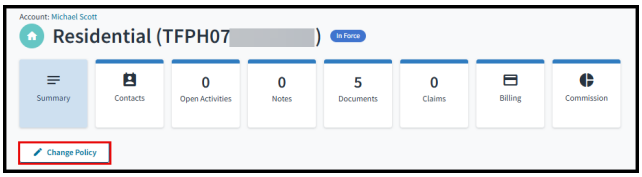
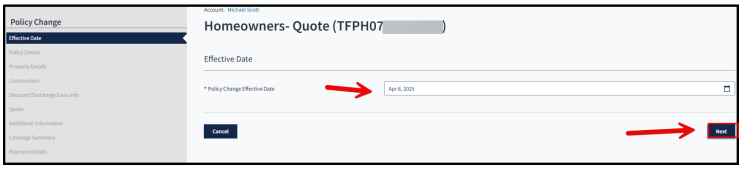
Adding/ Deleting A Mortgagee in the TFPA Agent Portal

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

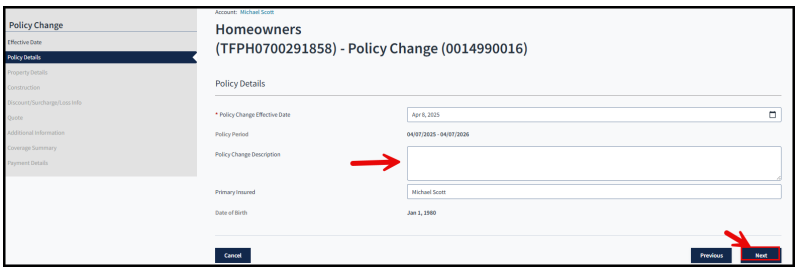
1. **Locate the policy that needs updating. Click on "Change Policy."**



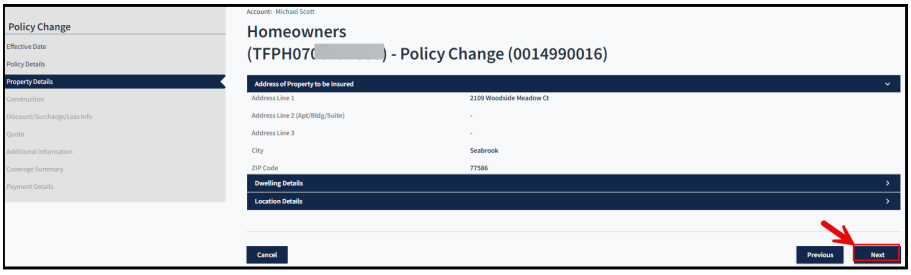
2. **Enter the effective date of the change and select "Next."**



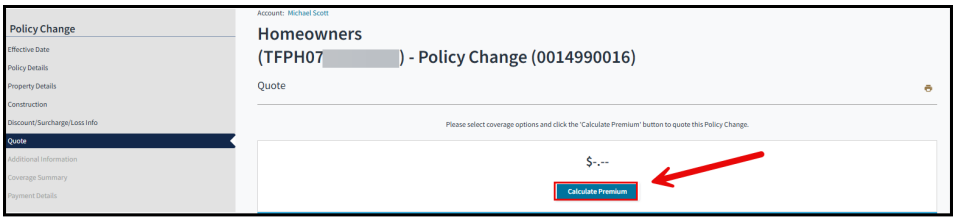
3. **Enter the policy change description and then select "Next."**



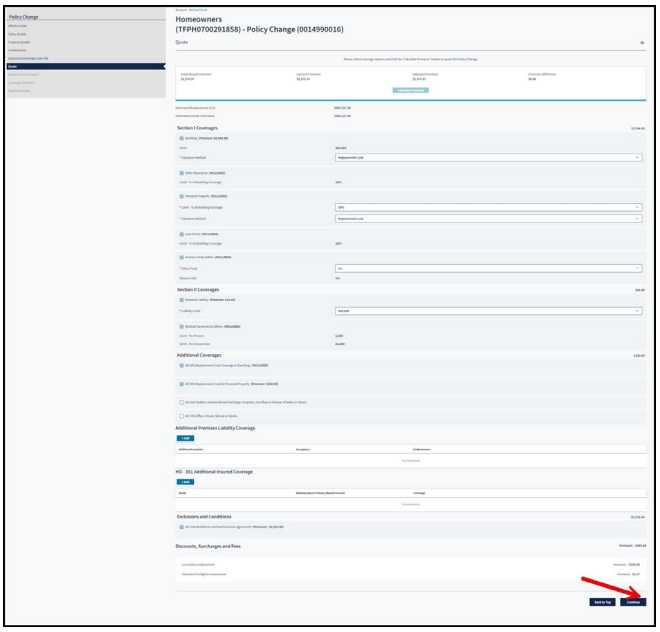
4. **If you are not making any other changes to the policy, select "Next" 3 times.**



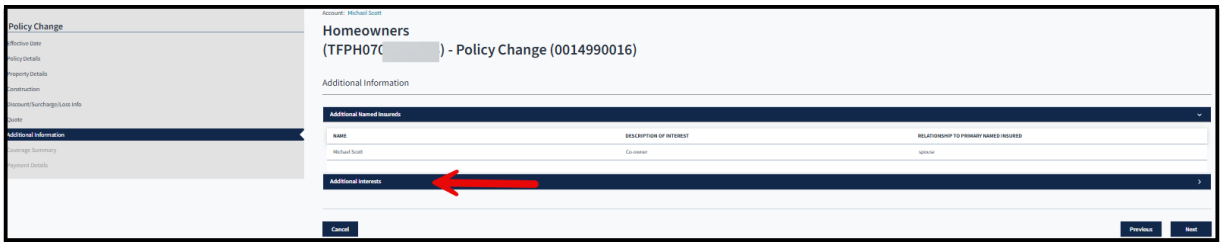
5. **Select “Calculate Premium.”**



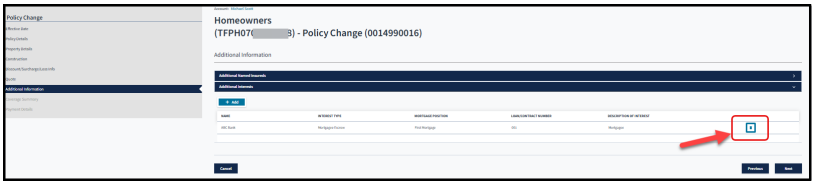
6. **Select, “Continue.”**



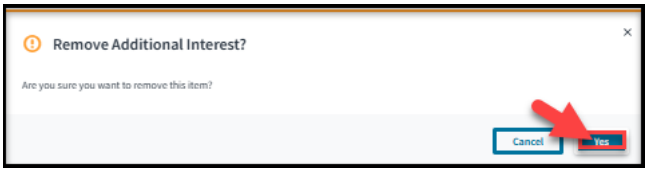
7. **To locate the mortgagee information, select “Additional Interests.”**



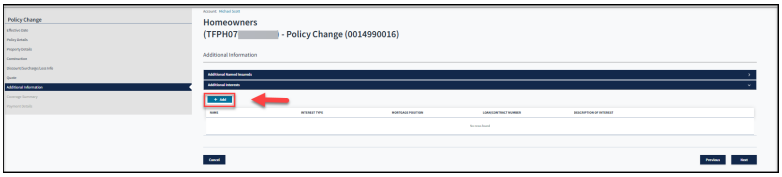
8. **The best practice is to delete the old mortgagee first and then add the new one. Remove the old mortgagee clause by selecting the trashcan symbol.**



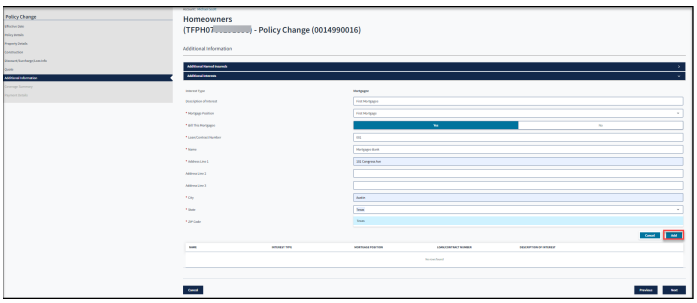
9. **Next confirm you want to remove the additional interest by selecting "Yes."**



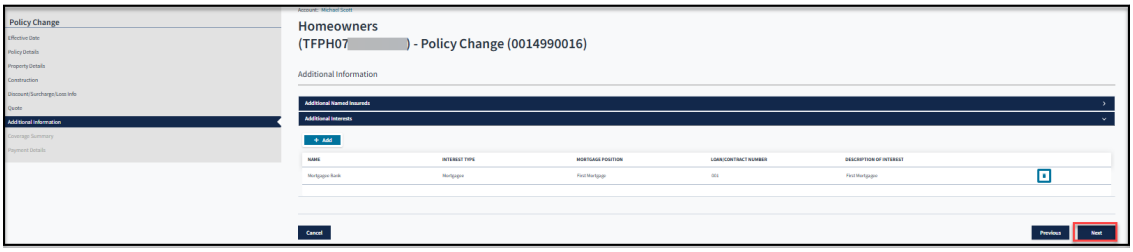
10. **Since you are adding new mortgage company information, click on "+Add."**



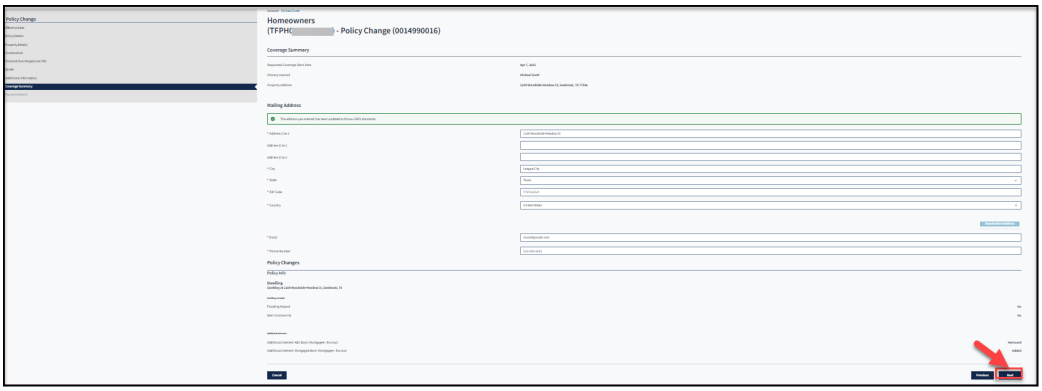
11. Enter the requested mortgagee information and then select "Add."



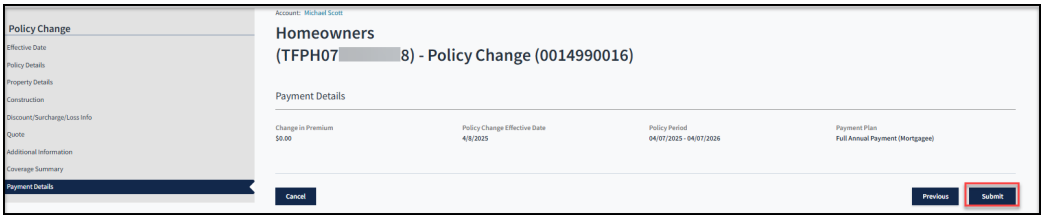
12. **Verify the information returned and then select "Next."**



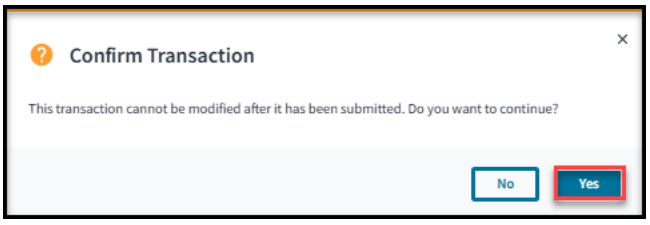
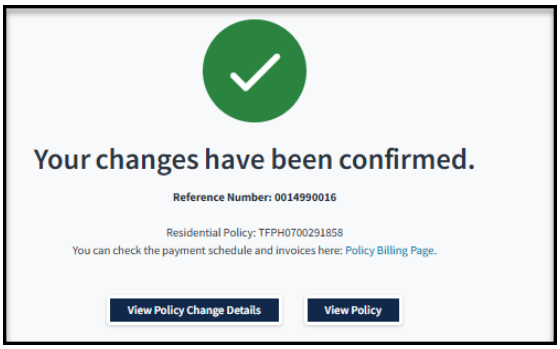
13. Select “Next.”



14. Select, “Submit.”



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



16. Your policy change has been confirmed.