

Agent Portal Bonds Quick Card

General Information

Access the Agent Portal by using the following URL: <https://agentportal.gaig.com/>

Learn more about the Agent Portal Bonds functionality by reviewing the sections listed below:

- Bond Forms Library
- Request a Bond Number
- Bond Report Sheet

Bond Forms Library

The user can conduct searches for different form templates and retrieve/download fillable PDFs. By filling in up to 4 fields and clicking a button, bond forms can be searched for.

1.

- On your **Homepage**, click the **Bond Forms Library** tile.
- Enter search criteria on the screen.
- Click the Search **Bond Form Button**.
- Bond Forms that match the search criteria will display in the **Bond Forms Search Result**.
- Returned Forms can be **previewed** where a window will open, allowing the user to **print** or **save** the Form.
- Selecting **PDF** will immediately download the Form as a PDF.
- Additional searches can be conducted by adjusting the search criteria and clicking the **Search Bond Form Button** again.

Search Bond Forms Library

Bond Form Title	State	Description	Form Type	
<input type="text" value="Enter a form title"/>	<input type="text" value="California"/>	<input type="text" value="Enter form description"/>	<input type="text" value="Contract"/>	<input type="button" value="Search Bond Form"/>

Bond Forms Search Result

BOND FORM TITLE	STATE	DESCRIPTION	FORM TYPE	
CAWellBondRider1million	California	CAWellBondRider1million	Contract	Preview PDF
CAPaymentBond000560	California	CAPaymentBond000560	Contract	Preview PDF
CAUniversityRegentsBidBond000584	California	CAUniversityRegentsBidBond000584	Contract	Preview PDF
CATustinUnifiedSchoolDistrictBidBond	California	CATustinUnifiedSchoolDistrictBidBond	Contract	Preview PDF

Request a Bond Number

The user can request a Bond Number without going into the Bond Report Sheet. By filling in 5 key data elements and clicking a button, a bond number will be assigned.

This workflow should only be used in cases when a bond needs to be processed immediately and there is not sufficient information to process it through the Bond Report Sheet workflow below. The Bond Report Sheet workflow should be used as much as possible for processing.

1.

- A. On your **Homepage**, click the **Request Bond Number** tile.
- B. Complete the fields on the screen.
Note: All fields are required.
- C. Click the **Request a Bond Number Button**.
Note: This button will be enabled when all required fields are completed.
- D. The **Bond Number** will display in the **Bond Number** field to be noted by the user. The request will be stored in the **Bond Form Library**.
- E. If you have more Bond Numbers to request, click the **Request Another Bond Number** button.
- F. If you are finished, click the **Exit** button.

REQUEST A BOND NUMBER

PRODUCER CODE & NAME *		BOND SYMBOL *	
187278 - Arthur J. Gallagher & Co.Insu		CA	
OBLIGEE'S NAME *	PRINCIPAL'S NAME *	TYPE OF BOND *	BOND AMOUNT *
Test	Test	Contract Surety Bond	1500000

Request a Bond Number

BOND NUMBER

CA 4102164

Request Another Bond Number

Exit

Bond Report Sheet

The user can complete the Bond Report Sheet and send it to the appropriate Divisional Office.

1.

- A. On your **Homepage**, click **Bond Report Sheet**.
- B. Complete the fields on the screen.
Note: Required fields are denoted with an Asterisk.
- C. Click **Save & Continue**.
Note: This will be enabled when all required fields are completed.
- D. Complete fields on **Principal/ Obligee** field and click the **Save & Continue**.
- E. Complete fields on the **Additional Info** field and click **Save & Continue**.

General Info / Producer Principal / Obligee Bond Details Additional Info Preview / Submit

SUBMIT A BOND REPORT SHEET

GENERAL INFO

STATUS

- ☐ New
☐ Renewal

METHOD OF RENEWAL

- ☐ Certificate
☐ New Bond
☐ Continuous

BONDING DEPARTMENT

- ☐ Great American Ins. Co.
☐ Great American Alliance Ins. Co.

PRODUCER

PRODUCER CODE & NAME *

DIVISIONAL OFFICE *

Agent Portal Test Office

STREET

CITY

San Jose

STATE

CA

ZIP

95113-1708

Save & Continue

Exit

Bond Report Sheet

2.

- F. **Preview Report Sheet PDF**— The user can preview the PDF to ensure that all data was entered correctly. Note: This copy of the PDF will not include the Bond Number as it has not been generated yet.
- G. If you need to make updates to previously entered data, you can either use the **Back** button or click the links at the top of the page to navigate to a specific page.
- H. On the **Preview/Submit** page, click the **Submit Bond Report Sheet** button.
- I. The assigned Bond Number will display in the **Bond Number** field and an email will be sent to the Divisional Office.
- J. To view the **PDF** after it has been submitted, click the View Final Report Sheet PDF button.
Note: This copy of the PDF will include the Bond Number.
- K. If you have more Bond Report Sheets to submit, click the **Submit Another Report Sheet** button.
- L. If you are finished, click the **Exit** button.

◀ Back
General Info / Producer
Principal / Obligor
Bond Details
Additional Info
Preview / Submit

SUBMIT A BOND REPORT SHEET

PREVIEW

*You may generate a preview of the completed PDF at this time. **PLEASE NOTE** that the Bond Symbol and the Bond Number will **NOT** be generated or displayed until the report sheet has been submitted.*

Preview Report Sheet PDF

SUBMIT

It is not required to generate a preview of the report sheet before submitting.

Submit Bond Report Sheet

CONFIRMATION

Upon successful submission, the Bond Symbol and Bond Number will be displayed below. You will also be able to view the final report sheet PDF at that time.

BOND NUMBER

CA 4102165

View Final Report Sheet PDF

Submit Another Report Sheet

Exit