

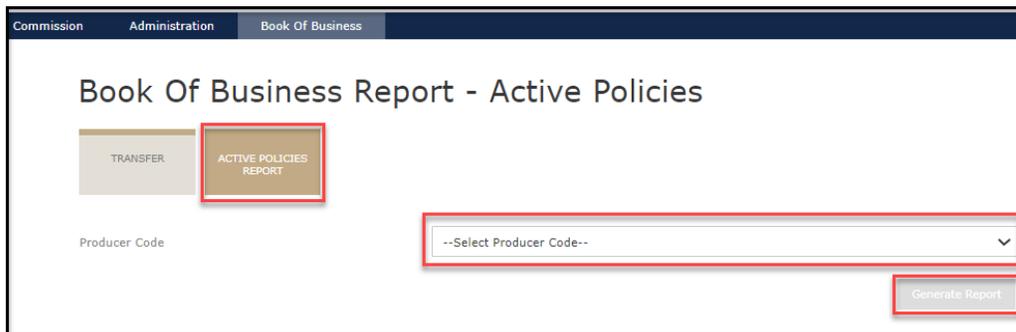
TWIA Book of Business Report

This job aid demonstrates the steps to generate a Book of Business Report for the Agent.

1. From the Agent Dashboard, select Book of Business. **Please note: you will only see Book of Business if you have permission to access the feature.**



2. Click on Active Policies Report, select a producer code from the drop-down menu and then click Generate Report.



3. The list of active policies will generate. If you want work with this information in MS Excel, select Export to CSV.

Book Of Business Report - Active Policies

TRANSFER ACTIVE POLICIES REPORT

Producer Code

Generate Report

Book Of Business Report

Export to CSV

POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	PROPERTY LOCATION	EFFECTIVE DATE	EXPIRATION DATE	ANNUAL WRITTEN PREMIUM
TWRD010000866	W000003566			1/28/22	1/28/23	\$2,233.00
TWRD	W000006977			2/7/22	2/7/23	\$452.00
TWRD0100001761	W000006977			2/11/22	2/11/23	\$142.00
TWRD0100002041	W000010361			2/16/22	3/4/22	\$5,830.00
TWRD0100002511	W000006977			2/22/22	2/22/23	\$311.00

