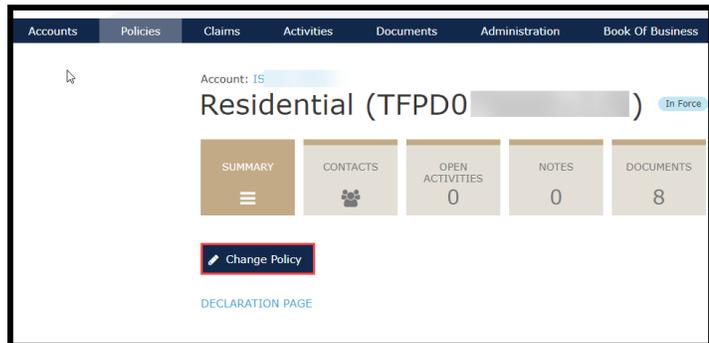


Adding/Deleting a Mortgagee

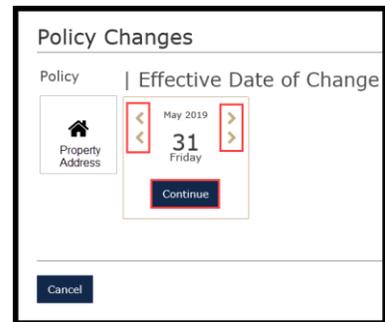
This job aid demonstrates the steps to add or delete a Mortgagee on a policy in the TFPA Agent Gateway system.

****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.****

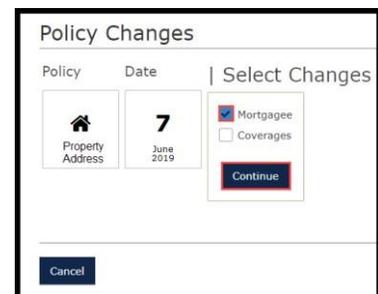
1. Once logged into TFPA Agent Gateway, locate the policy that needs updating. After entering the policy, click on the “Change Policy” button to begin the mortgagee policy change.



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



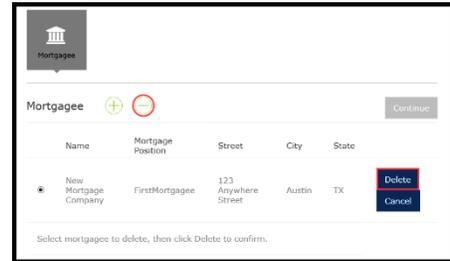
3. Then, check the Mortgagee box and click “Continue.”



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

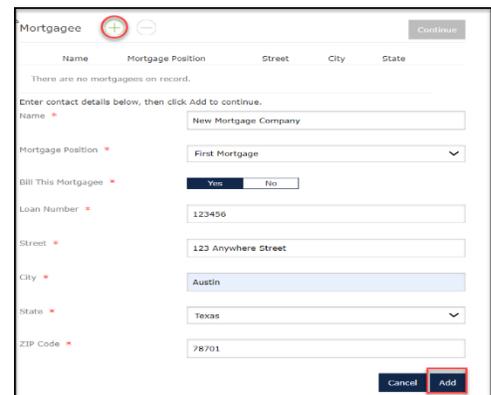
4. Deleting a Mortgagee:

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.

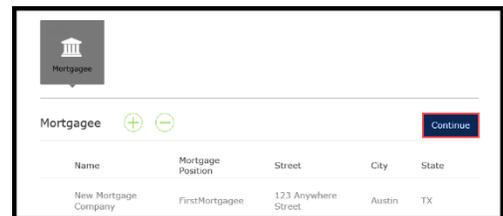


Adding a New Mortgagee:

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 completed , click “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.****

