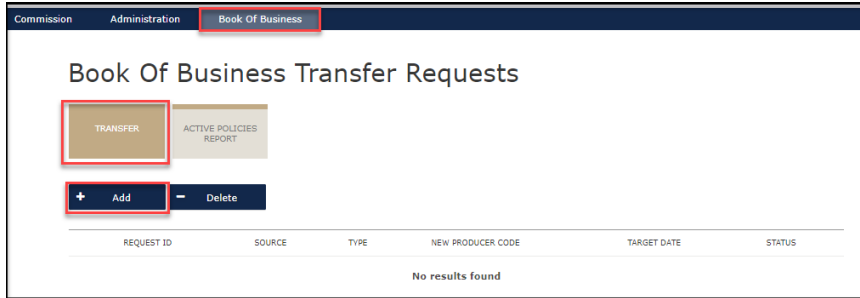


TWIA Book of Business Transfers Between Agency Locations

This job aid demonstrates the steps to make a Book of Business transfer.

Please note: A Book of Business transfer allows agencies with multiple locations to transfer policies between agency locations. Only administrators of agencies with multiple locations can conduct these Book of Business transfers.

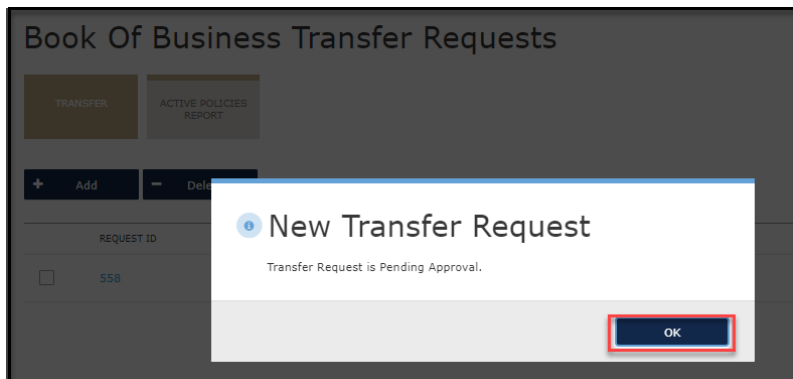
1. From the Agent Dashboard, select Book of Business, Transfer and then + Add.



2. Next, please enter the Effective Date for the transfer, select the Previous Producer Code and then select the New Producer Code. Select Create when ready.

The screenshot shows the 'New Transfer Request' form. It includes the following fields: 'Process Date *' with the value '02/24/2022', 'Effective Date *' with the placeholder 'MM/DD/YYYY', 'Previous producer code' with a dropdown menu showing '-- Choose Producer Code --', and 'New producer code' with a dropdown menu showing '-- Choose Producer Code --'. At the bottom, there are 'Create' and 'Cancel' buttons.

3. You will receive a pop-up confirmation that the transfer request is pending. Select OK.



- The Book of Business Transfer Request is now pending approval. Once the transfer is reviewed and approved, you will see the status change to Approved.

Book Of Business Transfer Requests

TRANSFER ACTIVE POLICIES REPORT

+ Add - Delete

REQUEST ID	SOURCE	TYPE	NEW PRODUCER CODE	TARGET DATE	STATUS
<input type="checkbox"/> 558	Producer Code	Specific Date Change		2/24/22	Pending Approval

If you are not moving an entire Book of Business, click on the blue Request ID number and continue to step 5. **Caution: Please ensure any Transfer is showing an Approved status before initiating any additional transfers.**

Book Of Business Transfer Requests

TRANSFER ACTIVE POLICIES REPORT


+ Add - Delete

REQUEST ID	SOURCE	TYPE	NEW PRODUCER CODE	TARGET DATE	STATUS
<input type="checkbox"/> 558	Producer Code	Specific Date Change		2/24/22	Pending Approval

- Then, begin to edit the Transfer Request by clicking the blue pen.

Transfer Request Details

Request ID: 564
 Process Date: February 25, 2022
 Effective Date: February 25, 2022
 Previous producer code: 7096W004
 New producer code: 7096W005
 Status: Pending Approval



POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	POLICY STATUS	POLICY EFFECTIVE DATE	STATUS	MESSAGE
TWRD0100000921	W000002887		In Force	12/31/21	Unprocessed	
TWRD0100000835	W000002295		In Force	1/28/22	Unprocessed	
TWRD0100000834	W000002887		In Force	1/28/22	Unprocessed	
TWRD0100000567	W000002295		In Force	6/25/21	Unprocessed	



6. Check the box next to any policies that should NOT be transferred to the new producer/agent. Then, click Delete to remove those policies from the Transfer Request. Lastly, click the Save Changes button to update the Transfer Request.

Transfer Request Details

Request ID: 564

Process Date: 02/25/2022

Effective Date: 02/25/2022

Previous producer code: 7096W004

New producer code: 7096W005

Status: Pending Approval

POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	POLICY STATUS	POLICY EFFECTIVE DATE	STATUS	MESSAGE
<input checked="" type="checkbox"/>	TWRD0100000921	W000002887	In Force	12/31/21	Unprocessed	
<input checked="" type="checkbox"/>	TWRD0100000835	W000002295	In Force	1/28/22	Unprocessed	
<input type="checkbox"/>	TWRD0100000834	W000002887	In Force	1/28/22	Unprocessed	
<input type="checkbox"/>	TWRD0100000567	W000002295	In Force	6/25/21	Unprocessed	

7. You will get a pop-up confirmation your request has been received. Click OK to continue.

Transfer Request Details

Transfer Request(s) saved.

8. Verify that the Status is Pending Approval. If so, this completes your steps in the Book of Transfer process. Once the transfer is reviewed and approved by Policy Services, you will see the status change to Approved.

Transfer Request Details

Request ID: 564

Process Date: February 25, 2022

Effective Date: February 25, 2022

Previous producer code: 7096W004

New producer code: 7096W005

Status: Pending Approval

POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	POLICY STATUS	POLICY EFFECTIVE DATE	STATUS	MESSAGE
TWRD0100000834	W000002887		In Force	1/28/22	Unprocessed	
TWRD0100000567	W000002295		In Force	6/25/21	Unprocessed	

