



# **TFPA Agent Migrated Renewal and Follow Up Training**

# Renewal and Follow Up Training

## **After today's webinar, you will learn:**

- When policies will migrate from our old system
- How these migrations will impact TFPA Agents
- The impact to policyholders
- Important timeframes in the renewal process

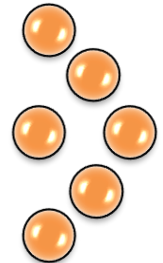
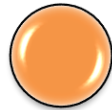
And lastly, we will answer some important billing questions we have heard from the Agent community.

# RENEWAL MIGRATION

A decorative horizontal bar consisting of a dark blue line on top and a lighter blue line below it, both extending across the width of the slide.

# Policy Migration

Requalifying Policies  
(requalified in Old System)



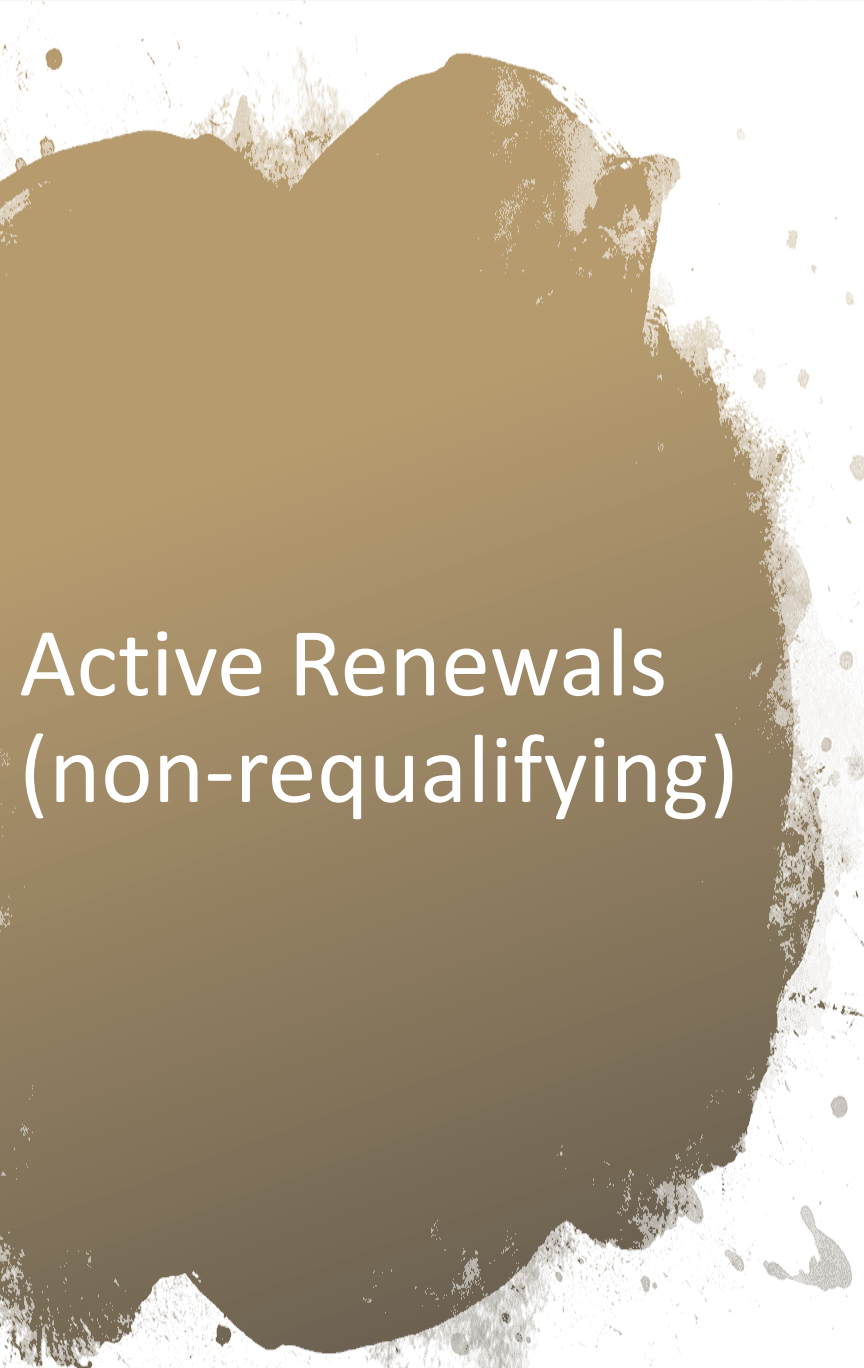
Active Policies





# Requalifying Renewals

- **Requalified in Old System**
  - Beginning 90 days from renewal date
- **Will migrate at 60 days from renewal date OR once renewal is requalified (whichever is later)**
- **Renewals that are not requalified will not migrate into Agent Gateway**




## Active Renewals (non-requalifying)

- **Will migrate at 60 days from the renewal date**
- **Policies will migrate daily**
- **Any policy not in an Active status will not migrate into Agent Gateway**
  - Pending Cancellation for non-payment policies will migrate
  - Pending Non-Renew policies will not migrate

# After Migration (60-35 days)

- **A new MSB will be calculated on all migrating homeowner and dwelling policies**
- **All Documents will migrate with the renewal**
- **Renewals in Agent Gateway will migrate in a view only mode until issued**
- **All renewal changes will be handled by Underwriting from 60 to 35 days prior to the renewal date**
  - Upload request in Agent Gateway
  - Calling 800-979-6440, Option 3 or 4
  - Emailing [tfpapolicy@twia.org](mailto:tfpapolicy@twia.org)

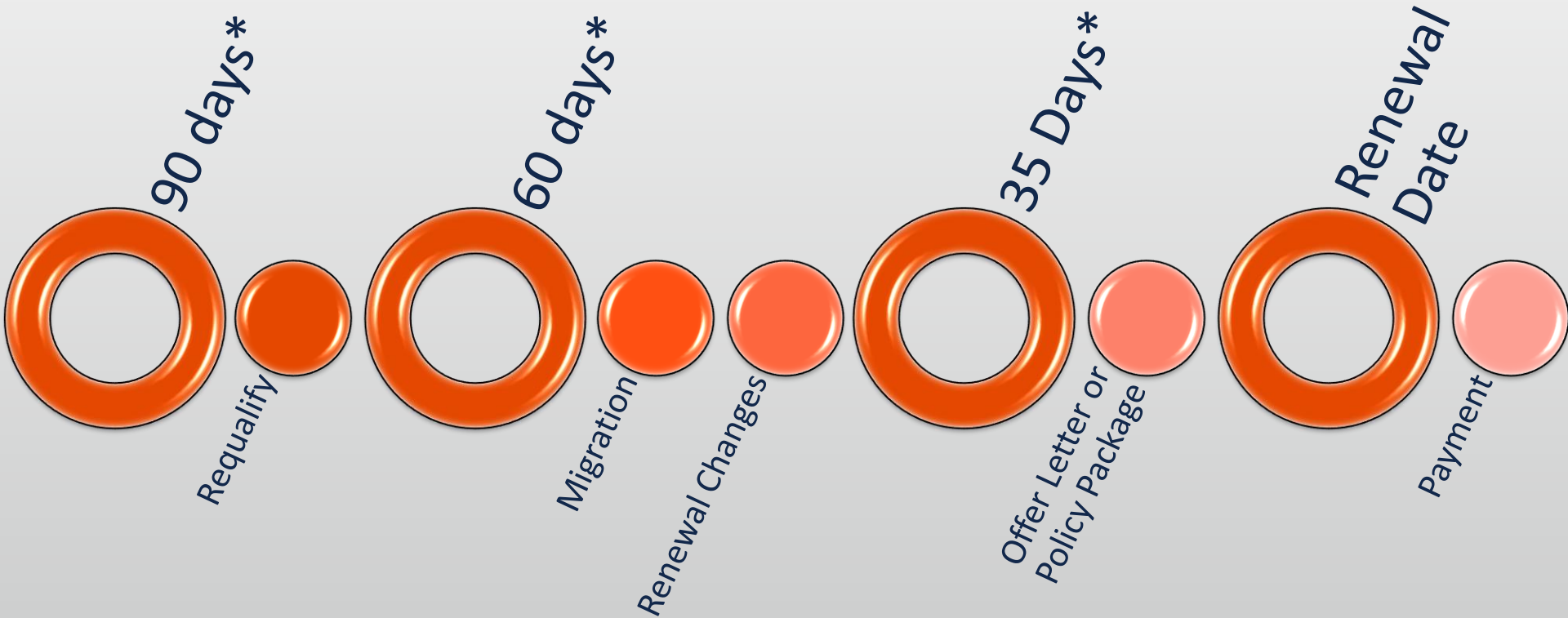


## Renewal Offer (35 days – Renewal Date)

- **Changes cannot be made to the renewal offer**
- **Mortgagee Escrowed**
  - Issued Status
  - Policy Package sent out
- **Policyholder Paid**
  - Offer Submitted Status
  - Offer Letter generated and mailed to policyholder
    - Offer allows **10 days** from renewal date for payment
    - If not paid within **10 days**, the offer expires

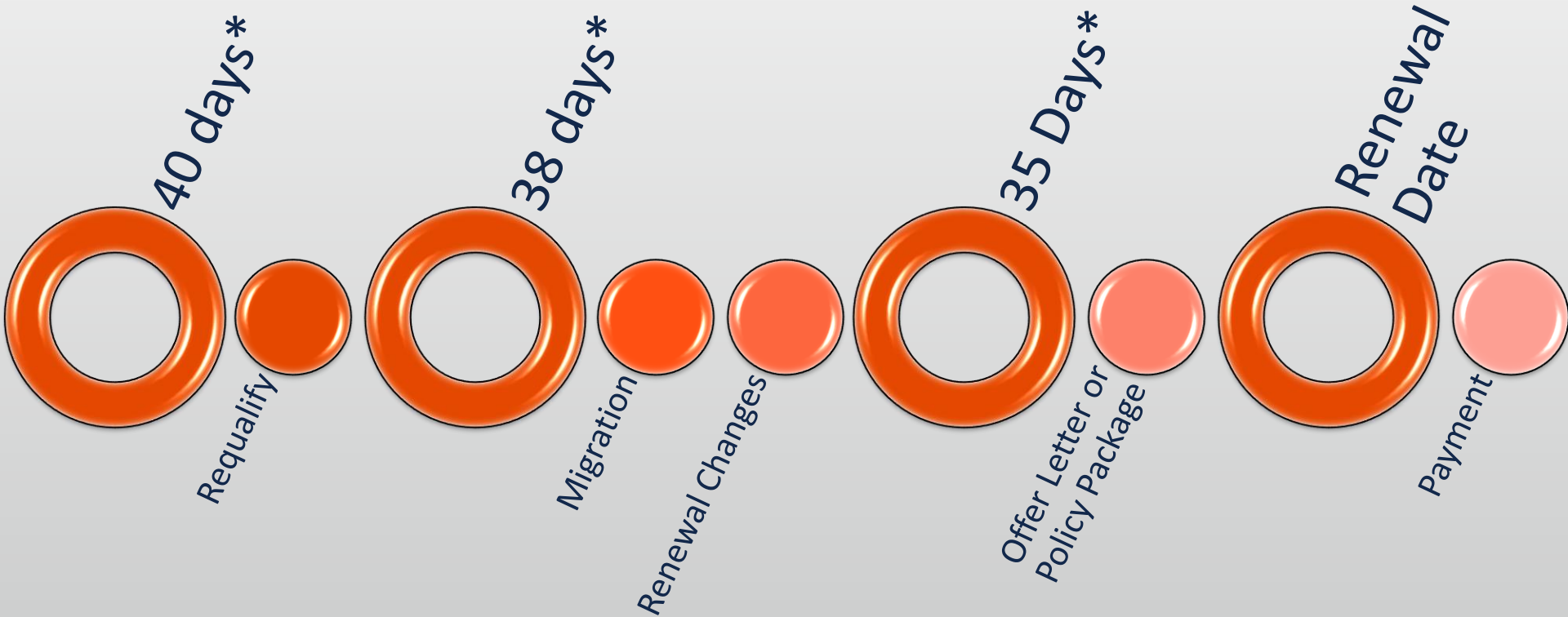
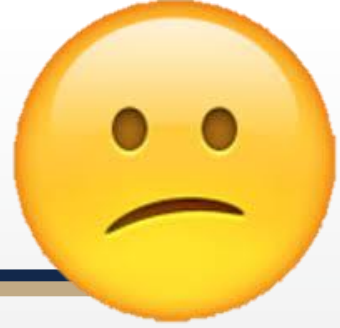


# Renewal Migration Timeline



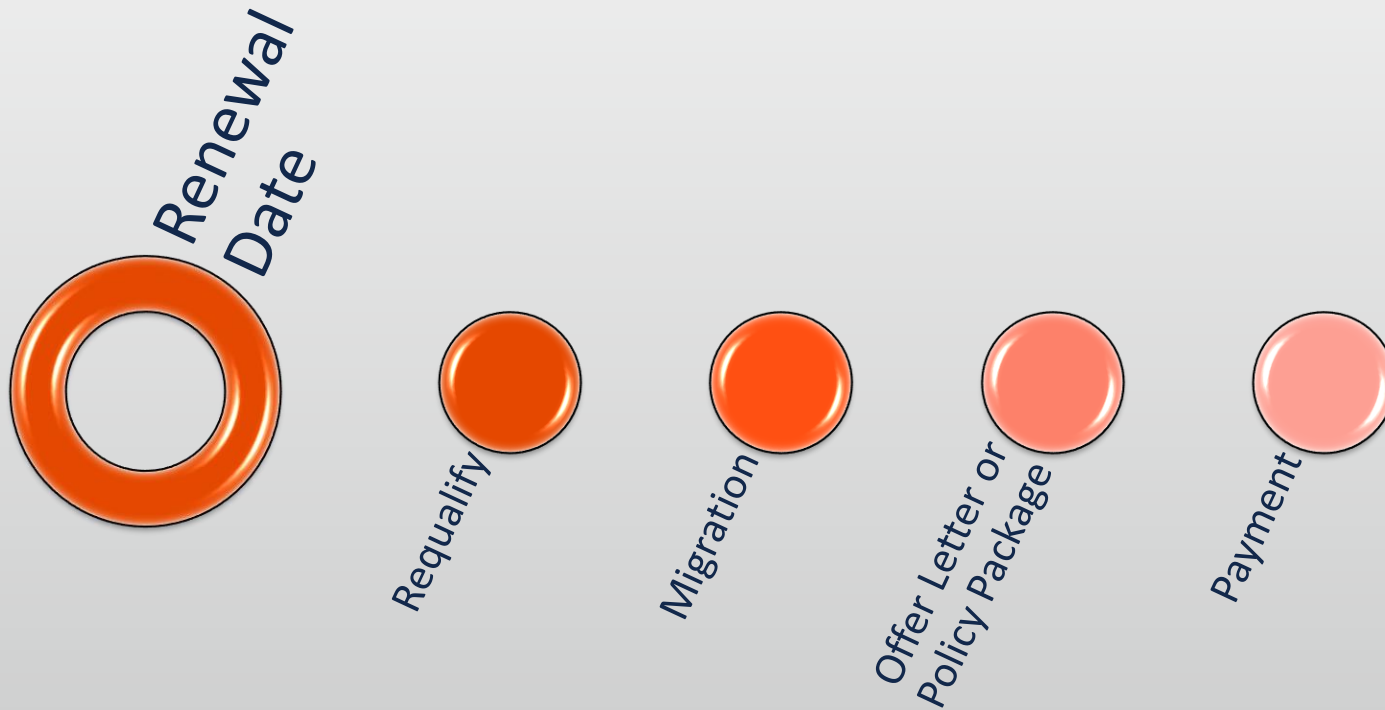
\*denotes before renewal date

# Renewal Migration Timeline



\*denotes before renewal date

# Renewal Migration Timeline



# When Does Migration Begin?

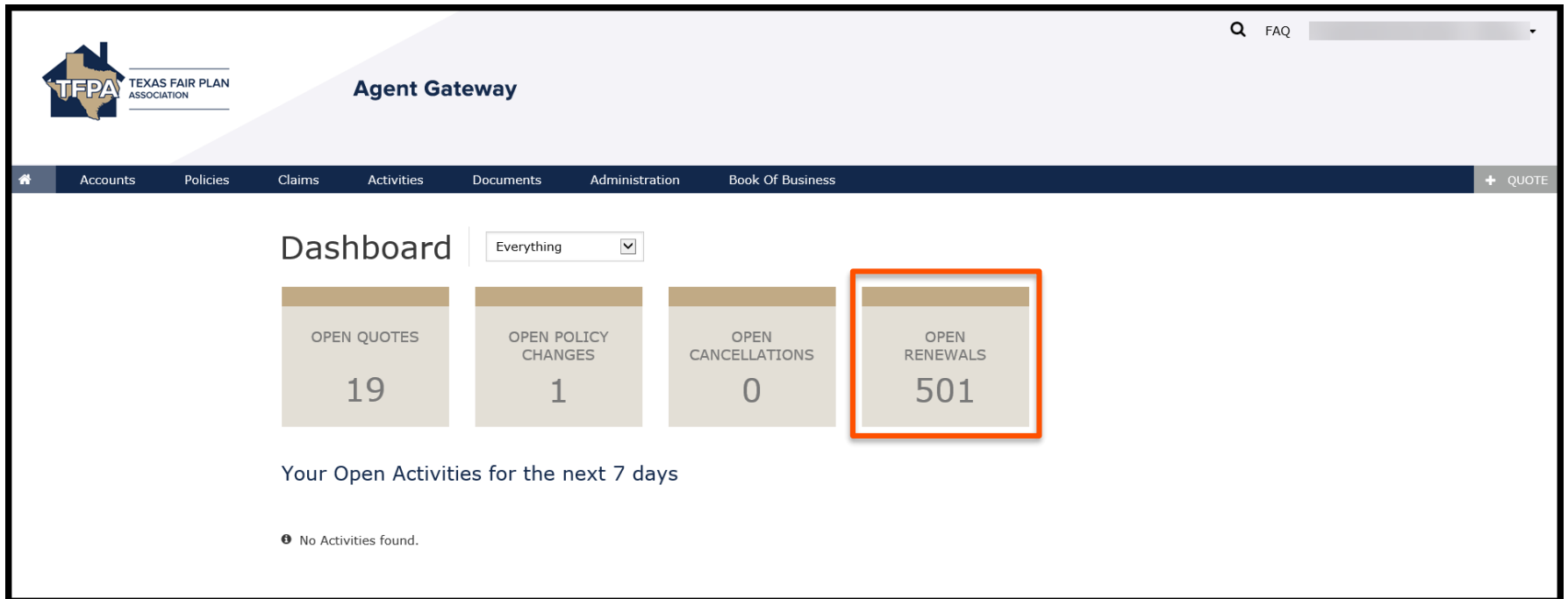
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Renewal Visible  
April 15<sup>th</sup>, 2019



Renewal Date  
June 13<sup>th</sup>, 2019

# Agent Gateway Renewals



The screenshot displays the Agent Gateway interface for the Texas Fair Plan Association (TFPA). The dashboard features a navigation bar with links to Accounts, Policies, Claims, Activities, Documents, Administration, and Book Of Business. A search bar and a 'QUOTE' button are also present. The main content area shows four metrics: Open Quotes (19), Open Policy Changes (1), Open Cancellations (0), and Open Renewals (501). The 'Open Renewals' metric is highlighted with a red box. Below the metrics, a section titled 'Your Open Activities for the next 7 days' indicates that no activities were found.

**Agent Gateway**

Dashboard | Everything ☒






OPEN QUOTES	OPEN POLICY CHANGES	OPEN CANCELLATIONS	OPEN RENEWALS
19	1	0	501

Your Open Activities for the next 7 days

**No Activities found.**

# Agent Gateway Renewals

## Open Renewals

CREATED	PRODUCT	POLICY TYPE	QUOTE	JOB NUMBER	POLICY NUMBER	EFFECTIVE DATE	ACCOUNT	JOB STATUS
4/4/19		Homeowners	00008	00008	TFPH07000C	5/21/19	Be Wil	Quoted
3/22/19		Homeowners	00007	00007	TFPH070000	5/21/19	Be Wil	Offer Submitted
3/22/19		Dwelling/Fire	00007	00007	TFPD070000	5/21/19	R Su	Draft
3/22/19		Dwelling/Fire	00007	00007	TFPD07000C	5/21/19	R S	Draft
3/22/19		Homeowners	00007	00007	TFPH07000C	5/21/19	Li Pe	Renewing

# Inside a renewal

Accounts Policies Claims Activities Documents Administration Book Of Business

Account: EV [redacted]

Residential (TFPC06 [redacted])

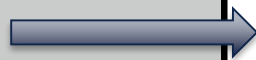
LegacyConversion

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

Policy Details

Policy Effective May 28, 2018	Policy Expiration May 28, 2019	Producer of Record GAR [redacted]	Total Premium \$0.00
Pre Renewal Direction None	Policy Status LegacyConversion	Producer of Service GAR [redacted]	Taxes and Fees
Policy Type Condominium	Primary Insured EV [redacted]	Total Cost \$0.00	

Clicking on this link will take you to the renewal policy information.



Property Details

1: 300 [redacted] Houston, TX

County Harris	Territory 1	Distance To Fire Hydrant 1000 ft	Public Protection Class 01
Year Purchased 2010	Residence Type Condominium	Home used as Rental Property	Dwelling Occupied Tenant
Fireplace No	Woodstove No	Swimming Pool No	Trampoline No

Construction Details

Discounts/Surcharges/Loss Info

Coverages

Policy Transactions

JOB NUMBER	TYPE	TRANSACTION STATUS	PREMIUM	EFFECTIVE DATE
00007	Renewal	Renewing	\$321.00	5/28/19

# Renewal documents

[Accounts](#)[Policies](#)[Claims](#)[Activities](#)[Documents](#)[Administration](#)[Book Of Business](#)

Account: JO

Residential (TFPD06 ) [LegacyConversion](#)

SUMMARY

CONTACTS

OPEN ACTIVITIES  
0

NOTES  
0

DOCUMENTS  
2

CLAIMS  
0

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). Files must not exceed 20MB. .avi, .bmp, .doc, .docm, .docx, .dot, .dix, .gif, .jpeg, .jpg, .mov, .mpg, .pdf, .png, .ppt, .pptx, .rtf, .rtx, .tif, .tiff, .txt, .wav, .wmv, .xls, .xlsx are the supported files.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
 Policy Package.pdf	Policy Package	Policy Package	4/5/19	
 Renewal Offer Letter.pdf	Renewal Offer Letter	Renewal Offer Letter	4/1/19	



# BILLING QUESTIONS



# Common Billing Questions

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## Are policyholders required to pay before a policy is issued?

- Yes, Agent Gateway requires the minimum down payment to be paid before coverage is bound on all policyholder paid submissions.

## When do payments have to be received?

- Payments must be received by TFPA before the Offer expires to honor the original offer of coverage.

## Have down payments changed in Agent Gateway?

- Yes, Agent Gateway has down payments that vary depending on the payment plan selected.

# Common Billing Questions

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## What email address do I enter into an application?

- The policyholder's email address needs to be obtained so important billing reminders and notifications can be emailed to them. Please do not use an Agency email or alternate email in place of the policyholder email.

## Where do I find the payment coupon if I need to mail in a payment?

- The Offer Letter contains a payment coupon at the bottom that can be used to mail in a payment.

## What are the payment options available on TFPA policies?

- Payments can be mailed using the coupon found on the Offer Letter, and policyholders can also pay electronically using <https://www.texasfairplan.org/epayments/>.

# 10 Pay Payment Plan Clarification

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- **Requires autopay (auto draft) from the policyholder's account**
- **Instead of Offer Letter, detailed email to the policyholder**
- **A down payment paid late can cause combining of the first and second installment to stay on payment schedule**
- **Valid policyholder email address is required**

# Thank you!

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**Additional training on Agent Gateway is available on our TFPA Training Center at <https://www.texasfairplan.org/agents/training/>.**

**If you have any additional questions, please feel free to reach out to Agent Services at 1-800-979-6443 or at [agentservices@twia.org](mailto:agentservices@twia.org).**