



Adding/ Deleting A Mortgagee in the TFPA Agent Portal

This job aid demonstrates the steps to add and delete a mortgagee in TFPA Agent Portal.

1. Locate the policy that needs updating. Click on “Change Policy.”

Account: Michael Scott

Residential (TFPH07) US Farm

Summary Contacts 0 Open Activities 0 Notes 5 Documents 0 Claims Billing Commission

[Change Policy](#)

2. Enter the effective date of the change and select “Next.”

Policy Change

Homeowners - Quote (TFPH07)

Effective Date

* Policy Change Effective Date Apr 6, 2023

[Cancel](#) [Next](#)

3. Enter the policy change description and then select “Next.”

Policy Change

Homeowners (TFPH0700291858) - Policy Change (0014990016)

Policy Details

* Policy Change Effective Date Apr 6, 2023

Policy Period 04/07/2023 - 04/07/2026

Policy Change Description

Primary Insured Michael Scott

Date of Birth Jan 1, 1980

[Cancel](#) [Previous](#) [Next](#)

4. If you are not making any other changes to the policy, select “Next” 3 times.

Policy Change

Homeowners (TFPH0700291858) - Policy Change (0014990016)

Address of Property to be Insured

Address Line 1 2109 Woodside Meadow Ct

Address Line 2 (Apt./Bldg./Suite) -

Address Line 3 -

City Seabrook

ZIP Code 77586

[Cancel](#) [Previous](#) [Next](#)



5. Select “Calculate Premium.”

Account: Michael Scott

Homeowners
(TFPH07) - Policy Change (0014990016)

Quote

Please select coverage options and click the "Calculate Premium" button to quote this Policy Change.

\$---

Calculate Premium

6. Select, “Continue.”

Account: Michael Scott

Homeowners
(TFPH070291858) - Policy Change (0014990016)

Quote

Please select coverage options and click the "Calculate Premium" button to quote this Policy Change.

Additional Coverages

Additional Premium Liability Coverage

Additional Insured Coverage

Exclusions and Conditions

Discounts, Surcharges and Fees

Calculate Premium

7. To locate the mortgagee information, select “Additional Interests.”

Account: Michael Scott

Homeowners
(TFPH07C) - Policy Change (0014990016)

Additional Information

Additional Named Insureds

NAME	DESCRIPTION OF INTEREST	RELATIONSHIP TO PRIMARY NAMED INSURED
Michael Scott	Co-owner	Spouse

Additional Interests

Cancel **Previous** **Next**



8. The best practice is to delete the old mortgagee first and then add the new one. Remove the old mortgagee clause by selecting the trashcan symbol.

Policy Change

Homeowners (TFPH07) - Policy Change (0014990016)

Additional Information

NAME	INTEREST TYPE	MORTGAGE POSITION	LOAN CONTRACT NUMBER	DESCRIPTION OF INTEREST
Mortgage Bank	Mortgage	First Mortgage	001	Mortgage

9. Next confirm you want to remove the additional interest by selecting “Yes.”

Remove Additional Interest?

Are you sure you want to remove this item?

Cancel Yes

10. Since you are adding new mortgage company information, click on “+Add.”

Policy Change

Homeowners (TFPH07) - Policy Change (0014990016)

Additional Information

+ Add

11. Enter the requested mortgagee information and then select “Add.”

Policy Change

Homeowners (TFPH07) - Policy Change (0014990016)

Additional Information

+ Add

NAME: Mortgage Bank

INTEREST TYPE: Mortgage

MORTGAGE POSITION: First Mortgage

LOAN CONTRACT NUMBER: 001

DESCRIPTION OF INTEREST: Mortgage

Add

12. Verify the information returned and then select “Next.”

Policy Change

Homeowners (TFPH07) - Policy Change (0014990016)

Additional Information

+ Add

NAME	INTEREST TYPE	MORTGAGE POSITION	LOAN CONTRACT NUMBER	DESCRIPTION OF INTEREST
Mortgage Bank	Mortgage	First Mortgage	001	Mortgage

Next



13. Select “Next.”

Policy Change

Homeowners
(TFPH078) - Policy Change (0014990016)

Coverage Summary

Mailing Address

Policy Changes

Payment Details

Next

14. Select, “Submit.”

Policy Change

Homeowners
(TFPH078) - Policy Change (0014990016)

Payment Details

Submit

15. You will be asked to confirm the transaction. If ready, select “Yes.”

Confirm Transaction

This transaction cannot be modified after it has been submitted. Do you want to continue?

No **Yes**

16. Your policy change has been confirmed.

Your changes have been confirmed.

Reference Number: 0014990016

Residential Policy: TFPH0700291858

You can check the payment schedule and invoices here: [Policy Billing Page](#).

View Policy Change Details **View Policy**



