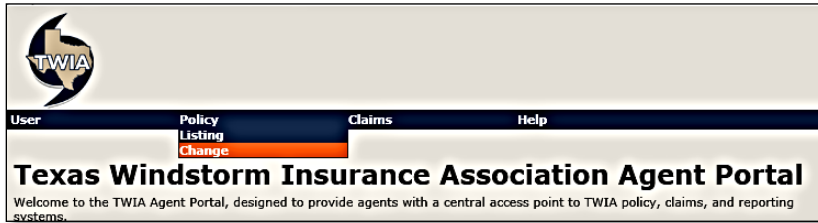# Policy Changes in Agent Portal

This job aid demonstrates how to submit policy changes in Agent Portal. For assistance quoting new business applications, please refer to our Policy Center Training, located here**.**

To submit an online policy change in Agent Portal, follow these steps:

1. Click on "Change" under the "Policy" tab in Agent Portal.

2. On the Policy Search page, enter the eight-digit TWIA Policy Number to be endorsed, updated or cancelled and click on "Search".

3. The Policy Search results will display the policy number and its information matching the search if the following criteria is met:
   a. The policy number is associated with your agency.
   b. The policy number is one of the following statuses:
      i. Cancelled
      ii. Cancelled Binder
      iii. Issued
      iv. Pending
      v. Rejected Application
      vi. Renewal
      vii. Under Binder (Returned Application)

   Note: If your policy number is not in one of these statuses, then please submit your changes for these policies via fax, email or paper mail.

4. Click on "Change."

5. On the Policy Change Request web page, enter and verify the following, then click on "Submit".

    a. "Effective Date" - Pre-filled - The date the change is effective. The date entered must fall within the policy term. Defaults to current date but may be overridden.

b. "Agency Use" - Optional - An optional field typically used as a unique identifier for your agency's internal records.

c. "Submitter Email Address" - Pre-filled - Email address of the agency (or person) making the request. Defaults to your E-Quote login email address but may be overridden.

d. "Submitter Telephone No" - Optional - Telephone number of the agency (or person) making the request. Field is optional. If entered, the valid format is a ten (10) digit telephone number, including area code. For example, enter 5128994900 or (512) 899-4900.

e. "Policy Request Type" - Required - Select the type from the dropdown most applicable to your request. Selection is required to submit.

   i. Binder Response: i.e. Response to a TWIA binder letter
   ii. Name Change: i.e. Updating the named insured, adding or deleting name insured, updating insured's mailing address, etc.
   iii. Mortgage Change: i.e. Updating the mortgagee or loss payee, adding or deleting a mortgagee or loss payee, updating mailing addresses, loan numbers, etc.
   iv. Property Location Change: i.e. Updating the property's physical address due to 9-1-1, Emergency Services, adding or deleting a new location, etc.
   v. Coverage Change: i.e. Increasing or decreasing insurance amounts, changing occupancy to secondary, adding or deleting listed items on the policy, etc.
   vi. Miscellaneous: i.e. Submitting MSB reports, photos, diagrams, etc.
   vii. Inspection: i.e. Submitting inspection photos and/or statement of repairs
   viii. Cancellation: i.e. Lost Policy Voucher (TWIA Form 113)

f. "Link Attachments Here" – Optional - Provides the agent the optional ability to include PDF documents to be submitted along with the request. You can attach multiple files however the size of the combined files is limited to 30MB.

g. "Policy Change Request" - Optional - free form description of the change or policy updates. An optional "free form" field provides the ability to enter and save up to 1000 characters. This information should be regarding the change and should not be used as a method to email underwriting.

6. Once the Change has been successfully submitted, you will receive an email acknowledging the receipt of you online submission. The email will not include details of the online request for your records. Please do not submit duplicate requests online or by other methods, such as fax, email or paper mail, unless directed to do so by TWIA personnel. Processing of your request will be handled in the received order, along with all other correspondence. Please be patient as duplicating the request, or phone calls to our office notifying us of your submitted request, will only delay processing.