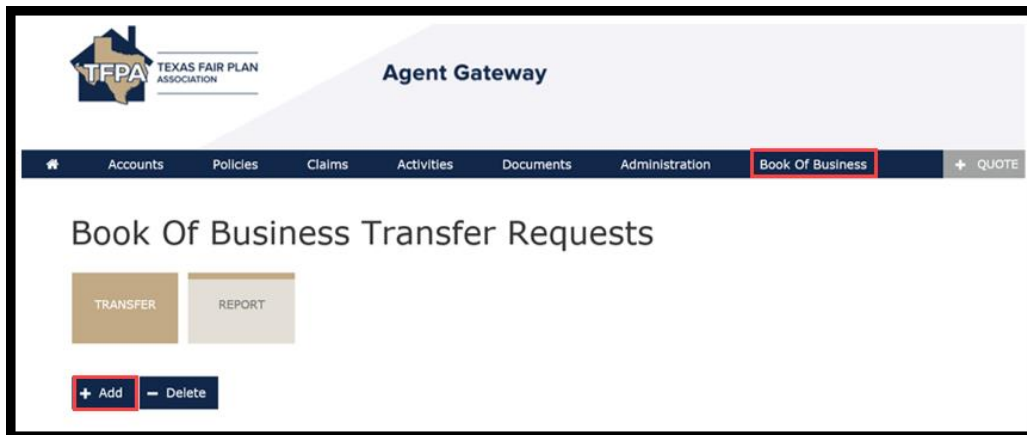


Book of Business Transfer

This job aid demonstrates the Book of Business Transfer process in TFPA Agent Gateway. A Book of Business Transfer allows agencies with multiple locations to transfer policies between agency locations. Only Administrators of agencies with multiple locations have the ability to conduct Book of Business transfers.

If you do not have this ability, complete this [form](#) and email it to Agent Services at agentservices@twia.org to process a Book of Business transfer for your agency.

1. Once logged into TFPA Agent Gateway, locate the Book of Business button in the blue bar at the top of the screen. Click “Book of Business” and then click “+ Add” to start a new transfer request.



2. Then, complete the fields on the next screen with the appropriate transfer information. The screenshot contains additional guidance on completing the fields correctly. Once the fields are completed, click the “Create” button.

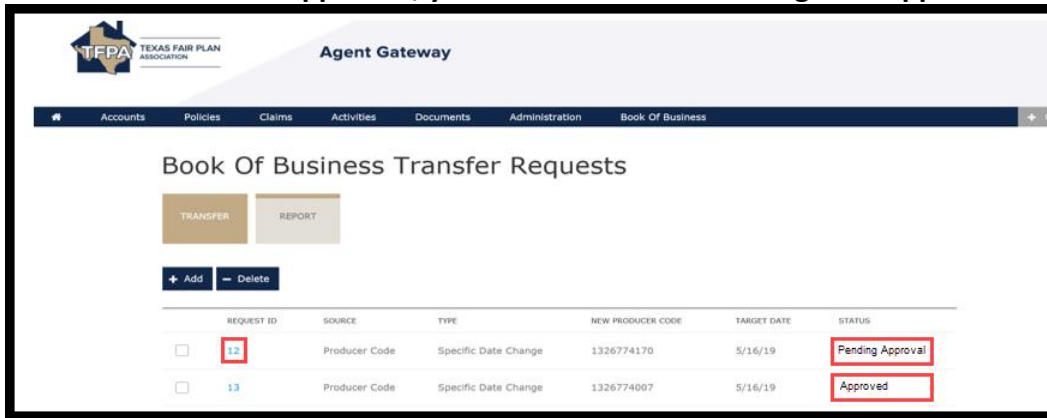
The screenshot shows the 'New Transfer Request' form in the TFPA Agent Gateway. The navigation bar is the same as in the previous screenshot, with 'Book Of Business' highlighted. The form fields are:

- Process Date: A date picker with a red box around it containing the text 'This date has to be a current or future date.'
- Effective Date: A date picker with a red box around it containing the text 'This date must contain the current year.'
- Previous producer code: A dropdown menu with a red box around it containing the text 'Select the producer that currently has the policies.'
- New producer code: A dropdown menu with a red box around it containing the text 'Select the producer that will be receiving the policies.'

At the bottom left, there are two buttons: 'Create' (highlighted with a red box) and 'Cancel'.



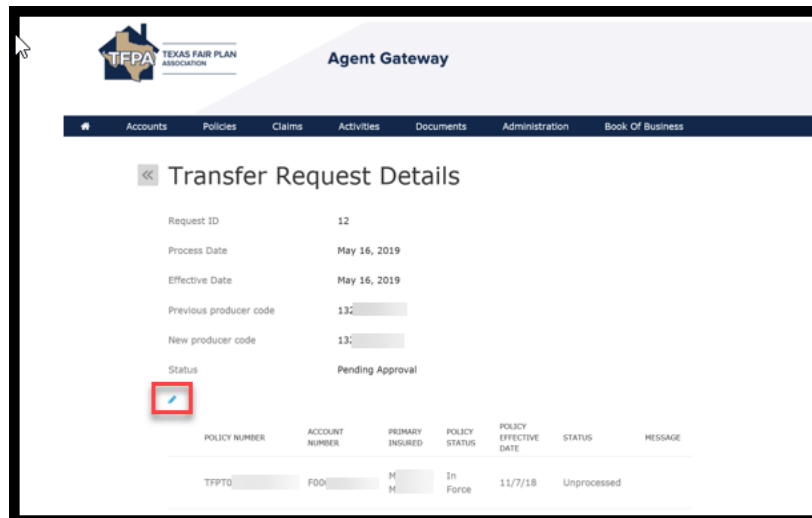
3. If you are moving an entire Book of Business to one producer/agent, verify the Status is "Pending Approval." This completes your steps in the Book of Transfer process. Once the transfer is reviewed and approved, you will see the status change to "Approved."



If you are not moving an entire Book of Business, click on the blue "Request ID" number and continue to step 4.

Caution: Please ensure any Transfer is showing an "Approved" status before initiating additional transfers.

4. Then, begin to edit the Transfer Request by clicking the blue pen.



- Check the box next to any policies that should NOT be transferred to the new producer/agent. Then, click “Delete” to remove those policies from the Transfer Request. Lastly, click the “Save Changes” button to update the Transfer Request.

Transfer Request Details

Request ID: 13

Process Date: 05/16/2019

Effective Date: 05/15/2019

Previous producer code: 1

New producer code: 11

Status: Pending Approval

Buttons: Save Changes, Delete, Cancel

	POLICY NUMBER	ACCOUNT NUMBER	PRIMARY INSURED	POLICY STATUS	POLICY EFFECTIVE DATE	STATUS	MESSAGE
<input type="checkbox"/>	TFI	FD	H	In Force	5/1/19	Unprocessed	
<input type="checkbox"/>	TFI	FC	J	In Force	4/20/19	Unprocessed	
<input type="checkbox"/>	TFI	FI	BE	In Force	4/25/19	Unprocessed	

- Verify that the Status is Pending Approval. If so, this completes your steps in the Book of Transfer process. Once the transfer is reviewed and approved by Agent Services, you will see the status change to “Approved.”

Book Of Business Transfer Requests

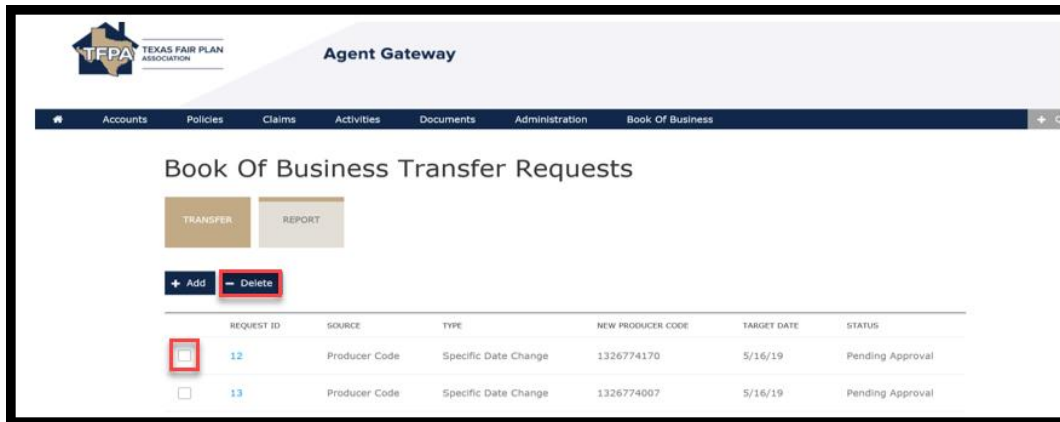
Buttons: Add, Delete

REQUEST ID	SOURCE	TYPE	NEW PRODUCER CODE	TARGET DATE	STATUS
13	Producer Code	Specific Date Change	1326774170	5/16/19	Pending Approval
13	Producer Code	Specific Date Change	1326774007	5/16/19	Approved

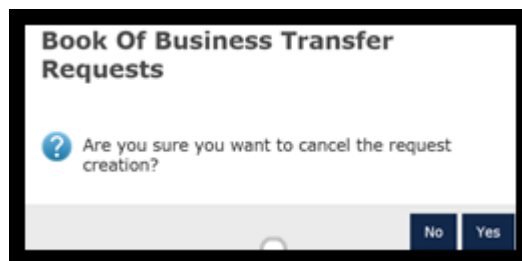
If you need to transfer additional/remaining policies to a second producer/agent, repeat steps 1-5 and select a second producer/agent in the New Producer Code dropdown menu. **Caution: Please ensure any Transfer is showing an “Approved” status before initiating additional transfers.**



To delete a Book of Business Transfer, check the box next to the transfer and select the "Delete" button.



Agent Gateway will then ask you to confirm the cancellation. Click Yes to proceed.



Then, you will receive a confirmation that the transfer was deleted successfully.

