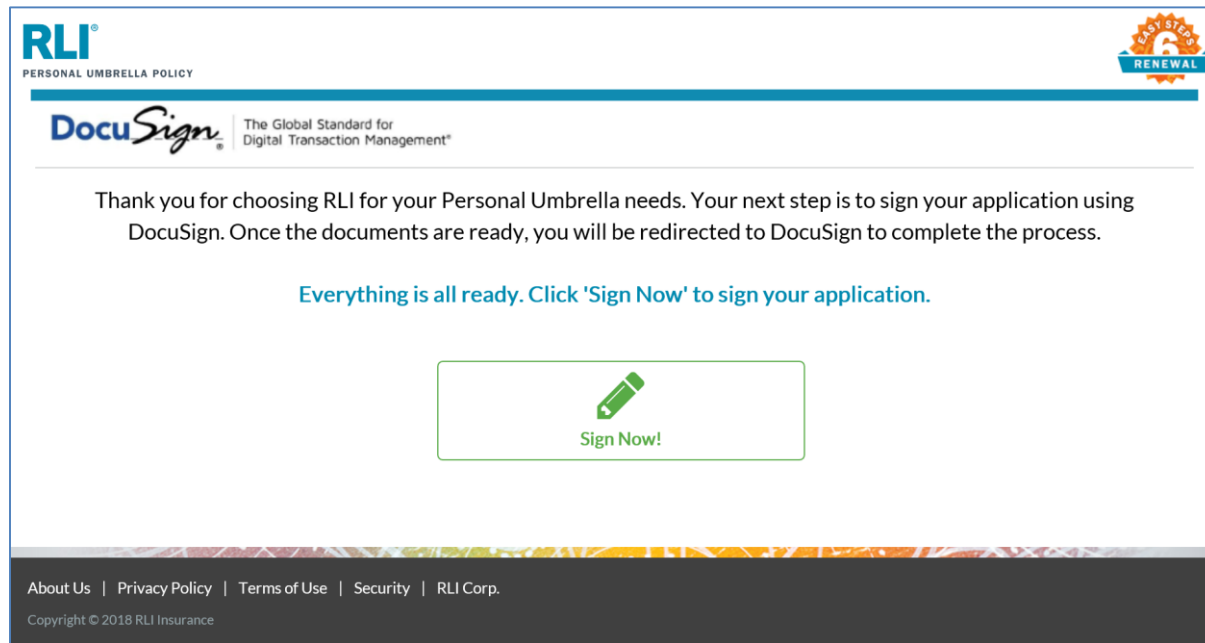
Please do not reply to this message; this is an automated email and is not set up to provide a response.

Username:  
Quote ID: 11091921  
Agency: \_\_\_\_\_

## eSign Instructions

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

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



The screenshot shows a web page for RLI's Personal Umbrella Policy. At the top left is the RLI logo and the text "PERSONAL UMBRELLA POLICY". At the top right is a "RENEWAL" badge with a "3 Easy Steps" icon. Below the logos is the DocuSign logo and the text "The Global Standard for Digital Transaction Management". The main content area contains a thank-you message: "Thank you for choosing RLI for your Personal Umbrella needs. Your next step is to sign your application using DocuSign. Once the documents are ready, you will be redirected to DocuSign to complete the process." Below this is a blue link: "Everything is all ready. Click 'Sign Now' to sign your application." In the center is a large green button with a pencil icon and the text "Sign Now!". At the bottom of the page is a footer with links: "About Us | Privacy Policy | Terms of Use | Security | RLI Corp." and "Copyright © 2018 RLI Insurance".

# eSign Instructions

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

Please Review and Sign Your Application



RLI - Personal Umbrella Insurance  
RLI



Powered by DocuSign

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

[CONTINUE](#) [OTHER ACTIONS](#) ▾

DocuSign Envelope ID: BD5BF1DB-17E4-451A-A196-A5DBFD615EA3 DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE

### PERSONAL UMBRELLA LIABILITY INSURANCE APPLICATION

RLI INSURANCE COMPANY

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

Name 1. D H 1867563  
2.  
Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC.

Phone Email daniel.husser@rlicorp.com

Applicant's Brokering Agent Number  
48936

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

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

Primary Residence  
Address 123  
City BEVERLY HILLS State CA Zip 90210

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

See page 5 for definitions and question details.

QUESTIONS 1-9:

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

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

# eSign Instructions

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

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

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

**START**

**PERSONAL UMBRELLA LIABILITY INSURANCE APPLICATION**  
RLI INSURANCE COMPANY

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

Name 1. JASMINE KINSLOW 1977271  
2. Named Insured may be a maximum of two individuals, provided both individuals reside in the same household. This policy cannot be issued in the name of an estate, trust or LLC.

Phone (309)692-1000 Email jasmine.kinslow@rlicorp.com

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

**Primary Residence**

posures (businesses, vehicles, water, etc.) if they become applicable during the term of this policy. The Brokering Agent shall not have the right to make, alter, modify, or discharge any contract or policy issued on the basis of this Application. I understand that the application and prepayment of premium must be accepted by RLI Insurance Company.

**SIGN AND DATE**

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

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

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

Applicant's Brokering Agent's Signature: \_\_\_\_\_  
Applicant's Brokering Agency's Name: \_\_\_\_\_  
Applicant's Brokering Agency's Address: \_\_\_\_\_

# eSign Instructions

Once the client has reviewed and electronically signed the application, the client must select “FINISH” to complete the eSign process.

document.pdf

document.pdf 3 of 5

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

DEMOSNTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
Please fully complete and print the Application, obtain the insured's signature and powers, if for your Personal Administrator for processing.

QUESTION 26:

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

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

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

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


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

**SIGN AND DATE**

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

Required - Signature Applied

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

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

Applicant's Brokering Agent's Signature: \_\_\_\_\_

Applicant's Brokering Agency's Name: \_\_\_\_\_

Applicant's Brokering Agency's Address: \_\_\_\_\_

Applicant's Brokering Agent's License ID #: \_\_\_\_\_

- After signing, the client will receive this message:



Thank you!

Your application is complete.  
Please contact your brokering agent if you need further assistance.



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

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# DIFFERENT WORKS

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