

## 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.

Submission #	Principal/Insured	Obligee	Bond Type	Expiration Date	Renewal Status	Actions
100047003	gringold/hughes	N/A	ERISA Fidelity	05/31/2014	Unfinished	Open
100047002	Test_P01	N/A	ERISA Fidelity	07/31/2014	Unfinished	Open
100047007	Test	N/A	ERISA Fidelity	01/31/2014	Unfinished	Open
100047009	Wash	Washington State Department of Licensing	Motor Vehicle Dealer Bond	04/15/2014	Unfinished	Open
100047024	Test	Tennessee Motor Vehicle Commission	Motor Vehicle Dealer Bond	01/30/2014	Unfinished	Open
100047023	ABC Corporation	N/A	ERISA Fidelity	01/30/2014	Referred	Open
100047027	Test_P01	N/A	ERISA Fidelity	01/30/2014	Unfinished	Open
100047015	Jim Jones	State of Texas, Comptroller of Public Accounts	Sales Tax Bond	01/30/2014	Referred	Open
100047006	Jim A.	Kansas Department of Revenue	Liquor Drink Tax Bond	01/30/2014	Unfinished	Open
100047071	The Jones Group	N/A	ERISA Fidelity	01/30/2014	Referred	Open

**Active Bonds**

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

Bond #	Principal/Insured	Obligee	Bond Type	Expiration Date	Renewal Status	Actions
100047491	2 TRAIL METALLURGICAL PC	N/A	ERISA Fidelity	04/04/2014	Active	Open
100047009	Comptrol	N/A	ERISA Fidelity	03/25/2011	Renewal Pending	Open
100047003	WASH STATE	CITY AND COUNTY OF SAN FRANCISCO	Contracting-Excess	02/13/2013	Renewal Pending	Open
100047009	WASTE MANAGEMENT BOARD	California Integrated Waste Management Board	Waste Tire Hauler Bond	03/01/2014	Active	Open
100047023	ABC Corp	N/A	ERISA Fidelity	03/01/2014	Active	Open
100047028	WASH STATE	N/A	ERISA Fidelity	02/08/2014	Active	Open
100047009	WASH STATE	N/A	ERISA Fidelity	02/12/2014	Active	Open
100047015	ABC Corporation	N/A	ERISA Fidelity	02/12/2014	Active	Open
100047009	ABC Corporation	N/A	ERISA Fidelity	02/12/2014	Active	Open

**Renewals**

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

Product: Surety  ERISA

Bond #:

# of Days:

Additional Search Criteria:

Search Results: 6

Bond #	Principal/Insured	Bond Type	Expiration Date	Renewal Generated	Renewal Type	Conversion Status	Actions
104473243	WEST VALLEY GAMBIT SERVICES INC	ERISA Compliance	02/10/2014	11/02/2013	Automatic	No	Open
102720929	WINDRIVE DBA/BA SHARSH STEEL & METALWORKS	ERISA Compliance	03/14/2014	12/04/2013	Automatic	No	Open
104501900	PACIFIC NATION ART INC	ERISA Compliance	03/24/2014	12/27/2013	Automatic	No	Open
100001010	WINDRIVE DBA/BA SHARSH STEEL & METALWORKS	ERISA Compliance	03/20/2014	12/05/2013	Automatic	No	Open

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

**Submission Search**

My Agency's Work: Search

Find a Submission or Bond

**Submission Search** Bond Search

Search for a submission by Number or Principal/Insured

Number: 106047623  
 Principal/Insured:

Search Results: Submissions

Your search returned 1 result(s).

Submission #	Principal/Insured	Obligee	Bond Type	Agency Processor	Last Updated	Status	Actions
106047623	ABC Corporation	N/A	ERISA Fidelity	Sharon Longwell	01/30/2014	Referred	Open

**Bond Search**

My Agency's Work: Search

Find a Submission or Bond

Submission Search **Bond Search**

Search for a bond by Number or Principal/Insured.

Number: 106047618  
 Principal/Insured:

Search Results: Bonds

Your search returned 1 result(s).

Bond #	Principal/Insured	Obligee	Bond Type	Agency Processor	Effective Date	Status	Actions
106047618	ABC Corporation	N/A	ERISA Fidelity	Sharon Longwell	02/12/2014	Active	Open

Finds unfinished bonds either in the process of being issued but paused by the agency user or those that were referred to the underwriter. A submission is not an active bond.

Finds bonds that are in an active status (i.e., in-force).

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.

**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	<a href="#">View</a>
New Business	01/31/2014	02/12/2014	02/12/2014	02/12/2017	\$100,000.00	\$234.00	Process eCommerce	<a href="#">View</a>

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: WICHELETT & ASSOCIATES  
 Agency Processor: Nancy Jo Jeffrey  
 Licensed Producer: WICHELETT, 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

**Forms**  
 Bond packages can only be viewed for bonds issued online. [View Final Policy Package](#)

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

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.

**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](#)

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**Customer Information**

<b>Account</b> Name: ABC Corporation Address 1: 1 Main Street Address 2: City, State, Zip Code: BOULDER, CO 80301 Account Type: Other	<b>Principal/Insured</b> Sponsor Name: ABC Corporation Address 1: 1 Main Street Address 2: City, State, Zip Code: BOULDER, CO 80301
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**Agency**  
Name: [REDACTED]  
Agency Processor: [REDACTED]  
Licensed Producer: [REDACTED]

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**Bond Details**

<b>Product</b> Category: ERISA Title of Obligation: ERISA Fidelity	<b>Policy Period</b> From: 02/13/2014 To: Until Cancelled
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<b>Plan Details</b> All plans of this Sponsor are covered as Named Insureds.	<b>Limits</b> Policy Limit: \$100,000 (Includes Inflation Guard)
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**Underwriting Questions**

Yes	No	
<input type="radio"/>	<input checked="" type="radio"/>	Has the Sponsor or have any of the Applicant's plans experienced any prior or pending fidelity loss?
<input type="radio"/>	<input checked="" type="radio"/>	Has the Sponsor or have any of the Applicant's plans been declined coverage by another insurance company?
<input type="radio"/>	<input checked="" type="radio"/>	Is the Sponsor of any of the Applicant's plans a Union?
<input type="radio"/>	<input checked="" type="radio"/>	Do any of the Applicant's plans contain Non-Qualifying Assets?

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**Premium & Billing**

<b>Current Term Details</b> Total Premium: \$234.00 Commission %: 20.0%	<b>Billing Type:</b>	<b>From:</b> 02/13/2014 <b>To:</b> 02/13/2017
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**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.

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

1. Bond Type & Customer 2. Bond Details 3. Underwriting Decision 4. Bill & Issue 5. Print Package

Bond Type Customer

**Sponsor Information**

- \* Plan Sponsor Name: ABC Corporation (As it appears on IRS Form 5500)
- \* Address 1: 1 Main Street
- Address 2:
- \* City, State, Zip Code: BOULDER CO 80301
- Phone:
- \* Account Type: Other
- The name/address above is considered your Customer Account unless you click here to change.

**Plan Names (Optional)**

The policy covers all eligible employee benefit plans of the sponsor. You also have the option to name the individual plans and list them on an endorsement. By doing so, you will need to add/remove/update plan names as changes occur to keep the endorsement current.

Plan Name	
Enter Plan Name	X
Enter Plan Name	X
Enter Plan Name	X

Add more

**Agency**

- \* Agency: MICHELETTI & ASSOCIATES SAN JOSE, CA
- \* Agency Processor: BRIAN CHAFFIN
- \* Licensed Producer: MICHELETTI, DAVID J.

\* Required

Previous Exit Next >

**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.



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