



# How to Correct The Primary Named Insured's Name

This job aid shows the steps needed to correct a primary named insured's name.

**Please note: Assignment of your rights and duties under this policy will not be valid unless we give our consent.**

1. Enter the policy number you would like to change in the search tool and hit enter.

The screenshot shows the TWIA dashboard. At the top right, there is a search bar with the text "Search..." and a magnifying glass icon. A red arrow points to this search bar. Below the search bar is a navigation menu with items: Accounts, Policies, Claims, Activities, Commission, Administration, and Book Of Business. The main content area is titled "Dashboard" and contains four cards: "8 Open Quotes", "0 Open Policy Changes", "0 Open Cancellations", and "1 Open Renewals".

2. Select the policy number you would like to change.

The screenshot shows a "Search Results" table. The table has columns: POLICY NUMBER, ACCOUNT, PRIMARY NAMED INSURED, PROPERTY ADDRESS, POLICY EFFECTIVE DATE, POLICY EXPIRATION DATE, and STATUS. The first row contains the following data: [Redacted], [Redacted], Steve Lopez, [Redacted], 3/24/2025, 3/24/2025, Scheduled. A red arrow points to the "POLICY NUMBER" column header.

3. Select "Change Policy."

The screenshot shows the policy details page for a Residential (TWRD01) account. The page has a header with the account name and a "Scheduled" status. Below the header are several cards: Summary, Contacts, Open Activities (0), Notes (0), Documents (6), Claims (0), Billing, and Commission. At the bottom of the page, there are two buttons: "Change Policy" (highlighted with a red box and a red arrow) and "Cancel Policy".

4. Enter the effective date and then "Next."

The screenshot shows the "Policy Change" form for a Dwelling and Personal Property Quote (TWRD01). The form has a sidebar on the left with tabs: Effective Date, Policy Details, Property Details, Construction, Quote, Additional Information, Billing/Coverage Summary, and Payment Details. The main content area is titled "Dwelling and Personal Property Quote (TWRD01)". It has a section for "Effective Date" with a text input field containing "Mar 24, 2025" and a calendar icon. Below the input field is a "Cancel" button and a "Next" button (highlighted with a red arrow).



5. Be sure to notate the change you are making in the Policy Change Description field and then select the pencil icon next to the primary named insured's name. In this change, we are correcting the name from Steve to Steven.

Account: Steve Lopez

Dwelling and Personal Property  
(TWRD01[redacted]) - Policy Change ([redacted])

Policy Change

Effective Date

Policy Details

Property Details

Construction

Quote

Additional Information

Holding/Coverage Summary

Payment Details

Policy Details

\* Policy Change Effective Date: Mar 24, 2025

Policy Period: 03/24/2025 - 03/24/2026

Policy Change Description: correcting name

Primary Named Insured: Steve Lopez [pencil icon]

Cancel Previous Next

6. Correct the Primary Named Insured's name as needed and then select "Change."

Account: Steve Lopez

Dwelling and Personal Property  
(TWRD01[redacted]) - Policy Change (00[redacted])

Policy Change

Effective Date

Policy Details

Property Details

Construction

Quote

Additional Information

Holding/Coverage Summary

Payment Details

Policy Details

\* Policy Change Effective Date: Mar 24, 2025

Policy Period: 03/24/2025 - 03/24/2026

Policy Change Description: correcting name

\* First Name: Steven

\* Last Name: Lopez

Change

Cancel Previous Next

7. Select "Next."

Account: Steve Lopez

Dwelling and Personal Property  
(TWRD01[redacted]) - Policy Change (001[redacted])

Policy Change

Effective Date

Policy Details

Property Details

Construction

Quote

Additional Information

Holding/Coverage Summary

Payment Details

Policy Details

\* Policy Change Effective Date: Mar 24, 2025

Policy Period: 03/24/2025 - 03/24/2026

Policy Change Description: correcting name

Primary Named Insured: Steven Lopez [pencil icon]

Cancel Previous Next



## 8. Select “Next.”

Account: Steven Lopez

### Dwelling and Personal Property (TWRD01 - Policy Change (001

**Address of Property to be Insured**

Address Line 1  
Address Line 2 (Apt/Unit/Box)  
Address Line 3  
County Galveston  
City TX Island  
State Texas  
ZIP Code 77554

Location Details  
Dwelling Details  
Primary Policy Details

Cancel Previous Next

## 9. Select “Next.”

Account: Steven Lopez

### Dwelling and Personal Property (TWRD01 - Policy Change (001

Launch MS2

**Construction Details**

Year Built 1996  
\* Condition of Dwelling Good  
Construction Type Frame  
Number of Stories 2  
Living Area Square Footage 2,179  
Garage Attached Garage - 2 Car  
Foundation Type Slab

Roof Details  
Additional Construction Details  
Repairs/Additions

Cancel Previous Next

## 10. Select “Calculate Premium.”

Account: Steven Lopez

### Dwelling and Personal Property (TWRD01 - Policy Change (001

Quote

Please select coverage options and click the 'Calculate Premium' button to quote this Policy Change.

\$---

Calculate Premium



## 11. Select “Continue.”

## 12. Select “Next.”

## 13. Select, “Next.”



#### 14. Select "Submit."

Account: Steven Lopez

**Dwelling and Personal Property**  
(TWRD01[REDACTED]) - Policy Change (001[REDACTED])

Payment Details

Change in Premium	Policy Change Effective Date	Policy Period	Payment Plan
\$0.00	3/24/2025	03/24/2025 - 03/24/2026	TWIA Full Pay

#### 15. Select "Yes" when you are ready to submit the policy change.

**Confirm Transaction** [X]

This transaction cannot be modified after it has been submitted. Do you want to continue?

#### 16. You may either View Policy Change Details or View Policy to see the details. In this example, select "View Policy."

**Your changes have been confirmed.**

Reference Number: 0014670036

Residential Policy: TWRD01[REDACTED]

You can check the payment schedule and invoices here: [Policy Billing Page](#).



**17. The Account is now showing Steven Lopez. The name correction is successful.**

A screenshot of a user account dashboard for Steven Lopez. The account is titled "Residential (TWRD01 [redacted])" and is marked as "Scheduled". The dashboard features a navigation menu on the left with a "Summary" option. Below the navigation menu are two buttons: "Change Policy" and "Cancel Policy". The main content area displays eight summary cards: "Contacts", "Open Activities" (0), "Notes" (0), "Documents" (8), "Claims" (0), "Billing", and "Commission".

Category	Count
Contacts	-
Open Activities	0
Notes	0
Documents	8
Claims	0
Billing	-
Commission	-