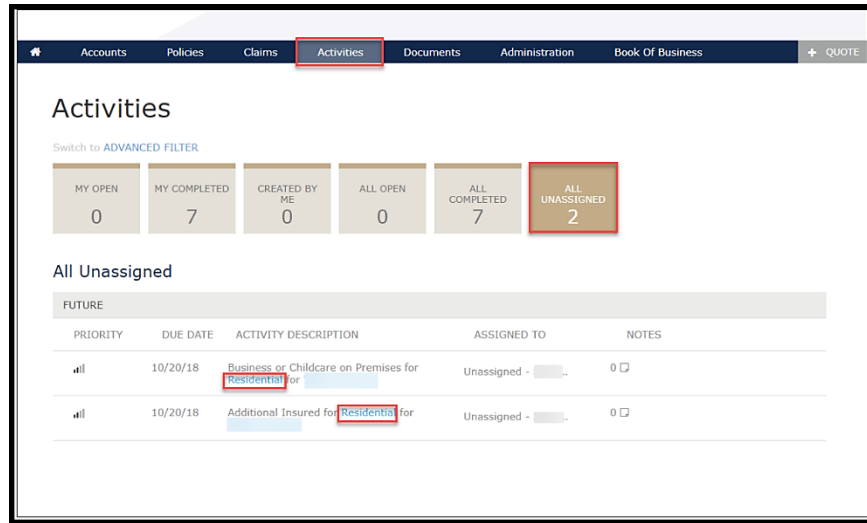


# Activities in Agent Gateway

In Agent Gateway, activities are created by TFPA Underwriting to request information or ask questions on a transaction. This job aid demonstrates the process of locating, responding, and completing activities in Agent Gateway.

Activities are found in two places in Agent Gateway.

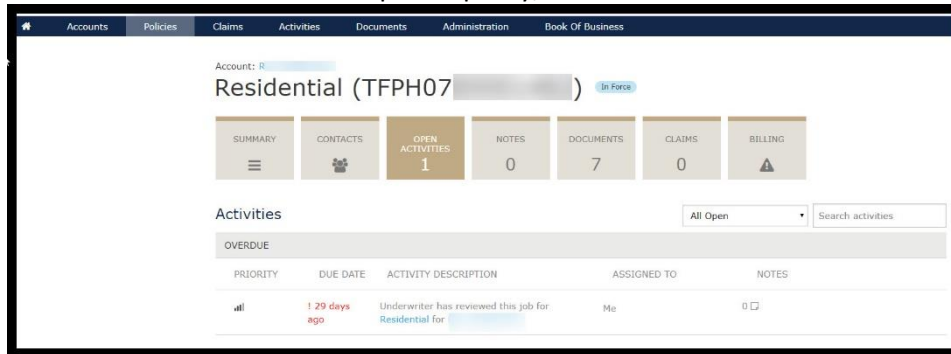
First, you can see a full list of all Activities for your agency when the Activities tab is selected.



Each tab shows activities based on status and assignment.

Tab Title	Tab Meaning
MY OPEN	Assigned to you and open/pending
MY COMPLETED	Assigned to you and completed
CREATED BY ME	Not an active tab
ALL OPEN	Assigned to Agency and open/pending
ALL COMPLETED	Assigned to Agency and completed
ALL UNASSIGNED	All Unassigned Agency Activities

Second, you can see activities related to a specific policy/transaction.



Click on the Activity from either the Activities Tab or the Policy to open it.

Contact us at 800-979-6440 or agentservices@twia.org.



Once the activity is open, follow the steps below to respond and complete the activity.

**#1-Assign it to yourself by selecting “Me” in dropdown menu, then click check box.**

All Unassigned

OVERDUE

PRIORITY	DUE DATE	ACTIVITY DESCRIPTION	ASSIGNED TO	NOTES
!!!	! 9 days ago	Building/Animal Exclusion for Residential for [redacted]	Unassigned - NECKE...	0
!!!	! 4 days ago	Gas Space Heater for Residential for [redacted]	Me	0

ESCALATION DATE 9/5/18  
TYPE Gas Space Heater  
DESCRIPTION You indicated that the property contains an unvented gas heater that does not have an oxygen depletion sensor. Properties with this type of heating are not eligible for coverage through TFPA. Please provide proof the heater has been properly vented, or replaced with an eligible heater, to avoid further action, which may include policy cancellation. Please upload the documentation by clicking the Upload Document button on the activity, then click the Complete button to submit your response to the Underwriting Department.

Notes for this Activity **+ Note**

Documents for this Activity  
**Please select document type and click '+Upload Documents' button to upload documents. After you upload the document, please update the description and click on Save.**

-- Select Document Type -- **+ Upload Documents**

**#2-Once the Activity is assigned to you, use the “+Note” box to add notes to this activity as needed. These notes can be seen by TFPA Underwriting once the Activity is completed.**

**#3-If there are documents need to be included to complete this activity, select the type of document you are adding from the dropdown menu, and then click the “+Upload Documents” button to locate the document on your computer and add it to the activity.**

Once you have added notes and documents important to responding to this activity, click the “Complete” button to complete the Activity and send it to TFPA Underwriting for review.

!!! 1 4 days ago Gas Space Heater for Residential for [redacted] Me 0

**Complete**

ESCALATION DATE 9/5/18 CREATED BY [redacted]

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