

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())							
Summary	Contacts	O Open Activities	O Notes	8 Documents	O Claims	Billing	Commission
Change Policy	y S Cance	el Policy					

2. Enter the effective date of the change and select "Next."

Policy Change	Aused Structure Dwelling and Personal Property Quote (TWRD01		
Policy Details Property Details	Effective Date		
Construction	* Naky Charge Stirche Data	٥	
Additional Information			
htalling/Coverage Summary Peyment Details	Canad	Next.	

3. Enter the policy change description and then select "Next."

Policy Change Difective Date Noticy Data	Xuent Sumulate Dwelling and Personal Property (TWRD01 ?) - Policy Change (0015010008)		
Property Details Construction	Policy Details		
Additional Information	* Policy Change Effective Date	Apr 9, 2025	
Mailing/Coverage Summary	Policy Period	03/24/2025 - 03/24/2026	
Payment Datails	Policy Charge Description	dedete old mentgagee 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 Effective Date	Accure: ServerLapper Dwelling and Personal Property (TWRD01() - Policy Change (0015010008)	
Property Details	Quote	•
Construction		
Quote	Please select coverage options and click the 'Calculate Premium' button to quote this PolicyChange.	
Additional Information		
Mailing/Coverage Summary	\$	
Payment Details	Cited in Reading	
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5. Select, "Continue."



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6. To locate the mortgagee information, select "Additional Interests."

Policy Change Effective Date Policy Details	Twelling and Personal Property (TWRD01 ') - Policy Change (0015010008)
Property Details Construction	Additional Information •
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Payment Details	Next RELIFICION TO TRANSFIT WARDS INSULT
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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.



Policy Change Ditedive Date Policy Details	Account: Seven Lopez Dwelling and Perso (TWRD01	onal Property) - Policy Change (00	15010008)			
Property Details Construction	Additional Information					•
Quote Additional Information	Additional Named Insureds					,
Mailing Coverage Summary Payment Details	Additional interests + Add					×
	NAME	INTEREST TYPE	MORTGAGE POSITION	LGAN/CONTRACT NUMBER		
	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."

Policy Change Shekuko Iara Policy datala Importy datala	Develling and Personal Property (TWRD01) - Policy Change (0015010008) Additional Information			
Construction				
Quote	Additional Named Insureds			
Haline/Coverses Sammary	Additional Interests	· · · · · · · · · · · · · · · · · · ·		
Payment Details				
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	* Interest Type	Hortgage v		
	* Mortgage Position	First Mortpage v		
	* Loan/Contract Number	01		
	Name	Mortgage Bank		
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	* Address Line 1	Zii Corgina he		
	Address Line 2			
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	* City	Autin		
	* State	1005 v		
	* ZP Code	78704		
	* Country	United States		
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	NAME INTEREST TYPE	MORTGAGE POSITION LOAN/CONTRACT NUMBER		
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11. Verify the information returned and select "Next."

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Property Details Construction Duale	Additional Information				•
Additional information	Additional Named Insureds				>
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	NAME	INTEREST TYPE	MORTGAGE POSITION	LOAR/CONTRACT NUMBER	
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12. Verify the information returned and then select "Next."

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PulityGends	(Twebolools4137) - Policy Change (0015010008)			
Property Database				
Earthurten	Mailing/Covwage Summary		•	
Duste				
Addronal information	Responded Coursept Date Date	Mar 24, 2021		
Kaling County Lannary	Minary Insured	Brown Lagar		
PaymentDoluth	Property Address	DEPrive in St. Weissen, W. 1920		
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13. Select "Submit."

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Property Details Construction	Payment Details	Payment Details				
Quote Additional Information Mailing (Coverage Summary	Change in Premium 50.00	Policy Change Effective Date 4(9)2025	Policy Period 03/24/2025 - 03/24/2026	Poyment Plan TWIK Full Pay		
Payment Details	Cancel			Previous		

14. Select "Yes," to confirm the transaction.



15. Your policy change has been confirmed.





