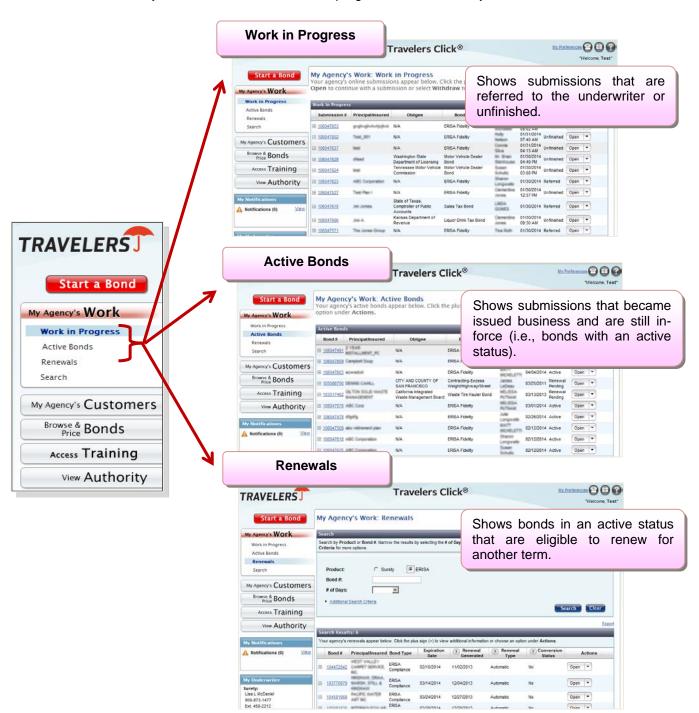# Travelers Click®

My Agency's Work

HOW TO FIND YOUR SURETY BONDS & ERISA POLICIES IN THE TRAVELERS CLICK® PLATFORM

My Agency's Work is the location in **Travelers Click** where you can find records of bonds that are in progress, issued, or about to renew. From *My Agency's Work* you can also resume work on unfinished submissions. "Bonds" refers to either surety bonds or ERISA Fidelity policies.
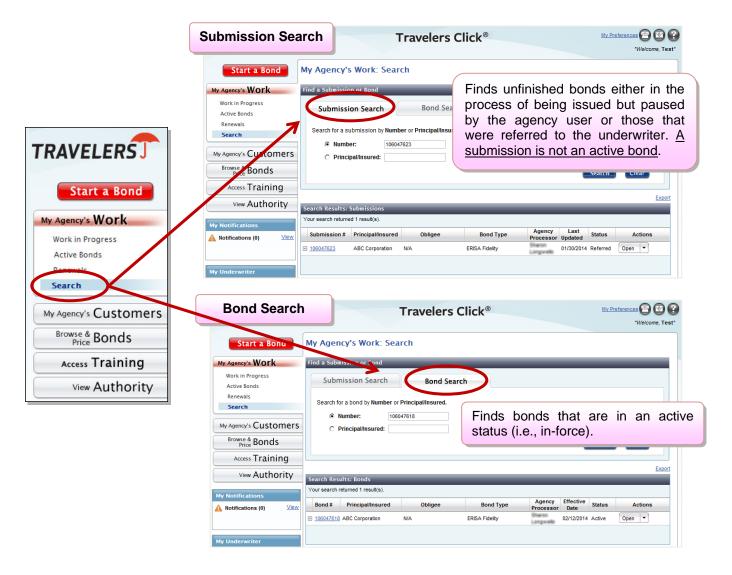
Finding Bonds

My Agency's Work offers intuitive, easy-to-use tools to find bonds, including three ways to look at the records of your bonds and two search options.

Bond Record Views – you can view bonds that are in progress, active, or ready to be renewed:

Work in Progress

Shows submissions that are referred to the underwriter or unfinished.

Active Bonds

Shows submissions that became issued business and are still in-force (i.e., bonds with an active status).

Renewals

Shows bonds in an active status that are eligible to renew for another term.

Search Options – you can search for submissions or active bonds:

In both searches, the bond records can be found by:

- Number (submission or bond number);
- Principal/Insured name; or
- Principal/Insured name in combination with additional criteria (e.g., state, city, address).

Opening Records

- Once you've found the bond or submission record you're looking for, it can be opened to reveal additional information.

- Records are opened by clicking on the hyperlinked bond number or the Open button at the end of the row of the submission or bond.

- Essential details of the bond can be quickly accessed by clicking on the "+" icon next to the submission or bond.

Opening a Bond Record will present the Bond Summary screen, which:

- Identifies the bond.
- Lists the transaction history.
- Shows the customer, bond, and billing details.
- Allows you to make a change to a previously issued bond.

The grid at the top lists the transactions that have been processed for the bond.

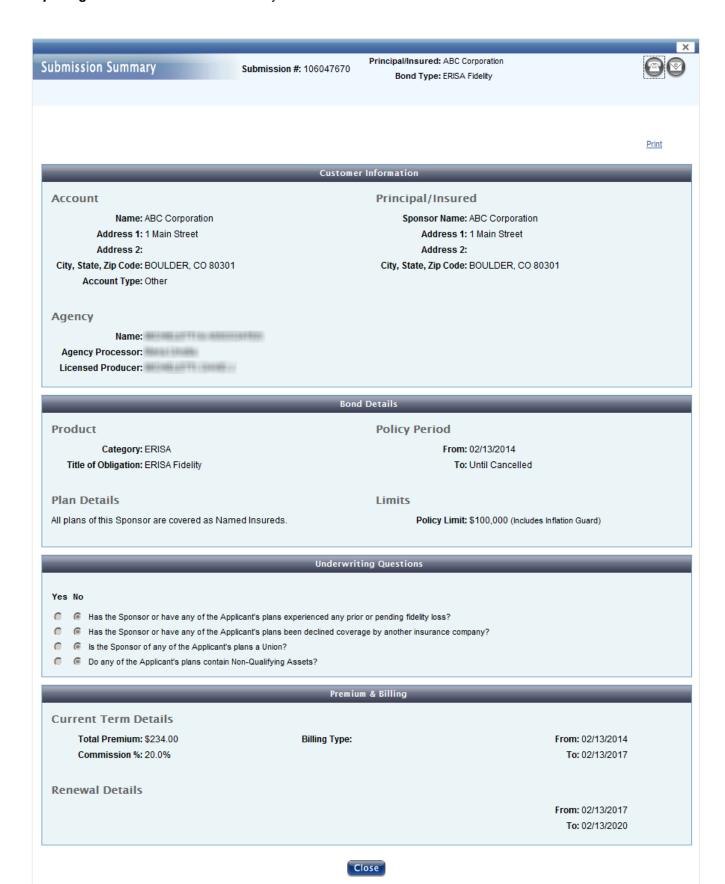Highlight the row for the one you want to see and click the View button.

If the bond was issued through **Travelers Click**, the bond summary will also display:

- Underwriting questions and answers

- The bond package that was generated

- Any supplemental documents supplied by the agency

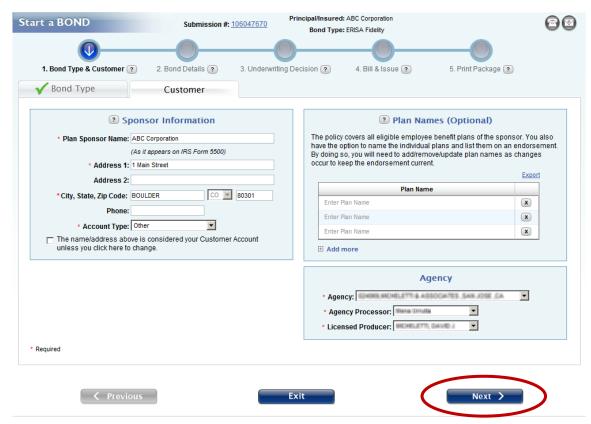If the bond was not issued through **Travelers Click**, the user will view the bond details.

Bond Summary Bond #: 106047668 Principal/Insured: ABC Corporation
Bond Type: ERISA Fidelity

What would you like to do with this bond? -Select-

Transaction Type	Process Date	Transaction Effective	Billing From	Billing To	Limit	Premium	Processor	Action
Policy Change	01/31/2014	02/12/2014	02/12/2014	02/12/2017	$100,000.00	$0.00	Process eCommerce	View
New Business	01/31/2014	02/12/2014	02/12/2014	02/12/2017	$100,000.00	$234.00	Process eCommerce	View

Print

Customer Information

Account

Name: ABC Corporation
Address 1: 1 Main Street
Address 2:
City, State, Zip Code: CONCORD, NH 03301
Account Type: Other

Principal/Insured

Sponsor Name: ABC Corporation
Address 1: 1 Main Street
Address 2:
City, State, Zip Code: CONCORD, NH 03301

Agency

Name: MICHELETTI & ASSOCIATES
Agency Processor: Nancy Jo Jeffery
Licensed Producer: MICHELETTI, DAVID J

Bond Details

Product

Category: ERISA
Title of Obligation: ERISA Fidelity

Policy Period

Transaction Effective: 02/12/2014
From: 02/12/2014
To: Until Cancelled

Plan Details

All plans of this Sponsor are covered as Named Insureds.

Limits

Policy Limit: $100,000 (Includes Inflation Guard)

Underwriting Questions

Yes No

- Has the Sponsor or have any of the Applicant's plans experienced any prior or pending fidelity loss?
- Has the Sponsor or have any of the Applicant's plans been declined coverage by another insurance company?
- Is the Sponsor of any of the Applicant's plans a Union?
- Do any of the Applicant's plans contain Non-Qualifying Assets?

Premium & Billing

Current Term Details

Total Premium: $234.00
Commission %: 20.0%

Billing Type: Agency Bill

From: 02/12/2014
To: 02/12/2017

Renewal Details

Renewal Type: Automatic
Renewal Generated: 100 days prior to 02/12/2017

From: 02/12/2017
To: 02/12/2020

Policy Package

Bond packages can only be viewed for bonds issued online. View Final Policy Package

Forms
Execution Instructions
Premium Evidence
ERISA Fidelity Policy - Declarations
ERISA Fidelity Policy - Terms and Conditions
New Hampshire Changes Endorsement
New Hampshire Notice
Producer Compensation Letter

Uploaded Documents

Document Name	Document Type	Date Uploaded	Size (KB)	User	Notes	Status
Form 5500.docx	IRS Form 5500	1/31/2014	13	bond-portal1		Ready

Close

Opening a Submission Record allows you to view submission details and resume an unfinished submission.

Submission Summary

Submission #: 106047670   Principal/Insured: ABC Corporation
Bond Type: ERISA Fidelity

Print

Customer Information

Account

Name: ABC Corporation
Address 1: 1 Main Street
Address 2:
City, State, Zip Code: BOULDER, CO 80301
Account Type: Other

Principal/Insured

Sponsor Name: ABC Corporation
Address 1: 1 Main Street
Address 2:
City, State, Zip Code: BOULDER, CO 80301

Agency

Name:
Agency Processor:
Licensed Producer:

Bond Details

Product

Category: ERISA
Title of Obligation: ERISA Fidelity

Policy Period

From: 02/13/2014
To: Until Cancelled

Plan Details

All plans of this Sponsor are covered as Named Insureds.

Limits

Policy Limit: $100,000 (Includes Inflation Guard)

Underwriting Questions

Yes No

○ ◉ Has the Sponsor or have any of the Applicant's plans experienced any prior or pending fidelity loss?
○ ◉ Has the Sponsor or have any of the Applicant's plans been declined coverage by another insurance company?
○ ◉ Is the Sponsor of any of the Applicant's plans a Union?
○ ◉ Do any of the Applicant's plans contain Non-Qualifying Assets?

Premium & Billing

Current Term Details

Total Premium: $234.00   Billing Type: From: 02/13/2014
Commission %: 20.0%   To: 02/13/2017

Renewal Details

From: 02/13/2017
To: 02/13/2020

Close

Resuming an Unfinished Submission

- From the "*Start a Bond*" screen, you can continue work on a bond that has yet to be issued.

- From this screen, you will re-start at Step 1. All data that was present when the submission was paused has been retained and is displayed, providing the ability to visually confirm it and change it if necessary. As you progress through the five steps of the submission process, all data is re-validated.

Note: Data in unfinished submissions may have been updated by Travelers between the time the submission was paused and when it is resumed. Updates to data occur when customer or product information is changed and Travelers learns of the changes. Updates may also be made when Travelers makes changes such as revising underwriting questions for a product.

Downloading Records

Records can be exported to Microsoft® Office Excel. Each exported record shows both the basic identifying information and the additional information seen when the record is opened online.