

ENDORSEMENTS

1

The screenshot shows the ORCHID Dashboard with a 'SUBMISSIONS' table. The table has columns for 'CREATED DATE', 'NAME', 'SUBMISSION #', 'ADDRESS', and 'STATUS'. There are five rows of data, all with a status of 'Submission in Progress'. A search bar and filter options are visible at the top of the table.

CREATED DATE	NAME	SUBMISSION #	ADDRESS	STATUS
11/01/2023	Fho3 Accredited1	SN268492	1301 River Reach Drive, Fort Lauderdale, FL 33315	Submission in Progress
11/01/2023	Jonathan Modi	SN268453	5268 Boca Raton Avenue, Sarasota, FL 34234	Submission in Progress
11/01/2023	Jonathan Modi	SN267547	2055 Sikes Road, Green Cove Springs, FL 32043	Submission in Progress
11/01/2023	Rate35 Testip	SN267514	Bayou Drive, Pensacola, FL 32505	Submission in Progress
11/01/2023	Fake Name2	SN267827	786 Regency Reserve Circle, Naples, FL 34109	Submission in Progress

From your Dashboard, search for the policy you need to endorse and select it by clicking on the row with the name of the insured.

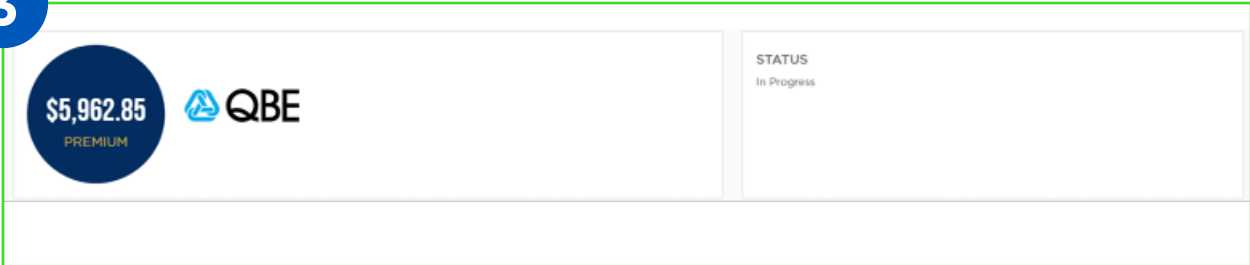
2

The screenshot shows the policy details page for 'LLOYDS'. It features a large blue circle with the premium amount '\$2,672.80' and the word 'PREMIUM'. To the right, the status is 'Issued'. Below this, there are two sections: 'COMPLETE PAYMENT' with a 'VIEW PAYMENTS' button, and 'ENDORSEMENTS' with a 'NEW ENDORSEMENT' button.

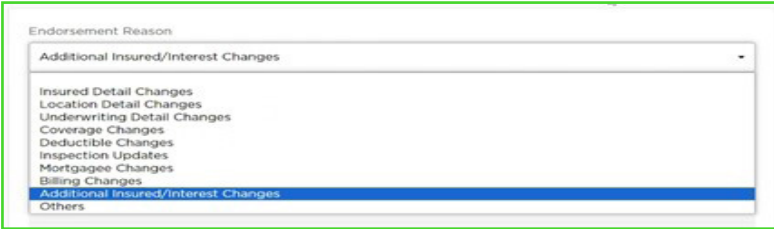
When the policy loads, you will see any previous endorsements that have been completed. Select "New Endorsement" to initiate an endorsement.

Notes:

3



The header of the endorsement screen is divided into two main sections. On the left, there is a dark blue circle containing the premium amount "\$5,962.85" with the word "PREMIUM" underneath it. To the right of this is the QBE logo. On the right side of the header, there is a "STATUS" section which currently displays "In Progress".



The "Endorsement Reason" dropdown menu is open, showing a list of options. The selected option, "Additional Insured/Interest Changes", is highlighted with a blue background. Other options in the list include "Insured Detail Changes", "Location Detail Changes", "Underwriting Detail Changes", "Coverage Changes", "Deductible Changes", "Inspection Updates", "Mortgagee Changes", "Billing Changes", and "Others".

The Endorsement screen will appear. The status in the top right tile will show "In Progress". Use the drop down menu below "Endorsement Reason" to select the reason for the endorsement.

Notes:

4

1. Enter all relevant information for the endorsement.
2. Enter the effective date of change.
3. Click on “Quote It”. If your endorsement results in a change in premium, that will display now, along with the new full annual premium.
4. When you are satisfied and ready to proceed with the endorsement, click on “Looks Good”.
5. Upload any supporting documents, then scroll down and select “Submit Changes”.
6. Once you select “Submit Changes” you will see a pop-up window letting you know that you are all set. An underwriter must review and finalize the request. You will receive a notification once the endorsement is processed, as well as a copy of the endorsement Declaration page via email.
7. Once you return to the Agent Dashboard, you can find the new Declaration page in the Documents section. You can also make a payment for any endorsements that resulted in additional premium.

Notes:

5 \$8,887.10 PREMIUM VARIOUS NON LLOYD'S INSURERS

Endorsement Reason: Others

Other Endorsement Reason: Update Mailing Address

MAILING ADDRESS

Mailing Address Search: ENTER ADDRESS

Mailing Address Line 1: 701 B Street

Mailing Address Line 2:

New Total Premium: \$-.-

Prorated Change: \$-.-

Effective Date of Change: MM/DD/YYYY

QUOTE IT

LOOKS GOOD

To update a mailing address, your endorsement reason will be "Others". You will then type in the change, "Update mailing address".

6

Endorsement Reason: Additional Insured/Interest Changes

MAILING ADDRESS

SECONDARY INSURED DETAILS

FIRST NAME: Test

LAST NAME: Endorsement

DATE OF BIRTH: 06/05/1969

COVERARE DETAILS

WIND/HAIL STORM DEDUCTIBLE

ADDITIONAL COVERARE DETAILS

New Total Premium: \$-.-

Prorated Change: \$-.-

Effective Date of Change: 11/02/2023

QUOTE IT

LOOKS GOOD

Secondary Insured Details - This is where you will be able to add an individual. The endorsement reason selected should be "Additional Insured/Interest Changes".

Notes:

7

\$9,095.00 PREMIUM

STATUS: In Progress

Endorsement Reason: Coverage Changes

MAILING ADDRESS

SECONDARY INSURED DETAILS

COVERAGE DETAILS

DWELLING	PERSONAL LIABILITY	MEDICAL PAYMENTS
685000	100,000	1,000
LOSS OF USE	CONTENTS	OTHER STRUCTURE
10%	25%	2%

New Total Premium: \$-
Prorated Change: \$-
Effective Date of Change: 11/02/2023

QUOTE IT

LOOKS GOOD

Coverage Details, your endorsement reason should be Coverage Changes.

8

\$8,887.10 PREMIUM

VARIOUS NON LLOYD'S INSURERS

STATUS: In Progress

Endorsement Reason: Deductible Changes

MAILING ADDRESS

SECONDARY INSURED DETAILS

COVERAGE DETAILS

WIND/HAIL STORM DEDUCTIBLE

TYPE OF DEDUCTIBLE	SELECTED STORM DEDUCTIBLE	ALL OTHER PERILS DEDUCTIBLE
Windstorm or Hail	10%	2,500

ADDITIONAL COVERAGE DETAILS

New Total Premium: \$-
Prorated Change: \$-
Effective Date of Change: 10/31/2023

QUOTE IT

LOOKS GOOD

Wind/Hailstorm Deductibles, endorsement reason should be "Deductible Changes".

Notes:

9

The screenshot shows an insurance endorsement form. On the left, there is a list of endorsement categories: Coverage Changes, MAILING ADDRESS, SECONDARY INSURED DETAILS, COVERAGE DETAILS, WIND/HAIL STORM DEDUCTIBLE, and ADDITIONAL COVERAGE DETAILS. The 'Coverage Changes' category is selected. Below this list are several dropdown menus for specific details: WATER DAMAGE LIMIT (10,000), WATER BACKUP (No Coverage), SERVICE LINE (No), ORDINANCE OF LAW (No Coverage), ADDITIONAL INSURANCE - DWELLING (No), and BROADENED HOME SHARE (No). On the right side, there is a summary box showing 'New Total Premium' and 'Prorated Change' both as '\$-'. Below this is the 'Effective Date of Change' set to 10/31/2023, a yellow 'QUOTE IT' button, and a blue 'LOOKS GOOD' button.

Additional Coverage Details, your endorsement reason should be Coverage Changes.

10

The screenshot shows an insurance endorsement form. On the left, there is a list of endorsement categories: Location Detail Changes, MAILING ADDRESS, SECONDARY INSURED DETAILS, COVERAGE DETAILS, WIND/HAIL STORM DEDUCTIBLE, ADDITIONAL COVERAGE DETAILS, and PROPERTY DETAILS. The 'Location Detail Changes' category is selected. Below this list are several dropdown menus for property details: Type Of Home (Single Family), Construction Type (Solid Brick Construction), Exterior Siding (Siding - Vinyl), Foundation Type (Basement), Garage/Carport (1.5 Car (281 - 396 sq ft)), HVAC (Central Air Conditioning), HVAC (Heating) (Forced Air Heating System), No. of Stories (2 Stories), and Protection Class (1). On the right side, there is a summary box showing 'New Total Premium' and 'Prorated Change' both as '\$-'. Below this is the 'Effective Date of Change' set to 10/31/2023, a yellow 'QUOTE IT' button, and a blue 'LOOKS GOOD' button.

Property Details, your endorsement reason should be Location Detail Changes.

Notes:

11

Underwriting Details, your endorsement reason should be Mortgage Changes.

To add or edit a mortgage, you will need to select “Underwriting Details”. Scroll to the bottom and enter the mortgage information. Once entered, scroll back to the top and select “Quote It”.

Notes:

12

Other Information

Is the property currently insured?

Mortgage?

Mortgage Name

Mortgage Address 1

Mortgage City

Mortgage State

Loan Number

Escrow Account for Insurance Billing

Address Search

Mortgage Address 2

Mortgage Zip Code

The first mortgagee on the policy will define if the policy is mortgagee or insured billed, please select accordingly. Also note that Orchid will only be able to place two mortgagees on file.

NOTE: You can make multiple endorsements in the same transaction. For example, adding a mailing address and changing the Wind Deductible. Since you are only able to select one reason from the Endorsement Reason drop down, you would select "Deductible Changes" since that is the most impactful and may generate a change to the premium.

Notes:
