

RLI Portal – Personal Umbrella

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

Navigating the New Portal:

Open your internet browser and go to **myportal.rlicorp.com**.

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

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Log in to your account	
Password LOG IN FORCOT PASSWORD?	

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

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





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

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Your Personal Umbrella options are:

Click "Start Quote" to start a new quote.

Click "Quote/Policy Search" to find and open an existing quote or policy.

Click "Forms Activity" to find and open forms for existing quotes and policies.

Click "**Reports**" to access and run production reports.

Click "Agency Administration" to access the Administration section of RLI's PUP Access system.

Click "Endorsement Request" to submit specific endorsement requests.

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

Click "OVERVIEW" for a summary of RLI's Personal Umbrella product.

Click "FORMS" to view sample policy forms.

Click "MARKETING" to access customizable marketing materials.

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



How to look up policy forms

Log in to RLI's portal at <u>myportal.rlicorp.com</u> using your registered E-mail and Password. Once logged in select the "Forms Activity" button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).



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

Enter your search criteria and click "Search."

jkinslow	Mailing Maintenance	PUP
Home Forms	Administration Quotes-Policies Reports Report IT Issues	Log Off
Quote Id	Policy Number	
Insured First Name	Insured Last Name	
Form Type	✓ Effective Date	
Endorsement Number	Endorsement Date	
Form Status	✓ Process Date	
Producer Number:	Get SubAgent List	
SubAgent:		
(Update Status)	(X Cancel) (Report Problem)	

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

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	Insured First Name		Insured Last Name	
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How to open an existing quote

Log in to RLI's portal at <u>myportal.rlicorp.com</u> using your registered E-mail and Password. Once logged in select the "Quote/Policy Search" button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).



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

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

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



Policy Inquiries

Log in to RLI's portal at <u>myportal.rlicorp.com</u> using your registered E-mail and Password. Once logged in select the "Quote/Policy Search" button at the top of the page (if you land on the Personal Umbrella Home Page) or in the Personal Umbrella drop down (if you land on the RLI Home Page).



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

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

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All policy terms will be listed.

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

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

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 Application include the Applicant's original signature: 	



Common RLI PUP Statuses

New Business & Renewal Statuses

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

eSignature Statuses

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