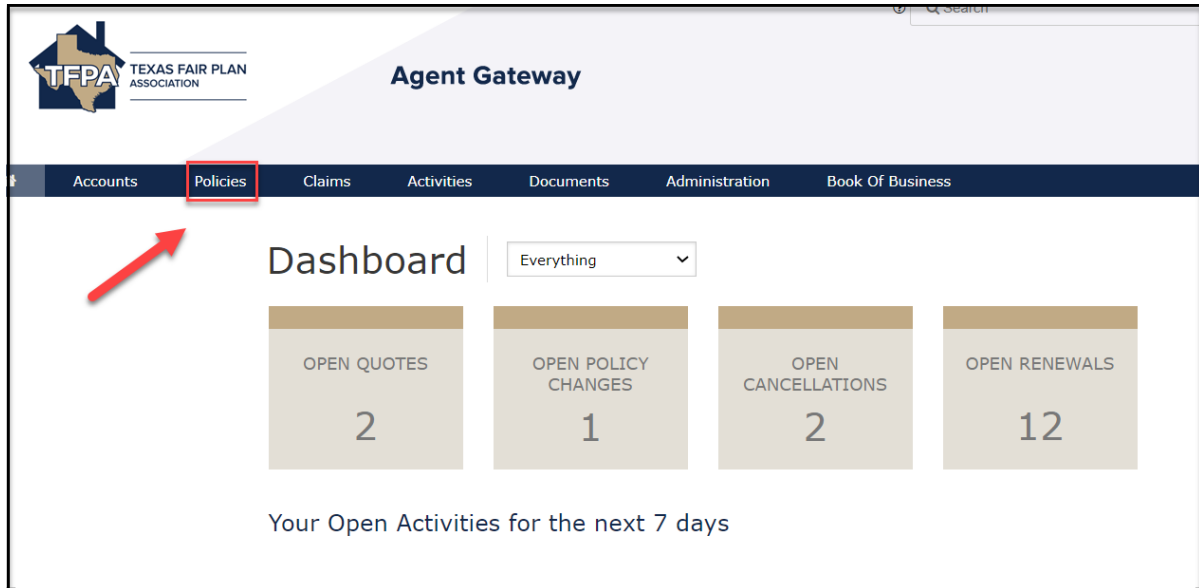


Requalifying a Renewal in TFPA Agent Gateway

This job aid shows how to requalify a renewal in TFPA Agent Gateway.

Please note, to requalify for TFPA coverage, the property must meet our declination requirements (TFPA [Eligibility Requirements](#)). TFPA has a declination form you may use for your convenience: [Declination Form](#).

1. Please log in to the Agent Portal. After you sign into the system, you will land on the Agent Dashboard page. Select. "Policies" to continue.



2. On the Policies screen, select “Requalification Renewal” (renewals that need to be requalified will show under this tab at 90 days before the renewal date) and then click on the “Policy Number” you would like to work with. ***Please note you will requalify the expiring policy, not the renewal offer itself. If you complete the requalification between 90-61 days before renewal, the renewal transaction will generate 60 days before the renewal date in the “Open Renewals” tab. If you requalify the policy after day 60, the renewal transaction will generate in the “Open Renewals” tab once requalified. The actual renewal offer or policy packet (if mortgagee pay) will print and be sent 35 days prior to the renewal date or the date you requalify the policy if between 35 and 1 day(s) prior to the renewal date.

The screenshot shows the 'Policies' screen with a dropdown menu set to 'Everything'. Below the menu are several tabs: 'RECENTLY VIEWED', 'RECENTLY ISSUED', 'BILLING DELINQUENT', 'OPEN QUOTES' (2), 'OPEN RENEWALS' (12), 'REQUALIFICATION RENEWALS' (3), 'OPEN CHANGES' (1), and 'OPEN CANCELLATIONS' (2). The 'REQUALIFICATION RENEWALS' tab is highlighted with a red box. Below the tabs is a table titled 'Requalification Renewals' with the following data:

CREATED	PRODUCT	POLICY TYPE	POLICY NUMBER	EXPIRATION DATE	ACCOUNT	REQUALIFICATION STATUS
4/18/23		Homeowners	TFPH0	7/17/23		Requalification pending
4/27/23		Condominium	TFPC	7/26/23		Requalification pending
5/6/23		Homeowners	TFPH 6	8/4/23		Requalification pending

3. On the next screen, select “Add Requalification.”

The screenshot shows the 'Residential (TFPH)' account page. At the top, it says 'Account: [redacted]' and 'Residential (TFPH [redacted]) In Force'. Below this are several tabs: 'SUMMARY', 'CONTACTS', 'OPEN ACTIVITIES' (0), 'NOTES' (0), 'DOCUMENTS' (71), 'CLAIMS' (0), and 'BILLING'. At the bottom, there are two buttons: 'Change Policy' and 'Add Requalification'. The 'Add Requalification' button is highlighted with a red box and a red arrow points to it. Below the buttons is a link for 'DECLARATION PAGE'.



4. Please make sure you read the information listed in the green boxed area below. TFPA requires that you keep the declination documentation (i.e. TFPA Declination Form or other written documentation you are using to complete the questions) on file indefinitely. You need 2 declinations of coverage for each policy. You will be asked to provide this documentation in the event you or your agency are audited. Please answer all questions with the red asterisk next to them * (see red boxed area below). When ready to continue, select "Submit."

Account: [redacted]
Residential (TFPH [redacted]) In Force

SUMMARY CONTACTS OPEN ACTIVITIES NOTES DOCUMENTS CLAIMS BILLING
0 0 71 0

Requalification

I am representing that diligent effort has been made by the agent and/or policyholder to obtain comparable residential property insurance coverage from a residential property insurance carrier in Texas that is licensed to write and actually writing residential property insurance. I am representing that I have discussed the FAIR Plan eligibility requirements with the policyholder and have determined, to the best of my knowledge, the above named policyholder is eligible to continue coverage with the Texas FAIR Plan. I understand that the Texas FAIR Plan Association may independently verify the information, and that my authority to write business with the Texas FAIR Plan may be suspended and/or cancelled if I have in any way misrepresented this information.

Policy Type **Homeowners**

Has the policyholder and/or agent attempted to obtain coverage from a licensed insurance company that is actually writing residential property insurance in Texas? * Yes No

Has the applicant been declined by at least two licensed/authorized insurance carriers? * Yes No

Insurance Company #1: *

1a: Did the declination occur within the last 90 days? * Yes No

1b: Reason *


Insurance Company #2: *

2a: Did the declination occur within the last 90 days? * Yes No

2b: Reason *

5. Your requalification has been submitted. Please click "Close" to continue.

Submitted Requalification

 Your renewal request and updated declination have been received and referred to underwriting. Thank you



6. If you navigate back to the Policies screen, you will see the requalification renewals tab has decreased by 1.

The screenshot shows the 'Policies' dashboard with a filter set to 'Everything'. A row of navigation tabs includes 'RECENTLY VIEWED', 'RECENTLY ISSUED', 'BILLING DELINQUENT', 'OPEN QUOTES' (2), 'OPEN RENEWALS' (12), 'REQUALIFICATION RENEWALS' (2), 'OPEN CHANGES' (1), and 'OPEN CANCELLATIONS' (2). A green arrow points to the 'REQUALIFICATION RENEWALS' tab. Below the tabs is a table titled 'Requalification Renewals' with columns for 'CREATED', 'PRODUCT', 'POLICY TYPE', 'POLICY NUMBER', 'EXPIRATION DATE', 'ACCOUNT', and 'REQUALIFICATION STATUS'. Two rows are visible, both with a status of 'Requalification pending'.

7. To verify a renewal has been requalified, you can go to the policy's "Documents" section. You should see an email that was sent to the agency (see *Email – Requalification Confirmation*).

The screenshot shows the 'Documents' section for a 'Residential (TFP)' policy. The 'DOCUMENTS' tab is highlighted with a red box and shows a count of 24. Below the tabs is a 'Documents' section with a dropdown menu set to '-- Select Document Type --', an '+ Upload Documents' button, and a search box. A red instruction reads: '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.' Below this is a table with columns for 'NAME', 'DESCRIPTION', 'DOCUMENT TYPE', 'DATE UPLOADED', and 'SAVE'. Two documents are listed: 'Email - Requalification Confirmation.pdf' (Email Sent, 5/8/23) and 'Requalification Letter.pdf' (Requalification Letter, 4/11/23). A green arrow points to the first document.

