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VERATEX, INC.
 336 E 56TH ST
 GROUND FLOOR
 NEW YORK, NY 10022-4145

Online Invitation Letter

Due Date: 07/15/2025

Date Created: 06/06/2025

Policy Period: 06/05/2024 to 06/05/2025

Policy Number: UB - 2J244256

How may we help? 1-800-842-4271 or auditcs@travelers.com

Dear Customer,

The success of your business is important to us. To ensure that your premium reflects any changes that may have occurred during the policy period and according to terms of your policy, we are required to conduct a premium audit of your Workers Compensation policy shown above. Since you are busy running a business, we offer the option to complete your premium audit online.

Complete Your Premium Audit Online

We invite you to complete your audit using our online tool, Electronic Policyholder Report (ePHR®). The ePHR® tool allows you to provide your audit information securely whenever your schedule allows. Once registered, you can delegate access to another employee, accountant or bookkeeper to provide the necessary information. You can also track the status of your audit, view prior term audits, and obtain your Premium Adjustment Notice.

What You Can Expect

The online audit consists of two parts, the Audit Questionnaire followed by Supporting Documents. You will be asked to provide information about your business operations, employees, owners, officers and use of contracted labor. Based upon your responses and type of policy, you will be asked to provide specific documents such as payroll or sales reports, and tax forms. Documents can be securely uploaded from your computer in a variety of formats such as PDF, CSV, Excel, PNG and JPEG. Gathering documents ahead of time can expedite your online experience and should you need help along the way, please contact our Customer Service team for assistance.

Don't Have Documents Electronically or a Scanner?

You have completed the online questionnaire but can't upload your documents. Here are some options:

- **Use your smart device.** Use a scanner app and convert your paper document to PDF format or take pictures of your documents, email them to your computer and upload to the secure site.
- **Mail your documents.** Send documents to: Travelers Premium Audit, PO Box 2927, Hartford, CT 06104-2927.
- **Print a paper form.** If you are unable to complete the audit online or prefer paper, print the audit form from Travelers.com/audit.



Getting Started

If you need to logon as a new user you can do that by going to www.travelers.com/register/biz.

What You Will Need

In general, the following information is needed, however specific documents may be requested after you register and log into the customer website. Visit Travelers.com/audit for Required Documents Checklists (note: this may be a different site from where you are directed to register).

- **Payroll information.** Match as closely to your Workers Compensation policy period as possible. For payroll reports include owners, officers and employees and their job duties for proper classification. You can round to the first of the month (it is acceptable to deviate from the policy period by 30 days).
- **Tax Forms.** Federal Form 941 and/or State Unemployment Wage Reports (SUTA). If your quarterly tax reports don't line up with your policy term, simply provide your last four filed quarterly reports. If you have policy coverage in California, DE-9 forms are required.
- **Contracted Labor.** If you utilized non-employee services during the policy term please provide payment information for all contracted and sub-contracted labor used during your audit period and supply a copy of their Certificate of Insurance (if insured).

NOTE: If the tax documents above do not apply to your business, you must provide one of the following:

- For a Sole Proprietor, the Profit or Loss (Form 1040) Schedule C tax form, pages 1 and 2
- For a Partnership, U.S. Partnership Return of Income (Form 1065) Page 1 and 1125-A
- For a Corporation, U.S. Corporation Income Tax Return (Form 1120) Page 1 and 1125-A

Your information is strictly confidential and will be used only for the purpose of completing your audit.

Your Cooperation is Important

In order to reconcile your premium in a timely fashion, please complete your premium audit by the Due Date shown at the top of this letter to prevent an estimated audit. If verification documents are not provided your payroll or sales will be estimated which will increase your premium.

How May We Help?

If you need help or are unclear about the information needed for your audit, a Premium Audit Customer Service representative is available to assist you Monday - Friday 8am - 7pm EST at 1-800-842-4271. You can also visit us at www.travelers.com/audit.

Thank you. We appreciate your time and assistance to complete your premium audit.

Sincerely,

The Travelers Premium Audit Team