- Use this option if you wish to apply payment authorization at point-of-sale and allow the insured to electronically sign.
- If the quote is not already loaded, locate the quote by searching with quote number or insured name.
- Select the quote, and then select "load":

Search											
Policy Number:				Effe	ctive Date:						
Quote ID:		1	Expiration Date:								
Insured Fir	st Name	-	Insured Last Name:								
Second Ins	sured First Name	Second Insured Last Name:									
Status:											
State:			T	UM/	UIM:		•				
Producer N	lumber:		0	Get SubAgent L							
SubAgent:											
2 Searc	h) Policy Inau	iiry									
Working List: Recent Transactions											
Load 4		Hold		Delete)		(Forms)				
	-						Results 1-50	of 500 🔄 🔄 💈	> >		
Quote #	Policy #	Name	St	Eff Dte	Premium	Туре	Status	Limit	Tier		
8733498	** 3	TEST TEST	IL	3/9/2020	\$0	QUOTE	Quote Rated	\$0	Р		
8733518	**	GUEST QUOTE	FL	3/20/2020	\$1,479	QUOTE	Quote Saved	\$5,000,000	S		
8733517	**	GUEST QUOTE	FL	3/20/2020	\$1,210	QUOTE	Quote Saved	\$3,000,000	s		
8733516	ale ale	GUEST QUOTE	FL	3/20/2020	\$994	QUOTE	Quote Saved	\$2,000,000	s		



- Review the signed application and verify that all responses in the system are accurate.
- Select the signature option "Pay Now, eSign email"

Premium Options	Quete
Underwriting Questions	Quote: 2684915
Limits of Liability	Confirmation
Members of Household	Please Select a Signature Option:
Address Information	Application contains original signature
Confirmation	No signature on application. Send a secure email to the insured to eSign and Pay Online
	Verbally provide login information to the insured to eSign and Pay Online
	Signed Application, Pay Now
	Pay Now, eSign email

• After selecting "Bind", you will see the following message:

Redirecting to payment portal, if this takes longer than 5-10 seconds, click here. If the problem persists, please contact Support.

See <u>Electronic Payment Processing</u> section for screen shots



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• Once payment authorization has been made, you will see this screen, detailing the next steps:



 Please note that payment has only been authorized at this point; the client still must electronically sign and the policy must be bound.



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 After our payment cycle processes, the insured will receive an automated email with a unique link to review and sign their application

🗄 🔊 🔿 🛧 🗸	ዲ 🍷 🚽 Electronically Sign your Personal Umbrella application - Message (Plain Text)	-
File Message Q	2 Tell me what you want to do	
Image: Constraint of the second s	Image: Categorize - Regarding:	m Report Phishing m PhishMe
no-Reply@rli	icorp.com Jasmine Kinslow	4:21 PM
Electronical	y Sign your Personal Umbrella application	
Retention Policy RLI - Defau	IIT - All Content - 7 Year Delete (7 years) Expires 2/28/2025	~
Click on the link below t have received notice th email and is not set up t https://uat.myrli.com/v Test Agency Sign By: 03/07/2018 Quote ID: 1854442	to access your personal umbrella application. It is important that you take the time to verify your application prior to sig iat you have completed the signature process, we will finalize your application. Please do not reply to this message; this to provide a response. If you encounter any problems, please call your agent for assistance. Thank you. welcome/authentication/landing?info=VUa25UTdQBGN%2f7PSqLtdh6x8lBuDV6EL	ning. Once we is an automated

See <u>eSign Instructions – Insured Only</u> section for screen shots

RLI°

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• After signing, the insured will receive this message:



Please reference <u>Binding Process – Admin Only</u> Section

