## TWIA Renewals- Making Down Payments when Auto Pay Enabled

The job aid demonstrates the steps necessary for an agent to make the first payment (using either eCheck or EFT) on a policy enrolled in the TWIA 10-Pay Auto Pay plan in order to obtain the declarations pages before the actual renewal date. Normally with 10-Pay Auto Pay plans, the polcyholder's first auto payment drafts on the renewal date so the declarations pages will not be accessible until the renewal date.

- ~ Policies Everything BILLIN OPEN QUOTES 58 ۲ A 雦 2 Open Renewals View All TRANSACTION POLICY EFFECTIVE DATE QUOTE EXPIRES PROPERTY ADDRESS POLICY TYPE POLICY NUMBER CREATED PRODUCT ACCOUNT STATUS Dwelling an 8/8/23 1 Personal Property 10/7/23 Renewing 8/8/23 11/7/23 10/7/23 1 Renewing
- 1. From the "Policies" tab, click on the renewal offer you want to make a payment on.

2. Next select "Edit Renewal/ Payment Details."

SUMMARY     OPEN ACTIVITIES     NOTES     DOCUMENTS       0     0     0       Image: Constraint of the second sec	Account: Policy: Residential (T) Renewal (000904	WRD000 45031) (Renewing)			
Image: The renewal for Residential policy       Edit Renewal / Payment Details         Status       Current Policy Expiration       Payment Method       Total Premium       \$3,150.00         Renewing       October 7, 2023       Insured Direct Pay       Total Cost       \$3,150.00         View Current Policy       Renewal Effective Date October 7, 2023       Payment Plan October 7, 2023       TWIA 10 Pay (Auto Pay)		NOTES DOCUMENTS			
Status     Current Policy Expiration     Payment Method     Total Premium     \$3,150.00       Renewing     October 7, 2023     Insured Direct Pay     Total Cost     \$3,150.00       View Current Policy     Renewal Effective Date October 7, 2023     Payment Plan     Total Cost     \$3,150.00	1 The renewal for Residential policy			Edit Renewal / Payment Details	
	Status Renewing View Current Policy	Current Policy Expiration October 7, 2023 Renewal Effective Date October 7, 2023	Payment Method Insured Direct Pay Payment Plan TWIA 10 Pay (Auto Pay)	mium \$3,150.00 st \$3,150.00	



**3.** If you are not making any changes on the following screen, select "**Continue**."

Renewal	Dwelling and	Personal Property	
Property Details	(TWRDOC	) — Reliewal (	)
Construction Details	Ouote		A
Quote			
Additional Information	Diagon coloct coverag	a options and click the 'Calculate Dramium' but	ton to quoto this Donowal
Coverage Summary	Please select coverage	e options and circk the Calculate Premium but	ton to quote this kenewal
Payment Details	т	otal Premium including Credits and Surcha	irges
		\$3,150.00 Continue	
		Property Coverages	

4. If you are not making any changes on this screen, select "Next" to continue.

Renewal	Account: Dwelling and Personal Property	
Policy Details	(TWRDUU) — Renewal (	
Property Details		
Quote	Additional Information	
Additional Information		
Coverage Summary	Additional Named Insureds	
Payment Details		
	Add + NAME RELATIONSHIP TO PRIMARY NAMED INSURED	
	Dana Cole spouse 🖋 🗃	
	Additional Interests 🗸	
	Upload Documents 🗸	
	Cancel Previous Next	



5.When ready, select "Next."

-1		ersonal Propert	24	
etalls	(TWR 3	) — Renewal (00	, y	
/ Details ction Details	Coverage Summary			Ð
al Information				
ESummary 4	Requested Coverage Start Date	Oct 7, 2023		
	Property Address			
	Mailing Address The address you entered has been u	p. 4. 4. 4. 4. 4. 4. 4. 4. 4. 4. 4. 4. 4.		
	Address Line 1 *			
	Address Line 2			
	Address Line 3			
	City *			
	State *			~
	ZIP Code			
	Country *			~
	Email *			
	Home Phone *			
	Made Plance	• Primary number		
	WORK Phone	0		
	Cell Phone			
		0		
	Coverages			
	Total Premium including Credits Ar	d Surcharges: \$3,150.00		
	Premium			
	Property Coverages			
		Limit	\$182,000.00	\$1,715.00
		Coverage Type	Wind and Hail	
		Deductible	\$250.00	\$467.00
	Personal Property	Limit Valuation Method	\$94,000.00 Replacement Cost	\$311.00
	Personal Property	Limit Valuation Method Coverage Type	\$94,000.00 Replacement Cost Wind and Hail	\$311.00
	Personal Property Premium	Limit Valuation Method Coverage Type Deductible	\$94,000.00 Replacement Cost Wind and Hail \$250.00	\$311.00 \$85.00
	Personal Property Premium	Limit Valuation Wethod Coverage Type Deductible	\$94,000.00 Replacement Cost Wind and Hail \$250.00	\$311.00 \$85.00
	Personal Property Premium Additional Property Coverages TWIN-365 Replacement Cat	Linit. Valuation Method Coverage Type Deductible	\$94,000.00 Replacement Cost Wind and Hail \$250.00	\$311.00 \$85.00 \$110.00
	Pennium Premium Additional Property Coverages TW/J-265 Replacement Cost Coverage B (Pennau Property TW/J-215 Department of Coverage B	Linit Valuation Method Coverage Type Deductible	\$94,000.00 Replacement Cost Wind and Hail \$250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00
	Perunial Poperty Premium Additional Property Coverages TWI-265 Resistant Fronty Coverage 6 Unional Property TWI-131 Extension of Coverage - Tencessed Cost of Construction	Limit Valuation Method Coverage Type Deductible	\$94,000.00 Replacement Cost Wind and Hall \$250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00
	Personal Poperty Persitum AddBional Property Coverages TW3-265 Rejutement Call Coverage II (Normal Poperty) TW30-431 Extension of Coverage - TW30-431 Extension of Co	Limit Valuation Method Coverage Type Deductive Limit % of Dwelling Coverage (15)%	\$94,000.00 Replacement Cost Wind and Hall \$250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$262.00 INCLUDED
	Pensinal Poperty Pensiam Additional Property Coverages Tritic-055 Subactivers Cost Coverage Subactivers Cost December Cost Coverage A (Deadling) Pension	Limit Valuation Method Coverage Type Deductible Limit % of Dwelling Coverage (10)%	\$94,000.00 Replacement Cost Wind and Hall \$259.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED
	Pensinal Poperty Pensium Middlond Property Coverages TWIG-365 Registerment Cod Coverage B (Nersonal Property Coverages) TWIG-013 Retrinsion of Coverage - Torcessed Code Construction TWIG-013 Retrinsion of Coverage - Coverage A (Dediling) Pensium Indirect Loss Coverage	Limit Valuation Method Coverage Type Deductible	994,000.00 Replacement Cost Wind and Hall \$250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED
	Personal Poperty Pensium Middisonal Property Coverages TWIA-385 Replacement Cost Coverage 8 (Hensonal Property TWIA-013 Detension of Coverage - TWIA-013 Detension of Coverage - TWIA-013 Replacement Cost Coverage A (Dwelling) Pensium Pensium	Limit Valuation Method Coverage Type Dedutble	\$94,000.00 Replacement Cost Wind and Hall \$220.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED
	Personal Poperty Pensium Middisonal Property Coverages TWIA-365 Replacement Cost Coverage 8 (Hensonal Property TWIA-101 Retrained of Communication TWIA-101 Retrained of Communication TWIA-101 Retrained of Communication TWIA-101 Additional Living Expension TWIA-211 Additional Living Expension	Linit Valuation Method Coverage Type Dedutable	994,000,00 Replacement Cost Wind and Hall 9250,00 \$18,200,00	\$311.00 \$85.00 \$110.00 \$282.00 \$MCLUCED \$MCLUCED \$MCLUCED
	Personal Poperty Personal MUM-265 Applacement Cost Coverage & (Neurosci) MUM-265 Applacement Cost Coverage & (Neurosci) MUM-215 Ostatistical Conductorial TWD-023 Applacement Cost Coverage A (Neurosci) Personal MUM-215 Additional Lowing Expenses MUM-215 Additional Lowing Expenses MUM-215 Additional Lowing MUM-215 Und Driven Rain TWD-215 Und Driven Rain	Link Valuation Method Coverage Type Deductible	994,000.00 Replacement Cost Wind and Hall 9250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED INCLUCED INCLUCED
	Renarial Reports Premium Additional Property Coverages DVID-555 Rejacoment Cast Coverage 3 (Neurosof Import) TVID-655 Rejacoment Cast Coverage 4 (Neurosof DVID-615 Resident Cast Coverage 4 (Neurosof Premium NUR-511 Additional Living Expense TVID-511 Additional Living TVID-512 Living Driven Rain TVID-512 Correspont Living Premium	Linit Valuation Method Coverage Type Deductilite	994,000.00 Replacement Cost Wind and Hall 9250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$262.00 1MCLUDED 1MCLUDED 1MCLUDED 1MCLUDED
	Personal Poperty Personal Modelianal Poperty Coverages Divid-255 Replacement Cast Coverage & (Neuroand Property Coverages) Divid-255 Replacement Cast Coverage & (Neuroand Property) Personal Profile Cast Coverage Personal Personal Pacter Cast Coverage Divid-211 Additional Living Divid-212 Wind Driven Rain Twid-321 Wind Driven Rain Twid-321 Consequential Lass Personal Per	Limit Valuation Method Coverage Type Deductilie	994,000.00 Replacement Cost Wind and Hall 9250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED INCLUCED INCLUCED INCLUCED
	Personal Poperty Personal Middional Poperty Coverages DWA-265 Registerment Cost Coverage & (Neurosci Property) TWA-213 Extension of Coverage - Instrument Cost of Continuction Personal Personal Middional Extension TWA-231 Middional Lowy Extension Coverage TWA-331 Antidional Lowy Extension Personal Personal Personal	Limit Valuation Method Coverage Type Deductile	194,000.00 Replacement Cost Wind and Hall 1230.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 INCLUCED INCLUCED INCLUCED INCLUCED
	Persinal Poperty       Persinal       Middional Poperty Coverages       DiVI-355 Rejacement Catl       DivI-355 Rejacement Catl <td>Limit Valuation Method Coverage Type Deductate</td> <td>994,000.00 Replacement Cost Wind and Hall \$250.00 \$18,200.00</td> <td>\$311.00 \$85.00 \$110.00 \$282.00 ?NCLUGED ?NCLUGED ?NCLUGED ?NCLUGED</td>	Limit Valuation Method Coverage Type Deductate	994,000.00 Replacement Cost Wind and Hall \$250.00 \$18,200.00	\$311.00 \$85.00 \$110.00 \$282.00 ?NCLUGED ?NCLUGED ?NCLUGED ?NCLUGED



6. Select "10-Pay" where indicated and then select "Submit." Please note: If you select a payment plan that does not match the plan the policyholder is currently enrolled in, you will be deactivating the policyholder's Auto Pay.

Renewal	Dwelling and Personal Property				
Policy Details	(TWRD0 ) — Renewal (00 .)				
Property Details Construction Details Quote	Payment Details				
Additional Information Coverage Summary	Total Premium including Credits and Surcharges \$3,150.00				
	<ul> <li>The policyholder is currently setup for Auto Pay. Making any changes to the Payment Details will deactivate Auto Pay.</li> <li>Edit Payment Details</li> </ul>				
	Payment Method * Insured Direct Pay V				
	Policyholder Email Address *				
	Payment Plans				
	TWIA 10 Pay (Auto Pay)         \$3,150.00         \$472.50         View				
	This payment plan requires the policyholder to enroll in Auto Pay in the Policyholder Portal. A valid policyholder email address is required for the policyholder to receive enrollment information and billing notifications for this plan. If Auto Pay is not setup, the policy will default to a 4-Pay plan without written notice to you or the policyholder.				
	Please note that cancellation of the policy will result in a pro-rata refund, subject to a policy minimum retained premium in an amount equal to 90 days or \$100, whichever is greater. The minimum retained premium is fully earned on the effective date of the policy				
	Cancel Previous Save and Exit				

7. Next select, "Yes" to continue.





**8**. Make sure TWIA 10 Pay (Auto Pay) is selected since that is what the policyholder is enrolled in currently and then click "**Submit**."

Policy Details	(TWF	(TWRD00 ) — Renewal (00 .)						
Construction Details	Paym	ent Details						
Additional Information Coverage Summary	Total Pres \$3,15	nium including Credits and Surcl $0.00$	harges					
Payment Details	Payment	Method *	Insured Direct	Pay		~		
	Policyhol	der Email Address *						
	Paym	ent Plans						
		NAME	TOTAL	DOWN PAYMENT	INSTALLMENTS			
		TWIA Full Pay	\$3,150.00	\$3,150.00	View			
	0	TWIA 2 Pay	\$3,150.00	\$1,575.00	View			
	0	TWIA 4 Pay	\$3,150.00	\$945.00	View			
	0	TWIA 10 Pay (Auto Pay)	\$3,150.00	\$472.50	View			
	Please no premium earned o	te that cancellation of the policy in an amount equal to 90 days o n the effective date of the policy	will result in a pro or \$100, whichever	rata refund, subject is greater. The minim	to a policy minimum retained num retained premium is fully			



Renewal Policy Details	Dwelling ar (TWRD0	nd Persona ) — Rer	al Proper	ty 			
Property Details Construction Details	Payment Details						
Additional Information	Total Premium including Cred	lits and Surcharges					
Coverage Summary Payment Details	\$3,150.00 Payment Method *	eCheck			~		
	Policyholder Email Address						
	eCheck Informatio	on					
	Required eCheck Payment Payment via eCheck is NO	Authorization Forms a	nd Guidelines are fo	panies.			
	Account Holder In	formation					
	First Name *						
	Last Name *						
	Address Line 1 ×		ve N				
	Address Line 2 (Apt/Bldg/Sui	te)					
	Address Line 3						
	County						
	City *						
	State *	Texas			*		
	ZIP Code *	77590-3	834				
	Country *	United 5	tates		~		
	E-Mail Address *		ttwia				
	Confirm E-Mail Address *		ttwia				
		Confirmed!					
	Phone Number *						
	Bank Account Info	ormation					
Г							
	Routing # *	3149774	05				
	Account # *	9000683	27				
	Confirm Account ≠ *	9000683	27				
	Account Type =	Checkin	g Savings				
	Account Category *	Busine	Consumer				
L	eCheck Terms and Conditions						
	Please Read and Approve	the Following Informa	ion				
	By clicking "I have read a affirm that I have receive debit the account holder's payment screen. This auti	nd acknowledge the Te d authorization from th bank account for the a norization is valid for th	rms and Conditions e account holder sta mount(s) on the sc is transaction only.	for ACH payment processin ating that TWIA may electro heduled payment date show	g", I nically m on the		
	In the event that a payme	nt is returned for insul	ficient funds, the po	licy will be cancelled			
	I have read and acknowledge	wledge the Terms & C	onditions for ACH pa	yment processing.			
	Payment Plans						
	NAME	TOTAL	DOWN PAYMENT	INSTALLMENTS			
	O TWIA Full Pay	\$3,150.00	\$3,150.00	View			
	O TWIA 2 Pay	\$3,150.00	\$1,575.00	View			
	O TWIA 4 Pay	\$3,150.00	\$945.00	View			
	O TWIA 10 Pay (Auto Pay)	\$3,150.00	\$472.50	View			
L	This payment plan A valid policyhold information and b default to a 4-Pay	a requires the policyhold ar email address is requ illing notifications for th plan without written no	er to enroll in Auto P red for the policyhol s plan. If Auto Pay is tice to you or the pol	ay in the Policyholder Portal. der to receive enrollment not setup, the policy will licyholder.			
	Please note that cancellation premium in an amount equal earned on the effective date	of the policy will result in to 90 days or \$100, whic of the policy	a pro-rata refund, su hever is greater. The i	bject to a policy minimum retai minimum retained premium is t	ned fully		
	Cancel	Previous	_	Su	bmit		

9. There are 4 things you need to pay attention to on the following screen: make sure to confirm the policyholder's email address, enter the bank account information for the eCheck, read and acknowledge the terms and conditions for the ACH processing, and make sure 10-pay plan is checked. When ready to continue, select **"Submit**."



10. To continue, select "Ok."



11. Select "View Policy."

Your transaction has been confirmed.
Residential policy: TWRD You can check the payment schedule and invoices here: Policy Billing Page
View Renewal Details View Policy

12. The policy has been renewed. The policy package is found under "Documents."

Account: Resident	ial (TWF	RD	)	Scheduled			
SUMMARY	CONTACTS	OPEN ACTIVITIES	NOTES O	DOCUMENTS	CLAIMS O	BILLING	
Change Policy	X Cancel Policy	I				🛔 Priv	vacy Policy
Policy Details							^
Policy Effective October 7, 2023		Policy Expiration October 7, 2024		Producer of Record	Total P	Premium	\$3,150.00
Pre-Renewal Direction	1	Policy Status Scheduled		Producer of Service	Total C	Cost	\$3,150.00
Policy Type Dwelling and Persona	l Property	Primary Insured Scott Cole					

