**How to Quote, Look Up Forms, and Re-Enter a PUP Quote**

**How to Quote a New PUP**

RLI is now paperless! Please note that we no longer accept faxed, mailed, or emailed applications.

**Two Options for Binding:**

**Option 1.** Choose the signature option in the portal to send a secure link to the customer to e-sign *and* pay online. This will trigger a message from RLI (not the agent) with a secure link to the email address on the application. The email will contain a temporary username and password to log in. The customer will *not* be able to make any changes to the application at this point.

Keep in mind that the quote will expire in five days. If it expires or the customer logs in more than three times, a new quote is required. Because of this, it is recommended to wait until the customer is ready to sign *and* pay.

**Option 2.** Verbally provide the less tech savvy customer with a temporary username and password. This option allows the agent to walk the customer through the process – including e-signing and entering payment information – from the agent’s office.

**How to Look Up Forms, Policy Information**

1. Log into <https://myportal.rlicorp.com/>.
2. Under the Personal Umbrella drop-down menu, select Start Quote *or* Quote/Policy Search.
3. Next, enter the policy number and click **policy inquiry**, or enter the quote number and click **search**.
4. This screen will provide all policy information, including if it has been paid (bound). To expand for more information, click the **+/-** box next to **TR Date** on the left side of the page. (This shows answers to the renewal questionnaire and premium limits.)
5. For **forms**, click on the forms tab. This will pull up all policy and application documents. Click the paper icon under **VIEW** to pull any documents to save or print.

**How to Make Renewal Payments**

Call 866-302-7925.

**How to Return to a Quote**

1. Enter the quote number and click **search.**
2. Select the customer’s name, and then click the blue **LOAD** button
3. This returns to the quote. Make any changes, and then select **RATE** and **CONTINUE** at the bottom of each page.
4. Note: If you make changes, you must resend a new link to the insured to e-sign and pay. Please ask them to sign the new quote, rather than the old one.