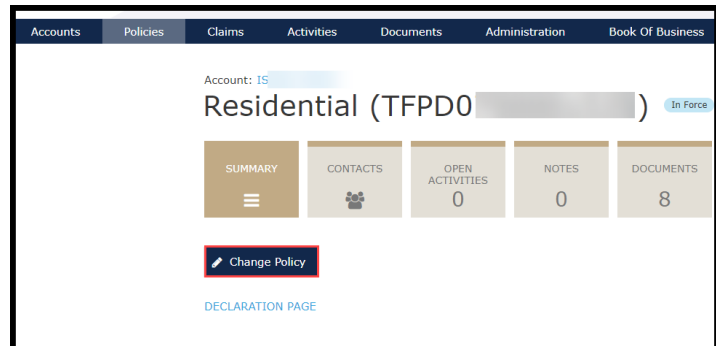


# Adding/Deleting a Mortgagee

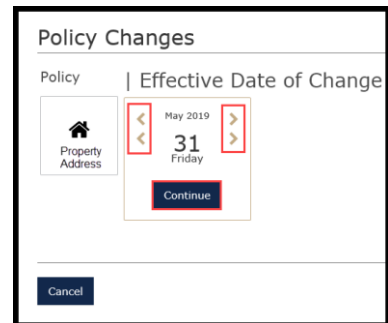
This job aid demonstrates the steps to add or delete a Mortgagee on a policy in the TFPA Agent Gateway system.

**\*\*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.\*\***

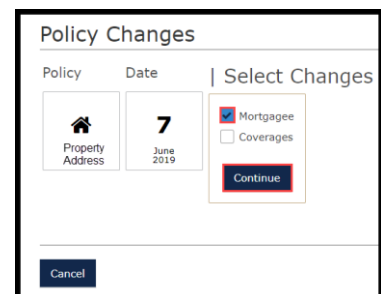
1. Once logged into TFPA Agent Gateway, locate the policy that needs updating. After entering the policy, click on the “Change Policy” button to begin the mortgagee policy change.



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



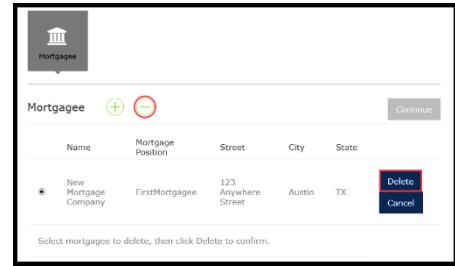
3. Then, check the Mortgagee box and click “Continue.”



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

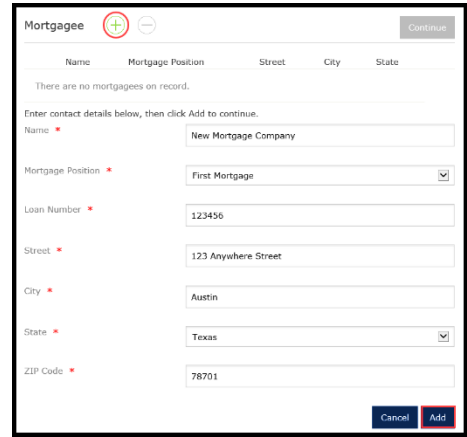
**4. Deleting a Mortgagee:**

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.

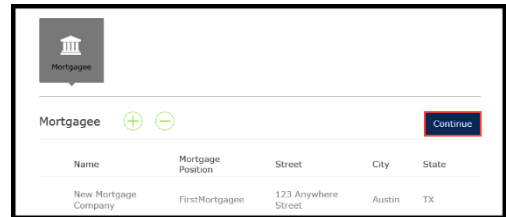


**Adding a New Mortgagee:**

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.”

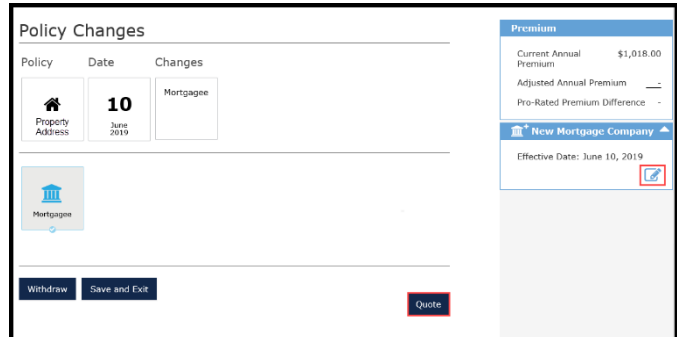


**5. Review the new Mortgagee information, or confirm the old Mortgagee has been removed, and if accurate, click “Continue.”**



**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.\*\***



7. Then, click "Submit."

Premium	
Current Annual Premium	\$1,018.00
Adjusted Annual Premium	\$1,018.00
Pro-Rated Premium Difference	\$0.00

**Submit**

New Mortgage Company

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

Premium Change \$0.00

**Confirm to proceed with change**

Policy Details:

Policy Number: TFPD0  
Policy Change Effective Date: Jun 3, 2019  
Address: [redacted]

**Save and Exit**

9. Lastly, click "OK" and "Save and Exit" to complete and bind the change.

**Change bound**

Change has been bound

**OK**

**Change Bound**

Your change was bound successfully.

**Save and Exit**

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

JOB NUMBER	TYPE	TRANSACTION STATUS	PREMIUM	EFFECTIVE DATE
00009	Policy Change	Bound	\$1,018.00	6/10/19
00004	Policy Change	Bound	\$1,018.00	1/14/19
00003	Submission	Bound	\$1,018.00	12/12/18

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: [redacted] **Residential (TFPH0700001482)** IN FILE

SUMMARY CONTACTS OPEN ACTIVITIES NOTES **DOCUMENTS** CLAIMS BILLING

Documents -- Select Document Type -- Upload Documents Search documents

Please select document type and click "Upload Documents" button to upload documents. After you upload the document, please update the description and click on Save.

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). File must not exceed 20MB. and .bmp, .doc, .docm, .docx, .dot, .dotx, .ppt, .pptx, .psd, .png, .rtf, .tif, .tiff, .xls, .xlsx are the supported files.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
68038.pdf	Notice of cancellation 68038	ROC	8/31/18	
Email - New Document on Policy.pdf	Email - New Document on Policy	Email Sent	8/16/18	
<b>Declaration Page.pdf</b>	Declaration document	Declaration Page	8/16/18	
1000004270.pdf	Invoice 1000004270	Installation Notice	8/2/18	
Policy Package.pdf	Policy Package	Policy Package	8/2/18	
Application Eligibility.pdf	Application Eligibility	Application Eligibility	8/2/18	

