



ORCHID

The First Choice.

Self-Serve Endorsement Training



Orchid continues to implement changes based on agent feedback. One of these changes is updating our system to allow you the ability to complete certain endorsements in Connect. Now, you'll be able to complete non-premium bearing changes for certain carriers.

Today's training will show you how to create and bind an endorsement for a mailing address change or a mortgagee change.

Please note that these types of endorsements for Lexington, Beazley, MarketScout, and Lloyd's Brit must still be submitted to Orchid for processing.



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Connect Helpline: 772-237-8818
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Personal Lines

NEW CARRIERS! We are adding more A.M Best A- or Better Rated carriers all the time. For Personal Lines, this impacts rating time slightly! Thank you for your patience as we work to optimize rating while adding more options for

Policy Number Goes Here

Home Quotes & Policies Insureds

Search All Search

-Agent

Dashboard

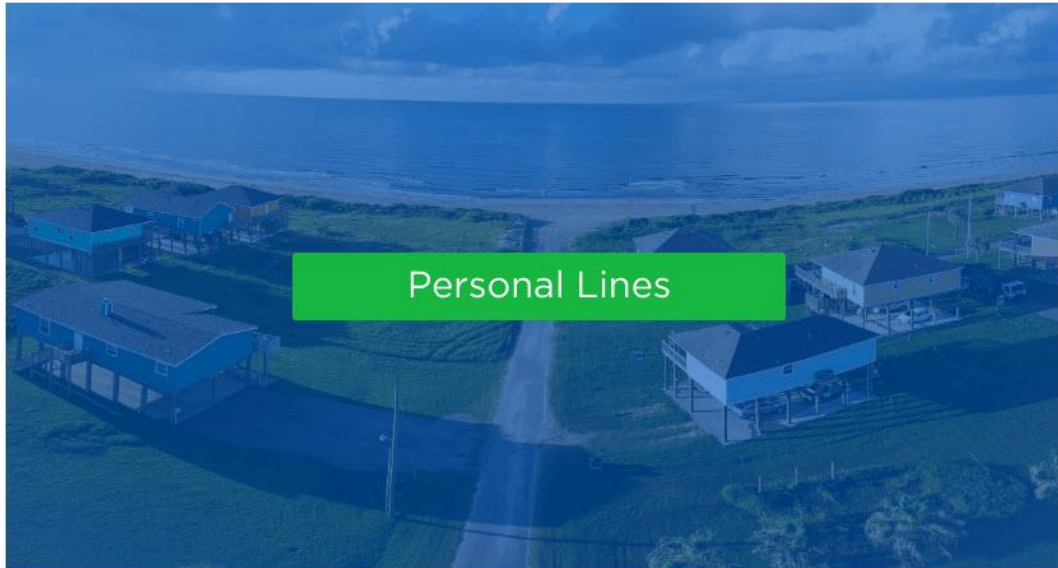
Create New Quote

Personal Lines
Quick Queues

Check Balance/
Make Payments

Training Center

State Guidelines



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Home Quotes & Policies Insureds

Search All Search...

Agent

Coverage Information Build Your Quote - The Orchid Difference Information Required to Bind Coverage

- Submission Screens
 - Coverage Information
 - Insured/Location Details
 - UW Renewal Quote Return
 - Coverages/Underwriting
 - Select Your Quote
 - Information Required to Bind Coverage

- Common Screens
 - Diary
 - Upload Attachments
 - Documents/Forms
 - E-mails
 - Quote Versions
 - Policy Transactions
- Actions
 - Endorse
 - Renew
 - Copy
 - Print Document

Insured/Location Details

Insured Details

Please Note: Endorsement and cancellation requests cannot be uploaded to the Docs/Attachments. You can now self- service Mortgagee and Mailing Address endorsements online! Click the endorse button to start the endorsement. Please submit all other requests to Processing@orchidinsurance.com

January 29, 1995

Insured Name should be entered to match the property deed

Occupation: Computer and Mathematical

Renewal Effective Date: April 11, 2023

Entity: Individual

Direct Bill: Yes

Address: [Redacted]

Ant./Unit/Suite #: [Redacted]

Currently insured by Orchid?: No

Prior Carrier: No

Underwriter: Any

Agency Contact Name: [Redacted]

Agency Contact Email: [Redacted]

Alternative Agency Contact: No

Expiring policy Number: [Redacted]

Location Details

Program to Quote: NonAdmitted

Policy Type: DP3

Policy Information

Line of: Homeowners

Business: [Redacted]

Policy No: [Redacted]

Status: **Renewal - Bound**

Agency: [Redacted]

Effective: 4/11/2023

Expiration: 4/11/2024

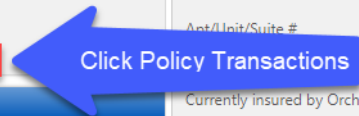
Named Insured

[Redacted]

Premium (USD)

\$18,668.90

[Premium Summary](#)



Save / Refresh

>

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Home Quotes & Policies Insureds

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Actions

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- Copy
- Print Document

Insured/Location Details

Insured Details

Insured Date Of Birth [?]

Named Insured *

Occupation

Renewal Effective Date

Entity *

Direct Bill

Address *

Apt/Unit/Suite #

Having trouble finding the address?

Currently insured by Orchid? *

Prior Carrier

Underwriter *

Agency Contact Name

Agency Contact Email

Alternative Agency Contact *

Expiring policy Number

Location Details

Program to Quote * [?]

Policy Type * [?]

Policy Transactions

Transaction ID	Type	Number	Effective Date	Last Modified By	Date and Time Bou...	Status	Premium
Term ID (Policy No.): . Term Effective: 04/11/2022. Term Valid Until: 04/11/2023							
0000328212	New Business		11-Apr-2022	Sai Kaska - UW	11-Apr-2022 06:30:39	Bound	13,938.00
Term ID (Policy No.): . Term Effective: 04/11/2023. Term Valid Until: 04/11/2024							
0000328221	Renewal		11-Apr-2023	Sai Kaska - UW	11-Apr-2022 07:17:15	Bound	17,378.00

Ready. Page 1 of 1

Select the most recent transaction

Cancel

Policy Information

Line of Business: [Homeowners](#)

Policy No:

Status: **Renewal - Bound**

Agency:

Effective: [4/11/2023](#)

Expiration: [4/11/2024](#)

Named Insured

Premium (USD)

\$18,668.90

[Premium Summary](#)

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* Indicates a Required Field



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Insured/Location Details

Insured Details

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Insured Date Of Birth

Named Insured *

Insured Name should be entered to match the property deed

Occupation

Renewal Effective Date

Entity *

Direct Bill

Address *

Apt/Unit/Suite #

Having trouble finding the address?

Currently insured by Orchid? *

Prior Carrier

Underwriter *

Agency Contact Name

Agency Contact Email

Alternative Agency Contact *

Expiring policy Number

Location Details

Program to Quote *

Policy Type *

Policy Information

Line of [Homeowners](#)

Business:

Policy No:

Status: **Renewal - Bound**

Agency:

Effective: [4/11/2023](#)

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Named Insured

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Coverage Information Confirm Bind

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- Actions
 - Calculate Quote
 - Copy

Insured/Location Details

Endorsement Request

Endorsement Effective Date *

Endorsement Type Mortgagee Change Mailing Address

Required Documents

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

Ready. Page 1 of 1 Add

Input the endorsement effective date

Select one of the available options



Policy Information

Line of [Homeowners](#)

Business:

Policy No:

Status: **Endorsement - Incomplete**

Agency:

Effective: [4/11/2023](#)

Expiration: [4/11/2024](#)

Named Insured

Premium (USD)

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Insured/Location Details

Endorsement Request

Endorsement Effective Date * Tuesday, April 18, 2023

Endorsement Type Mortgagee Change Mailing Address Other

How many Mortgagees? *

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

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Age...	Relationsh...
Ready.							

Click "Add" to supply the mortgagee information

Required Documents

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

Save / Refresh

More than 2 mortgagees requires submission to Orchid

Policy Information

Line of [Homeowners](#)

Business: [Redacted]

Policy No: [Redacted]

Status: **Endorsement - Incomplete**

Agency: [Redacted]

Effective: [4/11/2023](#)

Expiration: [4/11/2024](#)

Named Insured

[Redacted]

Premium (USD)

Chat now

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NEW CARRIERS! We are adding...

Additional Interest/Mortgagee Information

Party Type * Mortgage

Name * Chase Bank

Address * 123 Main Street

City Tampa

State FL

Zipcode 12345

Email Address

Phone Number

Mortgage Loan # 123456789

Click Save & Close once the information is entered

Save Add New Save & Close Cancel

ORCHID The First Choice

Home Quotes & Policies Insureds

Submission Screens

- Insured/Location Details
- Confirm Endorsement

Common Screens

- Diary
- Upload Attachments
- Policy Transactions

Actions

- Calculate Quote
- Copy

Insured/Location Details

- Endorsement Request
- Endorsement Effective Date *
- Endorsement Type
- How many Mortgagees? *
- Who will be billed for Direct Bill eligible p...
- Additional Interest/Mortgagee Infor...

Party Type	Name	Address
Ready.		

Required Documents

Ready.

Policy Information

Line of [Homeowners](#)

Business:

Policy No:

Status: **Endorsement - Incomplete**

Agency:

Effective: [4/11/2023](#)

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Named Insured

Premium (USD)

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Save / Refresh

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Insured/Location Details

Endorsement Request

Endorsement Effective Date * Tuesday, April 18, 2023

Endorsement Type Mortgagee Change Mailing Address Other

How many Mortgagees? *

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...	Relationsh...
Mortgagee	Chase Bank	123 Main S...	Tampa	FL	12345			123456789	

Ready. Page 1 of 1

Required Documents

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

Ready. Page 1 of 1

Policy Information

Line of [Homeowners](#)

Business: [Redacted]

Policy No: [Redacted]

Status: **Endorsement - Incomplete**

Agency: [Redacted]

Effective: [4/11/2023](#)

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Named Insured

[Redacted]

Premium (USD)

Click Save/Refresh

Save / Refresh

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Insured/Location Details

Endorsement Request

Endorsement Effective Date * Tuesday, April 18, 2023

Endorsement Type Mortgagee Change Mailing Address Other

How many Mortgagees? *

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

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Email Address	Phone Number	Mortgagee Loan #	Relationship Type
Mortgagee	Chase Bank	123 Main Street	Tampa	FL	12345			123456789	

Ready. Page 1 of 1

Add

Required Documents

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

Ready. Page 1 of 1

Add

Save / Refresh

Policy Information

Line of [Homeowners](#)

Business:

Policy No:

Status: **Endorsement - Incomplete**

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Click Calculate Quote





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Endorsement Request

Endorsement Effective Date * Tuesday, April 18, 2023

Endorsement Type Mortgagee Change Mailing Address Other

How many Mortgagees? *

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

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Email Address	Phone Number	Mortgagee Loan #	Relationsh...
Mortgagee	Chase Bank	123 Main Street	Tampa	FL	12345			123456789	

Ready. Page 1 of 1

Required Documents

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

Ready. Page 1 of 1

Policy Information

Line of [Homeowners](#)

Business:

Policy No:

Status: **Endorsement - Quoted**

Agency:

Effective: [4/18/2023](#)

Expiration: [4/11/2024](#)

Named Insured

Premium (USD)

\$0.00

[Premium Summary](#)

Verify premium is \$0

Bind Save / Refresh

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 - Copy

Insured/Location Details

Endorsement Request
 Endorsement Effective Date * Tuesday, April 18, 2023
 Endorsement Type Mortgage Change Mailing Address Other
 How many Mortgagees? *
 Who will be billed for Direct Bill eligible policies? * Insured Mortgagee

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Email Address	Phone Number	Mortgagee Loan #	Relationsh...
Mortgagee	Chase Bank	123 Main Street	Tampa	FL	12345			123456789	

Ready. Page 1 of 1 Add

Required Documents

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

Ready. Page 1 of 1 Add

Policy Information

Line of [Homeowners](#)
 Business:
 Policy No:
 Status: **Endorsement - Quoted**
 Agency:
 Effective: [4/18/2023](#)
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Named Insured

Premium (USD)

\$0.00
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Click "Bind"

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Insured/Location Details

✔ Your submission has been confirmed.

Endorsement Request

Endorsement Effective Date * Tuesday, April 18, 2023

Endorsement Type Mortgagee Change Mailing Address Other

How many Mortgagees? *

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

Additional Interest/Mortgagee Information

Party Type	Name	Address	City	State	Zipcode	Email Address	Phone Number	Mortgage...	Relationship Type
Mortgagee	Chase Bank	123 Main Street	Tampa	FL	12345			123456789	

Ready. Page 1 of 1

Required Documents

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

Ready. Page 1 of 1

Policy Information

Line of [Homeowners](#)

Business:

Policy No: 1

Status: **Endorsement - Bound**

Agency:

Effective: 4/18/2023

Expiration: 4/11/2024

Named Insured

Premium (USD)

\$0.00

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Save / Refresh

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