



## ESB Surety Company Dashboard Guide

The Surety Company Dashboard provides surety companies with summary information related to bonds issued in NMLS. Users can use links from the Dashboard to access relevant pages in NMLS. See *Figure 1* for an image of the *Surety Company Dashboard*, located under the Home Tab.

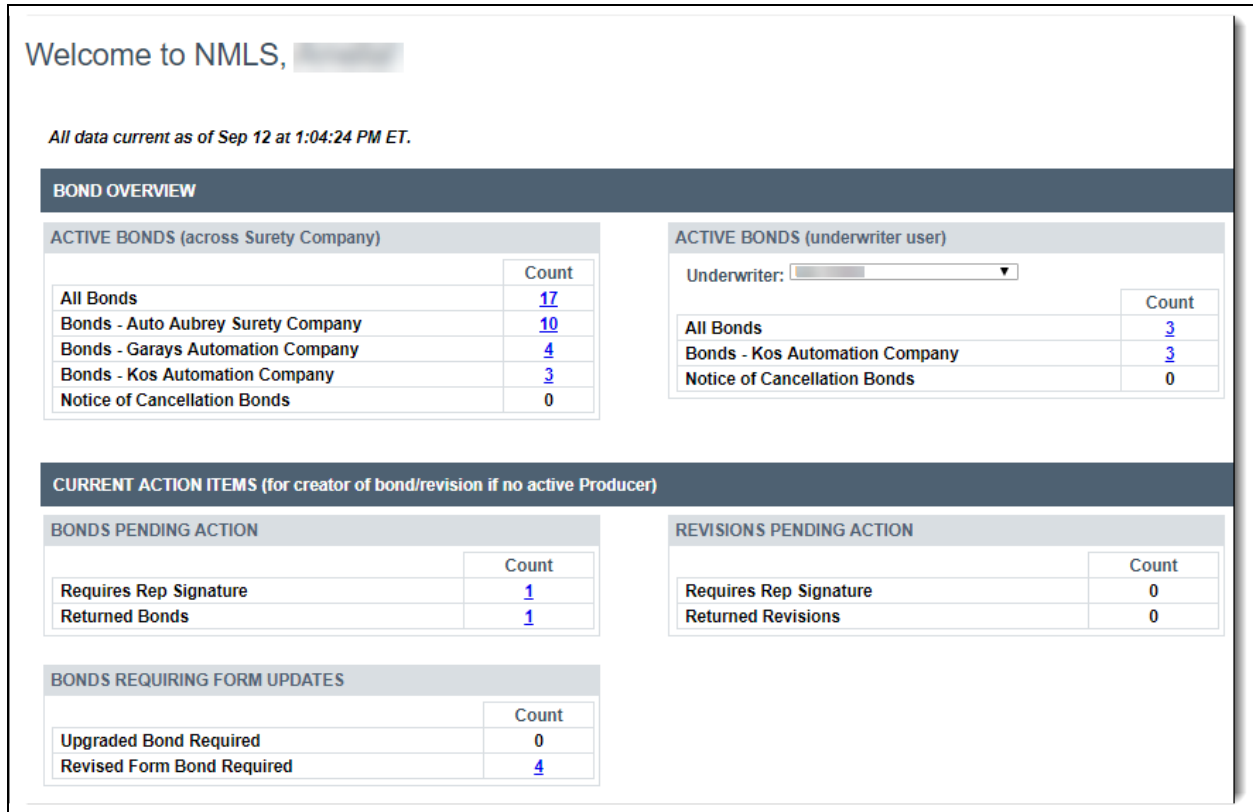


Figure 1: Surety Company Dashboard

Below is a breakdown of each section, including link destinations and common usage.

### Bond Overview

ACTIVE BONDS (across Surety Company)	
	Count
All Bonds <b>A</b>	<a href="#">17</a>
Bonds - Auto Aubrey Surety Company <b>B</b>	<a href="#">10</a>
Bonds - Garays Automation Company	<a href="#">4</a>
Bonds - Kos Automation Company	<a href="#">3</a>
Notice of Cancellation Bonds <b>C</b>	0

Figure 2: Active Bonds (across Surety Company)

**Active Bonds (Across Surety Company) (See Figure 2)**

	Heading	Used To	Destination
A	All Bonds	View the number of active bonds associated to the surety company and any of its underwriting companies	"Managed Bonds" page
B	Bonds – Surety Company/Underwriting Company	View the number of active bonds associated to a specific underwriting company with a separate row for each underwriting company.	"Managed Bonds" page
C	Notice of Cancellation Bond	View the number of bonds in a "Notice of Cancellation" status	"Managed Bonds" page
D	Pending BOR Changes	View the number of BOR changes in a pending status (row only appears if the count is > 0)	"View BOR changes" page

Table 1: Active Bonds

ACTIVE BONDS (underwriter user)		Count
Underwriter: <input type="text"/>		
All Bonds	E	3
Bonds - Kos Automation Company		3
Notice of Cancellation Bonds	F	0

Figure 3: Active Bonds (Underwriter User)

**Active Bonds (Underwriter User) (See Figure 3)**

	Heading	Used To	Destination
E	All Bonds	View the number of active bonds associated to the surety company and any of its underwriting companies assigned to the selected underwriter	"Managed Bonds" page
F	Notice of Cancellation Bonds	View the number of bonds in <i>Notice of Cancellation</i> status assigned to the selected underwriter	"Managed Bonds" page

Table 2: Active Bonds

**NOTE:** This section defaults to counts for the logged in user, but the user may select the **Underwriter** dropdown to view counts for other assigned underwriters.

## Current Action Items (for creator user)

BONDS PENDING ACTION		Count
Requires Rep Signature	G	1
Returned Bonds	H	1

Figure 4: Bonds Pending Action

### Bonds Pending Action (See Figure 4)

	Heading	Used To	Destination
G	Requires Rep Signature	View the number of active bonds associated to the surety company and any of its underwriting companies assigned to the selected underwriter	"Managed Bonds" page
H	Returned Bonds	View the number of bonds created by the user in <i>Returned to Surety</i>	"Managed Bonds" page

Table 3: Bonds Pending Action

REVISIONS PENDING ACTION		Count
Requires Rep Signature	I	0
Returned Revisions	J	0

Figure 5: Revisions Pending Action

### Revisions Pending Action (See Figure 5)

	Heading	Used To	Destination
I	Requires Rep Signature	View the number of riders/revised form bonds created by the user in <i>Requires Rep Signature</i> status if no producer is associated to the bond	"Managed Bonds" page
J	Returned Revisions	View the number of riders/revised form bonds created by the user in <i>Returned to Surety</i> status if no producer is associated to the bond	"Managed Bonds" page

Table 4: Revisions Pending Action

BONDS REQUIRING FORM UPDATES		Count
Upgraded Bond Required	K	0
Revised Form Bond Required	L	4

Figure 6: Bonds Requiring Form Updates

### Bonds Requiring Form Updates (See Figure 6)

	Heading	Used To	Destination
K	Upgraded Bond Required	View the number of bonds created by the user in <i>Requires Rep Signature</i> or <i>Returned to Surety</i> status requiring upgrade to a new form version if no producer is associated to the bond	"Managed Bonds" page
L	Revised Form Bond Required	View the number of bonds created by the user requiring surety action for issuance of a revised form bond if no producer is associated to the bond	"Managed Bonds" page

*Table 5: Bonds Requiring Form Updates*

**NOTE:** This section does not display on the dashboard if the counts for both rows are zero.

For assistance, please contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123).