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.
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.
5. 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.

6. 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.”

If you need to transfer additional/removing 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.