TWIA Renewal Status

Renewal Offer Status	Significance	Next Steps
Calculated	Renewal Offer was automatically generated by the system	Payment needs to be received by TWIA
Draft	Policy is set to non-renew/blocked by Underwriting or the agent started editing the offer, but did not calculate the premium	Either Underwriting issues need to be resolved or the agent started editing the offer and did not hit calculate premium.
Pending Payment	Renewal Offer was submitted by Agent	Payment needs to be received by TWIA
Submitted	Renewal Offer has been submitted and a payment has been applied to it	Underwriting will review the offer to make sure it meets TWIA guidelines
Issued	Renewal Offer is issued and a payment has been applied to it	Agents should review the corresponding billing statement to make sure there is not a balance due
Scheduled	Renewal Offer is issued with a future effective date and a payment has been applied to it	Agents should review the corresponding billing statement to make sure there is not a balance due

Overview of TWIA Renewal Offer Statuses



1. In order to check the renewal activities assigned to the agency, log in to the TWIA Agent Portal and select "Open Policy Center."



2. Open the "My Renewals" queue from the left navigation bar.



3. Under "My Renewals" is a drop-down menu. Select "Open with activity for me." This is where you can see any renewal offers that have been assigned to you by TWIA Underwriting to complete. In this example, the queue is empty.

Des <u>k</u> top Account	▼ <u>P</u> olicy ▼ Searc <u>h</u> ▼]	[eam Administration 💌
Actions	My Renewals	
My Activities	Open with activity for me	\checkmark
My Accounts	My Renewals (empty)	
My Submissions	Transaction Type	Primaty Insured
My Renewals		\bigcirc
My Other Transactions		
My Queues		
Invoices		



4. The next option in the drop-down menu is "Open with activity for me due within 7 days." Check this queue regularly to help track renewal offers and their submission status.

Des <u>k</u> top 💌 Account	• Policy •	Searc <u>h</u>	<u>T</u> eam	Administration		
Actions	My Renewal	S				
My Activities	Open with activity for me due within 7 days \checkmark					
My Accounts	My Renewals (empty)					
My Submissions	Transaction Type		Prin	nary Insured		
My Renewals						
My Other Transactions						
My Queues						
Invoices						

5. The next option in the drop-down menu is "Completed in the last 30 days." This will display renewals issued by Underwriting.

Desktop - Account	Policy Sear	ch 🔽 Ieam Administratio	n 👻						Go to (Al
Actions	My Renewals			N	0				
My Activities	Completed in last 30	days 💙		43	-				
My Accounts	My Renewals (1 - 15	of 596)							
My Submissions				-					Page 1
My Renewals	Transaction Type	Primary Insured	Transaction #	Policy #	Status	Submit Date -	Proposed Policy Period	Policy Type	Agency Loca
My Other Transactions	Renewal		T00	TWIA-000	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	
My Queues	Renewal	Reading Street Street	<u>T00</u>	TWIA-000	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	Contract of Contra
Invoices	Renewal		<u>T00</u>	TWIA-000	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	
	Renewal	Annual Constants	<u>T00</u>	<u>TWIA-000</u>	Scheduled	06/02/2020	06/04/2020 - 06/04/2021	Residential	Constant of Consta
() () () () () () () () () ()									

6. The next option in the drop-down menu is "All open." On this screen, you can see if a renewal offer is either in "Submitted" or "Pending Payment" status.

Desktop Account	Policy Search	<u>Team</u> <u>A</u> dministrati	on 🔻						Go to (A
Actions	My Renewals								
 My Activities	All open	V							
My Accounts	My Renewals (1 - 15 of	1105)							
My Submissions									Page 1
My Renewals	Transaction Type	Primary Insured	Transaction #	Policy #	Status	<u>Submit Date</u> ▼	Proposed Policy Period	Policy Type	Agency Lo
My Other Transactions	Renewal	state terms i	<u>T(</u>	TWIA-	Submitted	06/02/2020	05/27/2020 - 05/27/2021	Residential	1000
My Queues	Renewal	From 1980	<u>T(</u>	<u>TWIA-</u>	Pending Payment	06/02/2020	06/07/2020 - 06/07/2021	Residential	100
Invoices	Renewal		<u>T(</u>	<u>TWIA-</u>	Pending Payment	06/02/2020	06/19/2020 - 06/19/2021	Residential	
1.11.1799.000	Renewal	No.1 Autompt	T	TWIA-	Pending Payment	06/01/2020	06/05/2020 - 06/05/2021	Residential	100



7. To see if an "In Force" or "Scheduled" policy has been paid in full or if there is a balance due, please click on the "Transaction" number.

Desktop T Account	Policy Sear	ch Team Administration							Go to (Alt
Actions	My Renewals			Ν					
Mv Activities	Completed in last 30	days 🗸		63					
My Accounts	My Renewals (1 - 15	of 596)							
My Submissions				1					Page 1 🗸
My Renewals	Transaction Type	Primary Insured	Transaction #	Policy #	<u>Status</u>	<u>Submit Date</u> ×	Proposed Policy Period	Policy Type	Agency Loca
My Other Transactions	Renewal		<u>T00</u>	<u>TWIA-000</u>	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	100
My Queues	Renewal	ball for	<u>T00</u>	<u>TWIA-000</u>	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	
Invoices	Renewal		<u>T00</u>	TWIA-000	In Force	06/02/2020	06/02/2020 - 06/02/2021	Residential	100
province and a second	Renewal	India States a	<u>T00</u>	<u>TWIA-000</u>	Scheduled	06/02/2020	06/04/2020 - 06/04/2021	Residential	100
	Renewal	and the second se	T00	TWIA-000	Scheduled	06/02/2020	06/05/2020 - 06/05/2021	Residential	

8. Next, click on the "Documents" tab in the left navigation bar under "Tools."

≼ Renewal (In Force) 🏢	Windstorm and Hail Eff. 06/02/2020 Account # A F	Policy # TWIA-00	
Actions	Qualification		
	Next ≥ Invoice		
Renewal TO In Force	Policy Type Selection	Ν	
Qualification	Available options Residential	65	
Policy Contract	Pre-Qualification Questions		
Policy Info	Do all the risk items fall in the TWIA coverage area?	Yes TWIA Coverage & Eligibility Guidelines	
Locations and Risk	Does the applicant meet the evidence of declination requirements?	Yes Evidence of Declination Requirements	
Items Deline Deview	Does the applicant meet the flood insurance requirements?	Yes Flood Insurance Requirements	
Summary Forms Payment Required Decumentation	Pre-Renewal Information TWIA assumes no responsibility and has no liability for failure of th 31, 2020 at 00:01:00 CDT Have there been any repairs, alterations or additions to the build	ne insured or their agent to affect uninterrupt ding in the past 12 months?	ted coverage. Continuous coverage will not b
Submission	this die policy premium be maneed?		
Acknowledgement	[Next ≥] Invoice]		
🖓 Tools			
Internal Notes Documents Participants	_		
Activities			
Transaction Change Requests			
Transaction History			
Invoices			



9. Select the latest PDF document with "Billing Statement" in the Name/Type columns to see if there is a balance due. You may use this document to invoice the insured for any balance due. **Please note, it is the agent's responsibility to collect any balance due.

Desktop 🔻 Account	Policy Search Icam Administration			
≼ Renewal (In Force) 🏢	Vindstorm and Hail Eff. 06/02/2020 Account # A00 Policy # TWIA-000			
Actions	Documents			
	Document Search			
Renewal TOC In Force	Document Name Date Range - From	//		
Oualification	Document Type <none selected=""> V Date Range - To</none>	//		
Policy Contract	Author Bisk Item #	coope celected > V		
Policy Info	Search Reset	Chone selected > +		
Items	Documents (1 - 15 of 36)			
Policy Review	Upload Document			
Summary Forms	Name Name	Туре	Author	Role Date Added →
Payment	BillingStatement Agency	BillingStatement	TWIA	System 06/02/2020
Required	EFTPaymentConfirmation Other	EFTPaymentConfirmation	TWIA	System 06/02/2020
Documentation	TransactionSummary Agency	TransactionSummary	TWIA	System 06/02/2020
Submission	Policy Package Primary Named Insured	Policy Package	TWIA	System 06/02/2020

10. A sample 'Billing Statement' follows:

		Billing	g Statement		
			k		
Date: Policy Number Insured: Property Loca There is no ba	June 2, r: 000 tion: lance due on th	2020 is policy at this time	e.		
Date Processed	Transaction Type	Reference #	Description	Due Date	Amount
06/02/2020	Premium		Policy Issuance	07/02/2020	\$2,255.00
06/02/2020	Payment	TWIINS0	EFT		-\$2,255.00
				Total Due	\$0.00

