

Frequently Asked Questions: Travelers Click®

How do I access the Travelers Click platform?

Travelers Click can be accessed through Travelers' agency website For Agents at www.travelers.com/foragents. If you have any issues, contact the Agency User Administrator in your office or call our Help Desk at 800.842.2522 and select menu option one to get access to **Travelers Click**.

Does everyone in my agency need an individual ID and password to use **Travelers Click**?

Yes, anyone in your agency that will use **Travelers Click** will need an individual ID and password to Travelers For Agents, which will also provide access to **Travelers Click**.

Who can help me with a lost or forgotten user ID and password for Travelers For Agents?

Call our Help Desk at 800.842.2522 and select menu option one or you can click on the forgotten password link on the For Agents login page.

Do I need to use my co-worker's ID and password to submit business on his/her behalf?

No, as co-workers with access to the same agency codes you can logon to For Agents with your own ID and password to conduct work on behalf of each other inside **Travelers Click**. This is a feature that helps protect Travelers and your agency while still allowing your agency to balance workloads during peak periods, vacations, illness or other absence.

Do I automatically get access to Travelers Click if I already have an ID and password for For Agents?

No, the Agency User Administrator in your agency needs to update your For Agents enrollment to provide you access to **Travelers Click**.

What types of transactions can I process through Travelers Click?

Currently you can perform many different transactions, including (but not limited to) processing of New Business, bond/policy changes, updating agency personnel, reprinting bond packages, and editing billing type.

Which bond types and business are supported on Travelers Click?

The following bond types and business are supported on **Travelers Click**:

- Court
- License and Permit
- Miscellaneous
- Notary
- Probate
- Public Official
- ERISA Fidelity

Additionally, both the rate chart feature and the View Submission Requirements feature are available within **Travelers Click**.

How and when will I get an underwriting decision when I submit new business through the site?

The underwriting decision is displayed right in **Travelers Click**, on the third step of the five step new business submission process.

Is the online underwriting decision final in Travelers Click or is it subject to review by an underwriter?

Approvals and declinations are final. Under some circumstances, the site will refer a submission to your underwriter who will review the submission and contact you with a response.

What causes a submission to be referred by the site and what happens?

Referrals occur when **Travelers Click** is unable to make the proper underwriting decision based upon the customer and bond type details collected, and referrals are sent automatically to your underwriter. The submission is then held for you in the site's "Work In Progress" area that is found in the "My Agency's Work" section of the site. Upon reviewing the referral the underwriter will respond directly to you.

How does the five-step process work for submitting business?



- **Step 1** identifies your customer and the bond type needed.
- **Step 2** collects underwriting details.
- **Step 3** makes the underwriting decision.
- **Step 4** completes the forms, arranges the billing and issues the bond.
- **Step 5** compiles the forms, including the bond form with electronic signature and seal, if allowable. It also allows you to upload supplemental information to Travelers if necessary.

Can I use my own bond form?

Travelers Click has over 3,000 bond forms available in the Travelers [Bond Forms Library](#). In those limited number of cases where we don't have the form you need, the site will make you aware of that and ask you to upload the completed bond form so that it can be made a part of the transaction record. Also, if you choose to use your own form for an obligation that already has a version in the Travelers library, you must provide a copy of the form you executed to us.

How do I find a bond form in your library?

You can search the Travelers Bond Forms Library at bondforms.travelers.com. Or, in Travelers Click, search for a bond type, which will provide a list to select from. At the end of each row in the list you will see an icon (📄) indicating we have the form or (🔒) for those not available.

Is there a way to confirm the bond type I selected is the one my client needs before I get too far into the submission process?

Yes, in the first step of the submission when you search for bond type you will get a list from which to select. At the end of each row in the list you will see an icon (📄) indicating we have the form for that bond type. You can click on the form icon, which will open it for you to view the form and confirm that it is the one you want.

Is there a way to determine the information needed for my submission prior to starting a new bond?

Yes. Within Click, simply access the View Submission Requirements link associated to each bond, by selecting the Action drop down within the search results of the Browse & Price screen. The screen that appears will help you to determine the applicable information needed to start a new bond.

Can I get forms put into your library?

Yes, you can send us a form to put in our library by emailing it to BondFormRequests@travelers.com or to your Travelers surety underwriter. Or, email it using the **Travelers Click** email feature which can be accessed using either one of the two icons:



We will then prepare the form for our library and make it available for general use.

What are the technical requirements for my computer to run the site properly?

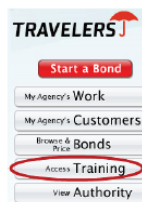
- One of the following browser versions (or a newer version) must be installed: Internet Explorer 9, Internet Explorer 10, Internet Explorer 11, Firefox 3 or above, Google Chrome 3 or above, Apple Safari 3 or above.
- Ensure that JavaScript is enabled for the browser (this is typically found within the browser options). By default this will be enabled.
- Adobe Reader version 9.X or above must be installed.
- At the first logon, click the “Configure Browser” link at the top of the logon page before entering the ID and password (this will set up a certificate for the user’s browser).

Can I continue to work with Travelers Bond Express or my local field office while I use Travelers Click?

Yes. Travelers has experienced personnel in all of our locations, and we want you to maintain the relationships you have with our team. On occasion, we may have personnel other than your local or customary contact who can provide special expertise best suited to resolve your questions or technical concerns. We created **Travelers Click** at the request of our agents seeking online processing of transactional business, but who wish to maintain their Travelers relationships.

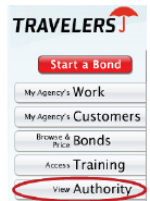
What educational resources are available on the site?

On the **Travelers Click** landing page select “Access Training” from the left hand navigation bar. This section provides several resources for **Travelers Click**. We designed and built **Travelers Click** with the goal of making it easy and intuitive to use, reducing the time and effort for users to learn our system.



How do I know what authority I have to write bonds through Travelers Click?

On the landing page, select “View Authority” from the left navigation bar to view a grid that lists the different types of bond categories and the authority you have for each bond type.



What happens if I am interrupted during the process of issuing a new bond?

Travelers Click allows you to pause and then resume your work. When you resume your work you will see the “progress bar” at the top of the screen that indicates where you are in the process. The step you are currently on shows a blue downward pointing arrow. Any steps you have completed will be represented by a green check mark. The site also shows the principal name, bond type, and submission number at the very top of the screen, so you will always know which customer and bond you are working on.



What happens if the interruption requires more than a pause and I need to put the new bond on hold?

You can save unfinished business in the “Work In Progress” area in the “My Agency’s Work” section of the site. When you are ready to finish the bond you can find it there and continue working on it – no starting over required!

Do I have to answer more or different underwriting questions than I have to with Bond Express?

No, the underwriting requirements are the same as the typical manual process when issuing a bond through **Travelers Click**.

Is there a way for me to tell what the cost of a bond will be before issuing it?

Yes, you can select “Browse & Price” on the left side of the landing page. There you can search for a particular bond type. Select the bond you want and click on (\$) to open up the row to get a price indication. Enter in the nominal information required (limit and/or term) and click the “Price” button to see the indicated premium.



Why does Travelers Click let me decrease the commission percentage by using the “Change” button in Step three of submitting a new bond?

The site lets you decrease the commission percentage to allow you to comply with a fee-based compensation arrangement you may have with a given customer.

Does using Travelers Click change the way I submit a claim?

No, claims against bonds issued by **Travelers Click** are submitted in the same way as other bond claims are made. If you have general claim reporting questions, call 800.842.8496.

Who can answer questions for me that are not answered in this FAQ?

For questions that are underwriting or bond related, please contact your assigned underwriter whose contact information is located on the **Travelers Click** landing page in the “My Contacts” section of the left navigation bar. For technical questions about using **Travelers Click** please call our Help Desk at 800.842.2522 and select option three.



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