Quote & Policy Maintenance

Log in to RLI's portal at **myportal.rlicorp.com**. Once logged in click the Personal Umbrella drop down. Then click on "Quote/Policy Search".
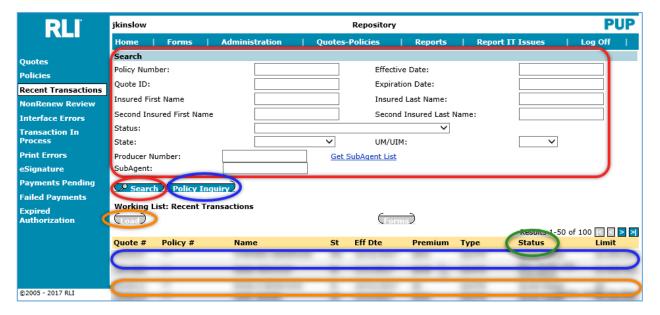

To find a specific quote or policy, enter your quote or policy search criteria and click "Search." [Marked in red]

The "Status" column will tell you the status of the policy. [Marked in green]
A list of common statuses and their definitions are available on page 3 of this document.

To open an existing quote, click on the quote to highlight it and then click "Load." [See orange marks]

To open the policy, click on the policy to highlight it and then click "Policy Inquiry." [See blue marks]
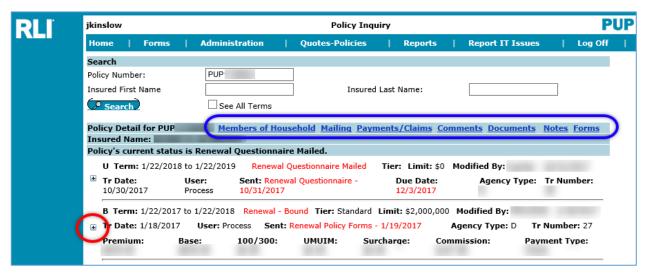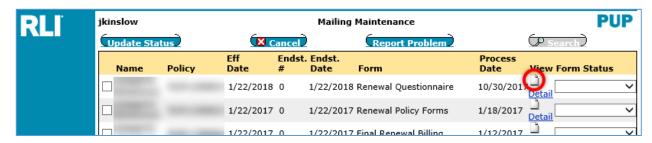
In "Policy Inquiry" view:

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, and forms by clicking on their respective hyperlinks. [Marked in blue]

If you select "Forms", a pop-up window will display. To open a form, click on the appropriate document icon.

[List of common statuses on the next page.]

Common 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.
Bound	The policy is 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.