

# Requalifying A Renewal in the TWIA Agent Portal

This job aid shows how to requalify a renewal in the TWIA Agent Portal.

Please note, to requalify for TWIA coverage, the property must meet our declination (TWIA [Declination Requirements](#)) and flood requirements (TWIA [Flood Requirements](#)). TWIA has a declination form you may use for your convenience: [TWIA Declination Form](#). You may also use FEMA's website: <https://msc.fema.gov/portal/home> to lookup flood zones.

1. Please log in to the Agent Portal. After you sign into the system, you will land on the Agent Dashboard page. Select. "Policies" to continue.

The screenshot shows the TWIA Agent Portal Dashboard. At the top left is the TWIA logo (Texas Windstorm Insurance Association). A search bar and a "Start New Quote" button are at the top right. Below the header is a navigation bar with tabs: Accounts, Policies (highlighted), Claims, Activities, Commission, Administration, and Book Of Business. The main content area is titled "Dashboard" and features a dropdown menu set to "Everything". Below this are four summary cards: "OPEN QUOTES" with 225, "OPEN POLICY CHANGES" with 3, "OPEN CANCELLATIONS" with 71, and "OPEN RENEWALS" with 568. At the bottom of the dashboard area, it says "Your Open Activities".

2. On the Policies screen, select "Requalification Renewal" (renewals that need to be requalified will show under this tab at 90 days before the renewal date) and then click on the "Policy Number" you would like to work with. **\*\*\*Please note you will requalify the expiring policy, not the renewal offer itself. If you complete the requalification between 90-61 days before renewal, the renewal transaction will generate 60 days before the renewal date. If you requalify after day 60, the renewal transaction will generate once requalified.**

The screenshot shows the "Policies" screen in the TWIA Agent Portal. At the top is a search bar and a dropdown menu set to "Everything". Below the header is a navigation bar with tabs: RECENTLY VIEWED, RECENTLY ISSUED, BILLING DELINQUENT, OPEN QUOTES (225), OPEN RENEWALS (568), REQUALIFICATION RENEWAL (2, highlighted with a red box), and OPEN CHANGES (3). Below this is another summary card for "OPEN CANCELLATIONS" with 71. The main content area is titled "Requalification Renewals" and includes a "View All" button. Below the title is a table with the following columns: PRODUCT, POLICY TYPE, POLICY NUMBER, EXPIRATION DATE, ACCOUNT, and REQUALIFICATION STATUS. The table contains two rows of data. A red arrow points to the "POLICY NUMBER" field in the first row, which is also highlighted with a red box.

PRODUCT	POLICY TYPE	POLICY NUMBER	EXPIRATION DATE	ACCOUNT	REQUALIFICATION STATUS
	Dwelling and Personal Property	[Redacted]	6/29/23	[Redacted]	Requalification pending
	Building and Business Property	[Redacted]	6/29/23	[Redacted]	Requalification pending



3. On the next screen, select "Add Requalification."

Account Residential (TWRD) In Force

SUMMARY CONTACTS OPEN ACTIVITIES 1 NOTES 0 DOCUMENTS 15 CLAIMS 0 BILLING

COMMISSION

Change Policy Add Requalification Cancel Policy Privacy Policy

Policy Details

Policy Effective June 29, 2022	Policy Expiration June 29, 2023	Producer of Record	Total Premium	\$2,535.00
Pre-Renewal Direction None	Policy Status In Force	Producer of Service		\$2,535.00
Policy Type Dwelling and Personal Property	Primary Insured John Doe			

Property Details

4. Please make sure you read the information listed in the boxed area below. TWIA requires that you keep the declination documentation you are using on file for 5 years. You will be asked to provide this information in the event you or your agency are audited. Please answer all questions with the red asterisk next to them \*. When ready to continue, select "Submit."

Account Residential (TWRD) In Force

SUMMARY CONTACTS OPEN ACTIVITIES 1 NOTES 0 DOCUMENTS 15 CLAIMS 0 BILLING

COMMISSION

Change Policy Cancel Policy Privacy Policy

Requalification

I am representing that a diligent effort has been made by the agent and/or policyholder to obtain comparable wind and hail insurance coverage from an admitted property insurance carrier in Texas that is licensed to write property insurance. I understand that the Texas Windstorm Insurance Association (TWIA) may independently verify the information and take appropriate action including cancellation of a policy issued by TWIA if I have in any way misrepresented this information.

Policy Type Dwelling and Personal Property

TWIA Requalification Questions

Has the applicant been declined wind and hail coverage by at least one insurance company in the private market? \*

Yes No

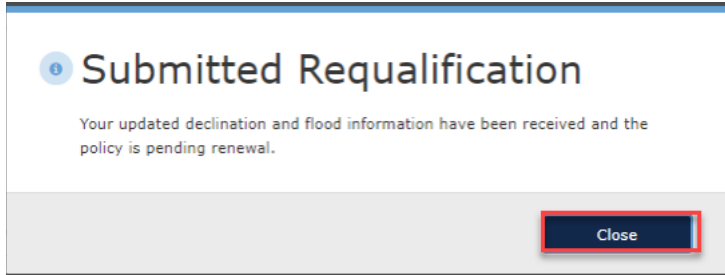
Is any part of this property located in one of the designated National Flood Insurance Program (NFIP) flood zones (V, VE, or V1-V30)? \*

Yes No

Cancel Submit



5. Your requalification has been submitted. Please click “Close” to continue.

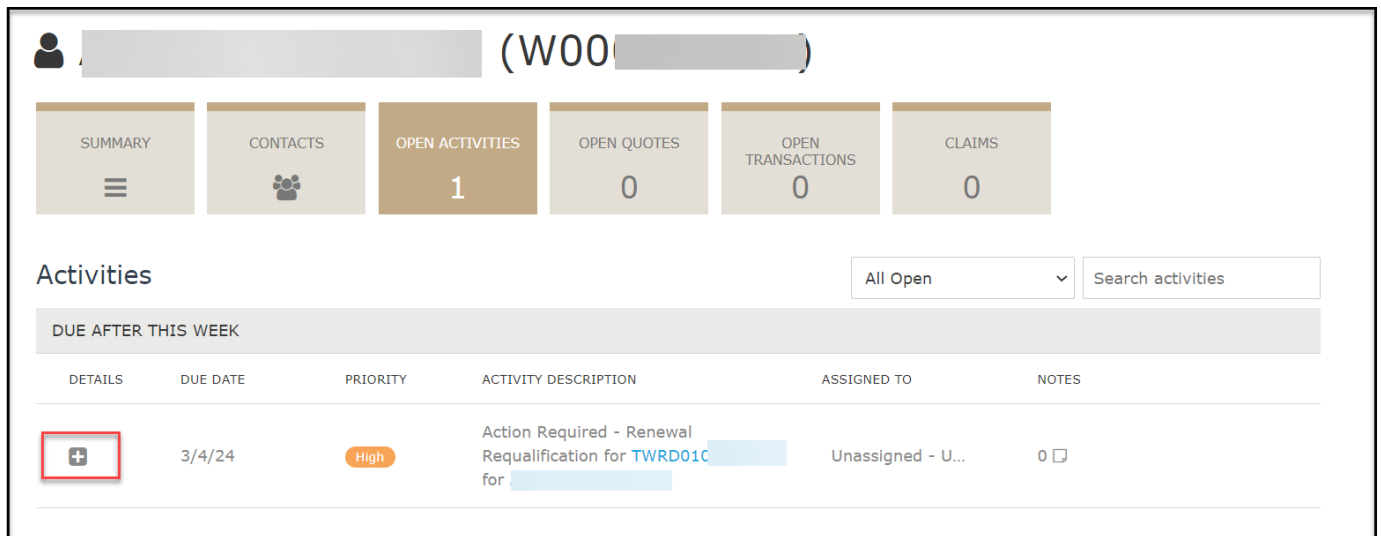


**Submitted Requalification**

Your updated declination and flood information have been received and the policy is pending renewal.

**Close**

6. There will still be an open activity on the policy for the agency to complete. Click on “Open Activities” and then select the + sign as indicated below to open up the activity details.



User profile: (WOO [redacted])

Navigation tabs: SUMMARY, CONTACTS, **OPEN ACTIVITIES (1)**, OPEN QUOTES (0), OPEN TRANSACTIONS (0), CLAIMS (0)

Activities section: Filter: All Open, Search: Search activities

**DUE AFTER THIS WEEK**

DETAILS	DUE DATE	PRIORITY	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
<b>+</b>	3/4/24	High	Action Required - Renewal Requalification for TWRD01C [redacted] for [redacted]	Unassigned - U...	0



7. Hover your mouse over the “Unassigned” field where indicated until the green pencil appears and choose “Me” from the list to assign it to yourself. Complete your notes where indicated and then select “Add.”

The screenshot shows the 'Activities' page with a table of activities. The activity 'Action Required - Renewal Requalification for TWIA' is listed with a due date of 3/4/24 and a high priority. The 'ASSIGNED TO' field is 'Unassigned'. A green pencil icon is visible next to the 'Unassigned' field. Below the activity details, there is a 'Notes' section with a form containing 're-qualification' in the subject field and 'completed' in the note field. The 'Add' button is highlighted with a red box.

8. Click “Completed” and the corresponding activity will be closed. Thank you.

The screenshot shows the 'Activities' page with the same activity as in the previous screenshot. The 'ASSIGNED TO' field is now empty. The 'NOTES' column shows '1' and a 'Complete' button with a checkmark, which is highlighted with a red box. A red arrow points to the 'Complete' button.

