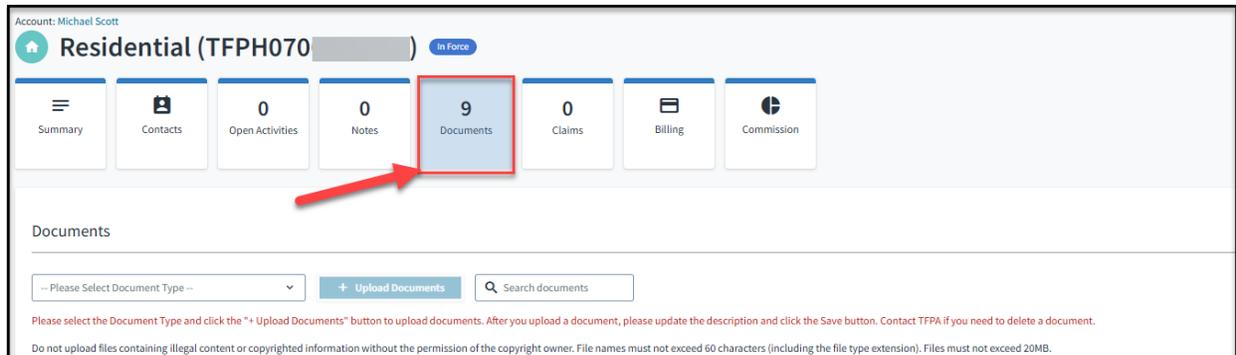




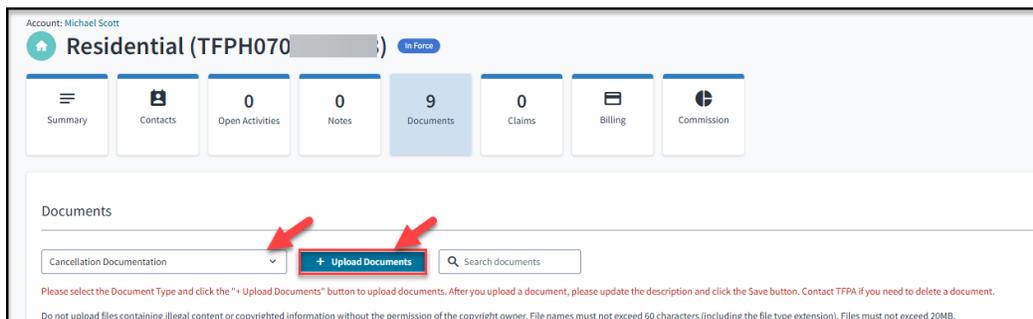
Canceling a TFPA Policy

This job aid demonstrates the steps needed to cancel a policy.

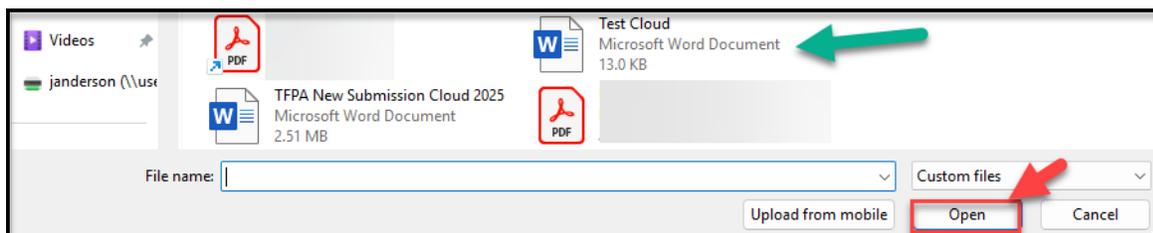
1. Open the TFPA policy you would like to work with and then select “Documents.”



2. Next select the document type you want to upload to the policy from the drop-down menu. In this example, we are choosing to upload a “Cancellation Documentation” document to initiate a policy cancellation. Next, select “+Upload Documents.”



3. The system will take you to your documents screen to select the document you would like to upload. Click on the document’s name and then select “Open.”





4. Next enter the document description where indicated and then save the document.

Account: Michael Scott

Residential (TFPH070[redacted]) In Force

Summary Contacts 0 Open Activities 0 Notes 10 Documents 0 Claims Billing Commission

Documents

Cancellation Documentation + Upload Documents

Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TFPA if you need to delete a document.

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Cloud.docx	<input type="text"/>	Cancellation Documentation	4/14/2025	<input type="button" value="Save"/>

5. Your document requesting the cancellation of the policy has been uploaded.

Account: Michael Scott

Residential (TFPH070[redacted]) In Force

Summary Contacts 0 Open Activities 0 Notes 10 Documents 0 Claims Billing Commission

Documents

Cancellation Documentation + Upload Documents

Please select the Document Type and click the "+ Upload Documents" button to upload documents. After you upload a document, please update the description and click the Save button. Contact TFPA if you need to delete a document.

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Test Cloud.docx	cancellation proof	Cancellation Documentation	4/14/2025	

