



1-800-331-6053

bONDLINE® QUICK REFERENCE GUIDE

Start Up:

Go to our website www.cnasurety.com then enter your ID and Password and select bONDLINE® from the Take me to: dropdown.

Help:

1. The Toggle Help link at the top right of the screen displays the on-line help.
2. Forward your question to us by e-mail at info@cnasurety.com.
3. Call our bONDLINE® Support Team at 800-331-6053.

Setting Up My Profile:

Setting up your profile allows us to e-mail you a new password if yours is lost.

1. Access My Profile from the link at the top right of the bONDLINE® screen.
2. Enter an answer to one of the default security questions or enter your own question and answer.
3. If the e-mail address is not correct, it cannot be reset in bONDLINE®. The designated bONDLINE® Administrator in your agency can change it in Agency Profile or you can contact our bONDLINE® Support Team at 800-331-6053 to change it.

Navigating Between Screens:

The Back and Forward buttons on your web browser have been disabled. Use the buttons at the bottom of the screens, or the "breadcrumbs" at the top of the page which show you the trail of screens you have been through. The screen you are currently on is gray and the screens you can go back to are in blue.

Searching For Bond Form:

Use the search filters on the Bond Search screen to locate the bond you need.

- For a specific state, choose the appropriate state from the State list. Select an Obligee type to narrow the results list.
- Fidelity, Public Official, and Notary E&O are best searched by the Bond Family only.
- Form 10 and Fast Track Applications are found under All Agent for the State and Bond Family as Other.
- Forms that can be used for multiple states are found by selecting All States in the State drop down list.
- All Agent Forms in the State drop down list will return forms that every agency has, regardless of where licensed.

Viewing Bond Form:

To view a sample only copy of the bond form to verify you are selecting the correct form, click on View in the View Bond column of the Select a Bond Form list.

Saving Unfinished Work:

To save a bond request you have started to your Pending List, click on the Save Request button at the bottom of the entry screen.

Printing an Approved Bond:

1. Click the Issue Bond button at the bottom of the Bond Summary screen and a new window will open, displaying the bond output.
2. After printing, click on the blue Bond Search breadcrumb. If, after you leave the Issue Bond screen, you find that the bond did not print correctly, contact the company so we can return the file to your Pending List in Reprint status.

Obtaining a Quote:

1. To obtain a quote, enter all requested information on the entry screens.
2. If approved, the Summary Screen will show the premium charge for the bond.
3. Click the Save as Quote button at the bottom of the screen to put the approved bond on your Pending List for you to issue it when needed.

Issuing a Saved Quote:

1. To find the quote, click the Pending List button.
2. Locate the file using the pagination buttons, if necessary.
3. Click on the file number. It will open the Summary Screen for you to issue the bond.

Editing Data You Entered:

1. If you mis-keyed information on a previous entry screen, use the Back button at the bottom of the screen to return to the previous screen.
2. From the Summary Screen, the Edit Input Data button returns you to the first entry screen to make changes. Once selecting Edit Input Data you must continue through all screens. If you cancel out before continuing through all screens, all information you have entered will be lost.
3. After issuing the bond, use the Change Rider form, or re-enter the bond and notify CNA Surety to cancel the incorrect bond.

Pending List:

The Pending List stores incomplete submissions, approved files, and quotes. The current status of any pending submissions is also listed.

1. To enter, click the Pending List button. If the file you need is not located on the first page of results, use the pagination buttons to move through the list, which is sorted by date.
2. To issue a bond from the Pending List, click on the bond number then click the Issue Bond button.
3. To remove a file, click on the Remove button on the right column of the Pending List.

Explanation of File Statuses:

- Submitted — Your submission is in Underwriting Review.
- Approved, Quote — The file was saved as a Quote and is available for issuance.
- Approved for Print — The bond has been approved by Underwriting and is ready for issuance.

- Incomplete — Data Entry has not been completed. Clicking on the File Number will return you to the Data Entry screen.
- Approved & Sent — The bond was approved by Underwriting and is being mailed to you.
- Expired — The request was submitted more than 30 days ago.
- Need More Info — Underwriting has reviewed and requested additional information.
- Decline — The submission has been declined.
- Ready for Reprint — The bond is available for reprint.
- Change Submitted — The Change Rider request is in Underwriting review.
- Change Approved — The Change Rider was approved by Underwriting and ready for issuance.
- Change Approved & Mailed — The Changed Rider was approved by Underwriting and is being mailed to you.
- Change Issued — The Change Rider is available in reprint.

Power of Attorney:

All bond forms that are not unique to our company include a question on the Bond Information screen about whether you have a bond form that you want to use. Answering Yes to the question will cause the output form to be a Power of Attorney, instead of a completed bond form.

Adjustments to Existing Bonds:

- The Change Rider form can be used to make adjustments to existing bonds, whether they were originally issued using bONdLINE® or not.
- Please review the helpful hints when you select the Change Rider form.

Paying For Your Bond:

The 'Pay Now' button allows you to make an electronic payment for your bond/policy, once it has been approved and issued. Payment can be made electronically by Credit/Debit Card or ACH through the use of our CNA Surety ePay Site powered by US Bank. When paying for a bond/policy through bONdLINE, information relating to your bond/policy, including the number, premium amount, and agency information will pre-populate for you, alleviating the need to re-key information for the payment. The first time your agency elects to make a payment electronically, we will require the execution of an electronic ePay Agency Agreement.