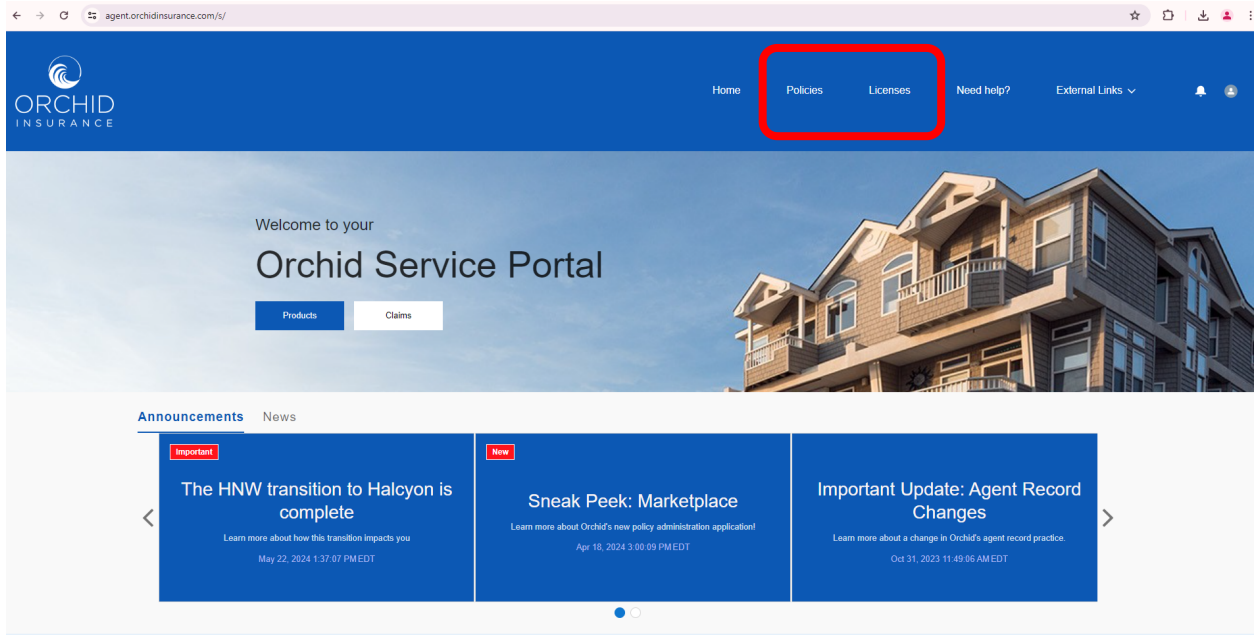


Agency Servicing Portal – Verifying Contacts and Uploading Licenses

Agent View at Log In



Agent View – Licenses and Policies for the agent



Admin View – Add Contact or View Agency Specific Information

Note: The Administrator is able to see policies and roster for the entire agency.

The screenshot shows the ORCHID INSURANCE Admin View. The top navigation bar includes links for Home, Policies, Agency Info, Related Agencies, Agency Roster (highlighted with a red box), Agency Documents, Need Help?, and More. Below the navigation bar, there is a section titled "CURRENT AGENT ROSTER" with a table of agents. To the right of the roster is a form titled "Add a Contact" (highlighted with a red box) which includes a "Select the Agency" dropdown menu and a "Next" button.

Name	Email	Status	Agency Name
Heather Heathorn	heathor@orchidins.com	Active	First Choice Insurance Services, LLC
Jacqui Farmer	jacqui@orchidins.com	Active	First Choice Insurance Services, LLC
Pam Sellers	pam@orchidins.com	Active	First Choice Insurance Services, LLC
Tasha Farmer	tasha@orchidins.com	Active	First Choice Insurance Services, LLC

Admin View - Agency Documents & Licenses. The admin can upload agency or agent licenses here.

The screenshot shows the ORCHID INSURANCE Admin View for Agency Documents and Licenses. The "Documents - Agency Portal" section displays a table of documents. The "Licenses" section displays a table of licenses. On the right side, there are two forms: "E&O INFORMATION" and "Upload Agent License", both highlighted with red boxes.

Document Name	Agency	Current Expiration Date	Record Type
1 ACH Information	First Choice Insurance Services, LLC		ACH
2 E&O Policy Aspen	First Choice Insurance Services, LLC	02/28/2024	E&O

Document Name	Contact	Current Expiration Date	Status	Agency	State
1 Agency License 1000100 (Texas)		10/01/2024	Current	First Choice Insurance Services, LLC	Texas
2 Agency License 8010000 (Louisiana)		01/01/2024	Current	First Choice Insurance Services, LLC	Louisiana
3 Agent License 1000100 (Texas)	Heather Heathorn		Expired	First Choice Insurance Services, LLC	Texas
4 Agent License 1000100 (Texas)	Pam Sellers	01/01/2024	Current	First Choice Insurance Services, LLC	Texas
5 Agent License 1000100 (Texas)	Pam Sellers	01/01/2024	Current	First Choice Insurance Services, LLC	Texas
6 Agent License 1000100 (Texas)	Jacqui Farmer		Expired	First Choice Insurance Services, LLC	Texas
7 Agent License 8010000 (Texas)	Clara S. Hobbins		Expired	First Choice Insurance Services, LLC	Texas

E&O INFORMATION
Your E&O is current. Thank you!
Current Expiration Date: May 09, 2024
Current E&O Link: Click Here to View
Status: Current

UPLOAD OTHER DOCUMENTS
* Document Name
* Document Details
Please include additional details about what the document is related to.
Expiration Date
Begin

Upload Agent License
Upload Agent License here. Please fill all the details -
License Number
Expiration Date
 Does Not Expire
State
--None--
Begin

Agent Upload Licenses

The screenshot shows the ORCHID INSURANCE website interface. At the top, the navigation menu includes 'Home', 'Policies', 'Licenses' (highlighted with a red box), 'Need help?', and 'External Links'. Below the navigation is a blue banner with the ORCHID INSURANCE logo and a background image of people. A red box highlights a text instruction: "To edit a license, click on the name of the license on the left. To upload a new license, follow the directions on the right-hand side of the screen." Below the banner is a 'Licenses' section with a table of existing licenses and an 'Upload Agent License' form on the right. The table has columns for Document Name, Contact, Current Expiration, Status, Agency, and State. The 'Upload Agent License' form includes fields for License Number, Expiration Date, a checkbox for 'Does Not Expire', and a State dropdown menu, with a 'Begin' button at the bottom.

ORCHID INSURANCE

Home Policies Licenses Need help? External Links

To edit a license, click on the name of the license on the left. To upload a new license, follow the directions on the right-hand side of the screen.

Licenses

2 items • Sorted by Document Name • Filtered by All documents • Record Type, Contact Status • Updated a few seconds ago

Document Name	Contact	Current Expirat...	Status	Agency	State
1 Agent License	Plan Status	01/01/2024	Current	First Choice Insurance Services, LLC	Texas
2 Agent License	Plan Status	01/01/2024	Current	First Choice Insurance Services, LLC	Texas

Upload Agent License

Upload Agent License here. Please fill all the details -

License Number

Expiration Date

Does Not Expire

State

--None--

Begin