

**Kevin C. Hord**

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**From:** RLI Insurance Company <connect@hello.rlicorp.com>  
**Sent:** Thursday, October 17, 2024 2:36 PM  
**To:** Kevin C. Hord  
**Subject:** RLI Personal Umbrella Program New Features

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## **RLI Personal Umbrella Program New Features Announced**

We are pleased to announce several new features for you and your retail agents to improve the self-service capabilities within our system.

**Renewal Questionnaires:** External users can now view renewal questionnaires - sent to RLI by email, mail or fax - via the "Documents" tab within a policy. This allows users to assist their clients during the renewal process if necessary. Users can also determine if RLI has received a questionnaire that has yet to be processed.

Any questionnaire packets, as well as questionnaires completed electronically via the Insured Portal, continue to be available via the "Forms" tab for a policy.

**Policy Inquiry** **PUP**

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Policy Number:

Insured First Name:  Insured Last Name:

See All Terms

**Policy Detail for PUP** [Members of Household](#) [Mailing](#) [Payments/Claims](#) [Documents](#) [Notes](#) [Forms](#)

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Insured Name:

**Policy's current status is Bound.**

<b>B Term:</b> 10/24/2024 to 10/24/2025	<b>Renewal - Bound</b>	<b>Tier:</b> Preferred	<b>Limit:</b> \$1,000,000	<b>Modified By:</b> PROCESS - 10/10/2024
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**Apply Payment:** This feature allows external users to input payment information on behalf of their clients for issued policies, in addition to the existing methods that clients can use to pay RLI directly. It is available only if a policy is in one of the statuses listed below. Please contact your account representative for documentation specific to this process. Note that this applies only to issued policies; the new business payment process remains unchanged.

Statuses where "Apply Payment" may be shown:

- Bound (only if policy is short-termed and money is due to make full term)
- Final Bill Sent
- Quote Billed
- Policy has been Canceled (NY only)
- Policy Has Been Endorsed (if money is due)
- Renewal Quote Lapsed (Up to 60 days after the expiration date; there will be a lapse in coverage)
- Revised Before Payment
- Revised Bill Sent

**Expanded Search Functionality:** Users are now able to search quotes or policies by phone number and email address within PUP Access.

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Policy Number:  Effective Date:

Quote ID:  Expiration Date:

Insured First Name:  Insured Last Name:

Second Insured First Name:  Second Insured Last Name:

Status:

State:  UM/UIM:

Connect Reference Number:

Email:

Phone Number:

Feel free to reach out to your RLI account representative if you have any questions regarding these new features.

Harriet Sennit  
[harriet.sennit@rlicorp.com](mailto:harriet.sennit@rlicorp.com)

Michael Houlihan  
[michael.houlihan@rlicorp.com](mailto:michael.houlihan@rlicorp.com)

Jamey Alwood  
[jamey.alwood@rlicorp.com](mailto:jamey.alwood@rlicorp.com)

Daniel Husser  
[daniel.husser@rlicorp.com](mailto:daniel.husser@rlicorp.com)

Lena Theesfield  
[lena.theesfield@rlicorp.com](mailto:lana.theesfield@rlicorp.com)

**RLI Insurance Company**

9025 N. Lindbergh Dr. | Peoria, Illinois | United States  
[RLICORP.com](https://www.rlicorp.com) | [Follow Us on LinkedIn](#)

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Sent to: kevinh@iabforme.com

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RLI Insurance Company, 9025 N. Lindbergh Dr., Peoria, IL 61615, United States