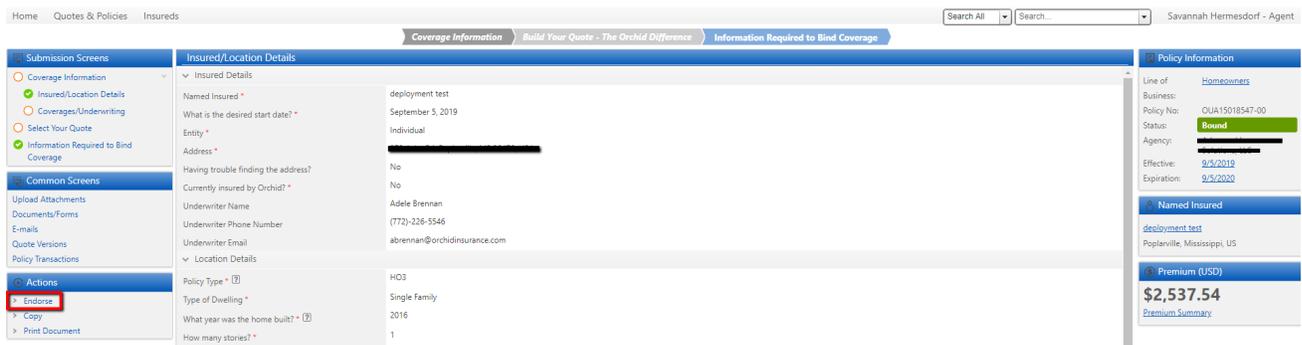


How to Request Policy Endorsements

To make any changes to a bound policy, you will have to request an endorsement. This is useful for changing mortgagees, changing mailing address, or changing coverage options. Once you are in the bound policy in Connect, click “Endorse” in the Actions box on the left-hand side.



The screenshot shows the Orchid Connect interface. On the left-hand side, under the 'Actions' menu, the 'Endorse' button is highlighted with a red box. The main area displays 'Insured/Location Details' for a policy, including fields for 'Named Insured', 'What is the desired start date?', 'Entity', 'Address', 'Having trouble finding the address?', 'Currently insured by Orchid?', 'Underwriter Name', 'Underwriter Phone Number', 'Underwriter Email', 'Policy Type', 'Type of Dwelling', 'What year was the home built?', and 'How many stories?'. On the right-hand side, the 'Policy Information' section shows 'Line of Business: Homeowners', 'Policy No: OUA15018547-00', 'Status: Bound', 'Agency: [redacted]', 'Effective: 9/5/2019', and 'Expiration: 9/5/2020'. Below this, the 'Named Insured' section shows 'deployment test' and 'Poplarville, Mississippi, US'. The 'Premium (USD)' section shows '\$2,537.54'.

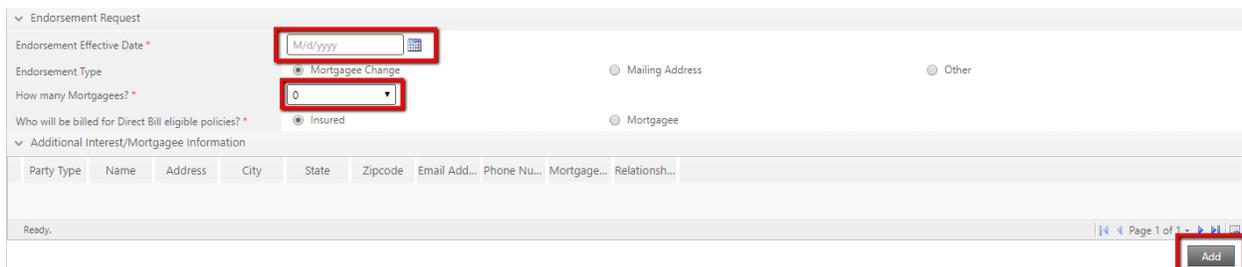
This will bring up the Endorsement Request screen.

Choose the **endorsement effective date**, and then select the **type of endorsement**:

- **Mortgagee Change:** Change the mortgagee on the policy.
- **Mailing Address:** Change the mailing address on the policy.
- **Other:** Any other changes to the policy, such as changes to Coverage A or Coverage B.

To Change Mortgagee(s):

With “Mortgagee Change” selected as the Endorsement Type, choose the number of mortgagees. Click “Add” to input the mortgagee information.



The screenshot shows the 'Endorsement Request' screen. The 'Endorsement Effective Date' field is highlighted with a red box and contains the text 'M/d/yyyy'. The 'Endorsement Type' is set to 'Mortgagee Change' with a radio button selected. The 'How many Mortgagees?' dropdown menu is highlighted with a red box and shows '0'. The 'Who will be billed for Direct Bill eligible policies?' section has 'Insured' selected with a radio button. Below this is a table for 'Additional Interest/Mortgagee Information' with columns for 'Party Type', 'Name', 'Address', 'City', 'State', 'Zipcode', 'Email Add...', 'Phone Nu...', 'Mortgagee...', and 'Relationsh...'. The table is currently empty. At the bottom right of the page, the 'Add' button is highlighted with a red box.

Once you click “Add”, a pop-up box will open, prompting you to input the mortgagee’s information.

Additional Interest/Mortgagee Information

Party Type: Mortgagee

Name: Orchid Insurance

Address: 1201 19th pl

City: vero beach

State: FL

Zipcode: 32962

Email Address:

Phone Number:

Mortgagee Loan #: 123456789-00

Save Add New Save & Close Delete Cancel

Enter the mortgagee information. If you need to add a second, click "Add New" If you are done, click "save & Close"

After hitting save and close, you will see the information in the grid. Make sure that the number answered for “How many Mortgagees?” is the same number of mortgagees in the grid. You can now click the next arrow to move on.

Insured/Location Details

Endorsement Request

Endorsement Effective Date: 9/23/2019 Monday, September 23, 2019

Endorsement Type: Mortgagee Change Mailing Address Other

How many Mortgagees?: 1

Who will be billed for Direct Bill eligible policies?: Insured Mortgagee

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Email Add...	Phone Nu...	Mortgage...	Relatsh...
Mortgagee	Orchid Insu...	1201 19th pl	vero beach	FL	32962			123456789...	

Ready. Page 1 of 1

Required Documents

File Type	File Name
There are no rows in this view.	

Ready. Page 1 of 1

Save / Refresh >

Once you click next, your endorsement will either be approved for a bind request (see page 5) or referred to our processing department for completion (see page 4).

To Change Mailing Address:

With “Mailing Address” selected for Endorsement Type, answer “No” to “Is the mailing address the same as the Insured location?”. Enter in the new mailing address and click the next arrow.

Insured/Location Details

Endorsement Request

Endorsement Effective Date *

Endorsement Type Mortgagee Change Mailing Address Other

Underwriting Questions

Is the Mailing Address the same as the Insured Location? * Yes No

Mailing Address *

Mailing City *

Mailing Country *

Mailing State *

Mailing Zip Code *

Required Documents

File Type	File Name
There are no rows in this view.	

Ready. Page 1 of 1

After clicking the next arrow, your request will either be approved for a bind request (see page 5) or will need to be submitted for referral (see page 4).

To Request a Different Endorsement:

With “Other” selected as the Endorsement Type, describe the endorsement needed in the text box (e.g., “Increase Coverage A to \$340,000”). Then click the next arrow. This will be a referred endorsement and will submit the request to our processing department for review.

Endorsement Request

Endorsement Effective Date * Monday, September 23, 2019

Endorsement Type Mortgagee Change Mailing Address Other

Please describe

Please Increase Coverage B to \$15k

Required Documents

File Type	File Name
There are no rows in this view.	

Ready. Page 1 of 1

Referred

If the endorsement needs to be referred, you will be asked to add an alternative agency contact and email:

The screenshot shows a web form titled "Referral". It has several sections: "Additional Carrier Eligibility Questions" with a "Target Premium" field; "Contact Information" with fields for "Agency Contact Name", "Agency Contact Email", and "Alternative Agency Contact" (radio buttons for Yes/No). Below this, there are input fields for "Alternative Agency Contact Name" and "Alternative Agency Contact Email", which are highlighted with a red box. A text box contains contact information for the processing team. At the bottom right, there is a "Save / Refresh" button, also highlighted with a red box.

Please enter a contact name and email, then hit save/refresh.

Click the "Submit Referral" button to submit the endorsement request to our processing department.

This screenshot shows the same "Referral" form after submission. A new section, "Referral Messages", is highlighted in pink and contains the message: "Your quote will be submitted to the underwriter." The "Alternative Agency Contact" section now shows the "Yes" radio button selected, and the input fields contain the values "Savannah" and "Shermesdorf@orchidinsurance.com". The "Submit Referral" button at the bottom right is now highlighted with a red box.

Approved

If the endorsement is approved, you will be able to Request Bind. Verify that all the information is correct and select “Yes” for “I confirm that the requested changes are complete and accurate”. Then click on the “Request Bind” button. The documents will be emailed over as soon as they are complete.

Confirm Endorsement

 **Your quote has been approved!** Please click the 'Request Bind' button to submit to an Underwriter to begin the Bind/issue process.

Endorsement Request

Endorsement Effective Date * September 17, 2019

Endorsement Type Mailing Address

Underwriting Questions

Is the Mailing Address the same as the Insured Location? * No

Mailing Address * 1201 19th Place

Mailing City * Vero Beach

Mailing Country * U.S.A.

Mailing State * Florida

Mailing Zip Code * 32968

Please review and confirm your requested changes below by checking the box and clicking Save/Refresh.

I confirm that the requested changes are complete and accurate. *

< **Request Bind** Save / Refresh