

Quote & Policy Maintenance / Endorsement Estimator

To **open an existing quote** in the PUP Access system:

1. Click on the “Quotes-Policies” tab
2. Enter your search criteria
3. Click “Search”
4. Highlight the quote you wish to open by clicking on it
5. Click “Load” to open the existing quote

The screenshot shows the PUP Access system interface. The user is logged in as mhpuptraining@gmail.com. The 'Quotes-Policies' tab is selected in the navigation menu. The search form contains the following fields: Policy Number, Quote ID, Insured First Name, Second Insured First Name, Status, State, Producer Number (48936), SubAgent, and Connect Reference Number. The 'Effective Date' field is highlighted with a red box and the number 1. The 'Search' button is highlighted with a red box and the number 3. Below the search form, the 'Working List: Recent Transactions' table is displayed. The table has columns: Quote #, Policy #, Name, St, Eff Dte, Premium, Type, Status, and Limit. The second row (Quote # 3804165) is highlighted with a red box and the number 2. The 'Load' button is also highlighted with a red box and the number 3.

Quote #	Policy #	Name	St	Eff Dte	Premium	Type	Status	Limit
3804166	PUP5000040	DAVEY DAVE	IL	1/11/2024	\$106	NEWISSUE	Bound	\$1,000,000
3804165	**	DAVEY DAVE	IL	1/11/2024	\$195	QUOTE	Quote Rated	\$1,000,000
3804154	PUP1566450	TEST DRIVER	IL	1/11/2024	\$322	NEWISSUE	Bound	\$1,000,000

To **open a policy** in the PUP Access system:

6. Click on the “Quotes-Policies” tab
7. Enter your search criteria
8. Click “Search”
9. Highlight the policy you wish to open by clicking on it
10. Click “Policy Inquiry” to open the policy

The screenshot shows the PUP Access system interface. The user is logged in as mhpuptraining@gmail.com. The 'Quotes-Policies' tab is selected in the navigation menu. The search form contains the same fields as in the previous screenshot. The 'Policy Inquiry' button is highlighted with a red box and the number 3. Below the search form, the 'Working List: Recent Transactions' table is displayed. The table has columns: Quote #, Policy #, Name, St, Eff Dte, Premium, Type, Status, and Limit. The first row (Policy # PUP5090940) is highlighted with a red box and the number 2.

Quote #	Policy #	Name	St	Eff Dte	Premium	Type	Status	Limit
3804166	PUP5090940	DAVEY DAVE	IL	1/11/2024	\$195	NEWISSUE	Bound	\$1,000,000
3804165	**	DAVEY DAVE	IL	1/11/2024	\$195	QUOTE	Quote Rated	\$1,000,000
3804154	PUP1566450	TEST DRIVER	IL	1/11/2024	\$322	NEWISSUE	Bound	\$1,000,000

Policy Inquiry view:

Expand a policy term to review the application answers and insured contact information by clicking on the plus sign to the left of the policy term. [Marked in red]

You can also view members of household, mailing information, payments/claims, notes, forms, and our endorsement estimator by clicking on their respective hyperlinks. [Marked in blue]

Endorsement Estimator: The Endorsement Estimator will give you the ability to see about how much a coverage endorsement may be for the remainder of the current policy term.

1. Select the desired policy term for the estimated endorsement.
2. Choose the effective date for the desired estimated endorsement.
3. Select 1 of the 3 coverage endorsements that are offered (Auto Limit, Policy Limit, UM/UIM)

Please Note:

- We do not process exposure changes on our RLI Personal Umbrella policies. If there is an exposure change that needs to be made, please have the insured update their policy when they receive the renewal questionnaire at the end of the policy term.
- To request the endorsement, please send the endorsement request to pup.processing@rlicorp.com. The endorsement estimator is for estimation purposes only.