RLI Portal – Personal Umbrella

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

Navigating the New Portal:

Open your internet browser and go to [myportal.rlicorp.com](http://myportal.rlicorp.com).

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

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.

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 myportal.rlicorp.com 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.”

All forms will be listed in the table. To open a form, click on the appropriate document icon.
How to open an existing quote

Log in to RLI’s portal at myportal.rlicorp.com 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.

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 myportal.rlicorp.com 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.
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”.
### Common RLI PUP Statuses

#### New Business & Renewal Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote Rated</td>
<td>A quote has been rated but no further action has been taken.</td>
</tr>
<tr>
<td>Payment Pending</td>
<td>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.</td>
</tr>
<tr>
<td>MVR has been Ordered</td>
<td>MVR’s are ordered for submissions with youthful drivers or DUls. 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]</td>
</tr>
<tr>
<td>MVR has been Received</td>
<td>MVR’s are ordered for submissions with youthful drivers or DUls. This status means that RLI has received the MVR and the underwriter is reviewing the submission.</td>
</tr>
<tr>
<td>New Quote Paid</td>
<td>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.</td>
</tr>
<tr>
<td>New Issue – Bound</td>
<td>The status of a new business policy when first bound.</td>
</tr>
<tr>
<td>Renewal Questionnaire Mailed</td>
<td>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.</td>
</tr>
<tr>
<td>Quote Billed</td>
<td>Once RLI receives the renewal questionnaire back from the insured, a bill is sent to the insured.</td>
</tr>
<tr>
<td>Final Bill Sent</td>
<td>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.</td>
</tr>
<tr>
<td>Renewal Bound</td>
<td>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.</td>
</tr>
</tbody>
</table>

#### eSignature Statuses

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>eSig e-mailed Pending</td>
<td>The email with the secure login link was sent to the applicant.</td>
</tr>
<tr>
<td>eSig Pending</td>
<td>The login information was given to the applicant verbally.</td>
</tr>
<tr>
<td>eSig Expired</td>
<td>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.</td>
</tr>
<tr>
<td>eSig Complete</td>
<td>The applicant has signed the application, but has not yet completed the electronic payment process.</td>
</tr>
</tbody>
</table>