

# **SurePath eBonds & the Bid Express® Service for Agents New Jersey Transit Corporation**



**InSure Vision Technologies, LLC**

**Revision No. 510**

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# Overview, Responsibilities & Workflow

## Overview

### Introduction

Contractors file surety bonds with obligees to guarantee performance. A growing number of obligees now accept surety bonds electronically. SurePath is a web-based surety bond processing and management system which also provides the process for creating electronic bonds for submission to obligees. SurePath receives input from the agent/contractor and provides output (bond verification) to the Obligee.

Several parties are involved in the electronic bond submission process: the contractor, the Obligee, the underwriter and the surety agent each with its own requirements and tools.

## Roles & Responsibilities

Who	Underwriter	Obligee	Client/Contractor	Agent
What	Grants agent electronic power of attorney.	Defines submission requirements.  Receives and verifies bond information, signatures and powers according to submission requirements.	Requests bond.  Submits bond validation number to Obligee.	Executes bond.  Signs bond (attaches digital certificate).  Uploads required documents to the bond record  Provides client with information needed to submit bond.

## Workflow

### Preparation

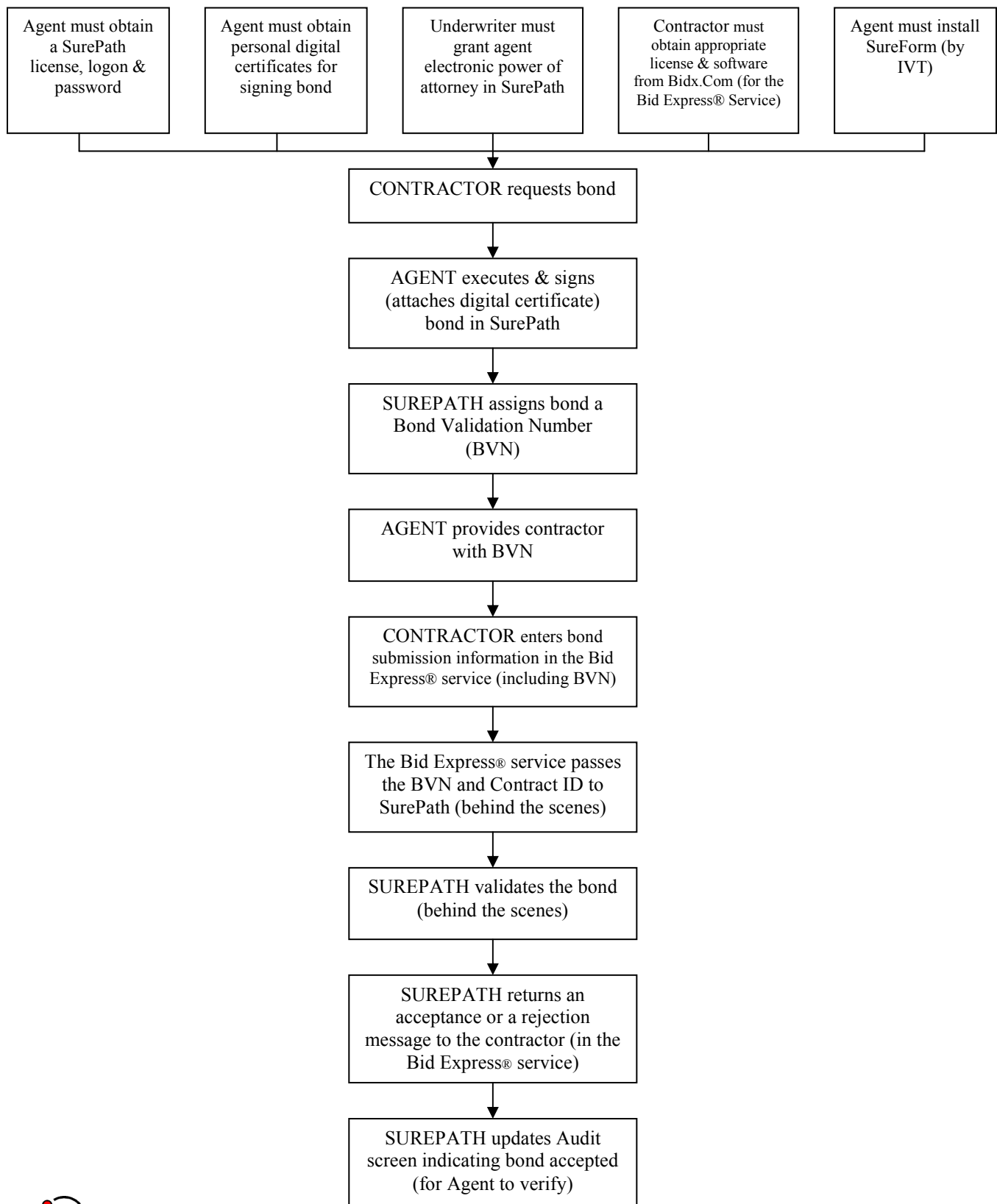
Prior to beginning the electronic bond submission process the following must occur:

- The surety agent and contractor must obtain a license to use SurePath.
- The contractor must obtain a license from the Bid Express® service and set the Bid Express® service software.
- The underwriter must grant the agent an electronic power of attorney in SurePath.
- The agent must obtain a digital certificate.



## SurePath eBonds & the Bid Express® Service for Agents

### Process Overview



## Quick Set Up Steps for Agents Using SurePath & the Bid Express® Service To Electronically Submit Bid Bonds

---

Prior to processing and submitting bid bonds electronically you must fulfill the following set up requirements.

- \_\_\_\_\_ 1. You must use SurePath and SureForm to issue bonds. If you are not currently doing so, contact IVT at (818) 783-3460 to obtain a license and install SureForm.
- \_\_\_\_\_ 2. Verify the surety company has granted you an electronic power of attorney in SurePath.
- \_\_\_\_\_ 3. Obtain a personal digital signature certificate for signing bonds electronically. **Need more information? Go to ([www.identrust.com](http://www.identrust.com))**, we suggest the personal signature.



## Quick Processing Steps for Agent Using SurePath & the Bid Express® Service To Electronically Submit Bid Bonds

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- \_\_\_\_ 1. Receive bond request from contractor. **Important:** The request must include the Contract ID provided by the NJ Transit to the contractor.
- \_\_\_\_ 2. Login to SurePath and execute bond.
- \_\_\_\_ 3. Sign the bond after the execution process.
- \_\_\_\_ 4. Upload required documents to your bond record.
- \_\_\_\_ 5. Notify the contractor the bond has been executed and provide them with the Bond Validation Number (BVN).
- \_\_\_\_ 6. Verify the bond was submitted and validated by the Obligee (optional).



# Verify Electronic Powers

## Overview

The term Electronic Power of Attorney, as it is used in SurePath, refers to a process by which the Surety Company Underwriter logs onto SurePath and “grants” the Surety Agent a Power of Attorney. The Surety Company Underwriter is actually verifying that the Surety Agent holds a “paper” Power of Attorney and is authorized to act on the Surety’s behalf.

## How to Verify I Have Electronic Power of Attorney

1. Logon to SurePath.
2. Click the **My Information** button, located on the navigation bar on the left-hand side of the screen.
3. Click the **Powers of Attorney** button located on the My Information toolbar across the top of the screen.
4. Locate the carrier that granted power of attorney and verify the checkmark in the **Power** column and the work “granted” in the **Claimed/Granted** column. If there is no checkmark or the column reads “Claimed”, you do not have an electronic power.

The screenshot displays the SurePath 5.0 interface. On the left is a navigation bar with buttons: Start, Execute, Clients, Shared Programs, Shared Rates, Bond Numbers, Find Bond:, Find Project:, Bond List, Request List, Reports, Bond Library, My Information, Help, Agency Carriers, Sites, Users, and Exit. The 'My Information' button is highlighted with an arrow. At the top is a toolbar with tabs: Contact Info, Change Password, Default Subscriptions, Powers of Attorney, Permissions, Preferences, and VCard. The 'Powers of Attorney' tab is selected, indicated by an arrow. Below the toolbar is a table titled 'Powers of Attorney' with columns: Billing Carrier, Issuing Carrier, Claimed/Granted By, Claimed/Granted, Claimed Date, and Power. The table lists various carriers and their associated information. The entry for 'Kanga Surety Company' is highlighted in green, and an arrow points to the 'Granted' status in the 'Claimed/Granted' column.

Billing Carrier	Issuing Carrier	Claimed/Granted By	Claimed/Granted	Claimed Date	Power
AIG	American Home Assurance Company				<input type="checkbox"/>
	The Insurance Company of the State of Pennsylvania				<input type="checkbox"/>
Atlantic Mutual Companies	Atlantic Mutual Insurance Company				<input type="checkbox"/>
	Centennial Insurance Company				<input type="checkbox"/>
Contractors Bonding and Insurance Company	Contractors Bonding and Insurance Company				<input type="checkbox"/>
Chubb & Son, Inc.	Federal Insurance Company				<input type="checkbox"/>
CNA Surety	American Casualty Company of Reading, Pennsylvania				<input type="checkbox"/>
Crum & Forster	United States Fire Insurance Company				<input type="checkbox"/>
Frontier Insurance Company	Frontier Insurance Company				<input type="checkbox"/>
Gulf Insurance Company	Gulf Insurance Company				<input type="checkbox"/>
Inso - Dico Group	Developers Surety and Indemnity Company				<input type="checkbox"/>
	Indemnity Company of California				<input type="checkbox"/>
ICW	Insurance Company of the West				<input type="checkbox"/>
Kanga Surety Company	Kanga Surety Company	Ursula Underwriter	Granted	9/11/2003	<input checked="" type="checkbox"/>
Lou Jones and Associates, Inc. - Intermediary	American Motorists Insurance Company - LOU JONES				<input type="checkbox"/>
Liberty Bond Services	Liberty Mutual Insurance Company				<input type="checkbox"/>



# Personal Digital Signature Certificates

## Overview

A digital signature is not a digitized image of a handwritten signature. It is an actual transformation of an electronic message using public key cryptography. Through this process, the digital signature is tied to the document being signed, as well as to the signer, and therefore cannot be reproduced. Individuals may not share a digital ID; each one identifies a particular person. With the passage of the federal digital signature bill, digitally signed electronic transactions have the same legal weight as transactions signed in ink. Now, a legally binding contract may be formed over the Internet by two parties who have never met, without requiring notarization. For more information on digital signatures refer to <http://identrust.com/support/overview.html>

The Obligee will require that you sign your bonds electronically using a personal digital certificate (or ID). Digital certificates are provided by a third-party vendor referred to as the “Certification Authority”. The certification authority that is recommended for this process is IdenTrust ([www.identrust.com](http://www.identrust.com)).

Digital certificates are purchased and downloaded using the internet. Download instructions for your certificate are sent through the regular mail. The entire process could take up to a week. If you have trouble with the download process, work with your IT person or utilize the vendor’s on-line support.

The Certification Authority does charge a fee for the digital certificate.





# Process the Bond in SurePath

## Overview

Issue the bond as you normally would in SurePath, using the following exceptions:

- Capture the Contract ID in the appropriate data field. The Bid Express® service uses this number behind-the-scenes to validate the contractor's bid bond.
- Sign the bond.
- Notify the Contractor that the bond has been issued and provide them with the BVN number.  
Note: If the contractor uses SurePath to request the bond you can configure SurePath to email the contractor when the bond is issued.

## How to Capture the Contract ID in SurePath

The Contract ID provided by the DOT must be entered in the **Contract ID No. Required for Electronic Bidding** field. This field is located in the **Bond Custom Information** section of the **Basic Information** page. Note: If the number also appears on the bond form, (appears on form) will also display.

**Bond Custom Information**

Order No. (appears on form)	<input type="text"/>
Principal Signature Name (appears on form)	<input type="text"/>
Principal Signature Name Title (appears on form)	<input type="text"/>
Local Surety Address (appears on form)	<input type="text"/>
Local Surety City	<input type="text"/>
Local Surety State	<input type="text"/>
Local Surety Zip	<input type="text"/>
Contract ID No. Required for Electronic Bidding (appears on form)	<input type="text"/>



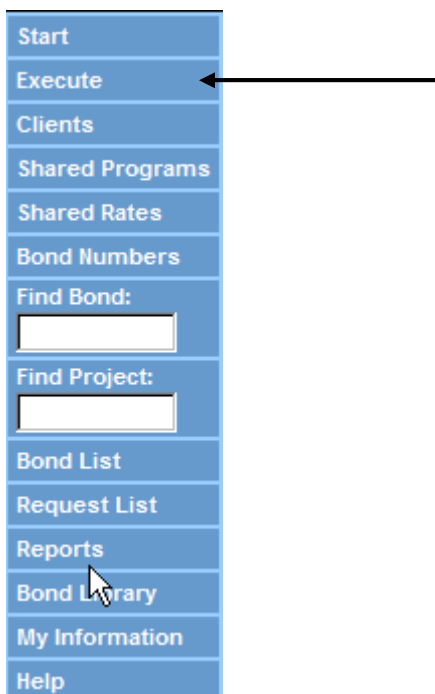
# Execute a Bond

## Overview

This section provided detailed instructions for executing a bond. Only required fields are addressed. All other fields may be completed at the user's discretion for reporting purposes.

## Getting Started – Select Client and Bond Form

1. Logon to SurePath.
2. Click the Execute button.



3. Select the Client Account for this bond using the drop down list.

### Bond Execution - Select Form

Select the form you would like to execute.

Client Account for this bond:

Select Bond Form:

☒ Add this form to the list of standard forms for this client.

☐ Execute [Execute a bond.](#)



4. Select the bond form from the Select Bond Form drop down list or use the bond form library as follows:
  - a. Click the Search button. Result: The Search for Bond Forms window opens.
  - b. Enter the keyword in the Search For field (i.e., dot, ebond)
  - c. Enter a state in the State field, if applicable.
  - d. Click the Search button.
  - e. Click on the desired form from the list of forms.

Search for: ebond  
Using: All Words

Country: United States  
State: New Jersey  
Carrier:   
Search Found 3 Forms

NJ Transit Corporation eBond Bid Bond Only Rev 2-09 (Bid Bond):SAAcode=000  
NJ DOT Co-Surety eBond Bid Bond Only-CONTACT IVT PRIOR TO SIGN  
NJ DOT eBond Bid Bond Only (Bid Bond):SAAcode=000  
NJ Transit Corporation eBond Bid Bond Only Rev 2-09 (Bid Bond):SAAcode=000

OK View Cancel

- f. Click the OK button. Result: The Search for Bond Forms window closes and the selected form populates the Select Bond Form field.
5. Click the Next button. Result: The Basic Information page displays.
6. Proceed to the next section, *Complete the Basic Information Page*.



## Complete the Basic Information Page

1. In the Principal Information section, select the principal using the Select a standard principal drop down list. **Result:** SurePath populates the Principal Name and address fields based on information entered in Client setup for the selected principal.

Select Bond Form >> Basic Information >>

**Execute Bond**

Selected Form: VA Dot Bid Bond Rev 4-24-01 (Bid Bond)

Complete the information below to execute a new bond.

Required information appears in bold.  
Currency entries should not include dollar signs or commas.

**Principal Information**

Select a standard principal (No Address Required) Woodland Los Angeles (Los Angeles, CA)

OR Enter custom principal information for this bond only. You can select a standard principal from the list above, or enter custom principal information below.

Subsidiary Woodland Western Division

Principal Name (appears on form) Woodland Los Angeles

Principal Address 123 Los Angeles Blvd.

Principal City Los Angeles

Principal State California

Principal Zip Code 92777

State Of Incorporation Delaware

2. Scroll down to display the Obligor/Owner Information section and note that for obligor-specific forms SurePath pre-fills the Obligor Name field. Remaining fields in this section are optional.

**Obligor/Owner Information**

Select a recently used obligor None

OR Enter obligor information for this bond only. You can select a frequently used obligor from the list above, or enter custom obligor information below.

Search

Obligor Name Commonwealth of Virginia

Obligor Address Department of Transportation

Obligor City

Obligor State Virginia

Obligor Zip Code

Obligor Type unknown

☐ Add or update this obligor address information to the frequently used obligor list.



3. Scroll down to the Bond Information section.

**Bond Information**

Program Woodland Company, Inc.

Issuing Carrier Name & Address Kanga Surety Company (Home Office)

Requestor None

Term Effective Date (mm/dd/yyyy) 8/10/2004

Term Expiration Date (mm/dd/yyyy) 11/8/2004

Contract Date (mm/dd/yyyy)

Execution Date (mm/dd/yyyy) (appears on form) 8/10/2004

Estimated Bid Amount 10000

Bid Bond Amount 5

Attorney In Fact (appears on form) Andy A. Agent

Exact Project Description (appears on form) This is the project description that prints on the bond form

Project, Invitation, or Bid Number (appears on form) Project #

Project Name

Project Manager

Project Address

Project City

Project State

Project Zip

City of Obligation

State Of Obligation Virginia

State Of Execution Maryland

Bid Date 8/10/04

Bid Time

Estimated Start Date

Estimated Completion Date

Project Duration Months

4. Complete the Issuing Carrier Name & Address field. Note: Use this field to select the issuing carrier AND the carrier address to be used IF the carrier address prints on the bond form. Address choices are as follows:
  - Home Office = carrier's home office address
  - Your City Name = agency's address
  - Carrier Branch: City = local surety office address (contact IVT to activate)
5. Complete the Effective and Expiration Date fields. Note: These dates are used internally to define the period of time in which this bond is on the client's outstanding liability and open bid bond report. Most agencies define these fields as follows:
  - Effective date as either the bid date or the date the bond is issued
  - Expiration date is 30 to 90 days after the effective date
6. Complete the Execution Date field. Note: This is the signed and sealed date that prints on the bond form.
7. Enter the estimated contract price in the Estimated Bid Amount field. Note: This field is used to calculate outstanding liability and does not print on the bond form.



8. Complete the Bid Bond Amount field. Note: Enter the bid bond amount as a number and with no punctuation. Examples:
  - For a 5% bid bond enter 5
  - For a \$10,000 bid bond enter 10000
9. Complete the Attorney In Fact field. Note: The first of the two Attorney in Fact fields print on the bond form. You can type the name in the first field or select the individual from the Quick Pick list (contact IVT to add names to the Quick Pick list).
10. Complete the Project Description field.
11. Complete the Project, Invitation or Bid Number if applicable.
12. Update the State of Obligation field, if applicable.
13. Update the Status of Execution field, if applicable.
14. Complete the Bid Date field. Note: This is a required field and must be entered as MM/DD/YYYY.
15. Scroll down to the Bond Custom Information section. Note: Fields in this section are based on the selected bond form and therefore vary from form to form.

16. Complete the Bond Custom Information section. Important: The Contract ID or number used to validate the bond in the electronic bidding process **MUST** be entered in the **Contract ID No. Required for Electronic Bidding** field.
17. Scroll down to the Options section.

18. Click the Quick Process button. Result: If required fields are incomplete or filled out incorrectly an error message is generated. If there are blank fields in the Bond Custom Information section a warning message is generated. Otherwise, the Preview page displays the selected form merged with data entered on the Basic Information page.
19. Proceed to the next section, *The Preview Page*



## The Preview Page

BVN No. RVNF-BUYL-FMNP-J1JV SEALED BID NO. 108513

**BID BOND**

KNOW ALL MEN BY THESE PRESENTS, that we, the undersigned \_\_\_\_\_  
 \_\_\_\_\_ Woodland Los Angeles  
 as PRINCIPAL, and Kanga Surety Company \_\_\_\_\_  
 a corporation organized and existing under the laws of the State of CA  
 and duly authorized to do business in the State of New Jersey, as SURETY, are held and firmly bound unto the  
 New Jersey Transit Corporation in the penal sum of ten percent (10%) of the amount bid for the project(s) listed  
 below, for the payment of which well and truly to be made, we hereby jointly and severally bind ourselves, our  
 heirs, executors, administrators, successors and assigns.

Signed, sealed, and dated this 14th day of May Two Thousand Ten

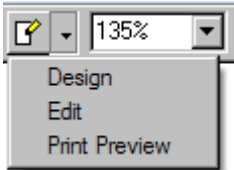

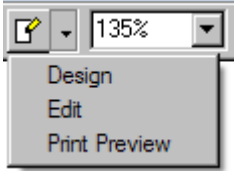


The condition of the above obligation is such that whereas the principal is herewith submitting a proposal  
 for: NJ Test bond

SEALED BID NO. 108513

Page 1 PKI Signatures

Next >>

1. Perform any of the following:

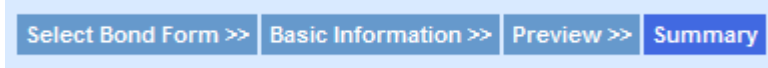
To...	Then...
Edit the bond form (make changes in yellow boxes)  <u>Note:</u> SurePath does not display final formatting for dates and currency in Edit mode. Switch to Print Preview mode to verify information displays correctly.	 Use the  button on the SureForm toolbar to switch to Edit mode.
Look at the form in Print Preview mode	 Use the  button to switch to Print Preview
Print the bond form	Switch to Print Preview mode and then use the  button on the SureForm toolbar.

2. Click the Next button continue with bond execution and save the form. Result: The Execution Summary page displays.
3. Proceed to the next section, *Commit the Bond*.

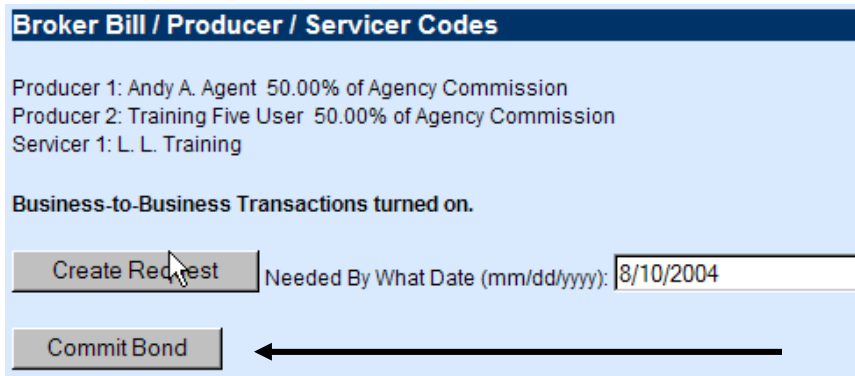


## Commit the Bond

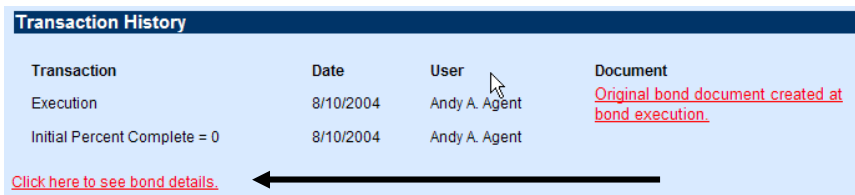
1. Review the information on the Execution Summary page.
2. If applicable, use the execution toolbar to go back to a previous screen and make corrections.



3. To save the bond, click the Commit Bond button located at the bottom of the page. Result: The bond is executed.



4. To go to the Bond Details page to sign the bond (after execution) or to obtain the BVN number, scroll to the bottom of the page and click the Click here to see Bond Details hyperlink.



5. From the Bond Details page, perform the following as your next step:

To...	Then...
Sign the bond <b>after</b> execution	Go to the next section below
Obtain the BVN number	Go to the Notify the Contractor section of the manual on page 18.





## Sign the Bond in SurePath

After bond execution perform the following steps to sign the bond:

1. Locate the bond and select **Bond Details**.

Scroll down to the **Transaction History** section and locate the most recent bond form in the document column.

Transaction History					
Transaction	Date Processed	User	Effective Date	Power of Attorney	Document
Execution	3/19/2008	Gina O'Shea	3/19/2008	Electronic Power	<a href="#">Original bond document created at bond execution.</a> <span>Delete</span> <span>Edit</span> <span>Sign</span> <span>?</span>
Initial Percent	3/19/2008	Gina O'Shea	3/19/2008		

2. Click the **Sign** button next to the document. Result: SureForm opens and displays the committed bond form.

3. Go to **PKI Signature page** Note: Bottom left of signature page will have a sign box

NEW JERSEY TRANSIT CORPORATION

BVN No. RVNF-BUYL-FMNP-J1JV SEALED BID NO. 108513

**BID BOND**

KNOW ALL MEN BY THESE PRESENTS, that we, the undersigned \_\_\_\_\_  
Woodland Los Angeles

as **PRINCIPAL**, and Kanga Surety Company \_\_\_\_\_  
a corporation organized and existing under the laws of the State of CA  
and duly authorized to do business in the State of New Jersey, as **SURETY**, are held and firmly bound unto the  
New Jersey Transit Corporation in the penal sum of ten percent (10%) of the amount bid for the project(s) listed  
below, for the payment of which well and truly to be made, we hereby jointly and severally bind ourselves, our  
heirs, executors, administrators, successors and assigns.

Signed, sealed, and dated this 14th day of May Two Thousand Ten

The condition of the above obligation is such that whereas the principal is herewith submitting a proposal  
for: NJ Test bond

Page 1 | Page 2 | **PKI Signatures**

Commit Signed Document Cancel Changes

Sign Details...

Page 1 | Page 2 | Page 3 | **PKI Signatures**

Commit Signed Document Cancel Changes

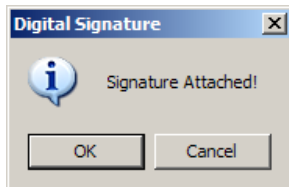


4. Perform one of the following:

If there is....	Then...
More than one certificate on your computer (for more than one signatory)	Select the certificate for the person signing the bond. This person must be the Attorney-in-Fact.
Only one certificate on your computer	Proceed to the next step.

Result: A window verifying a signature has been attached displays. Depending on the certification authority you may be prompted to enter a passphrase or password prior to receiving this confirmation. If so, enter the password and click OK to proceed

5. Click the **OK** button to verify the certificate has been attached. Note: Remember that this method attaches a certificate to a document. You will not see a signature on your bond form.



6. Click the Commit Signed Document button. Result: You are returned to the Bond Details page. The Bond Details page is updated to reflect the change.

Transaction	Date Processed	User	Effective Date	Power of Attorney	Document	
Execution	3/19/2008	Gina O'Shea	3/19/2008	Electronic Power	<a href="#">Original bond document created at bond execution.</a>	Delete Edit Sign
Initial Percent Complete = 0	3/19/2008	Gina O'Shea	3/19/2008			
Signing Document	3/19/2008	Gina O'Shea	3/19/2008	Electronic Power	<a href="#">Revised Bond Document</a>	Delete Edit Sign

The top document is the original unsigned document. The **Revised Bond Document** is the new signed document.



7. Upload NJ Transit required documents as per the bond form to your bond record:

**Certification to the Authority of the attorney in fact to commit the surety company must accompany this Bond, and true and correct statement of the financial condition of said surety company.**

Go the Bond Details screen.

Scroll to the Processing Options section.

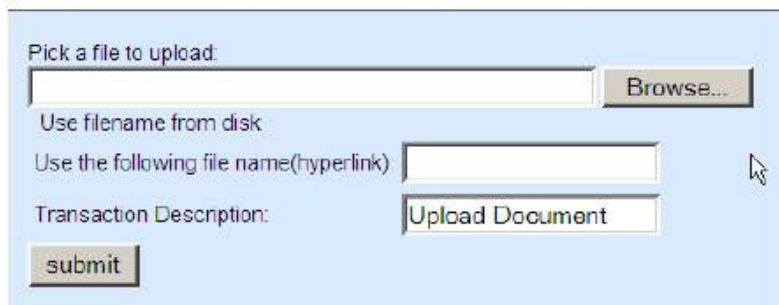
Click the Upload File hyperlink. Result: The Upload Document screen displays.



**Processing Options**

- [Upload File](#)
- [Managing Outstanding Liability](#)

Click the Browse button and select the file you want to upload.



Pick a file to upload:

Use filename from disk

Use the following file name(hyperlink)

Transaction Description: Upload Document

submit

**In the Use the following file name field - name one Surety Financial Statement and for the other document, it should be named Surety Disclosure**

Your bond record should then look like the screenshot below after the documents have been uploaded to the bond record:



Transaction	Date Processed	User	Effective Date	Power of Attorney	Document			
Execution	11/30/2009	Gina O'Shea	11/30/2009	Electronic Power	<a href="#">Original bond document created at bond execution</a>	Delete	Edit	Sign
Initial Percent Complete = 0	11/30/2009	Gina O'Shea	11/30/2009					
Signing Document	11/30/2009	Gina O'Shea	11/30/2009	Electronic Power	<a href="#">Revised Bond Document</a>	Delete	Edit	Sign
Upload Document	11/30/2009	Gina O'Shea	11/30/2009	✗	<a href="#">Surety Financial Statement</a>	Delete		
Upload Document	11/30/2009	Gina O'Shea	11/30/2009	✗	<a href="#">Surety Disclosure</a>	Delete		

**Processing Options**



# Notify the Contractor

The contractor must be notified when the bond is executed and signed. You must also provide the contractor with the Bond Validation Number (BVN). After the contractor is notified they complete the bid submission process in the Bid Express® service (they enter the BVN number and behind-the-scenes the Bid Express® service checks for the Contract ID).

The BVN number is located on the Bond Details page.

You can either copy and paste the BVN number into an E-mail or you can click on the E-mail BVN hyperlink to send it to your client.

Other Information	
Project, Invitation or Bid Number:	VA1120303
Bid Date:	4/1/2009
Estimated Bid Amount:	\$123,000.00
Bid Bond Amount:	10%
SurePath ID (Long):	{F229BDE4-EA5C-41E0-B5EA-03B455C1DD83}
Bond Validation Number(BVN):	ND7A-P2YK-UFR7-GV7R
	<a href="#">E-Mail ID (Long)</a>
	<a href="#">E-Mail BVN</a>
Issuing Carriers	

You may add two E-mail addresses if you like, your contractor's and yours if you would like a copy.

Transmit Bond Verification Number	
You can use this page to transmit a bond's verification number to another user of SurePath. You can select an Owner / Obligor / Obligee v drop down list, or you can enter a user's e-mail address in the text box. Select <b>Submit</b> to send the ID.	
Owners / Obligor / Obligees in Texas	<div>None</div> Disregard this box - do not change
Additional E-Mail Addresses You can separate multiple addresses with a semi-colon (;).	<div>johndoe@acmeconst.com; agent@insuranceagent.com</div>
	<div>Submit</div>

Alternately: You can highlight the BVN number, then copy/paste it into an E-mail to them.



# Verify the Bond is Accepted by NJ Transit

## How to Verify the Bond was Successfully Submitted

1. Login to SurePath.
2. Locate the bond and select Bond Details.
3. Click the Audit Records button located on the Bond Details toolbar. Result: If the Bid Express® service successfully validated the contractors bid bond, a verification message for the Bid Express® service displays in the General Audit Notices section.

Details	Copy Bond	Audit Records	Premium History	Current Rates	Bid Results	Underwriter Info
Audit Records						
General Audit Notices						
User Name	Date	Audit				
Bid Express	3/19/2008 6:48:27 PM	Bond (ND7A-P2YKUFRT-GV7R) verified by the Bid Express® service				

We suggest adding verification and failure notice subscriptions. To do that,

1. To go to your My Information Page
2. Under Default E-Mail subscriptions check Bonds Verified through the Bid Express® service (soon to be called Electronic Bond Verification)
3. Submit.

This subscription will be for all clients across the board. If you only want certain client subscriptions, please set them up under your clients General Information Page.

