

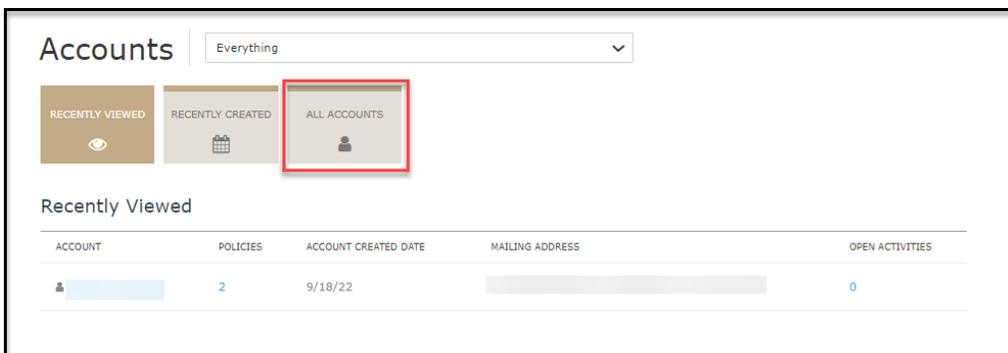
Changing The Policyholder Email Address In The New TWIA Agent Portal

This job aid demonstrates how to change Policyholder email addresses in the TWIA Agent Portal.

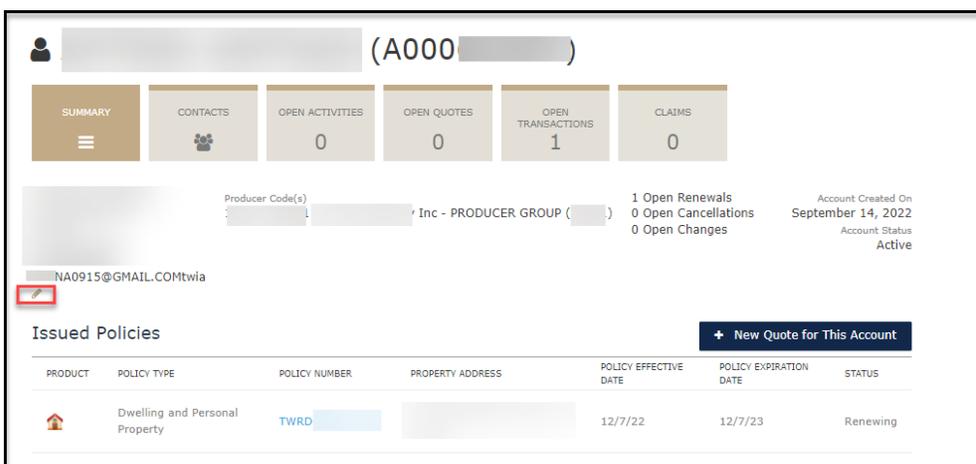
1. When you log in to the TWIA Agent Portal, you will land on the home page. From this page, select “Accounts.” The policyholder’s email address is found on the account level that is why it is advised you start your search here.



2. When you land on the Accounts page, you will see recently viewed accounts first. If the policyholder is not listed under recently viewed, select “All Accounts” to search for the policyholder account you want to work with.



3. Select the policyholder’s account and then click on the Pencil symbol to edit the policyholder’s contact information.



4. Enter the new email address in the field where indicated and then select “Save Changes.”

(A000)

SUMMARY CONTACTS OPEN ACTIVITIES 0 OPEN QUOTES 0 OPEN TRANSACTIONS 1 CLAIMS 0

Producer Code(s) Agency Inc - PRODUCER GROUP 1 Open Renewals 0 Open Cancellations 0 Open Changes Account Created On September 14, 2022 Account Status Active

IA0915@GMAIL.COMtwia

Edit Contact Details

Mailing Address must be edited within policy transactions.

Address * City State ZIP Code Country United States

Home Phone Work Phone Cell Phone * Account Holder Email Address * test@test.comtwia

Primary number

Cancel Save Changes + New Quote for This Account

Issued Policies

5. You will receive notice that the changes were saved. Next, select “OK.”

Changes Saved

Your changes have been saved.

OK



6. The policyholder's email address has been updated per the screen that follows.

The screenshot displays a user account dashboard. At the top, there is a user profile icon and a name field containing "(A000)". Below this is a navigation bar with six tabs: SUMMARY (selected), CONTACTS, OPEN ACTIVITIES (0), OPEN QUOTES (0), OPEN TRANSACTIONS (1), and CLAIMS (0). The main content area shows account details: a blurred profile picture, a "Producer Code(s)" field with "Agency Inc - PRODUCER GROUP", and a summary of "1 Open Renewals", "0 Open Cancellations", and "0 Open Changes". The account was created on "September 14, 2022" and is "Active". A text input field for the email address contains "test@test.comtwia" and is highlighted with a red box. Below the account details is a section for "Issued Policies" with a "+ New Quote for This Account" button. A table lists one policy: Dwelling and Personal Property, TWRC, with an effective date of 12/7/22 and an expiration date of 12/7/23, currently in a "Renewing" status.

PRODUCT	POLICY TYPE	POLICY NUMBER	PROPERTY ADDRESS	POLICY EFFECTIVE DATE	POLICY EXPIRATION DATE	STATUS
	Dwelling and Personal Property	TWRC		12/7/22	12/7/23	Renewing

