

2022 Agency Admin Training

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# **New Agent Portal Agency Administration Webinar**





# Objectives

## Today's Objectives

Direct Deposit Setup

EFT setup

View commission statements

Updating Organization Information

Adding locations

Add new users

Working Activities

Pull own BOB



Why is TWIA changing their system?

TWIA is moving to an updated and flexible system that gives agents a more streamlined application process with enhanced communication and maintenance capabilities.

Additionally, this will allow TWIA to easily make system changes and improve our business processes.





# New Agent Portal Deployment Timeline

## April 18, 2022

- New Agent Portal deploys
- ALL new business applications entered after this date will utilize the new system

## Mid May 2022

- Renewals with an effective date of July 17, 2022, will initiate migration into the new system

## Mid-2022 - Mid-2023

- Policies continue to migrate into the new system until the agency's entire book of business is in the new system





## Feature Demos

1. Adding New Users
2. Editing User Info
3. Commission Statements
4. Pulling Book of Business Reports
5. Utilizing Activities
6. Updating Organization Information
7. Setting up Direct Deposit
8. Setting up EFT
9. Adding locations

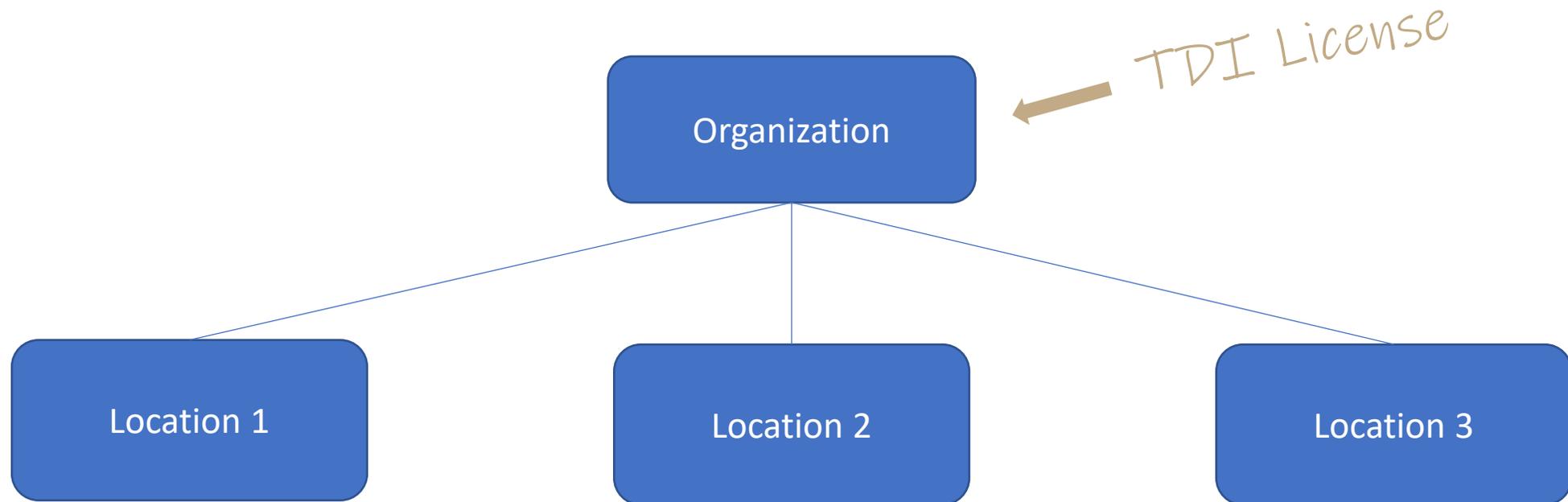


6

# What will Migrate from the Old System?

- Users
- The permissions of the users
- Direct deposit info
- EFT info

# Organization vs. Agency

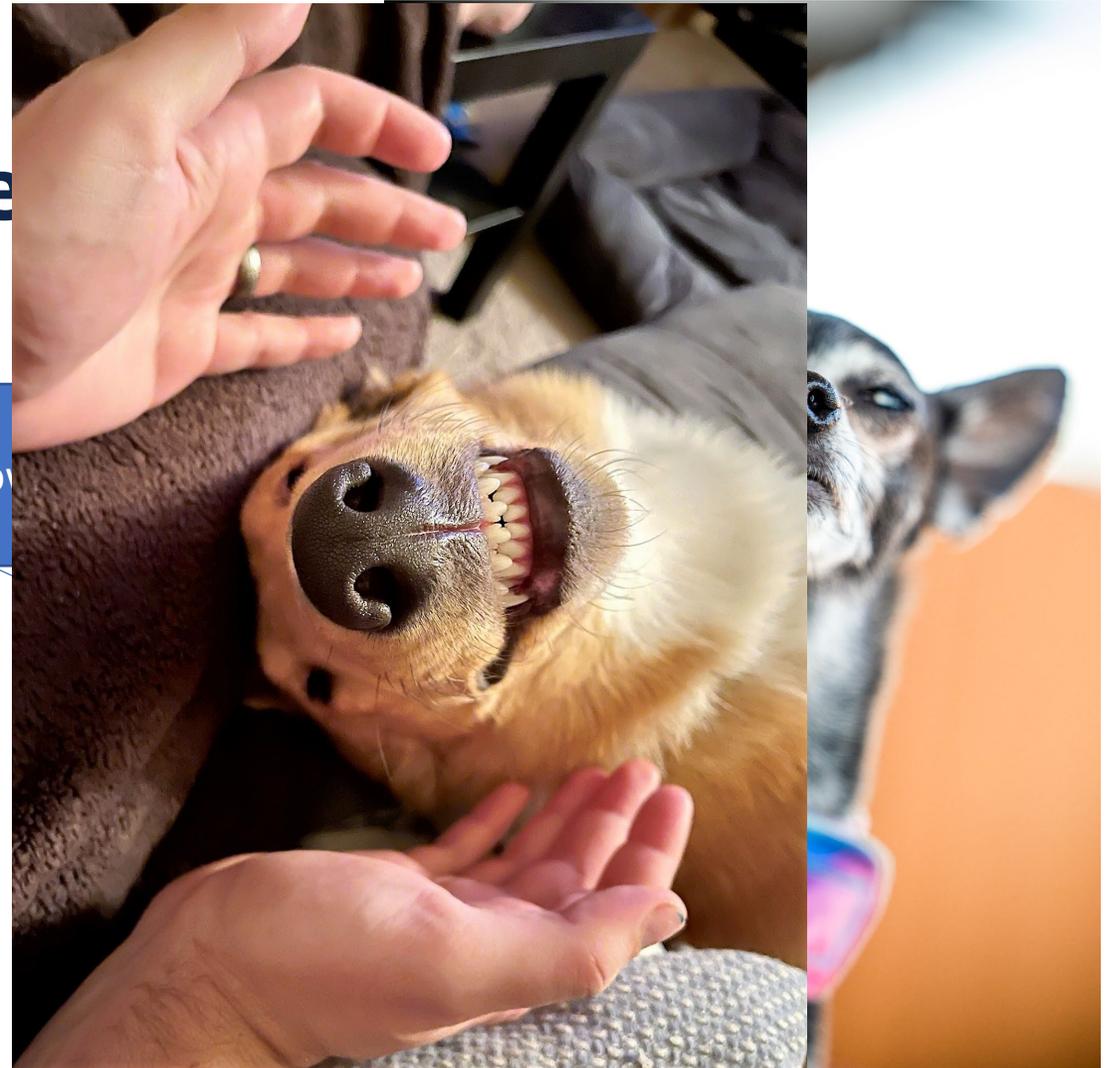


# Organization vs. Age



Catra Meow

Catra Meow-Meow



# Adding a New User

Catra Meow-Meow - XXXXXXXXXX

TDI License Number: XXXXXXXXXX

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019



Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745



Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Direct Deposit:  
XXXXXXXXXX6789  
111000614



+ Agency

Organization Administrators

## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
Catra Meow-Meow	<span style="background-color: #ccc; border: 1px solid #ccc; padding: 2px;">XXXXXXXXXX</span>	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active

## Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019



Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745



Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Direct Deposit:  
XXXXXXXXXX6789  
111000614



+ Agency

Organization Administrators

### Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
Catra Meow-Meow	[REDACTED]	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active



# Adding a New User to Organization

Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address: 29 MILL ST # 5 UNIONVILLE CT 06085-1019 	Mailing Address: 123 Meow-Meow Meowville TX 78745 	Primary Contact: Catra Meow-Meow kitty@cmeowmeow.com 860-933-4868 	Direct Deposit: XXXXXXXXXX6789 111000614 
---	---	--	--



[+ Agency](#) [Organization Administrators](#)

## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
<a href="#">Catra Meow-Meow</a>	[REDACTED]	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active
<a href="#">Indy Insures You</a>	[REDACTED]	Indiana Jones	512-123-4567	indiana@jones.com	Inactive



## Catra Meow-Meow - MASTER GROUP

### Mailing Address

123 Meow-Meow  
Meowville  
TX  
78745



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



### Status

Active



+ User

## Organization Administrators

Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Catra	Meow-Meow	<a href="#">cmeow-meow</a>	860-933-4868	kitty@cmeowmeow.com	Yes	Active



TEXAS WINDSTORM  
INSURANCE ASSOCIATION

## Catra Meow-Meow - MASTER GROUP

### Mailing Address

123 Meow-Meow  
Meowville  
TX  
78745



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



### Status

Active

## Search User

Email Address \*

Search



## Search User

 No user with matching email address found

Email Address \*

piaget@playistheanswer.com

Search

## New User

First Name \*

Piaget

Last Name \*

Bork

Email Address \*

piaget@playistheanswer.com

Phone Number \*

5121234567



## Roles

	Name	Description
<input type="checkbox"/>	Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
<input type="checkbox"/>	EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.
<input type="checkbox"/>	Financial Admin	Permission to view and update bank account details for Direct Deposit of commissions
<input type="checkbox"/>	Organization Admin	Permission to view entire organization and perform administration activities like manage Agencies/Locations, manage all Users etc.

Cancel

Submit

## Catra Meow-Meow - MASTER GROUP

### Mailing Address

123 Meow-Meow  
Meowville  
TX  
78745



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



### Status

Active

+ User

## Organization Administrators

Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Catra	Meow-Meow	<a href="#">cmeow-meow</a>	860-933-4868	kitty@cmeowmeow.com	Yes	Active
Piaget	Bork	<a href="#">pbork</a>	512-123-4567	piaget@playistheanswer.com	Yes	Active



# Add New User to the Agency

Catra Meow-Meow - 2106360

TDI License Number: [REDACTED]

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019

Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745

Primary Contact:  
Piaget Bork  
piaget@playistheanswer.com  
512-123-4567

Direct Deposit:  
XXXXXXXXXX6789  
111000614

+ Agency

Organization Administrators

## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
Catra Meow-Meow	[REDACTED]	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active
Indy Insures You	[REDACTED]	Indiana Jones	512-123-4567	indiana@jones.com	Inactive



## Agency/Location: Catra Meow-Meow

Producer Code [REDACTED]

<b>Mailing Address</b> 123 Meow-Meow Meowville TX 78745 	<b>Primary Contact</b> Catra Meow-Meow kitty@cmeowmeow.com 860-933-4868 	<b>Status</b> Active	<b>EFT Payments:</b> Active [REDACTED] wia 
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[+ User](#) [Deactivate](#)

### Users

Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Catra	Meow-Meow	<a href="#">cmeow-meow</a>	860-933-4868	kitty@cmeowmeow.com	Yes	Active



## Agency/Location: Catra Meow-Meow

Producer Code [blurred]

### Mailing Address

123 Meow-Meow  
Meowville  
TX  
78745



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Status  
Active

### EFT Payments:

Active  
[blurred] twia



## Search User

Email Address \*

piaget@playistheanswer.com

Search





## Search User

Email Address \*

piaget@playistheanswer.com

Search

### Select User to Add to Agency/Location

	First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
 <b>Select</b>	Piaget	Bork	<a href="#">pbork</a>	512-123-4567	piaget@playistheanswer.com	Yes	Active



	First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
<input type="button" value="Select"/>	Piaget	Bork	pbork	512-123-4567	piaget@playistheanswer.com	Yes	Active

### Roles

Name	Description
Agency Admin	Permission to view agency details and manage users, update address etc.
Financial Admin	Permission to view and update bank account details for Direct Deposit of commissions
Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
Organization Admin	Permission to view entire organization and perform administration activities like manage Agencies/Locations, manage all Users etc.
EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.





## Agency/Location: Catra Meow-Meow

Producer Code [REDACTED]

### Mailing Address

123 Meow-Meow  
Meowville  
TX  
78745



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



### Status

Active

### EFT Payments:

Active  
[REDACTED] twia



+ User

Deactivate

## Users

Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Catra	Meow-Meow	<a href="#">cmeow-meow</a>	860-933-4868	kitty@cmeowmeow.com	Yes	Active
Piaget	Bork	<a href="#">pbork</a>	512-123-4567	piaget@playistheanswer.com	Yes	Active



# Editing User Information

Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address:  
7265 NORTH FWY SERVICE  
RD  
HOUSTON  
TX  
77076



Mailing Address:  
7265 NORTH FWY SERVICE  
RD  
HOUSTON  
TX  
77076



Primary Contact:  
Catra Meow-  
Meow  
kitty@cat.com  
281-974-1767



Direct Deposit:  
XXXXXXXXXX4321  
111000614  
Approval of recent bank account details change is  
pending

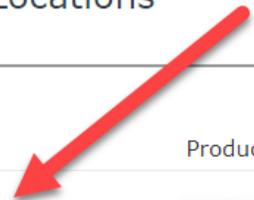
+ Agency

Organization Administrators

## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
<a href="#">Catra Meow-Meow</a>	[REDACTED]	Catra Meow-Meow 2	281-974-1767	kitty@cat.com	Active



# Editing User Information

+ User

## Users

Search:

First Name	Last Name	Username	Phone Number	Email Address	EFT Enabled	Status
Catra	Meow-Meow	<a href="#">cmeow-meow7</a>	281-974-1767	kitty@cat.com	Yes	Active
Piaget	Bork	<a href="#">pbork</a>	512-123-4567	piaget@playistheanswer.com	Yes	Active



# Editing User Information

Piaget Bork

User Name	pbork	Status	Active	<a href="#">Edit</a>	<a href="#">Deactivate</a>
First Name	Piaget	Last Name	Bork		
Email Address	piaget@playistheanswer.com	Phone Number	512-123-4567		





# Editing User Information

Email Address

piaget@playistheanswer.com

**To update the email address, please send your request to [agentservices@twia.org](mailto:agentservices@twia.org).**



# Editing User Information

## Roles

---

	Name	Description
<input checked="" type="checkbox"/>	Agency Admin	Permission to view agency details and manage users, update address etc.
<input checked="" type="checkbox"/>	Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
<input checked="" type="checkbox"/>	EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.

Cancel

Submit





# Getting Commission Statements

Home Accounts Policies Claims Activities **Commission** Administration Book Of Business

## Commissions

### Commission Statements

NAME	DATE UPLOADED
TWIA November 2021 Commission Statement.pdf	11/30/21
TWIA November 2021 Commission Statement.csv	11/30/21
TWIA January 2022 Commission Statement.pdf	1/31/22



Search

+ Start New Quote

Help cmeow-meow7



Accounts

Policies

Claims

Activities

Commission

Administration

Book Of Business

## Book Of Business Report - Active Policies

TRANSFER

ACTIVE POLICIES  
REPORT

Producer Code

--Select Producer Code--

2 W001 Catra Meow-Meow

Generate Report



Search

+ Start New Quote

Help cmeow-meow7



Accounts

Policies

Claims

Activities

Commission

Administration

Book Of Business

## Book Of Business Report - Active Policies

TRANSFER

ACTIVE POLICIES  
REPORT

Producer Code

2 W001 Catra Meow-Meow

Generate Report





# Book Of Business Report - Active Policies

TRANSFER      ACTIVE POLICIES REPORT

Producer Code

2108225W001 Catra Meow-Meow

Generate Report

1 - 25 of 99



Book Of Business Report

Export to CSV

POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	PROPERTY LOCATION	EFFECTIVE DATE	EXPIRATION DATE	ANNUAL WRITTEN PREMIUM
TWRD0100000024	W000000005	Nugget Bork	123 Woof, Chocolate Bayou, TX 77422	11/24/21	11/24/22	\$917.00
TWRD0100000030	W000000005	Nugget Bork	123 Woof, Chocolate Bayou, TX 77422	11/30/21	11/30/22	\$614.00



# Assigning Activities to Users

Search  + Start New Quote Help cmeow-meow7

Accounts Policies Claims **Activities** Commission Administration Book Of Business

## Activities

YOUR OPEN 10	YOUR COMPLETED 0	ALL OPEN 10	ALL COMPLETED 0	ALL UNASSIGNED 1
-----------------	---------------------	----------------	--------------------	---------------------

All Unassigned [Advanced Filter](#)

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
<a href="#">+</a>	4/17/22	Normal	Additional Info Needed - Item 2 for TWCC0100000483 for Carmen San Diego	Unassigned - C...	0

# Activities

YOUR OPEN 10	YOUR COMPLETED 0	ALL OPEN 10	ALL COMPLETED 0	ALL UNASSIGNED 1
-----------------	---------------------	----------------	--------------------	---------------------

All Unassigned

Advanced Filter

Search activities

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	4/17/22	Normal	Additional Info Needed - Item 2 for TWCC0100000483 for Carmen San Diego	Unassigned - C...	0 

ESCALATION DATE	4/28/22	CREATED BY	Adam Young
TYPE	Additional Info Needed - Item 2	CREATED	3/29/22
DESCRIPTION	No COC for original construction. If not provided		





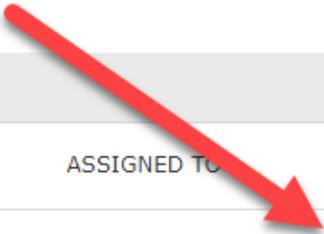
## All Unassigned

Advanced Filter

Search activities

DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	4/17/22	Normal	Additional Info Needed - Item 2 for TWCC0100000483 for Carmen San Diego	<input type="text" value=""/>	0
ESCALATION DATE	4/28/22			CREATED BY Adam	
TYPE	Additional Info Needed - Item 2			CREATED 3/29/22	
DESCRIPTION	No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.				



- Unassigned - Catra Meow-Meow - 2108225 Me
- Piaget Bork (Catra Meow-Meow)



## All Unassigned

Advanced Filter

Search activities

### DUE AFTER THIS WEEK

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	4/17/22	Normal	Additional Info Needed - Item 2 for TWCC0100000483 for Carmen San Diego	Piaget Bork (Catr:	0
ESCALATION DATE	4/28/22			CREATED BY	Adam Young
TYPE	Additional Info Needed - Item 2			CREATED	3/29/22
DESCRIPTION	No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.				
Notes	Note				





4/17/22

Normal

Additional Info Needed - Item 2 for  
TWCC010000483 for Carmen San  
Diego

Me

0

ESCALATION DATE 4/28/22

CREATED BY Adam

TYPE Additional Info Needed - Item 2

CREATED 3/29/22

DESCRIPTION No COC for original construction. If not provided  
by 4/17/22, this item will be removed from the  
policy.

Unassigned - Catra Meow-Meow - 2018225  
Piaget Bork (Catra Meow-Meow)

Notes



Note

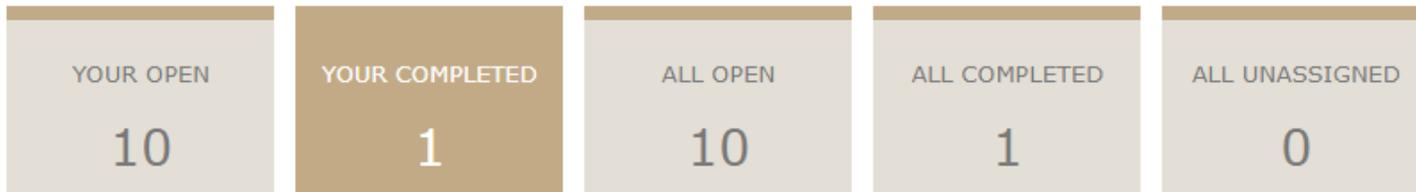


# Activities – Completing

	4/17/22	Normal	Additional Info Needed - Item 2 for TWCC010000483 for Carmen San Diego	Catra Meow-Me...		Complete
ESCALATION DATE	4/28/22	CREATED BY	Adam Young	CREATED	3/29/22	
TYPE	Additional Info Needed - Item 2					
DESCRIPTION	No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.					
Notes	Note					
Documents for this Activity						
Certificate of Compliance		Upload Documents		Search documents		



# Activities



## Your Completed

Advanced Filter

Search activities

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
	-	Normal	Additional Info Needed - Item 2 for TWCC010000483 for Carmen San Diego	Catra Meow-Me...	0 <span style="color: green;">✓ COMPLETED</span>



# Activities – Leaving Notes



12/3/21

High

Underwriter has reviewed this job for 0005220413 for [Nugget Bork](#)

Catra Meow-Me...

0

Complete

ESCALATION DATE —

CREATED BY Nate Neddeau

TYPE Underwriter has reviewed this job

CREATED 12/1/21

DESCRIPTION —

Notes

Note



Documents for this Activity

-- Please Select Document Type --

Upload Documents

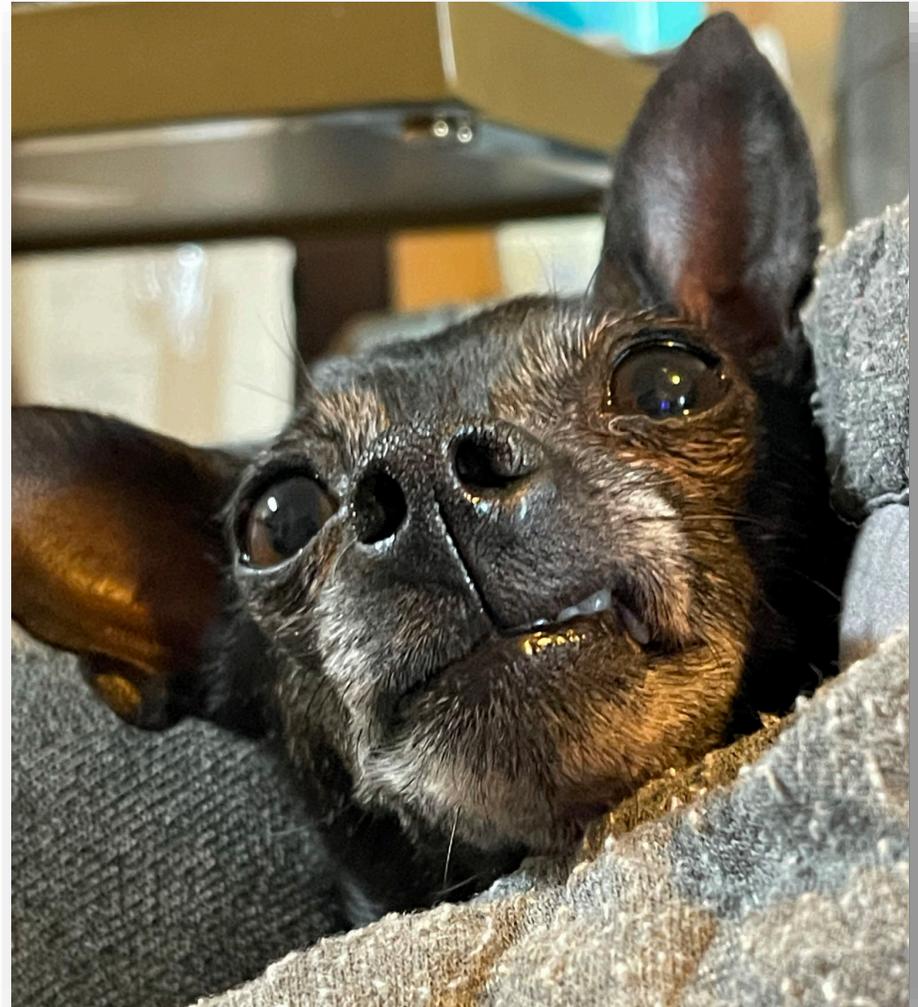
**Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.**

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.



Underwriter has reviewed this job for  
0005220413 for Nugget Bork

---





12/3/21

High

Underwriter has reviewed this job for  
0005220413 for **Nugget Bork**

Catra Meow-Me...

0 

 Complete

ESCALATION DATE —

CREATED BY Nate Neddeau

TYPE Underwriter has reviewed this job

CREATED 12/1/21

DESCRIPTION —

Notes

Topic General

Subject \*

A note for me

Note \*

A note for you

Cancel

Add

Documents for this Activity

-- Please Select Document Type -- 

 Upload Documents



12/3/21 High 0005220413 for Nugget Bork Catra Meow-Me... 1 Complete

ESCALATION DATE	—	CREATED BY	Nate Neddeau
TYPE	Underwriter has reviewed this job	CREATED	12/1/21
DESCRIPTION	—		

Notes Catra Meow-  
1

+ No

Documents for this Activity

-- Please Select Document Type -- + Upload Documents

**Note Created**

You have successfully created a note.

OK

**Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.**

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

12/3/21 High Underwriter has reviewed this job for 0005220413 for Nugget Bork Catra Meow-Me... 1  ✓ Complete

ESCALATION DATE	—	CREATED BY	Nate Neddeau
TYPE	Underwriter has reviewed this job	CREATED	12/1/21
DESCRIPTION	—		

Notes

Catra Meow-Meow	<b>A note for me</b>
4/5/22	A note for you
1:50PM	

+ Note

Documents for this Activity

-- Please Select Document Type -- + Upload Documents

**Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TWIA if you need to delete a document.**

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.



# Activities – Uploading Documents

4/17/22 Normal Additional Info Needed - Item 2 for TWCC0100000483 for Carmen San Diego Piaget Bork

ESCALATION DATE 4/28/22 CREATED BY Adam Young  
TYPE Additional Info Needed - Item 2 CREATED 3/29/22  
DESCRIPTION No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.

Notes + Note

Documents for this Activity

-- Please Select Document Type -- + Upload Documents

**Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description, select the Building, and click the Save button. Contact TWIA if you need to delete a document.**

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.



4/17/22

Normal

Additional Info Needed - Item 2 for  
TWCC0100000483 for Carmen San  
Diego

Piaget Bork

0 

ESCALATION DATE 4/28/22

CREATED BY Adam Young

TYPE Additional Info Needed - Item 2

CREATED 3/29/22

DESCRIPTION No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.

 Notes



Note

Documents for this Activity

- Certificate of Compliance
- Certificate of Compliance
- Historical Landmark Exception Photo
- ISO Loss Cost Report
- Replacement Cost Valuation Map/Diagram
- Other Document
- Cancellation Request
- Premium Finance
- Underwriting Response

 Upload Documents

**Click the "+ Upload Documents" button to upload documents. After you upload a document, click the Building, and click the Save button. Contact TWIA if you need to delete a document.**

items or copyrighted information without the permission of the copyright owner. File names must not exceed 255 characters. Files must not exceed 20MB.

[-]    4/17/22    Normal    Additional Info Needed - Item 2 for TWCC010000483 for Carmen San Diego    Piaget Bork    0 [-]

ESCALATION DATE 4/28/22    CREATED BY Adam Young  
 TYPE Additional Info Needed - Item 2    CREATED 3/29/22  
 DESCRIPTION No COC for original construction. If not provided by 4/17/22, this item will be removed from the policy.

[-] Notes    + Note

Documents for this Activity

Certificate of Compliance [-]    + Upload Documents    Search documents

**Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description, select the Building, and click the Save button. Contact TWIA if you need to delete a document.**

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	BUILDING *	DATE UPLOADED	SAVE
 IMG_3800.JPG.jpg	<input type="text"/>	Certificate of Compliance	N/A	04/05/2022	





# Setting Up Direct Deposit

The screenshot shows the TWIA agent portal interface. At the top left is the TWIA logo and the text "TEXAS WINDSTORM INSURANCE ASSOCIATION". To the right is a search bar with a magnifying glass icon and the text "Q Search". Further right is a dark blue button with a white plus sign and the text "Start New Quote". On the far right is a "Help" link and a user profile dropdown menu showing "cmeow-meow7".

Below the header is a dark blue navigation bar with white text for the following menu items: Home (house icon), Accounts, Policies, Claims, Activities, Commission, Administration (highlighted with a white box), and Book Of Business.

A light blue notification box contains the following text:  
i Changes made do not automatically update in our legacy Agent Portal.  
You may login to the legacy Agent Portal to make changes or contact TWIA at agentservices@twia.org.

Below the notification, the user's name "Catra Meow-Meow" is displayed next to a blurred ID number. Underneath, the text "TDI License Number:" is followed by a blurred license number. At the bottom, the labels "Primary Location Address:" and "Mailing Address:" are visible, followed by blurred address information.



Q Search

+ Start New Quote

Help cmeow-meow7

- Accounts
- Policies
- Claims
- Activities
- Commission
- Administration
- Book Of Business

Changes made do not automatically update in our legacy Agent Portal.

You may login to the legacy Agent Portal to make changes or contact TWIA at [agentservices@twia.org](mailto:agentservices@twia.org).

Catra Meow-Meow - **2106225**

TDI License Number: **2106225**

Primary Location Address:  
7265 NORTH FWY SERVICE RD  
HOUSTON  
TX  
77076

Mailing Address:  
7265 NORTH FWY SERVICE RD  
HOUSTON  
TX  
77076

Primary Contact:  
Catra Meow-Meow  
[kitty@cat.com](mailto:kitty@cat.com)  
281-974-1767

Direct Deposit:



## Commissions Direct Deposit Authorization

Account Number



Confirm Account Number



Routing Number



Account Type

 Personal  Commercial

## Check Image

Upload copy of a blank check with "VOID" written on the face of the check

[+ Upload Documents](#)



For the account indicated above, I hereby authorize Texas Windstorm Insurance Association to initiate credit entries (deposits) and adjustments for any credit entries in error. This authority remains in full force and effect until Texas Windstorm Insurance Association has received notification from me of its termination in such manner as to afford the Association and my bank a reasonable opportunity to act. It is my responsibility to verify that funds transferred to my account are available for disbursement. Texas Windstorm Insurance Association is not responsible for bank fees incurred due to my failure to verify the availability of deposited funds.



Account Type \*

**Personal** Commercial

Check Image

[143004914\\_3559600677410657\\_2235947636599270744\\_n.jpg](#) [X]

For the account indicated above, I hereby authorize Texas Windstorm Insurance Association to initiate credit entries (deposits) and adjustments for any credit entries in error. This authority remains in full force and effect until Texas Windstorm Insurance Association has received notification from me of its termination in such manner as to afford the Association and my bank a reasonable opportunity to act. It is my responsibility to verify that funds transferred to my account are available for disbursement. Texas Windstorm Insurance Association is not responsible for bank fees incurred due to my failure to verify the availability of deposited funds.

Cancel

Save Changes





## Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address:  
7265 NORTH FWY SERVICE  
RD  
HOUSTON  
TX  
77076

Mailing Address:  
7265 NORTH FWY SERVICE  
RD  
HOUSTON  
TX  
77076

Primary Contact:  
Catra Meow-  
Meow  
kitty@cat.com  
281-974-1777

Direct Deposit:  
XXXXXXXXXX6789  
111000614  
Approval of recent bank account details change is pending

+ Agency

Organization Administrator

### Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
-------------	---------------	-----------------	--------------	---------------	--------



# Setting Up EFT

Catra Meow-Meow - **2106360**

TDI License Number: **00000**

Primary Location Address:  
29 MILL ST  
#5  
UNIONVILLE  
CT  
06085



Mailing Address:  
29 MILL ST  
#5  
UNIONVILLE  
CT  
06085



Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Direct Deposit:  
XXXXXXXXX6789  
111000614



+ Agency

Organization Administrators

## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
<a href="#">Catra Meow-Meow</a>	2106360W001	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active





## Agency/Location: Catra Meow-Meow

Producer Code XXXXXXXXXX

### Mailing Address

29 MILL ST  
#5  
UNIONVILLE  
CT  
06085



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



### Status

Active

### EFT Payments:

Inactive





## EFT Payment Enrollment Contact

This information is required by Chase and may be used to contact you.

First Name *		<input type="text"/>
Last Name *		<input type="text"/>
E-Mail Address *		<input type="text"/>
Phone Number *		<input type="text" value="( )- - - -"/>
Address Line 1 *		<input type="text"/>
Address Line 2		<input type="text"/>
Address Line 3		<input type="text"/>
City *		<input type="text"/>
State *		<input type="text" value="-- Choose State --"/>
ZIP Code *		<input type="text"/>

## EFT Payment Enrollment Bank Account Information

Bank Account information is not required if you are only changing the EFT Payment Enrollment Contact

Account Number *		<input type="text"/>
Confirm Account Number		<input type="text"/>
Routing Number		<input type="text" value="99999999"/>
Account Category		<input type="checkbox"/> Business <input type="checkbox"/> Consumer
Account Type		<input type="checkbox"/> Checking <input type="checkbox"/> Savings



## Electronic Funds Transfer Terms and Conditions

### ELECTRONIC FUNDS TRANSFER TERMS AND CONDITIONS

This document covers you and your rights and responsibilities concerning the Electronic Payment via electronic funds transfer ("EFT") services offered to you by Texas Windstorm Insurance Association ("TWIA"). Electronic funds transfers are electronically initiated transfers of money from your account through the electronic funds transfer services described below. By signing a request for EFT service, or using the service, each of you, jointly and severally, agree to the terms and conditions in the Agreement and any amendments for the EFT services offered.

#### 1. Definitions

In this Agreement, the words "you" and "yours" mean those who sign the application, joint owners, or any authorized users. The words "we," "us," and "our" mean TWIA. The word "account" means any one or more savings and checking accounts you have with banking institutions. Business day means Monday through Friday excluding any holidays on which TWIA and/or our third party financial institution is closed.

#### 2. Service Provider

You authorize TWIA to use a party to make the authorized EFT withdrawals.

#### 3. EFT Services

Upon approval, you may use EFT services offered by TWIA. We will only process payments to TWIA. Our bank will withdraw, via the Automated Clearing House (ACH), the designated funds from the checking or savings account that you have specified.

Payment transactions requested on or before 8:00 pm Central Time will be processed the same day they are submitted. Payment transactions requested after 8:00 pm Central Time will be processed the following Federal business day.

By checking this box, you attest that:

1. You desire EFT capabilities for the agency shown above;
2. Your agency is in the process of registering and is in good standing;
3. You are authorized to enter into banking agreements for the agency shown above; and
4. You have read and you understand the "Electronic Funds Transfer Terms and Conditions"

The Terms and Conditions will remain in effect until TWIA has received written notification of the agency's desire to terminate EFT capabilities. TWIA has the right to revoke your permissions to use EFT if any payments are returned due to non-sufficient funds.

Cancel

Submit



## Agency/Location: Catra Meow-Meow

Producer Code

### Mailing Address

29 MILL ST  
#5  
UNIONVILLE  
CT  
06085



### Primary Contact

Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Status  
Active

EFT Payments:  
Active

twia





# Updating Org Info- Location Address

Search [ ] + Start New Quote Help cmeow-meow ▾

Accounts Policies Claims Activities Commission Administration Book Of Business

Changes made do not automatically update in our legacy Agent Portal.  
You may login to the legacy Agent Portal to make changes or contact TWIA at [agentservices@twia.org](mailto:agentservices@twia.org).

Catra Meow-Meow - [REDACTED]

TDI License Number: 2106360

Primary Location Address: 29 MILL ST #5 UNIONVILLE CT 06085 	Mailing Address: 29 MILL ST #5 UNIONVILLE CT 06085 	Primary Contact: Catra Meow-Meow kitty@cmeowmeow.com 860-933-4868 	Direct Deposit: XXXXXXXXXX6789 111000614 
---	--	---	---



## Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address:  
29 MILL ST  
#5  
UNIONVILLE  
CT  
06085  


Mailing Address:  
29 MILL ST  
#5  
UNIONVILLE  
CT  
06085  


Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868  


Direct Deposit:  
XXXXXXXXXX6789  
111000614  


### Edit Primary Location Address

Primary Location Address (As Registered with TDI)

-- Please Choose --  
{BL} 29 MILL ST, #5, UNIONVILLE, CT, 06085  
{ML} 29 MILL ST # 5, UNIONVILLE, CT, 060851019

### Primary Location Address

Address \* 29 MILL ST  
#5  
City UNIONVILLE  
State Connecticut  
ZIP Code 06085




# Update Org Info – Mailing Address

The screenshot shows the TWIA Admin Portal interface. At the top, there is a search bar, a 'Start New Quote' button, and a user profile for 'cmeow-meow'. Below this is a navigation menu with tabs for Accounts, Policies, Claims, Activities, Commission, Administration (selected), and Book Of Business. A light blue information box states: 'Changes made do not automatically update in our legacy Agent Portal. You may login to the legacy Agent Portal to make changes or contact TWIA at agentservices@twia.org.' The main content area displays the profile for 'Catra Meow-Meow' with a TDI License Number. Below the profile, there are four sections: 'Primary Location Address', 'Mailing Address', 'Primary Contact', and 'Direct Deposit'. Each section has a pencil icon for editing. A red arrow points to the pencil icon under the 'Mailing Address' section.

Changes made do not automatically update in our legacy Agent Portal.  
You may login to the legacy Agent Portal to make changes or contact TWIA at agentservices@twia.org.

Catra Meow-Meow - 2108360  
TDI License Number: 00000

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019

Mailing Address:  
29 MILL ST  
#5  
UNIONVILLE  
CT  
06085

Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868

Direct Deposit:  
XXXXXXXXXX6789  
111000614

## Edit Mailing Address

Agency Address (As Registered with TDI)

-- Please Choose --

{BL} 29 MILL ST, #5, UNIONVILLE, CT, 06085  
{ML} 29 MILL ST # 5, UNIONVILLE, CT, 060851019

## Mailing Address

OR

Address Line 1 \*

29 MILL ST

Address Line 2

#5

Address Line 3

City \*

UNIONVILLE

State \*

Connecticut

ZIP Code \*

06085

Cancel

Submit



# Update Org Info – Primary Contact

Q Search   + Start New Quote   Help   cmeow-meow ▾

Accounts   Policies   Claims   Activities   Commission   Administration   Book Of Business

**i** Changes made do not automatically update in our legacy Agent Portal.  
You may login to the legacy Agent Portal to make changes or contact TWIA at [agentservices@twia.org](mailto:agentservices@twia.org).

### Catra Meow-Meow - 2106360

TDI License Number: 2106360

Primary Location Address: 29 MILL ST # 5 UNIONVILLE CT 06085-1019	Mailing Address: 123 Meow-Meow Meowville TX 78745	Primary Contact: Catra Meow-Meow <a href="mailto:kitty@cmeowmeow.com">kitty@cmeowmeow.com</a> 860-933-4868	Direct Deposit: XXXXXXXXX6789 111000614
---	---	---	---



## Catra Meow-Meow - [REDACTED]

TDI License Number: [REDACTED]

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019



Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745



Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Direct Deposit:  
XXXXXXXXX6789  
111000614



### Select Primary Contact

	First Name	Last Name	Username	Phone Number	Email Address	Status
 <b>Select</b>	Piaget	Bork	<a href="#">pbork</a>	512-123-4567	piaget@playistheanswer.com	Active
	Catra	Meow-Meow	<a href="#">cmeow-meow</a>	860-933-4868	kitty@cmeowmeow.com	Active



## Catra Meow-Meow - 21096360

TDI License Number: 000000

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019



Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745



Primary Contact:  
Piaget Bork  
piaget@playistheanswer.com  
512-123-4567



Direct Deposit:  
XXXXXXXXXX6789  
111000614





# Adding Locations

Catra Meow-Meow - **XXXXXXXXXX**

TDI License Number: **XXXXXX**

Primary Location Address:  
29 MILL ST # 5  
UNIONVILLE  
CT  
06085-1019



Mailing Address:  
123 Meow-Meow  
Meowville  
TX  
78745



Primary Contact:  
Catra Meow-Meow  
kitty@cmeowmeow.com  
860-933-4868



Direct Deposit:  
XXXXXXXXXX6789  
111000614



+ Agency

Organization Administrators

Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
Catra Meow-Meow	<b>XXXXXXXXXX</b>	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active



# New Agency Registration

## Agency Information

Agency Name \*



Indy Insures You

Address Line 1 \*



123 Boulder

Address Line 2

Address Line 3

City \*



Harrison

State \*



Texas

ZIP Code \*



78745



City <sup>^</sup>

State \*

ZIP Code \*

### Agency Contact

Email Address \*





## Agency Contact

**i** No user with matching email address found

Email Address \*

indiana@jones.com

Search

## New User

First Name \*

Last Name \*

Email Address \*

indiana@jones.com

Phone Number \*



## Roles

	Name	Description
<input checked="" type="checkbox"/>	EFT Enabled	Permission to make EFT Payments for EFT Enabled Agencies/Locations.
<input checked="" type="checkbox"/>	Agency User	Permission to perform policy transactions like New Submission, Renewal, Policy Change, Policy Change etc.
<input checked="" type="checkbox"/>	Agency Admin	Permission to view agency details and manage users, update address etc.

Cancel

Submit



## Agencies/Locations

Search:

Agency Name	Producer Code	Primary Contact	Phone Number	Email Address	Status
<a href="#">Catra Meow-Meow</a>	[REDACTED]	Catra Meow-Meow	860-933-4868	kitty@cmeowmeow.com	Active
<a href="#">Indy Insures You</a>	[REDACTED]	Indiana Jones	512-123-4567	indiana@jones.com	Inactive





# NOW YOU'RE PREPARED FOR LAUNCH!

Any last questions we  
can answer for you?

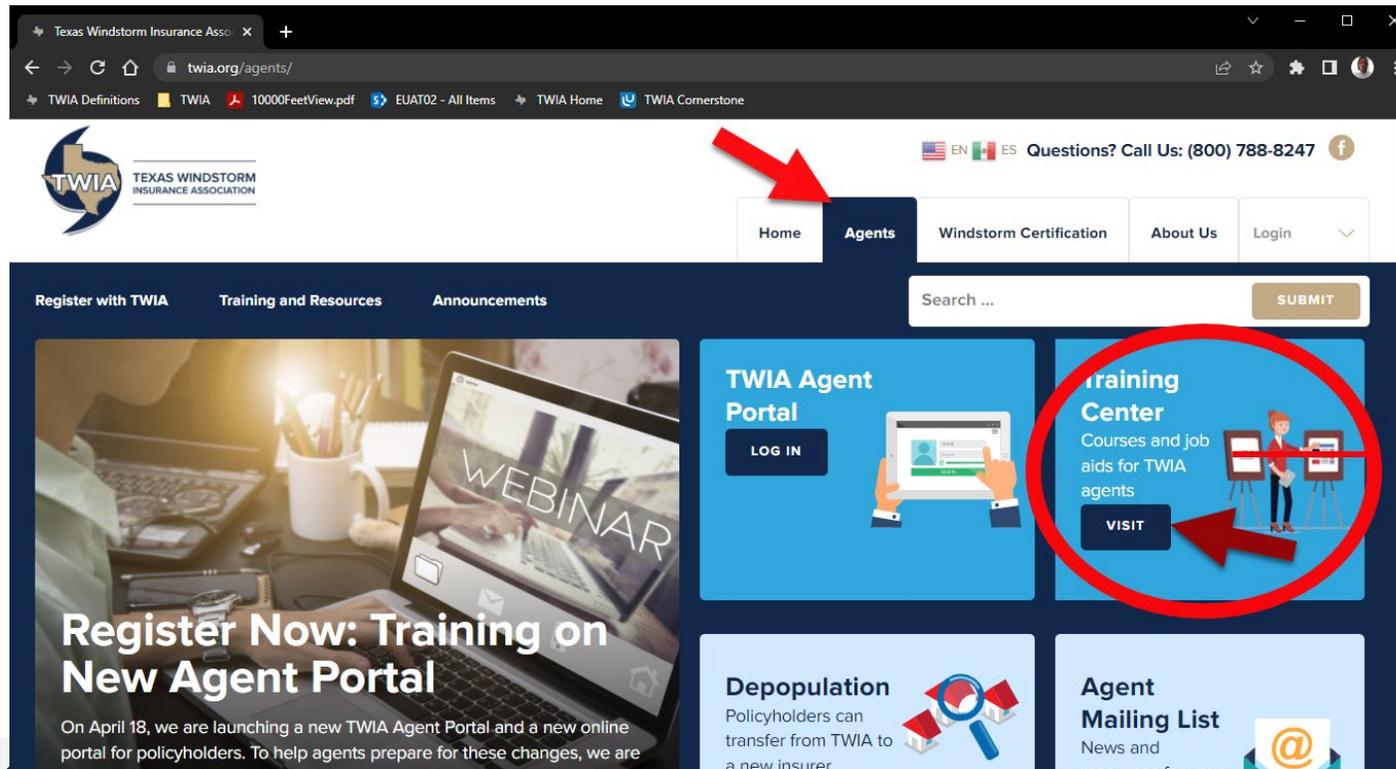




73

# TWIA Agent Training Center

twia.org/agents/training/



★ Job Aids

★ Recorded Webinars

★ CBTs  
[Video Tutorials]



# TWIA Agent Training Center

## Access inside the Agent Portal

The screenshot shows the TWIA Agent Portal dashboard. At the top left is the TWIA logo. To the right is a search bar and a 'Start New Quote' button. Below this is a navigation menu with items: Accounts, Policies, Claims, Activities, Commission, Administration, and Book Of Business. The main content area is titled 'Dashboard' and includes a filter dropdown set to 'Everything'. Below the dashboard title are four cards: 'OPEN QUOTES' (0), 'OPEN POLICY CHANGES' (0), 'OPEN CANCELLATIONS' (0), and 'OPEN RENEWALS' (0). Underneath is a section for 'Your Open Activities' which shows 'No Activities found.' On the right side of the dashboard, there is a 'Welcome' message box highlighted with a red border and a red arrow pointing to it. The message reads: 'Welcome For training guides and additional resources, please visit our resource center'. Below the welcome message is a news feed with three items: 'Register Now: Training on New Agent Portal' (March 28, 2022), 'TWIA Board Directs Reinsurance Purchase for \$4.2 Billion in Total 2022 Hurricane Season Funding' (March 23, 2022), and 'Public Invited to Comment as TWIA Board to Meet to Decide on Reinsurance for 2022 Hurricane Season' (March 7, 2022). At the bottom right is a social media widget for 'Texas Windstorm I...' with a 'Like Page' button and '1.5K likes'.



A Week After We Go Live

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**Bring your questions!**

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Tuesday, April 26, 10:00 – 11:30 a.m.

Thursday, April 28, 2:00 – 3:30 p.m.

**Elevate Town Hall  
Sessions**

**LIVE Q&A**

**Look for Your Invitation  
Coming Soon!**



**Thank you for  
joining us!**

