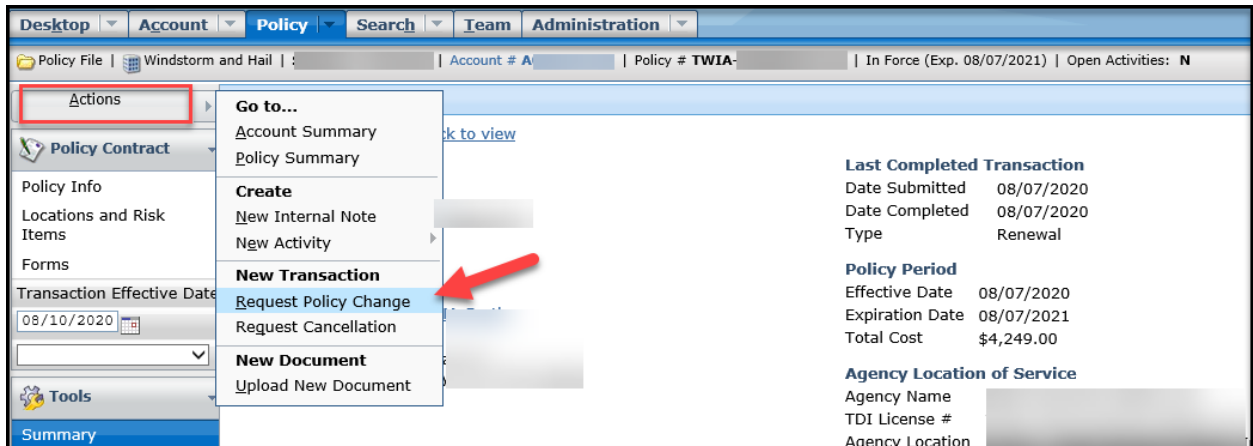


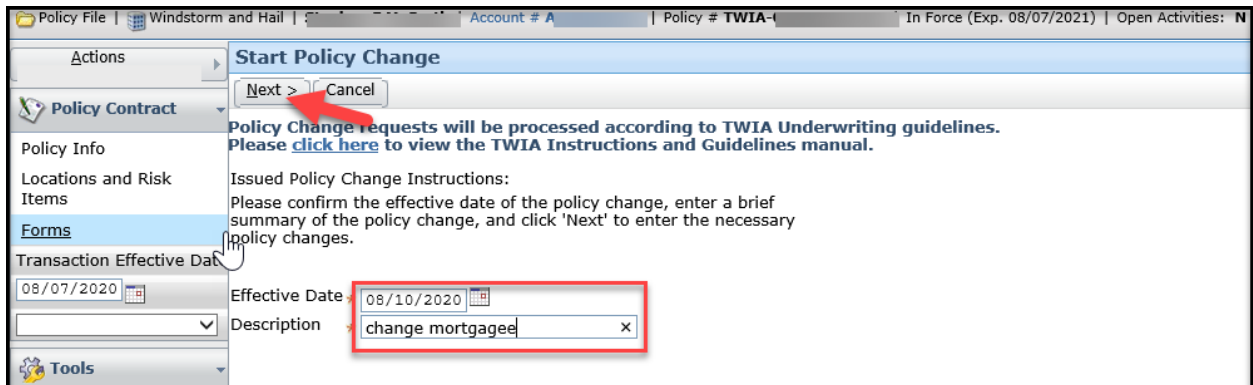
Adding/Deleting a Mortgagee in TWIA Policy Center

This job aid demonstrates the steps to add and delete a mortgagee in TWIA Policy Center.

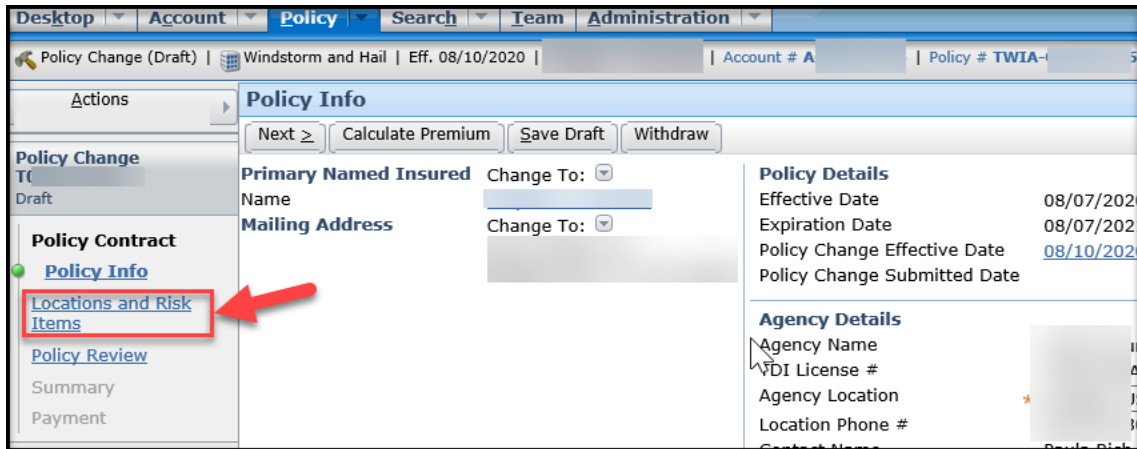
1. Locate the policy that needs updating. After entering the policy, click on “Actions” and then click on “Request Policy Change.”



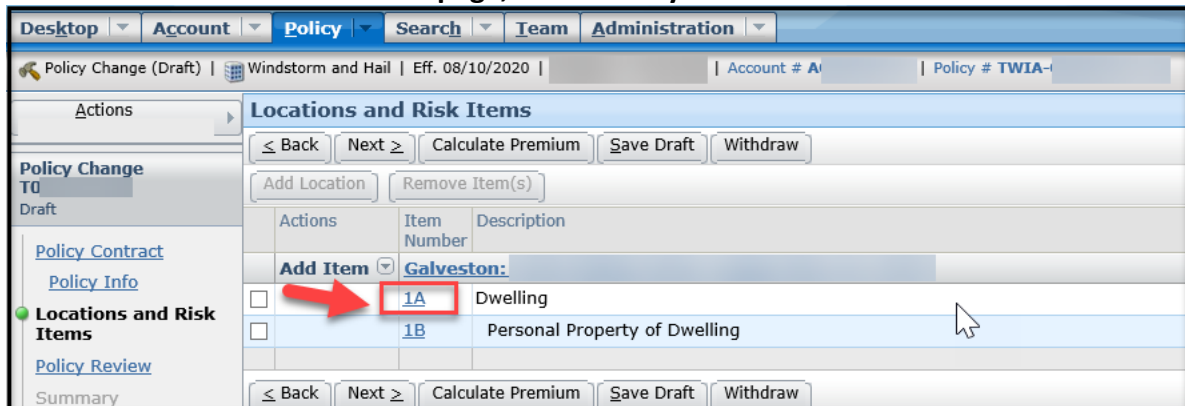
2. Enter the effective date of the change, fill in the description field and then click on “Next.”



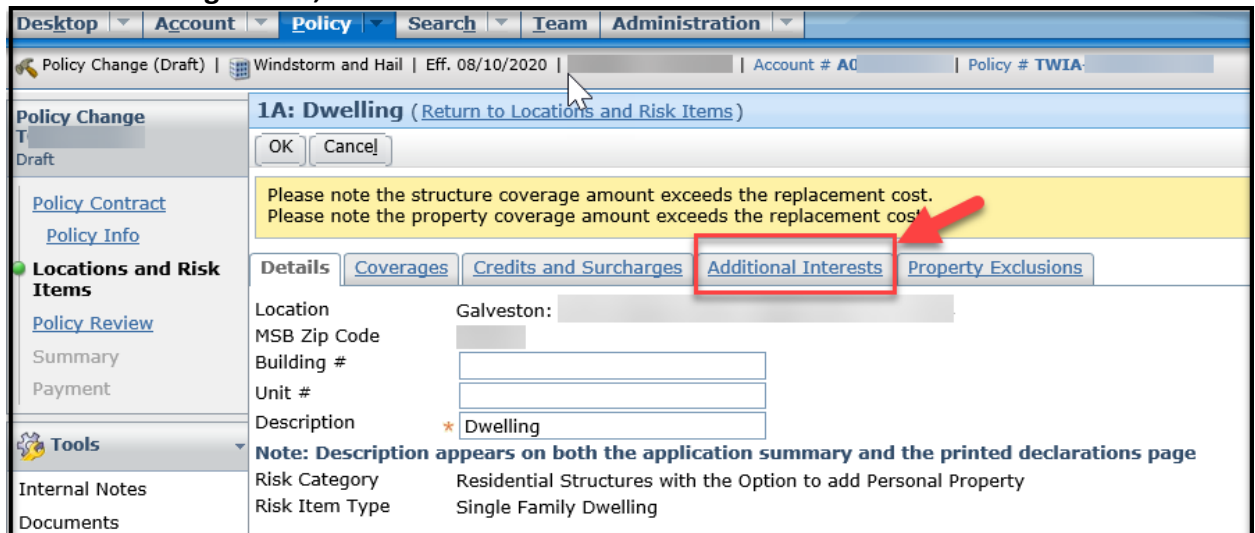
- On the Policy Info screen, click on the "Locations and Risk Items" tab on the left of the screen.



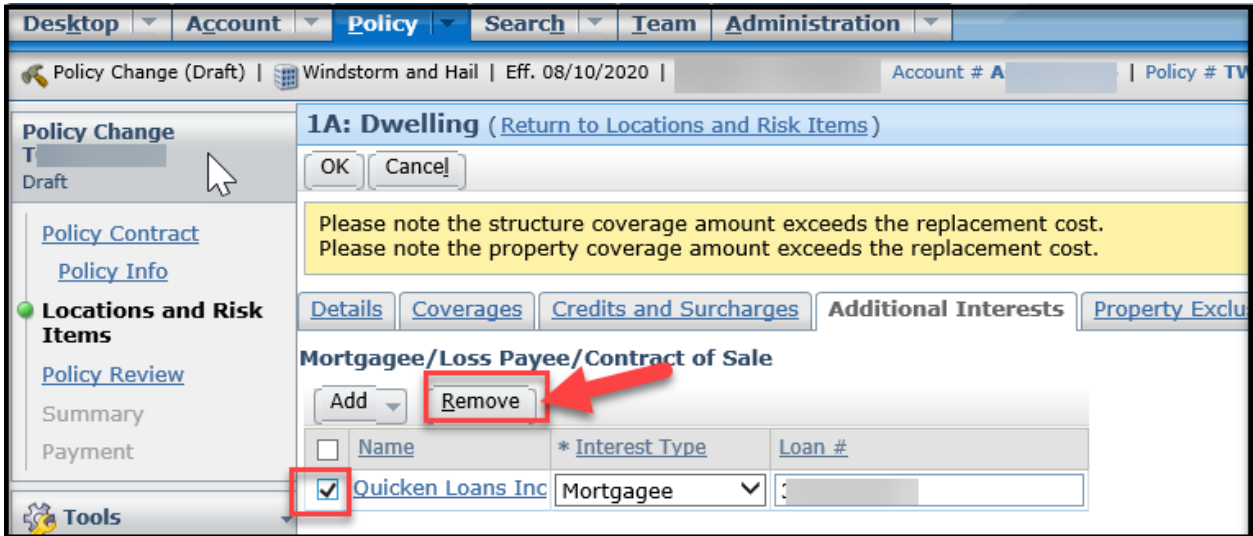
- On the Locations and Risk Items page, click directly on the "1A."



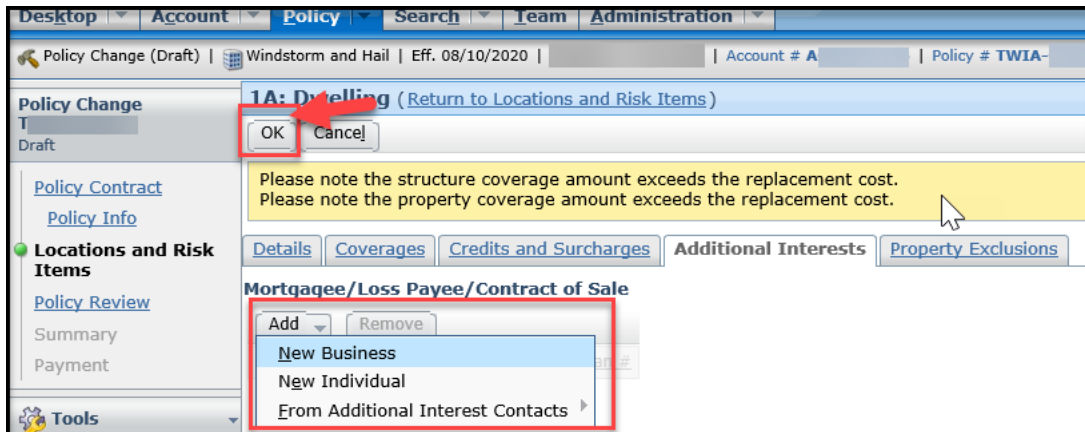
- On the Dwelling screen, click on "Additional interests."



6. If you are replacing the existing mortgagee with a new mortgagee, always remove the old mortgagee first and then add the new one. To remove the old mortgagee, check the box to the left of the current mortgagee and then click "Remove."



7. To add the new mortgagee, loss payee or contract of sale, click "Add," and then select the type of Additional Interest you are adding. If you are adding a mortgagee, select "New Business" from the drop-down menu and then click on "OK."



- Enter the new Additional Interest information where indicated by the asterisks *. When completed, click on "Validate Address" and then select "OK."

New Additional Interest - Dwelling (Galveston)

OK Cancel

Type * Mortgagee

Loan Number * 00001

Contact Detail

Business

Business Name * ABC Bank

Name 2

Office Phone

Fax

Primary Email

Secondary Email

Address

Country * United States of America

APO/FPO/DPO

Address Line 1 * 101 Main St

Address Line 2

City * Austin

State * Texas

ZIP Code * 78701-....

County

Validate Address

To validate this address, Address Line 1 and either City and State, or ZIP Code are required

- Next select "OK."

1A: Dwelling (Return to Locations and Risk Items)

OK Cancel

Please note the structure coverage amount exceeds the replacement cost.
Please note the property coverage amount exceeds the replacement cost.

Details Coverages Credits and Surcharges **Additional Interests** Property Exclusions

Mortgagee/Loss Payee/Contract of Sale

Add Remove

Name	* Interest Type	Loan #
ABC Bank	Mortgagee	00001

10. On the next screen, select "Calculate Premium."

Desktop | Account | Policy | Search | Team | Administration

Policy Change (Draft) | Windstorm and Hail | Eff. 08/10/2020 | Account # A | Policy # TWIA-

Actions: < Back, Next >, **Calculate Premium**, Save Draft, Withdraw

Policy Change (Draft)

Policy Contract
Policy Info
Locations and Risk Items
Policy Review
Summary

Locations and Risk Items

Add Location Remove Item(s)

Actions	Item Number	Description
<input type="checkbox"/>	1A	Dwelling
<input type="checkbox"/>	1B	Personal Property of Dwelling

< Back, Next >, Calculate Premium, Save Draft, Withdraw

11. On the Summary Screen, select "Submit to TWIA."

Desktop | Account | Policy | Search | Team | Administration

Policy Change (Calculated) | Windstorm and Hail | Eff. 08/10/2020 | Account # AC | Policy # TWIA-

Actions: < Back, Edit Transaction, Versions, Invoice, **Submit to TWIA**, Withdraw, Print

Policy Change (Calculated)

Policy Contract
Policy Info
Locations and Risk Items
Policy Review
Summary
Payment

Summary

Policy # 000005935-06
Policy Period 08/07/2020 - 08/07/2021
Primary Named Insured
Mailing Address

Transaction Effective Date 08/10/2020
Transaction Description change mortgagee
In Force Policy Premium \$4,249.00
Actual Premium \$4,249.00
Surcharges -
Actual Premium & Surcharges \$4,249.00
Commission -
Cost Difference -
Commission Amount is 16% of Actual Premium of Issued Policy.

Policy Premium Cost Difference Detail

Item #	Description	Coverage Detail	Cost Amount	Premiums
Galveston:				
1A	Dwelling	\$340,000.00	\$3,053.00	\$3,979.00
	Increased Cost of Construction	-	\$489.00	-
	Personal Property Replacement Cost	-	\$166.00	-
	Indirect Loss	-	\$271.00	-
1B	Personal Property	\$75,000.00	\$236.00	\$270.00
	Personal Property Replacement Cost	-	\$13.00	-
	Indirect Loss	-	\$21.00	-

< Back, Edit Transaction, Versions, Invoice, Submit to TWIA, Withdraw, Print

12. On the next screen, read and follow the instructions, then select "Continue."

Desktop Account Policy Search Team Administration

Policy Change (Calculated) | Windstorm and Hail | Eff. 08/10/2020 | Account # A0 | Policy # TWIA-0

Checklist of Required Documentation

If a signed copy of a TWIA form is required, please download it from the following link:
[Documents and Downloads](#)

If the documentation has not yet been uploaded or if you are unsure as to which documentation you have in documentation that is associated with the transaction and make any necessary additions/corrections.

Once you confirm the document(s) upload(s), please re-initiate the submission process via the 'Payment' screen.

You may be contacted by a TWIA underwriter prior to issuance to provide further documentation.

Item #	Description	Documentation required includes, but is not limited to:
1	Dwelling	WPI-8 Certificate

Continue Cancel/Return

13. On the Submission Acknowledgement Screen, check the box under the Submission Certification if applicable and then select "Continue."

Desktop Account Policy Search Team Administration

Policy Change (Calculated) | Windstorm and Hail | Eff. 08/10/2020 | Account # AC | Policy # TWIA-C

Submission Acknowledgement

After clicking the "Continue" button, a PDF version of the transaction summary will be available for printing.

Depending on your method of payment, you may be required to complete the associated payment entry screens before guidelines.

Yes, I certify that the information provided is correct to the best of my knowledge.

Continue Cancel/Return

14. This screen acknowledges the change request has been received by TWIA Underwriting. If you are not backdating your mortgagee change, the system should automatically process the change. If you click on "View your policy" it will take you back to the policy screen.

Desktop Account Policy Search Team Administration

Policy Change (In Force) | Windstorm and Hail | Eff. 08/10/2020 | Account # A | Policy # TWIA-

Policy Change Information

Thank you! Your Policy Change (#TWIA-) has been received by TWIA. We will process the Policy Change according to TWIA Underwriting guidelines. To retrieve a PDF copy of the transaction summary, click the "Review Changes" link below, and then select Documents from the Tools menu.

- View your policy (#TWIA-)
- Review Changes
- Go to your desktop