

Change Capabilities with Travelers Click®

HOW TO MAKE A CHANGE TO AN ERISA POLICY

The **Travelers Click** platform provides the ability to make changes to both **Travelers Click** and non-**Travelers Click** originated ERISA policies, except for SAA/ERISA Compliance policies. The following changes can be made:

- Sponsor Information – name and address.
- Policy Information – policy limit, change inflation guard coverage, and/or add plan names.
- Agency Personnel Change – agency processor or licensed producer.

How to Initiate a Change

A change can be made from three different places within **Travelers Click**:

1. Active Bonds queue
2. Bond Search results
3. Bond Summary screen

Initiate a Change from the Active Bonds Queue

1. Access the Active Bonds queue from the My Agency's Work menu and select a policy from the list.
2. Click on the dropdown menu in the Actions column and choose Bond Change.

TRAVELERS Travelers Click®

My Preferences [Icons]

Welcome, Test

Start a Bond

My Agency's Work

Work in Progress

Active Bonds

Renewals

Search

My Agency's Customers

Browse & Price Bonds

Access Training

View Authority

My Notifications

Notifications (0) View

My Underwriter

Surety:
Lisa L McDaniel
800-873-1477
Ext. 458-2212
eMail

ERISA:
Tracy A Albertelli
800-873-1477
Ext. 458-2202
eMail
View all contacts

My Agency's Work: Active Bonds

Your agency's active bonds appear below. Click the plus sign (+) to view additional information or choose an option under **Actions**.

Export

Bond #	Principal/Insured	Obligor	Bond Type	Agency Processor	Effective Date	Status	Actions
106047491	2 YEAR METALLURGICAL INC	N/A	ERISA Fidelity	Clementine Jones	05/28/2014	Active	Open
106047609	Campbell Soup	N/A	ERISA Fidelity	Berta Grubbs	05/24/2014	Active	Open
106047603	acornet	N/A	ERISA Fidelity	WATT MICHELETTI	04/04/2014	Active	Open
105586750	DENNIS CAMEL	CITY AND COUNTY OF SAN FRANCISCO	Contracting-Excess Weight/Highway/Street	JAMES LADEAU	03/25/2011	Renewal Pending	Open
103517462	GILTON SOLID WASTE MANAGEMENT	California Integrated Waste Management Board	Waste Tire Hauler Bond	MELESSA PUTTANAL	03/13/2013	Renewal Pending	Open
106047578	ABC Corp	N/A	ERISA Fidelity	MELESSA PUTTANAL	03/01/2014	Active	Open
106047478	Highly	N/A	ERISA Fidelity	JULIE LONGWORTH	02/26/2014	Active	Open
106047509	abc retirement plan	N/A	ERISA Fidelity	WATT MICHELETTI	02/12/2014	Active	Open
106047618	ABC Corporation	N/A	ERISA Fidelity	Sharon Longworth	02/12/2014	Active	Open
106047625	ABC Corporation	N/A	ERISA Fidelity	Susan Schultz	02/12/2014	Active	Open

<< first < prev 1 2 3 4 5 6 7 8 9 10 (1 of 15) next > last >>

Show

Open
Bond Change
Edit Personnel
Reprint Bond Package
Request to Cancel

Initiate a Change from the Bond Search Results

1. Search for a policy using basic or advanced search criteria and select it from the search results.
2. Click on the dropdown menu in the Actions column and choose Bond Change.

The screenshot displays the Travelers Click web application interface. The top navigation bar includes the Travelers logo, the text "Travelers Click®", and links for "My Preferences", a phone icon, an email icon, and a help icon. A welcome message "Welcome, Test" is visible in the top right.

The left sidebar contains several navigation sections:

- Start a Bond** (red button)
- My Agency's Work**
 - Work in Progress
 - Active Bonds
 - Renewals
 - Search**
- My Agency's Customers**
 - Browse & Price **Bonds**
 - Access **Training**
 - View **Authority**
- My Notifications**
 - Notifications (0) [View](#)
- My Underwriter**
 - Surety:** Lisa L. McDaniel, 800-873-1477, Ext. 458-2212, [eMail](#)
 - ERISA:** Tracy A. Albertelli, 800-873-1477, Ext. 458-2202, [eMail](#)
 - [View all contacts](#)

The main content area is titled "My Agency's Work: Search" and contains a "Find a Submission or Bond" section. It has two tabs: "Submission Search" and "Bond Search". The "Bond Search" tab is active, showing a search form with the following details:

- Search for a bond by **Number** or **Principal/Insured**.
- ☒ **Number:** 106047618
- ☐ **Principal/Insured:**
- Search** and **Clear** buttons.

Below the search form, the "Search Results: Bonds" section shows "Your search returned 1 result(s)." and a table with the following data:

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

The "Actions" dropdown menu for the first result is open, showing the following options: Open, **Bond Change** (highlighted with a red circle), Edit Personnel, Reprint Bond Package, and Request to Cancel. A red arrow points from the "Bond Change" option in the dropdown to a larger, detailed view of the "Actions" dropdown menu on the right side of the image.

This image shows a detailed view of the "Actions" dropdown menu. The menu is titled "Actions" and contains the following options: Open, **Bond Change** (highlighted with a red circle), Edit Personnel, Reprint Bond Package, and Request to Cancel. A red arrow points from the "Bond Change" option in the dropdown to the main screenshot of the Travelers Click application.

Initiate a Change from the Bond Summary

1. From the list of policies in either the Active Bonds queue or Bond Search results, select the one to be changed.
2. Choose () under Actions or click on the Bond Number (106047618) to view the Bond Summary.
3. Select the type of change from the dropdown options.

The screenshot shows a dropdown menu titled "What would you like to do with this bond?". The menu is open, displaying a list of options: "Bond Change", "Edit Personnel", "Reprint Bond Package", and "Request to Cancel". A "VIEW" button is visible at the bottom right of the menu.

	Limit	Premium	Processor
7	\$100,000.00	\$234.00	Process eCommerce

TRAVELERS  Travelers Click® [My Preferences](#)    "Welcome, Test"

Start a Bond

My Agency's Work: Active Bonds

Your agency's active bonds appear below. Click the plus sign (+) to view additional information or choose an action.

Bond Summary		Bond #:	Principal/Insured:	Bond Type:
		106047618	ABC Corporation	ERISA Fidelity

What would you like to do with this bond?

- Select-
- Bond Change
- Edit Personnel
- Reprint Bond Package
- Request to Cancel

Transaction Type	Process Date	Transaction Effective	Billing From	Billing To	Limit	Premium	Processor	Actions
New Business	01/30/2014	02/12/2014	02/12/2014	02/12/2017	\$100,000.00	\$234.00	Process eCommerce	Open

[Print](#)

Customer Information

Account	Principal/Insured
Name: ABC Corporation Address 1: 1 Main Street	Sponsor Name: ABC Corporation Address 1: 1 Main Street

How to Make a Change to a Policy

Step 1a: Bond Details (Change Information)

The screen is populated with the current term sponsor, policy, and agency personnel information. Changes to these items can be made here.

An effective date for the changes must also be entered.

Start a Bond Change Bond #: [106047618](#) Sponsor Name: ABC Corporation Bond Type: ERISA Fidelity

1. Bond Details ? 2. Underwriting Decision ? 3. Bill & Issue ? 4. Print Package ?

Bond Details Underwriting

Review the **Sponsor, Policy and Agency** information and update as needed. Click **Next** to continue with the bond change process.

Current Billing Term: From: 02/12/2014 To: 02/12/2017

* **Transaction Effective Date:**

Sponsor Information

* **Plan Sponsor Name:**
(As it appears on IRS Form 5500)

* **Address 1:**
Address 2:

* **City, State, Zip Code:**

Policy Information

* **Policy Limit: (\$)** [Limit Worksheet](#)

☐ Remove Inflation Guard ?

☐ Add Plan Names

Agency

Agency: 024069, MICHELETTI & ASSOCIATES, SAN JOSE, CA

* **Agency Processor:**

* **Licensed Producer:**

* Required

[Previous](#) [Cancel](#) [Next](#)

Step 1b: Bond Details (Underwriting)

Answer any underwriting questions if required.

Start a Bond Change

Bond #: [106047618](#)

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details ?

2. Underwriting Decision ?

3. Bill & Issue ?

4. Print Package ?

✓ Bond Details

Underwriting

Please answer the question(s) below.

Yes

No

☐

☐

Do any of the Applicant's plans contain Employer Securities?

< Previous

Cancel

Next >

Step 2: Underwriting Decision

An underwriting decision is immediately provided, along with any premium for the transaction.

Start a Bond Change

Bond #: 106047618

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details

2. Underwriting Decision

3. Bill & Issue

4. Print Package

Underwriting Decision

APPROVED! Please click Next to continue to bill and issue this policy.

Sponsor Information

Plan Sponsor Name: ABC Corporation

Address 1: 100 Park Street

Address 2:

City, State, Zip Code: PAWTUCKET, RI 02860

Limits

Policy Limit: \$100,000

Current Billing Term

From: 02/12/2014

To: 02/12/2017

Transaction Effective: 03/12/2014

Transaction Premium

\$0.00

Premium Details

Policy Premium: \$0.00

Commission %: 20.0%

Commission \$: \$0.00 (Included in premium)

Tax: \$0.00

Surcharge: \$0.00

Transaction Premium: \$0.00

Previous

Cancel

Next

Step 3a: Bill & Issue (Billing Information)

This tab shows previously entered billing information (Agency Bill or Direct Bill) for the current term. For non-premium bearing changes, billing type information is not displayed.

Premium Bearing Change

Start a Bond Change

Bond #: 106047618

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details

2. Underwriting Decision

3. Bill & Issue

4. Print Package

Billing Information

Issue Package

Current Billing Type: Direct Bill

Direct Bill #: 9375L5077

An invoice for this transaction will be sent to the following billing address:

ABC Corporation

100 Park Street

PAWTUCKET, RI 02860

Current Billing Term

From: 02/12/2014

To: 02/12/2017

Transaction Effective: 03/12/2014

An Inflation Guard surcharge will be applied at renewal.

Non-Premium Bearing Change

Start a Bond Change

Bond #: 106047618

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details

2. Underwriting Decision

3. Bill & Issue

4. Print Package

Billing Information

Issue Package

Additional premium will not be charged for this transaction.

Current Billing Term

From: 02/12/2014

To: 02/12/2017

Transaction Effective: 03/12/2014

An Inflation Guard surcharge will be applied at renewal.

Step 3b: Bill & Issue (Issue Package)

Allows the user to:

1. Preview the policy package, which includes the change endorsement and related documentation; and
2. Issue the change!

Start a Bond Change

Bond #: [106047618](#)

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details ?

2. Underwriting Decision ?

3. Bill & Issue ?

4. Print Package ?

Billing Information

Issue Package

The policy package is almost ready to be issued. Please take a moment to preview the documents below as you will be unable to make changes after **Bill & Issue**.

Forms

Execution Instructions

Premium Evidence

Policy Changes Endorsement

Preview Policy Package

< Previous

Cancel

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

POLICY CHANGE ENDORSEMENT

This endorsement changes ERISA Fidelity Policy: Policy Number: 106047618

Issued By: Travelers Casualty and Surety Company of America

Issued To: ABC Corporation

Effective date: March 12, 2014 12:01 a.m.

Process date:

It is agreed that:

1. The Declarations are amended, as indicated below by ☒:

☒ ITEM 1: Name and Address of the entity sponsoring the Insured Plan(s)

☐ The name of the entity sponsoring the Insured Plans is changed:

From:

To:

☒ The address of the entity sponsoring the Insured Plans is changed:

From: 1 Main Street, PAWTUCKET, RI 02860

To: 100 Park Street, PAWTUCKET, RI 02860

☐ ITEM 3: Policy Period is amended to read:

Policy Period: Effective from 12:01 a.m. on ; or

☐ 12:01 a.m. on the effective date of the cancellation or termination of this Policy.

☐ ITEM 4: Limit of Insurance:

The Limit of Insurance in ITEM 4 is changed

From: \$100,000.00

To: \$100,000.00

(This amount is the summation of the Limits of Insurance for each insured as of the Policy effective date and as more fully set forth in section II. LIMIT OF INSURANCE with Inflation Guard.)

EFP-19001 Ed. 02-14

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Step 4: Print Package

View, print, or save the policy change package and upload supplemental documentation, if needed.

Start a Bond Change

Bond #: 106047618

Sponsor Name: ABC Corporation

Bond Type: ERISA Fidelity

1. Bond Details

2. Underwriting Decision

3. Bill & Issue

4. Print Package

Print Package

Congratulations! The policy is issued.

Click to save a final copy to your computer or print.

View Final Policy Package

Include Premium Evidence and Execution Instructions

Click to upload other supporting documents.

Upload Documents

Document Name	Document Type	Date Uploaded	Size (KB)	User	Notes	Status
---------------	---------------	---------------	-----------	------	-------	--------

Financial statements or other supporting documents not uploaded at this time can be emailed to TravelersClickERISA_NonProd@travelers.com or faxed to 866.785.2463.

Close

How to Edit the Billing Method

The Billing Method can be changed for policies in either the Active Bonds queue or Bond Search results.

1. Select a policy from the list.
2. Click on the dropdown menu in the Actions column and choose Edit Billing Type.
3. Make the necessary changes in the window displayed.

The screenshot shows the 'Edit Billing Type' window for Bond # 106047509. The window title is 'Edit Billing Type'. The main content area displays the current billing term (From: 02/12/2014 To: 02/12/2017) and the next billing term (From: 02/12/2017 To: 02/12/2020). The billing option is set to 'Agency Bill'. Below this, there is a section to 'Change the billing option for the next billing term:' with two radio buttons: 'Agency Bill' and 'Direct Bill - Invoice'. The 'Direct Bill - Invoice' option is selected. There is a button 'Add Billing Details' and a table with columns: 'Direct Bill #', 'Bill To', 'Name', 'Address 1', and 'Address 2'. The table has one row with the following data: '9495L1077', 'Principal/Insured', 'abc retirement plan', '1234 Maple', and 'OVERLAND PARK, KS 66213'. A red arrow points from the 'Edit Billing Type' dropdown menu in the top right corner to the 'Edit Billing Type' button in the window title bar. Another red arrow points from the 'Submit' button at the bottom to the 'Ok' button in the 'Confirmation' dialog box.

Bond #: 106047509
Principal/Insured: abc retirement plan
Bond Type: ERISA Fidelity

CURRENT BILLING TERM: From: 02/12/2014 To: 02/12/2017
Billing Option: Agency Bill

NEXT BILLING TERM: From: 02/12/2017 To: 02/12/2020
Billing Option: Agency Bill

Change the billing option for the next billing term:

☐ Agency Bill
☒ Direct Bill - Invoice

Select the billing name and address or **Add Billing Details**

Direct Bill #	Bill To	Name	Address 1	Address 2
☒ 9495L1077	Principal/Insured	abc retirement plan	1234 Maple	OVERLAND PARK, KS 66213

Confirmation

A change to the Billing Type for Bond #106047509 will take effect at renewal.

Ok

Cancel **Submit**

The ability to add a new address is also available from this screen.

Edit Billing Type

Bond #: 106047509

Principal/Insured: abc retirement plan

Bond Type: ERISA Fidelity

CURRENT BILLING TERM:

From: 02/12/2014

To: 02/12/2017

Billing Option: Agency Bill

NEXT BILLING TERM:

From: 02/12/2017

To: 02/12/2020

Billing Option: Direct Bill

Direct Bill: Invoice

Direct Bill #: 9495L1077 abc retirement plan 1234 Maple OVERLAND PARK, KS 66213

Change the billing option for the next billing term:

Agency Bill

Direct Bill - Invoice

Select the billing name and address or

Add Billing Details

	Direct Bill #	Bill To	Name	Address 1	Address 2	City	State	Zip Code
☒	9495L1077	Principal/Insured	abc retirement plan	1234 Maple		OVERLAND PARK	KS	66213

Add New Address

Select a Bill To name and provide the following information.

Bill To:

☒ Principal/Insured: abc retirement plan

☐ Customer Account: ABC Holding Company

☐ Alternate Payor Name:

* Address 1:

1234 Maple

Address 2:

* City, * State, * Zip Code:

OVERLAND PARK

KS

66213

* Phone:

* Required

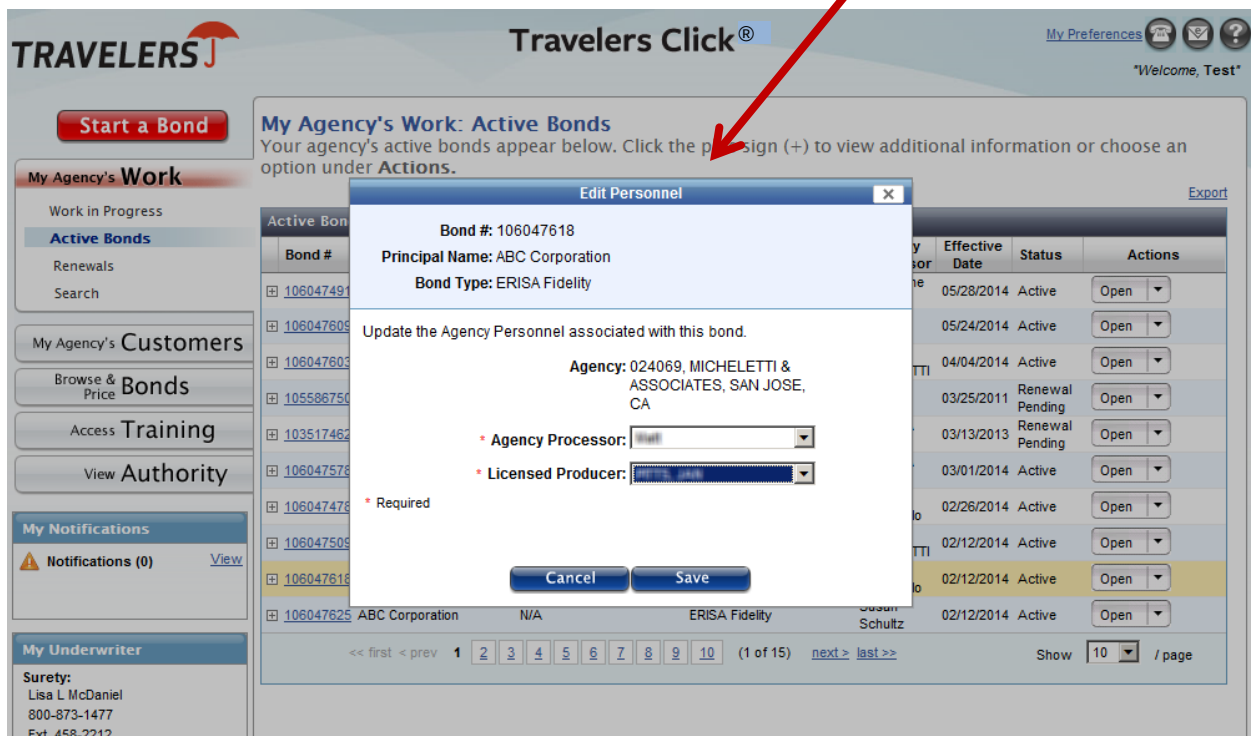
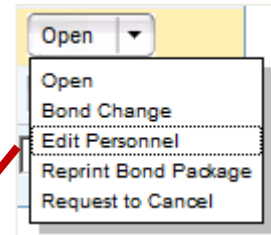
Cancel

Save

How to Edit Agency Personnel

Agency personnel information can be edited for policies listed in either the Active Bonds queue or Bond Search results.

1. Select a policy from the list.
2. Click on the dropdown menu in the Actions column and choose Edit Personnel.
3. Make the necessary changes in the window displayed



Travelers Click®

My Preferences [Phone] [Email] [Help]

"Welcome, Test"

Start a Bond

My Agency's Work

- Work in Progress
- Active Bonds**
- Renewals
- Search

My Agency's Customers

- Browse & Price
- Bonds**
- Access Training
- View Authority

My Notifications

Notifications (0) [View](#)

My Underwriter

Surety:
Lisa L. McDaniel
800-873-1477
Ext. 458-2212

My Agency's Work: Active Bonds
Your agency's active bonds appear below. Click the plus sign (+) to view additional information or choose an option under Actions.

Active Bonds

Bond #	Principal Name	Bond Type	Effective Date	Status	Actions
106047491	ABC Corporation	ERISA Fidelity	05/28/2014	Active	Open
106047605	ABC Corporation	ERISA Fidelity	05/24/2014	Active	Open
106047603	ABC Corporation	ERISA Fidelity	04/04/2014	Active	Open
105586750	ABC Corporation	ERISA Fidelity	03/25/2011	Renewal Pending	Open
103517462	ABC Corporation	ERISA Fidelity	03/13/2013	Renewal Pending	Open
106047576	ABC Corporation	ERISA Fidelity	03/01/2014	Active	Open
106047476	ABC Corporation	ERISA Fidelity	02/26/2014	Active	Open
106047509	ABC Corporation	ERISA Fidelity	02/12/2014	Active	Open
106047616	ABC Corporation	ERISA Fidelity	02/12/2014	Active	Open
106047625	ABC Corporation	ERISA Fidelity	02/12/2014	Active	Open

Edit Personnel

Bond #: 106047618

Principal Name: ABC Corporation

Bond Type: ERISA Fidelity

Update the Agency Personnel associated with this bond.

Agency: 024069, MICHELETTI & ASSOCIATES, SAN JOSE, CA

* Agency Processor: [Dropdown]

* Licensed Producer: [Dropdown]

* Required

Cancel Save

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Show 10 / page

Request to Change for ERISA SAA/Compliance Policies

Changes to ERISA/SAA Compliance policies are initiated through a request in Click that will be handled by your Travelers ERISA underwriter. This option will only be available for these types of policies; in the event that this is not applicable to the policy in question, you will see the option for Bond Change in the Actions drop down list.

For these types of policies you will see "Request to Change" in the drop down list under Actions:

The screenshot displays the Travelers Click web application interface. The top header includes the Travelers logo, the text "Travelers Click®", and user preferences. The left sidebar contains navigation links for "My Agency's Work", "My Agency's Customers", "My Notifications", and "My Underwriter". The main content area is titled "My Agency's Work: Search" and features a search bar with "Submission Search" and "Bond Search" tabs. Below the search bar, there are radio buttons for "Number" (selected) and "Principal/Insured", with input fields for "105157002" and an empty field respectively. "Search" and "Clear" buttons are at the bottom right of the search area. Below the search results, a table titled "Search Results: Bonds" shows one result. The table has columns for Bond #, Principal/Insured, Obligor, Bond Type, Agency Processor, Effective Date, Status, and Actions. The first row contains the bond number 105157002, Principal/Insured AAPF, INC., Obligor N/A, Bond Type ERISA Compliance, Agency Processor Constance Jones, Effective Date 07/31/2011, and Status Active. The Actions column for this row has a dropdown menu open, showing options: Open, Reprint Bond Package, Request to Cancel, and Request to Change. The "Request to Change" option is highlighted with a red box.

Start a Bond

My Agency's Work

- Work in Progress
- Active Bonds
- Renewals
- Search**

My Agency's Customers

- Browse & Price **Bonds**
- Access **Training**
- View **Authority**

My Notifications

Notifications (0) [View](#)

My Underwriter

Surety:
Lisa L. McDaniel
800-873-1477
Ext. 458-2212

Travelers Click®

[My Preferences](#)

"Welcome, Test"

My Agency's Work: Search

Find a Submission or Bond

Submission Search **Bond Search**

Search for a bond by **Number** or **Principal/Insured**.

☒ **Number:**

☐ **Principal/Insured:**

Search **Clear**

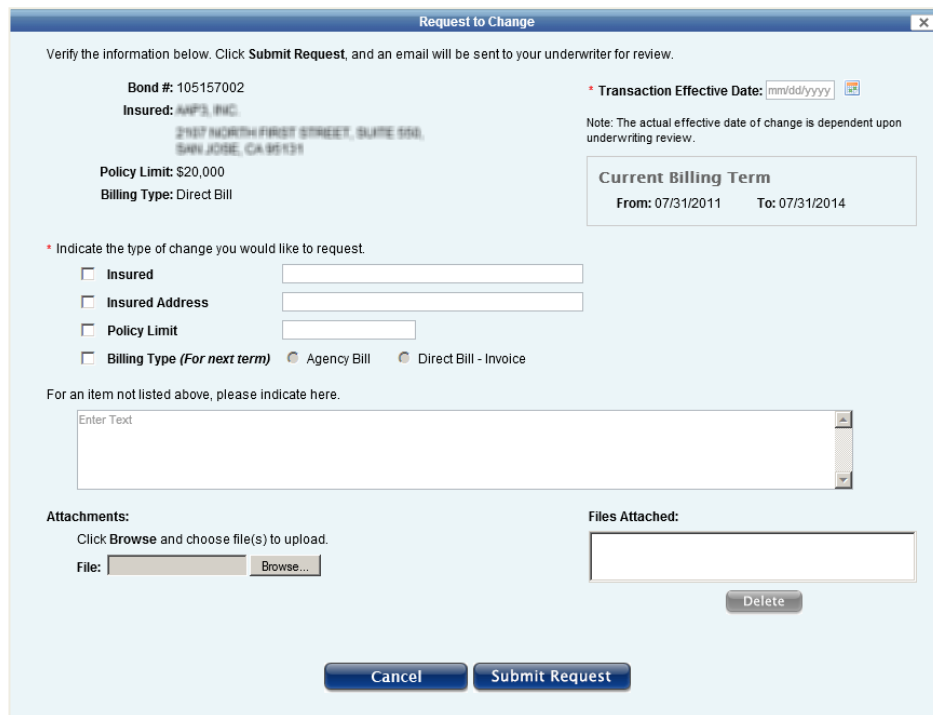
[Export](#)

Search Results: Bonds

Your search returned 1 result(s).

Bond #	Principal/Insured	Obligor	Bond Type	Agency Processor	Effective Date	Status	Actions
105157002	AAPF, INC.	N/A	ERISA Compliance	Constance Jones	07/31/2011	Active	Open Reprint Bond Package Request to Cancel Request to Change

Clicking "Request to Change" will bring up a window for you to enter the items you wish to have changed on the policy:



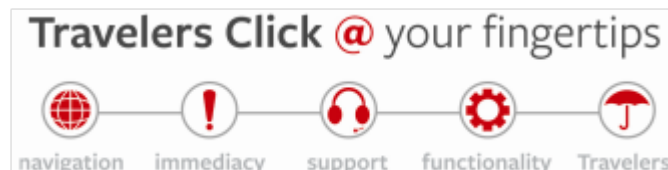
The "Request to Change" window is a light blue dialog box with a title bar. It contains the following fields and controls:

- Verify the information below. Click **Submit Request**, and an email will be sent to your underwriter for review.**
- Bond #:** 105157002
- Insured:** ANFL INC.
2107 NORTH FIRST STREET, SUITE 550,
SAN JOSE, CA 95131
- Policy Limit:** \$20,000
- Billing Type:** Direct Bill
- Transaction Effective Date:** mm/dd/yyyy (calendar icon)
- Note:** The actual effective date of change is dependent upon underwriting review.
- Current Billing Term:**
From: 07/31/2011 To: 07/31/2014
- Indicate the type of change you would like to request.**
 - ☐ Insured
 - ☐ Insured Address
 - ☐ Policy Limit
 - ☐ Billing Type (For next term)
 - ☐ Agency Bill
 - ☐ Direct Bill - Invoice
- For an item not listed above, please indicate here.**
Enter Text (text area)
- Attachments:**
Click **Browse** and choose file(s) to upload.
File: (text field) **Browse...** (button)
- Files Attached:**
(text field) **Delete** (button)
- Buttons:** **Cancel** (button), **Submit Request** (button)

Simply enter the items you want to change, the effective date of the change, and click Submit Request. You will receive the following message:



Your underwriter will automatically receive the request and will review it for processing. An email will be sent to you along with the details submitted with your request. **If you do not want to receive these confirmation emails please go to My Preferences in Travelers Click and disable the checkbox for this option.**



Travelers Casualty and Surety Company of America and its property casualty affiliates.

One Tower Square
Hartford, CT 06183

travelers.com/click

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