



Adding/ Deleting a Mortgagee in the TWIA Agent Portal

This job aid demonstrates the steps to add and delete a mortgagee in the TWIA Agent Portal.

1. Locate the policy that needs updating. Click on “Change Policy.”

Account: Steven Lopez

Residential (TWRD01()) In Force

Summary Contacts 0 Open Activities 0 Notes 8 Documents 0 Claims Billing Commission

Change Policy Cancel Policy

2. Enter the effective date of the change and select “Next.”

Policy Change

Account: Steven Lopez

Dwelling and Personal Property Quote (TWRD01)

Effective Date

* Policy Change Effective Date Apr 9, 2025

Cancel Next

3. Enter the policy change description and then select “Next.”

Policy Change

Account: Steven Lopez

Dwelling and Personal Property (TWRD01) - Policy Change (0015010008)

Policy Details

* Policy Change Effective Date Apr 9, 2025

Policy Period 03/24/2025 - 03/24/2026

Policy Change Description delete old mortgagee and add new one

Primary Named Insured Steven Lopez

Cancel Previous Next

4. If you are not making any other changes to the policy, select “Next” 2 times.

Select “Calculate Premium.”

Policy Change

Account: Steven Lopez

Dwelling and Personal Property (TWRD01) - Policy Change (0015010008)

Quote

Please select coverage options and click the 'Calculate Premium' button to quote this PolicyChange.

\$--

Calculate Premium

5. Select, “Continue.”



6. To locate the mortgagee information, select “Additional Interests.”

7. It is best to delete the old mortgagee and add the new one. Remove the old mortgagee clause by selecting the trashcan symbol.

8. You will be asked to confirm your removal of the additional interest. Select “Ok.”

9. To add a mortgagee, select “+Add” to start.



Account: Steven Lopez
Dwelling and Personal Property
(TWRD01[REDACTED]) - Policy Change (0015010008)

Additional Information

Additional Interests

Additional Interests

+ Add

NAME	INTEREST TYPE	MORTGAGE POSITION	LOAN/CONTRACT NUMBER
No items found			

Upload Documents

Cancel Previous Next

10. Since you are adding mortgage company information, click on Organization, enter the requested information in all fields noted with an * and then select "Save."

Account: Steven Lopez
Dwelling and Personal Property
(TWRD01[REDACTED]) - Policy Change (0015010008)

Additional Information

Additional Interests

Additional Interests

+ Add

Contact Type: Person Organization

* Interest Type: Mortgage

* Mortgage Position: First Mortgage

* Loan/Contract Number: 001

* Name: Mortgage Bank

* Address Line 1: 301 Congress Ave

* Address Line 2:

* Address Line 3:

* City: Austin

* State: Texas

* ZIP Code: 78701

* Country: United States

Email: mortgage@texas.com

Phone Number:

NAME	INTEREST TYPE	MORTGAGE POSITION	LOAN/CONTRACT NUMBER
No items found			

Upload Documents

Cancel Save

11. Verify the information returned and select "Next."

Account: Steven Lopez
Dwelling and Personal Property
(TWRD01[REDACTED]) - Policy Change (0015010008)

Additional Information

Additional Interests

Additional Interests

+ Add

NAME	INTEREST TYPE	MORTGAGE POSITION	LOAN/CONTRACT NUMBER
Mortgage Bank	Mortgage	First Mortgage	001

Upload Documents

Cancel Previous Next



12. Verify the information returned and then select “Next.”

The screenshot shows a web form titled "Policy Change" for "Dwelling and Personal Property (TWRD0100194197) - Policy Change (0015010008)". The "Making Address" section is active, displaying fields for street address, city, state, zip, and phone number. A red arrow points to the "Next" button at the bottom right of the form.

13. Select “Submit.”

The screenshot shows the "Payment Details" section of the form. It displays "Change in Premium" as \$0.00, "Policy Change Effective Date" as 4/30/2022, "Policy Period" as 01/04/2021 - 01/04/2026, and "Payment Plan" as TWRA Full Pay. A red box highlights the "Submit" button at the bottom right.

14. Select “Yes,” to confirm the transaction.

The screenshot shows a "Confirm Transaction" dialog box with the text: "This transaction cannot be modified after it has been submitted. Do you want to continue?". There are "No" and "Yes" buttons at the bottom, with a red box around the "Yes" button.

15. Your policy change has been confirmed.

The screenshot shows a confirmation message with a green checkmark icon. The text reads: "Your changes have been confirmed." followed by "Reference Number: 0015010008", "Residential Policy: TWRD0100194197", and "You can check the payment schedule and invoices here: Policy Billing Page." At the bottom, there are two buttons: "View Policy Change Details" and "View Policy".



