

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)									
Summary	Contacts	O Open Activities	0 Notes	5 Documents	O Claims	Billing	Commission		
Change Polic	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 Jetse Resid	dential (rwrdo	1) In Force										
Summary	Contacts	O Open Activitie	o Notes	5 Documents	O Claims	Billing	Commission							
Change Policy	Change Policy Cancel Policy							olicy						
Cancel Policy														
This cancellat Any mailing a	ition request will be iddress changes must	ent to Underwrit be made before ir	ing for review and appro itiating a cancellation. Su	val. pporting documents m	ty be uploaded after in	nitiating the cancellation	n. Any WPI-8 Waiver S	Surcharges ap	pplied are fully ear	ned.				
* Source		Insu	red				~							
* Reason		Solo					v							
Refund Method		Flat					~							
* Effective Date		4/11	/2025											
												Do Not Cancel	Start Cancella	tion



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 (0015								
The system Description Description <thdescription< th=""> <thdescription< th=""></thdescription<></thdescription<>								
This cancellation request has been sent to Underwriting for review and approval. My mailing address changes must be made before initiating a cancellation. Supporting documents may be uploaded after initiating the cancellation.								
Cancellation Created Date Reason Cancellation Effective Date								
Apr11,2025 Sold Apr12,2025								
Description	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."

= 0			Cancellation (0015							
iummary Open Activities N	0 0 Documents									
Documents Plasse Select Document Type - Uplace Documents Do not uplaced flee containing likegit 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 20Ms.										
NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED ~	SAVE						
No rows found										

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

janderson (\\use	Vertex Cloud Microsoft Word Document 13.0 KB
File name:	✓ Custom files ✓
	Upload from mobile Open Cancel



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.

ount: George Jetson Policy: Residential (TWRD01001945	532)			
Cancellation (001	.) Quoted			
E 0 0 Summary Open Activities Notes	1 Documents			
Documents				
Cancellation Documentation ~	+ Upload Documents	uments		
uo not upioad nies containing illegal content or copyrighte	to information without the permission of the copyright of	when the names must not exceed 60 characters (including the	e nie type extension), rikes must not exceed 20MB.	
NAME				
NAME Test Cloud docx	DESCRIPTION	Cancellation Documentation	4/15/2025	
NAME Test Cloud docx		Cancellation Documentation	4/15/2025	i i i i i i i i i i i i i i i i i i i

7. The cancellation documentation is now saved.

Account: George Jetson Policy: Residential (TWRD0100194532)							
E Cancellation (001							
E O Open Activities O Notes	1 Documents						
Documents	Documents						
Cancellation Documentation ~	+ Upload Documents Q Search documents						
Do not upload files containing illegal content or copyrighted i	nformation without the permission of the copyright owner. File n	names must not exceed 60 characters (including the file type exte	ension). Files must not exceed 20MB.				
NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED 🛩	SAVE			
Test Cloud.docx	settlement statement	Cancellation Documentation	4/15/2025				



