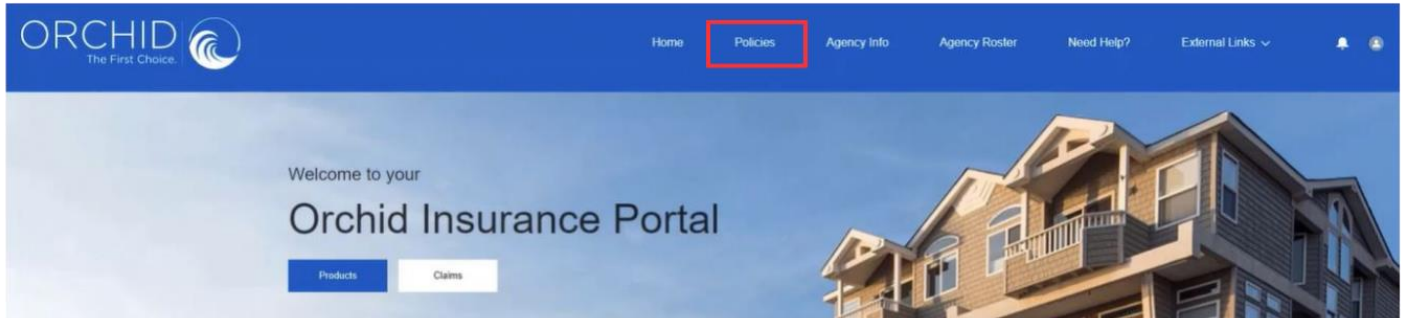


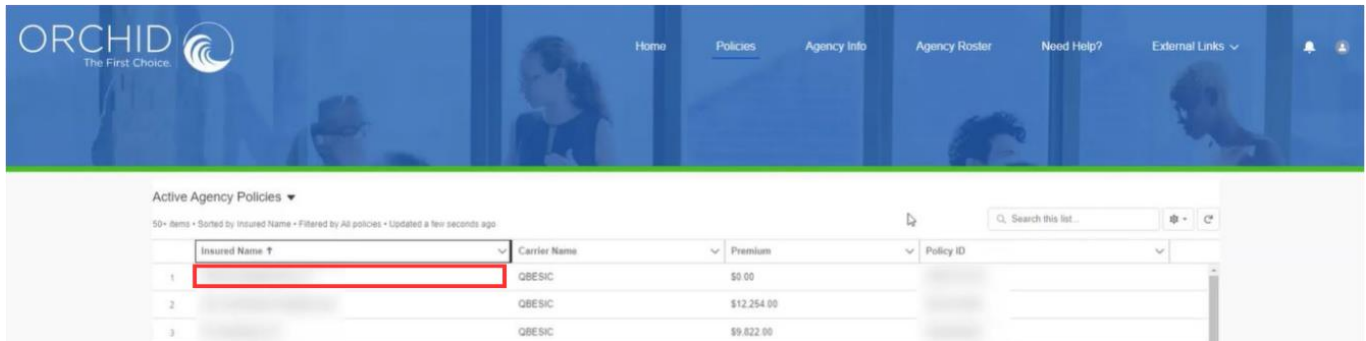
# How to Update a Policy with Ease

1) Log in to the Agent Servicing Portal, select “Policies” in the menu bar at the top of the



webpage.

2) Select the name of the insured whose policy needs updating.



- 3) Under the “Request Type” dropdown, select “Endorsement,” fill out the other required information, upload any supporting files, and select “Submit Request.”

The screenshot shows the ORCHID portal interface. At the top, there is a navigation bar with the ORCHID logo and the tagline "The First Choice." followed by menu items: Home, Policies, Agency Info, Agency Roster, Need Help?, and External Links. Below the navigation bar, there is a "Back to Policies" button. The main content area is divided into two sections: "Policy Details" and "Submit a Request related to the policy".

The "Policy Details" section includes a "Related Cases" link and a "Policy Details" header. Underneath, there are two expandable sections: "Agency Details" and "Insured Details". The "Insured Details" section contains fields for Insured Name, Insured Address, Insured Phone, Insured Email, Effective Date (11/30/2021), and Expiration Date (11/30/2022). To the right of these fields, there are fields for Status (Active), Carrier Name, Policy ID, Premium (\$12,254.00), State (FL), and Effective Date.

The "Submit a Request related to the policy" section contains a form with the following fields: "Request Type" (a dropdown menu with "--None--" selected, highlighted by a red box), "Subject" (a text input field), and "Request Details" (a text area). Below the form are two buttons: "Upload Files" and "Submit Request".

- 4) A case number will be assigned to your request. Please select “Finish.”

The screenshot shows the ORCHID portal interface after a request has been submitted. The navigation bar and "Back to Policies" button are the same as in the previous screenshot. The "Policy Details" section is visible on the left. The main content area now displays a "Thank You" message:

**Thank You**  
Your Request has been submitted and will be assigned in the next 24 hours.  
**Case Number -**  
Please monitor your case progress from the portal.

At the bottom right of the "Thank You" message, there is a blue "Finish" button highlighted with a red box.

## Help & Support

Agency Services Department

1-866-370-6505, Option 1 then Option 4

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