



## Cancelling A TWIA Policy

This job aid demonstrates the steps needed to cancel a TWIA Policy.

\*\*\*Please note that policy means an actual in-force policy, not an expired policy or one in pending status, offer submitted status or a renewing offer of coverage. An issued policy will show either in force or in scheduled (one with a future effective date) status.

### 1. Locate the TWIA Policy you wish to cancel. Click on “Cancel Policy.”

Account: George Jetson  
Residential (TWRD01) In Force

Summary | Contacts | 0 Open Activities | 0 Notes | 5 Documents | 0 Claims | Billing | Commission

Change Policy | **Cancel Policy**

### 2. Next, you will select the “Source” and “Reason” for the cancellation from the drop-down menus and enter the “Cancellation Effective Date.” In this example, we are selecting the insured as the source of the cancellation request and sold as the reason.

**Please note:** If a mailing address change is required, it will need to be processed before initiating the cancellation. You may select “Do Not Cancel”, process a policy change for the mailing address and start a new cancellation request.

If the mailing address is ok as is, please select “Start Cancellation” to navigate to the next screen.

Account: George Jetson  
Residential (TWRD01) In Force

Summary | Contacts | 0 Open Activities | 0 Notes | 5 Documents | 0 Claims | Billing | Commission

Change Policy | Cancel Policy | Privacy Policy

**Cancel Policy**

This cancellation request will be sent to Underwriting for review and approval.  
Any mailing address changes must be made before initiating a cancellation. Supporting documents may be uploaded after initiating the cancellation. Any WP-8 Waiver Surcharges applied are fully earned.

\* Source: Insured  
\* Reason: Sold  
Refund Method: Flat  
\* Effective Date: 4/11/2025

Do Not Cancel | **Start Cancellation**



3. This screen confirms the cancellation request has been sent to TWIA Underwriting for review and approval. Next, be sure to upload the supporting documents for the cancellation. For insured's request cancellation due to the sale of the home, please upload the closing documents or settlement statement. To begin the upload of the documents, click on the "Documents" tab.

Cancellation Created Date	Reason	Cancellation Effective Date
Apr 11, 2025	Sold	Apr 11, 2025
Description	Refund Method	Estimated Refund Amount
-	-	\$5,426.00

4. Next, select the document type from the drop-down menu. In this example, you should select, "Cancellation Documentation." When ready, select, "+ Upload Documents."

5. Select the document you want to upload by double clicking on it.



6. Enter a description of the document where indicated i.e. settlement statement. When ready, select the save button to save it to the policy documents.

Account: George Jetson | Policy: Residential (TWR00100194532)

**Cancellation (001)** Quoted

Summary | 0 Open Activities | 0 Notes | **1 Documents**

Documents

Cancellation Documentation | [+ Upload Documents](#) | Search documents

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Cloud.docx	<input type="text"/>	Cancellation Documentation	4/15/2025	<input type="button" value="Save"/>

7. The cancellation documentation is now saved.

Account: George Jetson | Policy: Residential (TWR00100194532)

**Cancellation (001)** Quoted

Summary | 0 Open Activities | 0 Notes | **1 Documents**

Documents

Cancellation Documentation | [+ Upload Documents](#) | Search documents

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NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Cloud.docx	settlement statement	Cancellation Documentation	4/15/2025	



