Adding/Deleting a Mortgagee

This job aid demonstrates the steps to add or delete a Mortgagee on a policy in the TFPA Agent Gateway system.

If an Agent needs to replace the listed Mortgagee, first delete the existing Mortgagee, and then add the new Mortgagee. Both steps are demonstrated in step #4.

 Once logged into TFPA Agent Gateway, locate the policy that needs updating. After entering the policy, click on the "Change Policy" button to begin the mortgagee policy change.

Accounts	Policies	Claims	Activities	Documents	Adm	inistration	Book Of I	Business
ß		Account: IS	lential	(TFPD	0)	In Force
					PEN VITIES	NOTES	DOCU	jments 8
		Change	Policy					
		DECLARATIO	IN PAGE					

2. First, select the Effective Date of the change by using the arrows to the left and right of the date. Then click "Continue."

3. Then, check the Mortgagee box and click "Continue."







If an Agent needs to replace the listed Mortgagee, first delete the existing Mortgagee, and then add the new Mortgagee.

4. Deleting a Mortgagee:

Adding a New Mortgagee:

completed , click "Add."

To delete a Mortgagee, click the green "-" button. Select the radio button next to the mortgagee you wish to delete and click the "Delete" button. The Continue button will then be available to click.

To add a new Mortgagee, click the green "+" button. New, required fields will appear to enter the new mortgage company's information. Once all fields are

Mortg	pagee					
Mortg	agee 🕂	Θ				Continu
	Name	Mortgage Position	Street	City	State	

Mortgagee 🤇	$\overline{\mathbf{D}}$			Co	ntinue
Name	Mortgage Position	Street	City	State	
There are no mort	gagees on record.				
Enter contact details	below, then click Add to c	ontinue.			
Name *	New Mo	rtgage Company			
Mortgage Position *	First Me	ortgage			~
Bill This Mortgagee	Yes	No			
Loan Number 🔹	123456				
Street *	123 Any	where Street			
City 💌	Austin				
State =	Texas				~
ZIP Code 💌	78701				
				Cancel	Add



5. Review the new Mortgagee information, or confirm the old Mortgagee has been removed, and if accurate, click "Continue."



6. Then, click "Quote." ****Notice the blue "Edit" button under the** Mortgagee information. This button can be used when editing new Mortgagee data entered on the previous screen.**

olicy	Date	Changes	Premium
Property	10	Mortgagee	Adjusted Annual Premium Pro-Rated Premium Difference
Address	2019		 m [*] New Mortgage Compar
-			Enective Date: some 10, 2019
Mortgagee			
0			





- Contact us at 800-979-6440 or agentservices@twia.org.

7. Then, click "Submit."

8. Click "Confirm to proceed with change" to continue.

9. Lastly, click "OK" and "Save and Exit" to complete and Change bound

Policy Transactions

TYPE

Policy Change

Policy Change

Submission

JOB NUMBER

Once the change is successful, you can locate it on the policy in the **Policy Transactions list.**

bind the change.

You can also locate the new Declaration Page in the Documents section of the policy.

(Declaration Page may take several minutes to generate in Agent Gateway.)

Account:								
Reside	ntial (T	FPH07	000014	82) (18 Force)				
SUMMARY	CONTACTS	OPEN	NOTES	DOCUMENTS	CLAIMS	BILLING		
=	201 201	1	0	7	0	A		
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TRANSACTION STATUS

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PREMIUM

\$1,018.00

\$1,018.00

\$1,018.00

All 🗹 Search Transacti

EFFECTIVE DATE

6/10/19

1/14/19

12/12/18

Premium Change \$0.00 Confirm to proceed with change

Policy Number: TFPD0 Policy Change Effective Date: Jun 3, 2019

Policy Details:

Addres ave and Exit



