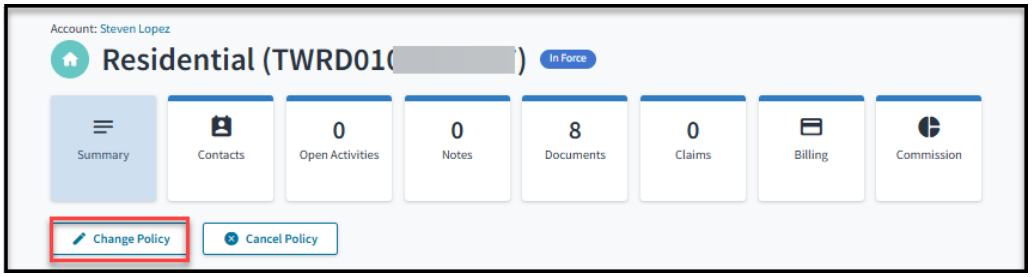
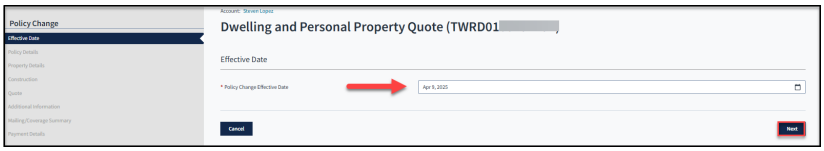
Adding/ Deleting a Mortgagee in the TWIA Agent Portal

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

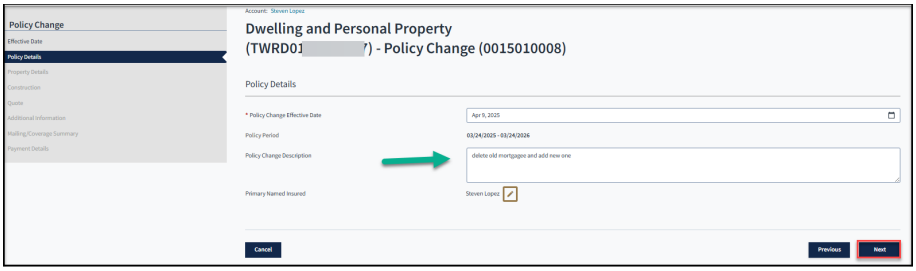
1. **Locate the policy that needs updating. Click on "Change Policy."**



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

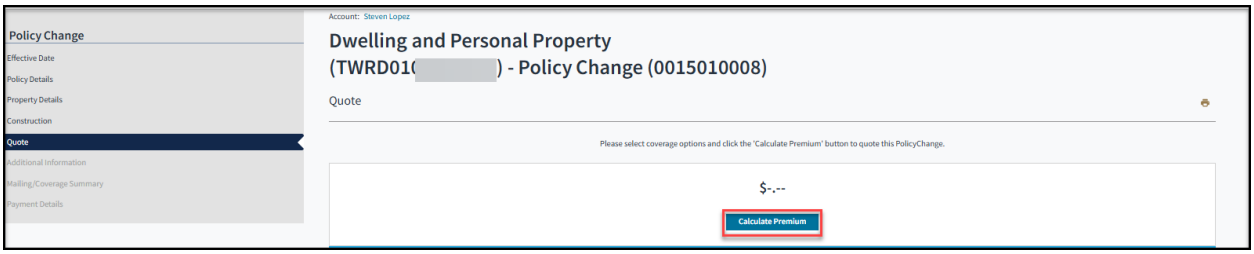


3. **Enter the policy change description and then select "Next."**

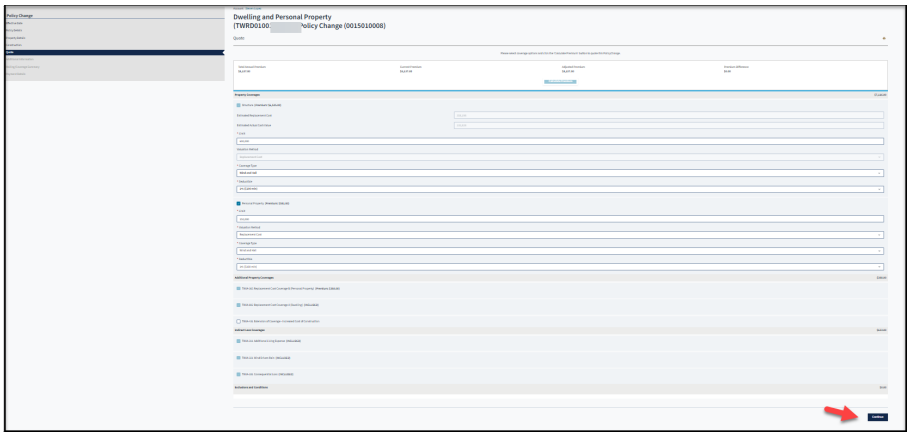


4. **If you are not making any other changes to the policy, select "Next" 2 times.**

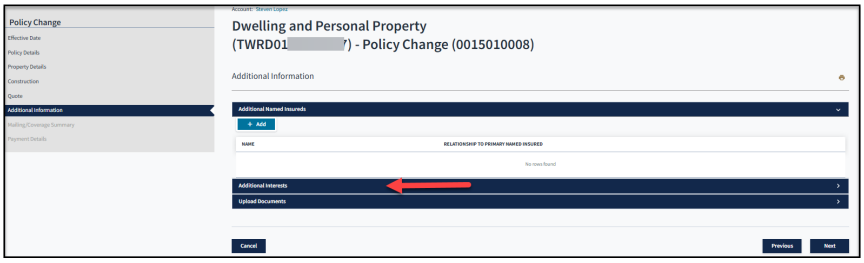
   Select "Calculate Premium."



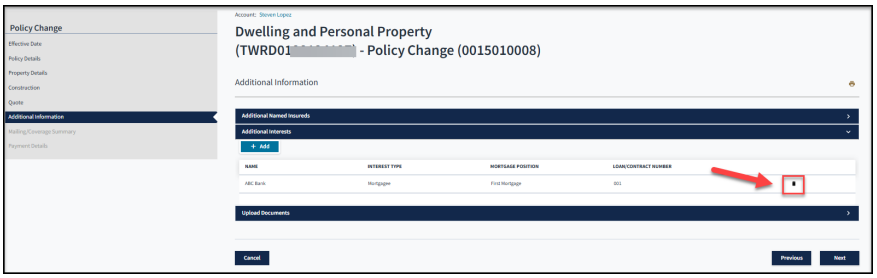
5. **Select, "Continue."**



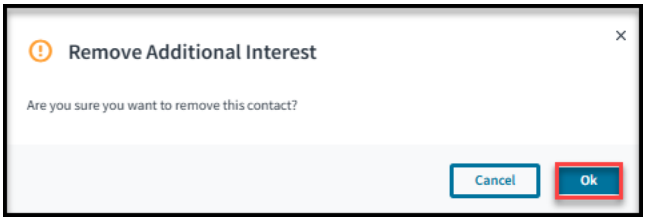
6. **To locate the mortgagee information, select "Additional Interests."**



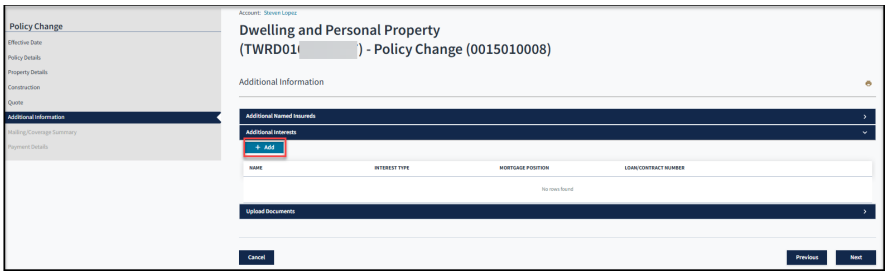
7. **It is best to delete the old mortgagee and add the new one. Remove the old mortgagee clause by selecting the trashcan symbol.**



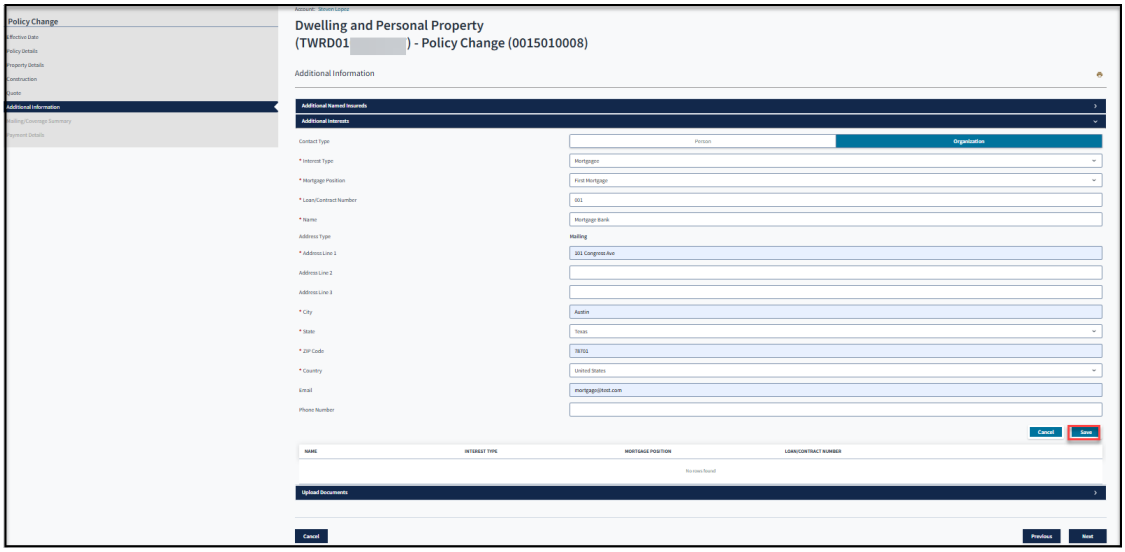
8. **You will be asked to confirm your removal of the additional interest. Select "Ok."**



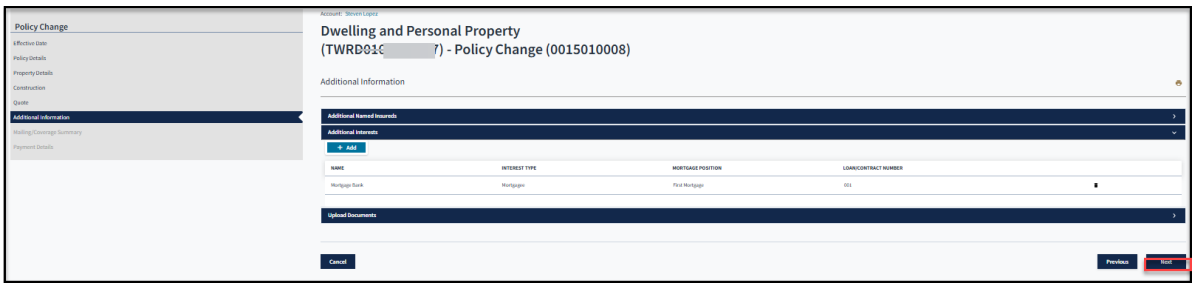
9. **To add a mortgagee, select "+Add" to start.**



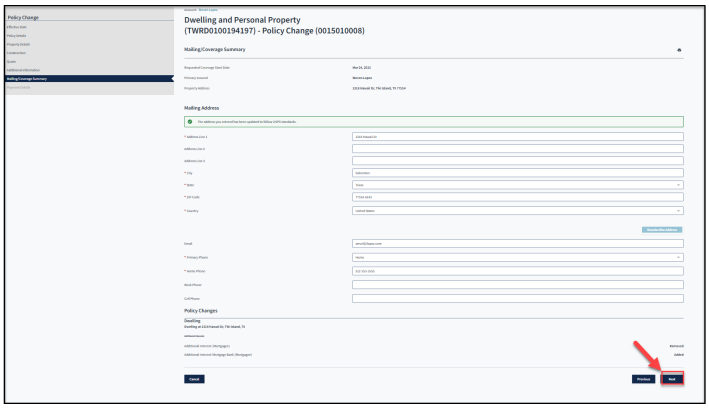
10. Since you are adding mortgage company information, click on Organization, enter the requested information in all fields noted with an * and then select "Save."



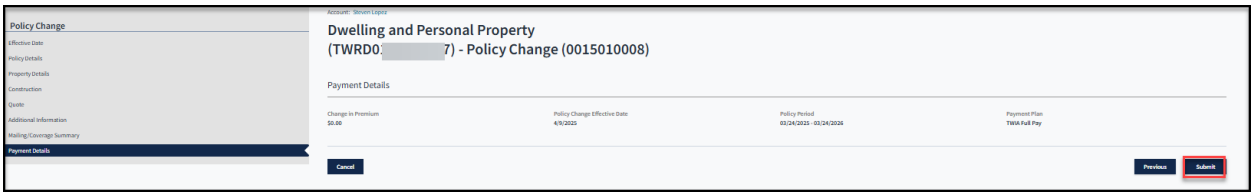
11. Verify the information returned and select "Next."



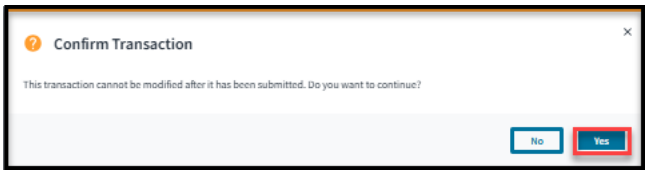
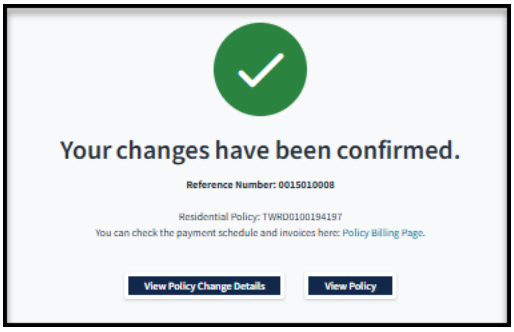
12. Verify the information returned and then select “Next.”



13. Select “Submit.”



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



15. Your policy change has been confirmed.