TWIA Renewal Status

Overview of TWIA Renewal Offer Statuses

Renewal Offer Status	Significance	Next Steps
Calculated	Renewal Offer was automatically generated by the system	Payment needs to be received by TWIA
Draft	Policy is set to non-renew/blocked by Underwriting or the agent started editing the offer, but did not calculate the premium	Either Underwriting issues need to be resolved or the agent started editing the offer and did not hit calculate premium.
Pending Payment	Renewal Offer was submitted by Agent	Payment needs to be received by TWIA
Submitted	Renewal Offer has been submitted and a payment has been applied to it	Underwriting will review the offer to make sure it meets TWIA guidelines
Issued	Renewal Offer is issued and a payment has been applied to it	Agents should review the corresponding billing statement to make sure there is not a balance due
Scheduled	Renewal Offer is issued with a future effective date and a payment has been applied to it	Agents should review the corresponding billing statement to make sure there is not a balance due

1. In order to check the renewal activities assigned to the agency, log in to the TWIA Agent Portal and select "Open Policy Center. "

2. Open the "My Renewals" queue from the left navigation bar.
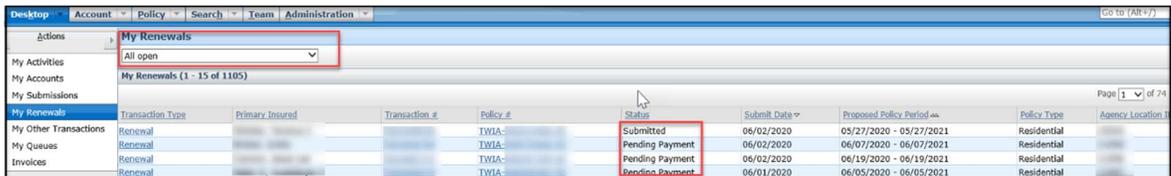
3. Under "My Renewals" is a drop-down menu. Select "Open with activity for me." This is where you can see any renewal offers that have been assigned to you by TWIA Underwriting to complete. In this example, the queue is empty.
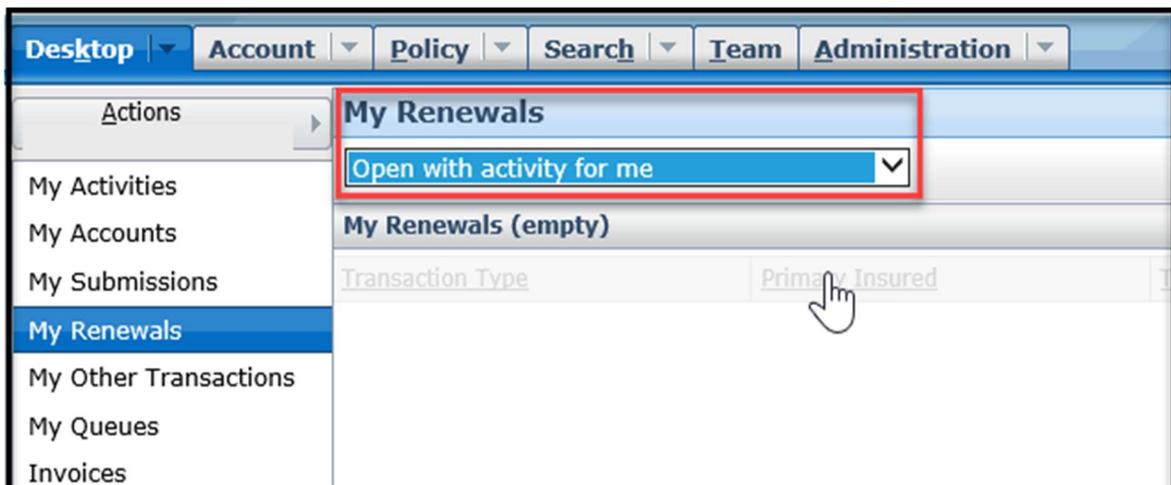
4. The next option in the drop-down menu is "Open with activity for me due within 7 days." Check this queue regularly to help track renewal offers and their submission status.
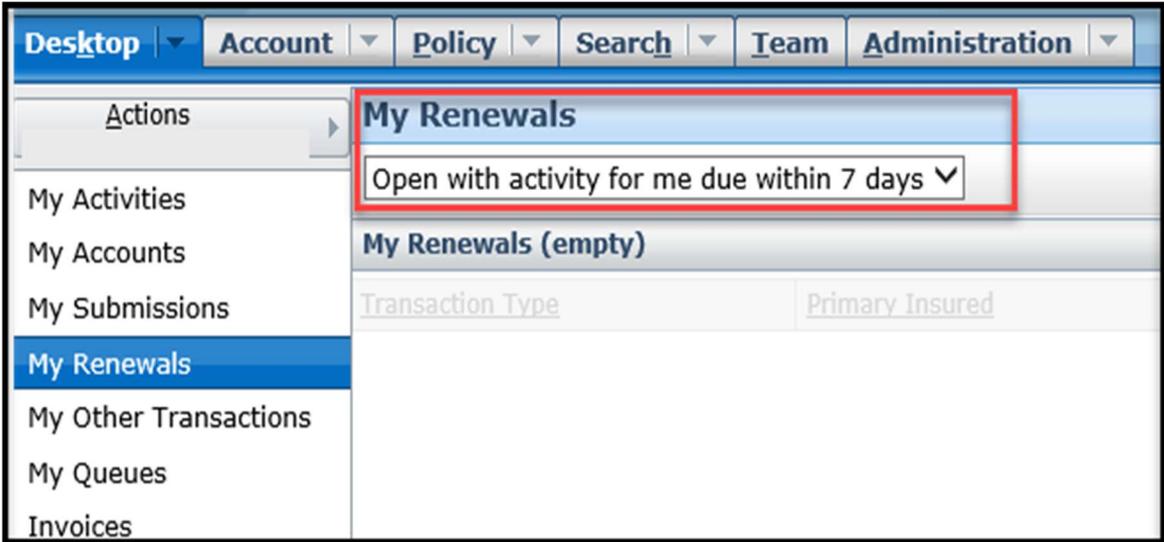
5. The next option in the drop-down menu is "Completed in the last 30 days." This will display renewals issued by Underwriting.

6. The next option in the drop-down menu is "All open." On this screen, you can see if a renewal offer is either in "Submitted" or "Pending Payment" status.

7. **To see if an "In Force" or "Scheduled" policy has been paid in full or if there is a balance due, please click on the "Transaction" number.**

8. **Next, click on the "Documents" tab in the left navigation bar under "Tools."**

9. **Select the latest PDF document with "Billing Statement" in the Name/Type columns to see if there is a balance due. You may use this document to invoice the insured for any balance due. **Please note, it is the agent's responsibility to collect any balance due.**
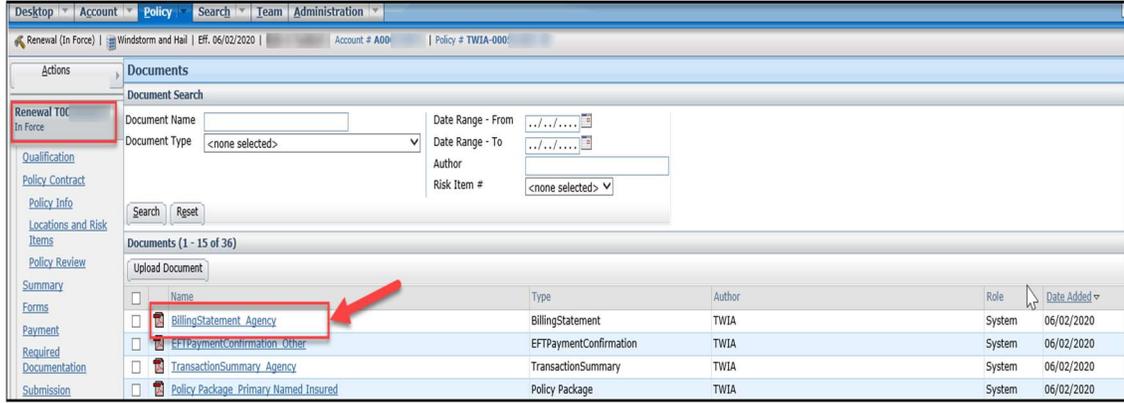
10. **A sample 'Billing Statement' follows:**

Billing Statement

Date: June 2, 2020
Policy Number: 000█████████
Insured: ████████████
Property Location: ████████████
                     ████████████

There is no balance due on this policy at this time.

Date Processed	Transaction Type	Reference #	Description	Due Date	Amount
06/02/2020	Premium	████████	Policy Issuance	07/02/2020	$2,255.00
06/02/2020	Payment	TWIINS0████	EFT	--	-$2,255.00
				Total Due	**$0.00**