

How to Correct the Primary Named Insured's Name in The TWIA Agent Portal

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

Please note: Not to be used for a change in ownership. A change in ownership will require policy cancellation and a new submission. 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 Texas Windstorm Insurance Association Agent Portal. At the top right, there is a search bar with the text 'TWRD01' and a red arrow pointing to it. Below the search bar is a navigation menu with links: Accounts, Policies, Claims, Activities, Commission, Administration, and Book Of Business. The main content area is titled 'Dashboard' and features four cards: OPEN QUOTES (1271), OPEN POLICY CHANGES (8), OPEN CANCELLATIONS (395), and OPEN RENEWALS (2355).

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

The screenshot shows the search results for the policy number 'TWRD01'. The results are displayed in a table with columns for Policy Number, Policy Name, Agent Name, and Effective Date. The first row shows 'TWRD01' as the policy number, 'WC' as the policy name, 'Ted Smith' as the agent name, and '6/6/22' as the effective date. A red box highlights the 'TWRD01' text, and a red arrow points to it.

3. Select "Change Policy."

The screenshot shows the policy details page for 'Residential (TWRD01)'. The page has a navigation menu with links: SUMMARY, CONTACTS, OPEN ACTIVITIES, NOTES, DOCUMENTS, CLAIMS, and BILLING. Below the navigation menu is a 'COMMISSION' section. At the bottom, there is a 'Policy Details' section with a table of information. A red box highlights the 'Change Policy' button in the top left corner of the page.

Policy Details	
Policy Effective June 6, 2022	Policy Expiration June 6, 2023
Pre-Renewal Direction None	Policy Status In Force
Policy Type Dwelling and Personal Property	Primary Insured Ted Smith
Producer of Record	Total Annual Premium \$3,011.00
Producer of Service	Total Premium \$3,011.00
	Total Cost \$3,011.00



4. Enter the effective date and then “Next.”

This screenshot shows the 'Effective Date' step of a policy change process. On the left is a sidebar menu with options: Policy Change, Effective Date (highlighted), Policy Details, Property Details, Construction Details, Quote, Additional Information, Summary, and Payment Details. The main content area is titled 'Account: TED SMITH Dwelling and Personal Property (TWRD [redacted])'. Below the title is the 'Effective Date' section. It contains a label 'Policy Change Effective Date *' and a date input field with the value '04/13/2023'. A green arrow points to the date field. At the bottom are two buttons: 'Cancel' and 'Next' (which is highlighted with a red box).

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 Ted to Theodore.

This screenshot shows the 'Policy Details' step of the policy change process. The sidebar menu on the left now has 'Policy Details' highlighted. The main content area is titled 'Account: TED SMITH Dwelling and Personal Property (TWRD [redacted]) — Policy Change ([redacted])'. Below the title is the 'Policy Details' section. It contains three fields: 'Policy Change Effective Date *' with the value '04/13/2023', 'Policy Period' with the value '6/6/22 - 6/6/23', and 'Policy Change Description' with the value 'changing name to Theodore'. A green arrow points to the description field. Below these fields is the 'Primary Named Insured' section, which shows 'Ted Smith' next to a pencil icon (highlighted with a red box). At the bottom are three buttons: 'Cancel', 'Previous', and 'Next'.



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

Account: TED SMITH

Dwelling and Personal Property

(TWRD [REDACTED]) — Policy Change ([REDACTED])

Policy Details

Policy Change Effective Date * 04/13/2023

Policy Period 6/6/22 - 6/6/23

Policy Change Description changing name to Theodore

First Name * Theodore

Last Name * Smith

7. Select "Next."

Account: TED SMITH

Dwelling and Personal Property

(TWRD [REDACTED]) — Policy Change ([REDACTED])

Policy Details

Policy Change Effective Date * 04/13/2023

Policy Period 6/6/22 - 6/6/23

Policy Change Description changing name to Theodore

Primary Named Insured Theodore Smith



8. Select "Next."

Effective Date

Policy Details

Property Details

Construction Details

Quote

Additional Information

Summary

Payment Details

(TWRD) — Policy Change ()

Address of Property to be Insured

Address Line 1

Address Line 2 (Apt/Bldg/Suite)

Address Line 3

County

City

StateTexas

ZIP Code

Location Details

Dwelling Details

Primary Policy Details

Cancel

Previous

Next

9. Select "Calculate Premium."

Policy Change

Effective Date

Policy Details

Property Details

Construction Details

Quote

Additional Information

Summary

Payment Details

Dwelling and Personal Property

(TWRD) — Policy Change ()

Quote

Please select coverage options and click the 'Calculate Premium' button to quote this PolicyChange

Calculate Premium

10. Select "Continue."

Policy Change

Effective Date

Policy Details

Property Details

Construction Details

Quote

Additional Information

Summary

Payment Details

Dwelling and Personal Property

(TWRD) — Policy Change ()

Quote

Please select coverage options and click the 'Calculate Premium' button to quote this PolicyChange

Total Annual Premium	Current Premium	Adjusted Premium	Premium Difference
\$3,011.00	\$3,011.00	\$3,011.00	\$0.00

Continue



11. Select “Next.”

Policy Change

Effective Date

Policy Details

Property Details

Construction Details

Quote

Additional Information

Summary

Payment Details

Dwelling and Personal Property

(TWRD) — Policy Change ()

Additional Information

Additional Named Insureds

✓

Add +

NAME

RELATIONSHIP TO PRIMARY NAMED INSURED

Additional Interests

✓

Upload Documents

✓

Cancel

Previous

Next

12. Select, “Next.”



Account: TED SMITH

Dwelling and Personal Property

(TWRD [REDACTED] 3) — Policy Change ([REDACTED])

Summary

Policy Change Effective Date: Apr 13, 2023

Primary Insured: Theodore Smith

Property Address: [REDACTED]

Mailing Address
 ✓ The address you entered has been updated to follow USPS standards.

Address Line 1 * [REDACTED]

Address Line 2 [REDACTED]

Address Line 3 [REDACTED]

City * [REDACTED]

State * Texas

ZIP Code [REDACTED]

Country * [REDACTED]

Standardize Address

Email [REDACTED]

Home Phone * [REDACTED]

☒ Primary number

Work Phone [REDACTED]

Cell Phone [REDACTED]

Policy Changes

ITEM	EXISTING POLICY	NEW CHANGES
Policy Info		
[REDACTED]	12/20/2022	04/13/2023
[REDACTED]	Ted	Theodore
Dwelling		
[REDACTED]	474032	379866
[REDACTED]	Attached Garage ...	Other
[REDACTED]	592541	474833
[REDACTED]	592541	474833
[REDACTED]	Yes	No

Cancel Previous **Next**

13. Select "Submit."

Policy Change

Dwelling and Personal Property

(TWRD [REDACTED]) — Policy Change ([REDACTED])


Payment Details

Change in Premium	Policy Change Effective Date	Policy Period	Payment Plan
\$0.00	4/13/23	6/6/22 - 6/6/23	TWIA Full Pay

Cancel Previous **Submit**

14. Select "OK" when you are ready to submit the policy change.






Confirm Transaction

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

Cancel

OK

15. 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: 0008224934

Residential policy: TWRD0: [redacted]

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

This change has been applied to the renewal transaction: [redacted]

View Policy Change Details

View Policy

16. The Account is now showing Theodore Smith. Your name correction is successful.

Account: Theodore Smith

Residential (TWRD [redacted])

In Force

SUMMARY

≡

CONTACTS

👤

OPEN ACTIVITIES

0

NOTES

0

DOCUMENTS

14

CLAIMS

0

BILLING

📄

COMMISSION

📊

Change Policy

✕ Cancel Policy

Privacy Policy

