

To Submit or Not Submit, And Other Tips to Quoting in the RLI Portal

Whether you're new to quoting personal umbrellas with RLI, or a veteran, here are a few tips to help make your experience better.

Binding

The Submit/Bind button available once you have entered an application does not submit that quote to us for binding. You will still need to send the signed application and payment to PRIM.

1. Mail the signed application* with check (payable to PRIM)
OR
2. Email the signed application* to processing@iamt.org. Then call Natalia at the PRIM office to process an electronic check or credit card over the phone.

**If the application has been signed electronically, you must also send the completion certificate or security summary.*

Restrictions on Effective Dates

RLI has reduced the number of days we have from issuing the quote to binding the policy when it comes to effective dates. We now can only honor effective dates going back 5 days. Example: Requested effective date of July 1 – signed application and payment must be received by PRIM before end of day on July 6.

Changes to Already Entered Quotes

If you make a change to any of the application answers in the RLI portal, always make sure to click on the RATE button again. This ensures the change is recorded and the correct quote provided. If you don't, you run the risk of providing a wrong quote to your client and we won't be able to bind coverage when it is received in our office.

Questions? Email processing@iamt.org or call Natalia Rogers at 406-442-9555 ext 106.