USER'S GUIDE

ORCHID

MARKETPLACE

ORCHID
MARKETPLACE

We are excited to introduce you to Orchid's new policy administration application, Marketplace! This new system was designed with **YOU** in mind: to improve your experience with Orchid by providing you with increased efficiency and transparency. For the best experience as you acclimate to this new application, we strongly encourage all members of your agency to participate in the trainings. Please reach out to your Agency Development Manager to find out when they will be hosting a training for your office or visit the Marketplace resource page at **orchidinsurance.com/marketplace** for tutorials, job aids, and webinars.
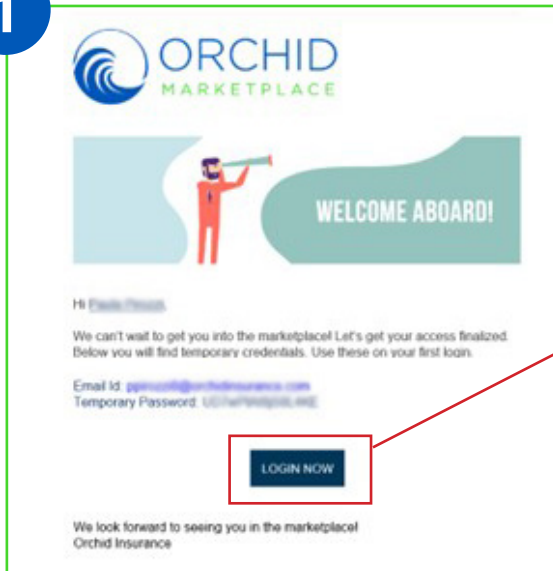
TABLE OF CONTENTS

Login at: marketplace.orchidinsurance.com

For assistance with Marketplace, please reach out to us at 1-866-370-6505 or visit us at orchidinsurance.com/marketplace.
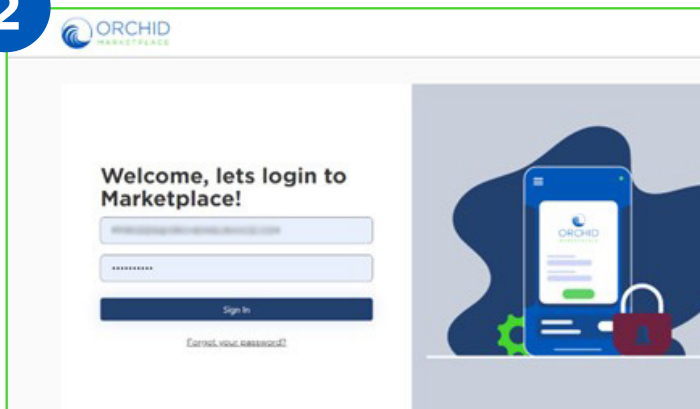
SINGLE SIGN ON

1

Keep an eye out for an invitation emailed from the Orchid Support Team (application. support@orchidinsurance.com) with an ID and temporary password.
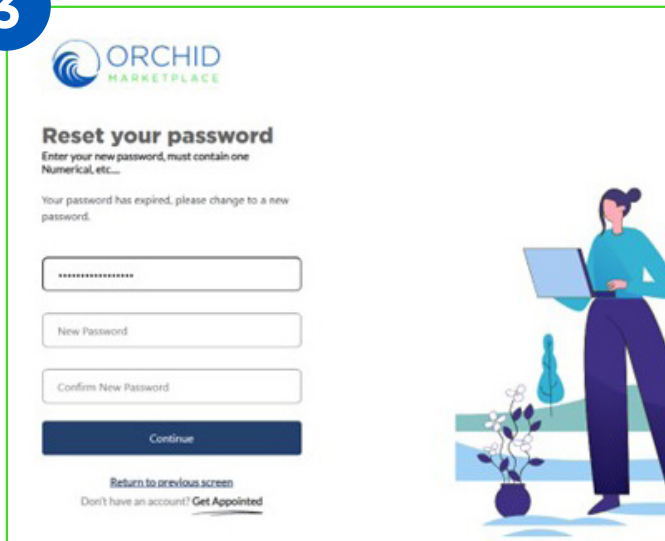
Select "LOGIN NOW".

2

After selecting "LOGIN NOW", use your temporary password to sign in.

Notes:

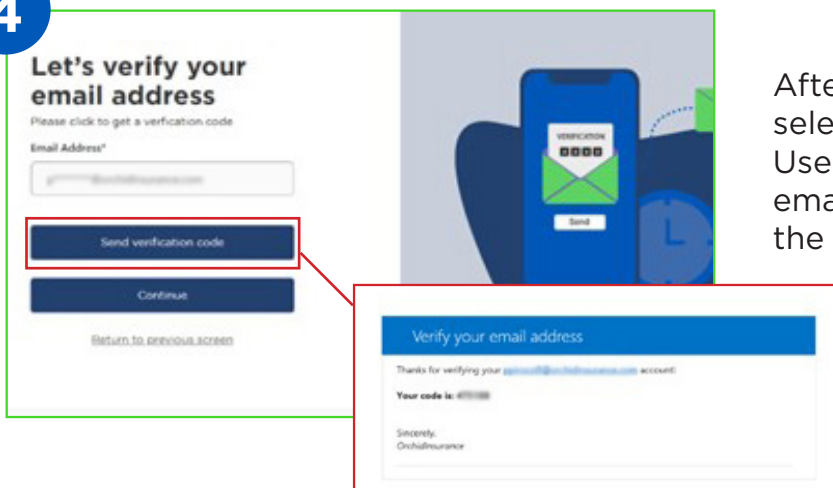**3**

After signing in with your temporary password, you will be prompted to select a new password.

IMPORTANT: Passwords are user specific and can only be reset by the user. Orchid will not manage password resets.
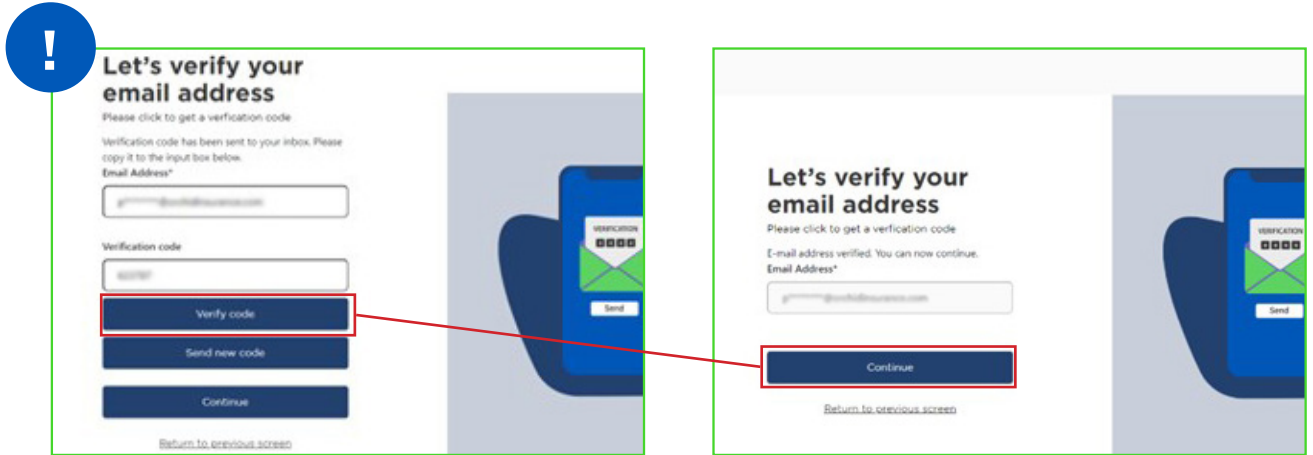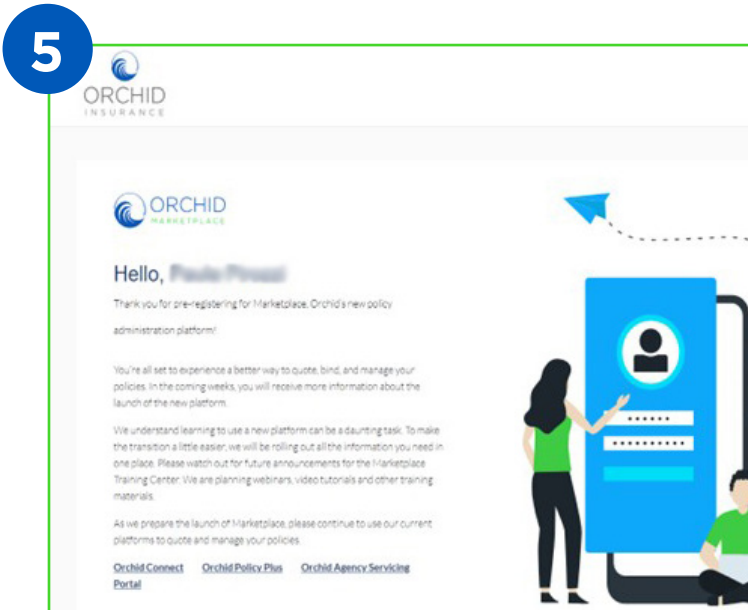
4

After choosing a new password, select "Send Verification Code". Use the verification code that is emailed to you to continue with the login process.

Notes:

Note: As part of our dual factor authentication, a verification code will be emailed to you every time you sign in.
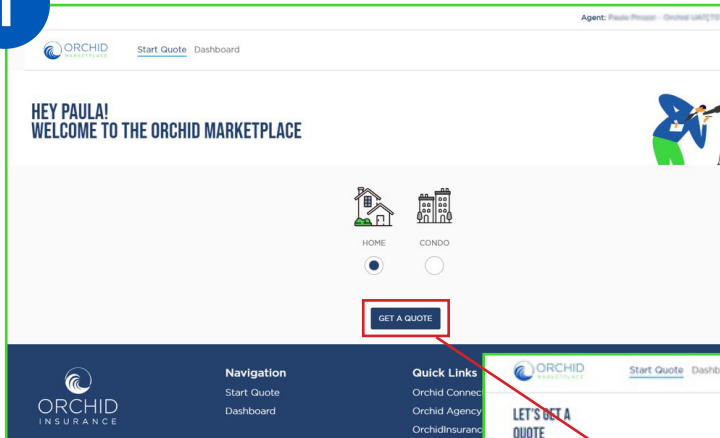

Congratulations, you are now in the Orchid Marketplace!

NOTE: The password you use here will also be your password for the Agency Servicing Portal.
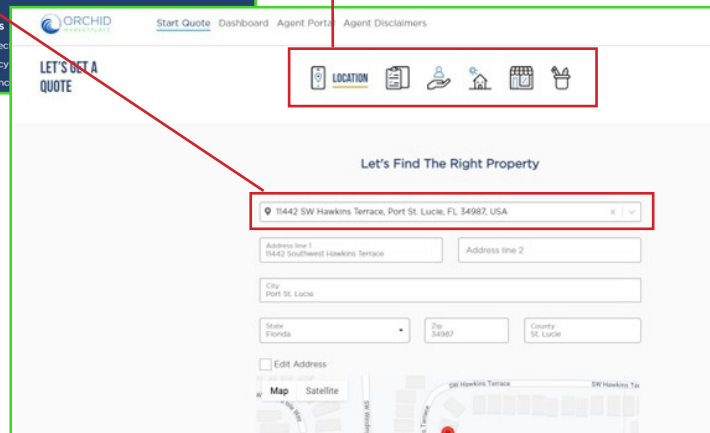
Notes:

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QUOTE TO BIND

NOTE: You can track where you are in the quote process with the icons at the top of the screen, currently, you are in the "Location" section.

Once you sign into Marketplace, you will be taken to the "Start Quote" page by default. To start a quote, select the risk type (Home or Condo) and then click on "Get A Quote".

You will now enter the risk address and confirm the location to ensure that the correct property was found by selecting it from the drop down menu. Once confirmed, select "NEXT". A confirmation from USPS may appear to verify the address format.

The location should appear in the Google Maps. You have the option to select the check box to edit the address. Once confirmed, select "NEXT".

Notes:

2 LET'S GET A QUOTE — POLICY TYPE

Requested Effective Date: 2024-03-08

Tell us about the occupancy of the home.

Home Occupancy Type
PRIMARY

When would you like coverage to begin?

Effective Date
03/08/2024

What kind of policy are you looking for?

HO3 | HO5 | DP3 | HO3-BR | WIND ONLY

BACK

Exclude Wind | NEXT

Now, you can tell us a little more about the type of policy you are looking for. From the drop down menu select the occupancy of the home, then when you would like the coverage to begin.

NOTE: We are not able to back date new business.

Next, Select the kind of policy you are looking for (HO3, HO5, DP3, HO3 Builders Risk, or Wind Only). Be sure to select the check the box to "Exclude Wind" at the bottom if appropriate. Once satisfied with the entries, select "Next".

Notes:

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INSURANCE

Now, you can tell us more about the applicant. Use the dropdown menu to choose the ownership type (Individual, Trust, LLC, LLP, or Corporation).

NOTE: If ownership is an entity and not individual, please obtain the name and date of birth for the principal of the entity.

Enter the insured's (or principal's) first and last name. Select the box if the mailing address is the same as the property address. If checked, it will prefill. If there is a different mailing address, please enter it. Be sure to enter the date of birth for the insured or the entity principal and please select the check box authorizing the use of consumer reporting agencies during the underwriting process. Select "Next" to continue.

On occasion the year and square footage will not import. If that happens, enter the information and select "Save".

Notes:

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NOTE: You now have a submission number to reference located in the upper right corner.

Next, we will need some more details on the property. Some of the information is pulled from our 3rd party vendor. The fields that do not have any information must be filled out. Any field left blank will prevent your ability to move forward.

You may notice that a Replacement Value is automatically generated. You will need to recalculate it if you make any changes to the property details. Once you are satisfied that all the information is correct, select "Next" to view all available markets.

!

To recalculate replacement value, launch the estimator in the replacement value box and add specific details. Selecting "Calculate Now" will return you to the Property Detail page with an updated Replacement Value.

Notes:

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5

LET'S GET A QUOTE

AVAILABLE MARKETS

Submission Number: SN397601

Requested Effective Date: 2024-03-08

To create your quote, please select one of the carriers below.

SELL CONFIDENTLY
All Orchid partners maintain an A.M. Best financial stability rating of A- or better.

ADJUST COVERAGES

⌂ Dwelling	476000
⊞ Other Structure	2%
⌂ Content	25%
⌀ Loss of Use	10%
⊚ Personal Liability	100,000
▤ Medical Payments	1,000

ADJUST COMMISSION

∥ Commission Amount	10%

RESET   CALCULATE

CANOPIUS

VAVE

GET RATES

Estimated Premium
$4,545.35

chaucer

⊚ Water Damage Sublimit: $10,000.00
⊚ Roofing sublimit: N/A
⊚ AOP: $2,500.00
⊚ Windstorm or Hail: 5%

SELECT CARRIER

Estimated Premium
$4,614.65

R&Q ACCREDITED

⊚ Water Damage Sublimit: $10,000.00
⊚ Roofing sublimit: N/A
⊚ AOP: $2,500.00
⊚ Windstorm or Hail: 5%

SELECT CARRIER

Estimated Premium
$4,682.90

LLOYD'S

⊚ Water Damage Sublimit: $10,000.00
⊚ Roofing sublimit: N/A
⊚ AOP: $2,500.00
⊚ Windstorm or Hail: 5%

SELECT CARRIER

Now you will be able to see estimated premium for all the carriers available in your market. You have the option to adjust coverages using the box on the left side of the screen. Please remember to click the "calculate" button at the bottom of the box to update all the tiles.

NOTE: You now have the option to adjust your commission. Please keep in mind that any adjustments to commission or coverages may impact estimated premium and even available carriers.

When you find an estimate that is right for your customer, click the "Select Carrier" option at the bottom of that tile to continue with the quote.

Notes:

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Requested Effective Date: 2024-03-08

Excellent Choice!

$4,819.40
Estimated Premium

QBE

Additional Coverage Options:

Deductibles:

TYPE OF WIND DEDUCTIBLE Windstorm or Hail	SELECTED STORM DEDUCTIBLE 5%	ALL OTHER PERILS DEDUCTIBLE 2,500

Coverages:

ADDITIONAL INSURANCE - DWELLING No	ASSIGNMENT OF BENEFITS EXCLUSION Yes	BROADENED HOME SHARE No
EQUIPMENT BREAKDOWN No	GOLF CART No	INCREASED LOSS ASSESSMENT 1,000
MOLD (Property) No Coverage	ORDINANCE OR LAW No Coverage	PERSONAL INJURY No
REPLACE COST FOR CONTENTS No	SCREENED ENCLOSURES No Coverage	SERVICE LINE No
WATER BACKUP No Coverage	WATER DAMAGE LIMIT 10,000	

CALCULATE

Premium and Other Charges:

Base Premium: $4,043.00

Policy Fee: $350.00

Inspection Fee: $195.00

Stamping Fee: $2.75

EMPA Fee: $2.00

Surplus Lines State Tax: $226.65

Total: $4,819.40

Quote Number:

RETURN TO AVAILABLE MARKETS   GENERATE QUOTE   SHARE QUOTE   GO TO APPLICATION   EXIT

Now, it's time to personalize your quote by adjusting deductibles and coverages. Once you have made the desired changes, select "Calculate" to generate an updated premium. Keep in mind that some changes may not be available with the selected carrier. If that is the case, you can select "Return To Available Markets" to look at other carriers. Once you are satisfied with the potential personalized quote, select "Generate Quote".

Notes:

Quote To Bind

7

NOTE: Document the quote number to make searching for it easier.

Once you have generated the quote, you will see the quote number, premium and other charges. You have the option to "Share Quote", "Go to Application", or "Exit".

NOTE: Do not select "Share Quote"

8

When you are ready, select "Go To Application" to answer some final questions. You will need to indicate if the agent or applicant is completing the application, if the mailing address is the same as the property address, if the property is currently insured, and if there is currently a mortgage on the property. Please confirm all the information is correct and select "Confirm & Continue" at the bottom.

Notes:

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9

If you select Yes, there is a mortgage, additional fields will open to allow you to enter the mortgagee, or mortgagees. Don't forget to select yes if this will be escrow paid on the first mortgage.

Follow the same steps to add an Additional Interest or Additional Insured.

Once completed you will be able to "Confirm & Continue", which will bring you to the Application Detail screen.

Notes:

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Application for Insurance:
Paula Test 3.8.24
Date Of Birth: **/**/1957
11442 SW Hawkins Terrace, Port St. Lucie, FL 34987, USA
Effective Date of Coverage: 03/08/2024

Applicant Detail

Phone Number
(561)251-1059

Email
ppirozzi@orchidinsurance.com

Properties Owned
0

Marital Status
Single

Non Taxable
No

☐ Do you wish to add a Secondary Insured?

Once on the Application Details screen, you will need to enter additional information about the applicant and secondary insured, if applicable.

11

Property Location Detail

Occupants
1

Number Of Bathrooms
2

Do you rent any part of your property to others, occasionally or regularly?
☐ Yes ☑ No

Is there a home day care on premises?
☐ Yes ☑ No

Do you have, or will you have, a trampoline?
☐ Yes ☑ No

Smart Home
No

Hot Tub
None

Swimming Pool
None

Solar Panels
None

Flood Zone
X

Underwriting Details

	Yes	No
Is the property on the market for sale?	☐	☑
Is the property under construction or major renovation?	☐	☑
Does the home have polybutylene, galvanized, lead or cast iron piping?	☐	☑
Is the property on more than 5 acres?	☐	☑
Is there any unrepaired or existing damage to the property?	☐	☑
Does the electrical system use aluminum or knob & tube wiring?	☐	☑
Is the property on a historical registry?	☐	☑
Is the entire electrical system on circuit breakers not made by Challenger, Federal Pacific, Zinsco or Pushmatic from any year or Square D Panels from 1988, 2004, 2006 & 2022?	☑	☐
Is any part of the property used for student housing?	☐	☑
Do you use a wood burning stove as a primary source of heat?	☐	☑
Is any business with visitors conducted at the property?	☐	☑
Have you ever filed a 1st party lawsuit against your auto insurance or homeowners insurance carrier?	☐	☑
Has the applicant been canceled or nonrenewed by another insurance carrier for a reason other than nonpayment of premium?	☐	☑
Has any applicant been convicted of a felony in the past 10 years?	☐	☑
Is any applicant a high-profile individual or working in a high-profile occupation?	☐	☑

Next, you will need to enter property location and underwriting details.

Notes:

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Please ensure that all fields are complete and select "Confirm" to submit your form.

NOTE: If the "Confirm" button is not blue, more information is needed. Please review the form for any questions you may have missed.

Notes:

Quote To Bind

1. From the Dashboard, select the quote number.
2. If the "Status" shows "Offered, Pending Application Review", you will see what forms need to be completed before Binding in the section below.
3. For "Offered" quotes, please complete the Diligent Effort form, upload any accompanying documents, then click the "Refresh Status" button in the Status tile. A "+" symbol indicates the ability to upload several documents.

NOTE: Anytime you upload to "Documents Attached for UW Review-Referred" the quote will go to Underwriting and will have to wait for review.

Notes:

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If the "Status" shows "Referred, Pending Underwriting Review", please call Underwriting using the provided phone number. Our underwriters will not review the referral without speaking with you first.

When uploading files, you can drag and drop your files or browse your computer. The file names should be alphanumeric and should not contain any spaces or special characters.

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Quote To Bind

15

After completing the Diligent Effort form and uploading accompanying documents, the Quote Status should now show Offered and the Processing Status is Pending Agent & Insured eSignature

You are now ready to select "Send mail" to the insured and yourself to sign the required documents.

16

Above is a sample of the email that is sent to both the agent and the insured.

Both parties will review all documents to ensure accuracy, then sign it electronically by clicking on the yellow arrow.

Notes:

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Submission #SN397601

Quotes created under this submission:

CREATED DATE	QUOTE NUMBER	CARRIER	PREMIUM	QUOTE STATUS	PROCESS STATUS
03/08/2024	025I549-01	QBE	$4,819.40	Offered	eSignature Completed

$4,819.40 QBE

STATUS
Offered
eSignature Completed

Once all signatures are completed you will return to the Agent Dashboard and search for your submission number.

The Process Status now shows eSignature Completed.

18

ESIGN REQUEST   COMPLETED
Applications and diligent effort forms must be signed by esignature by you and the applicant. You must initiate the esign request here.

BIND QUOTE   BIND QUOTE
Request a binder and allow for payment to be accepted. Policy issuance occurs automatically after payment is received.

Inspection Contact details

First Name   Last Name
Paula   Test
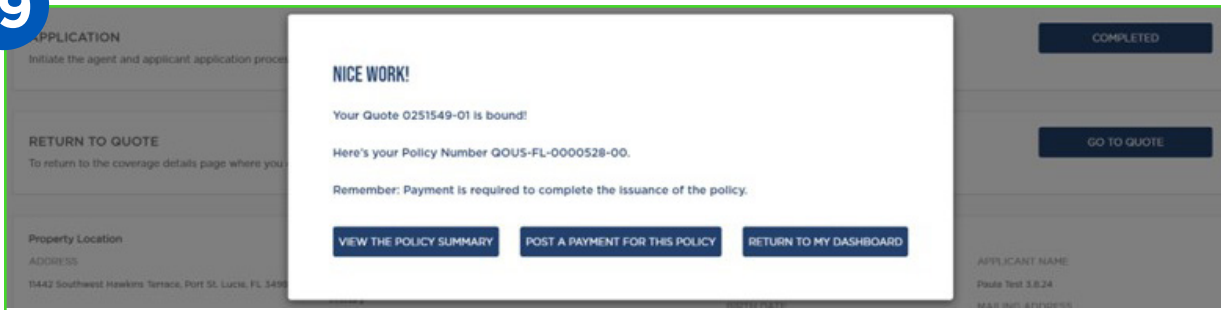
Phone Number

You are able to select "Bind Quote" and enter the contact information for the inspection.

NOTE: When you select "Bind Quote" you will not receive policy documents. Bound status will provide a confirmation of coverage. The policy will not be issued until payment has been received.

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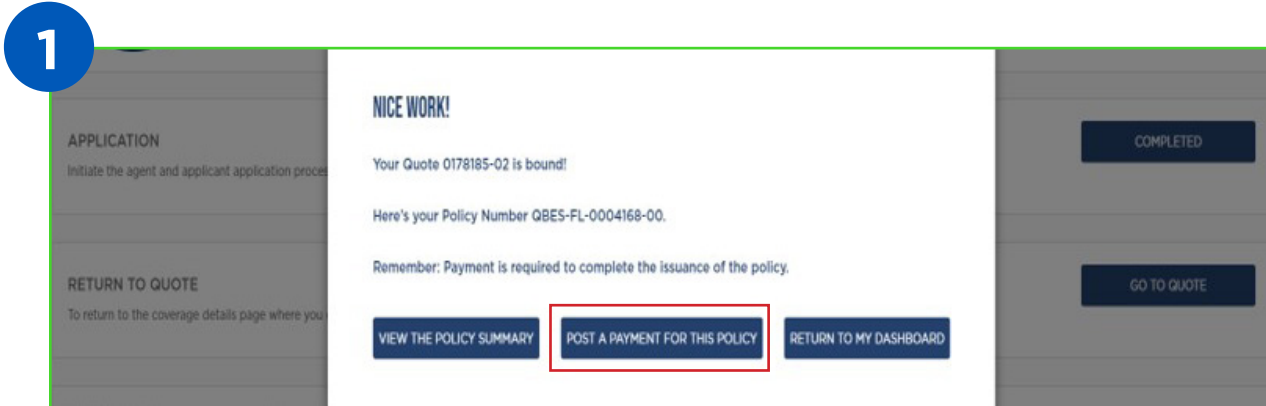
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Quote To Bind

19

After binding the quote, you will see this pop-up screen. Selecting "Post A Payment" will allow you to make a payment on the insured's behalf. Selecting "Return To Dashboard" will bring you back to your dashboard and allow the insured to make a payment through Orchid's Payment Portal.

NOTE: Payment is required to complete the issuance of the policy. Please see the next section on how to make a payment.
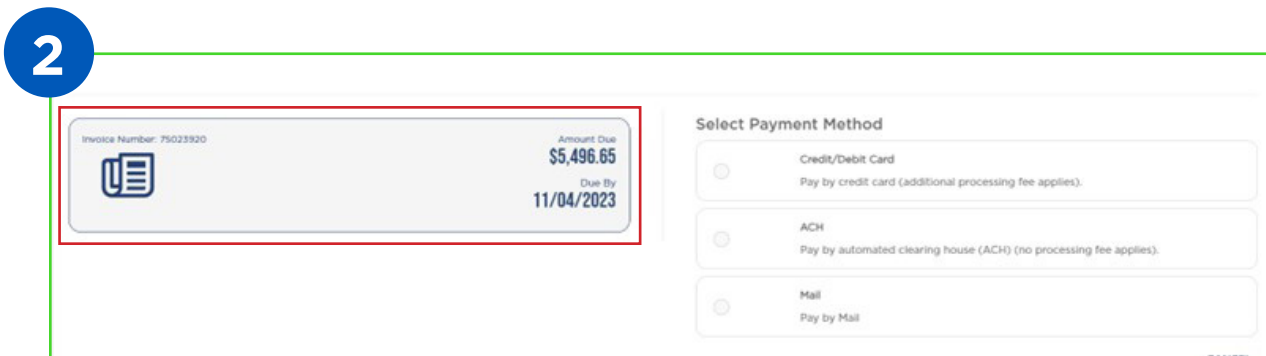
Notes:

MAKING A PAYMENT

1

Once the Binder has been issued, you will have the opportunity to make a payment on behalf of the insured or direct the insured to the Orchid Payment Portal to process on their own.

First, we will look at the steps you would follow to make the payment. From the screen, select "Post A Payment For This Policy".

2

It will bring you to a page that shows the pending invoice outlined in blue.

Notes:
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Making A Payment

3

Select the invoice by clicking on the box. The box will become blue and the radio buttons for the payment methods will be activated. Select the payment method by clicking the corresponding radio button.
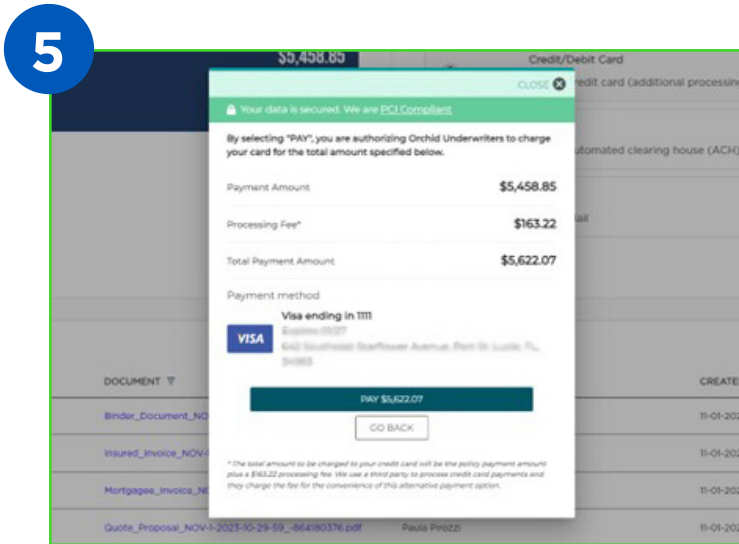

4

Once a payment method is selected, a window will open for you to complete your payment.

The option to split a payment between two cards has been added. You can also select "Edit" to adjust the amount.
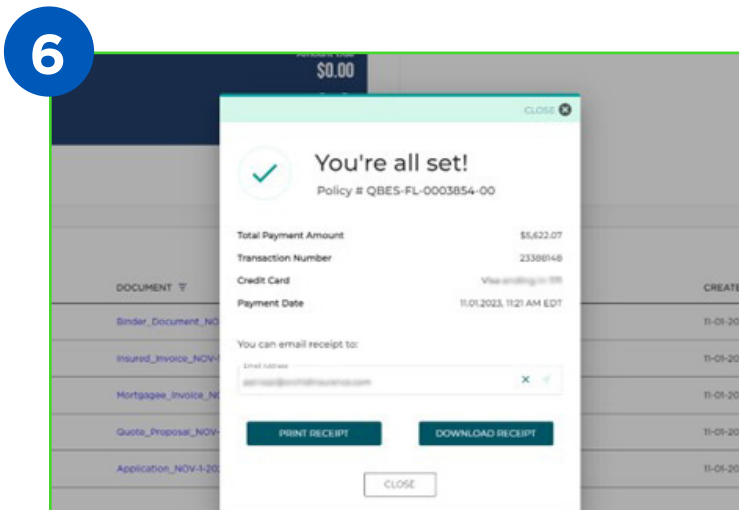
NOTE: There is an additional fee added by the processing vendor for payments made with credit or debit cards.

Notes:

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5

After entering your ACH or credit card information, you will see this screen showing the payment amount, processing fee (if any), and total payment. Select "Pay $5,622.07" to proceed with payment or "Go Back" to choose another method.
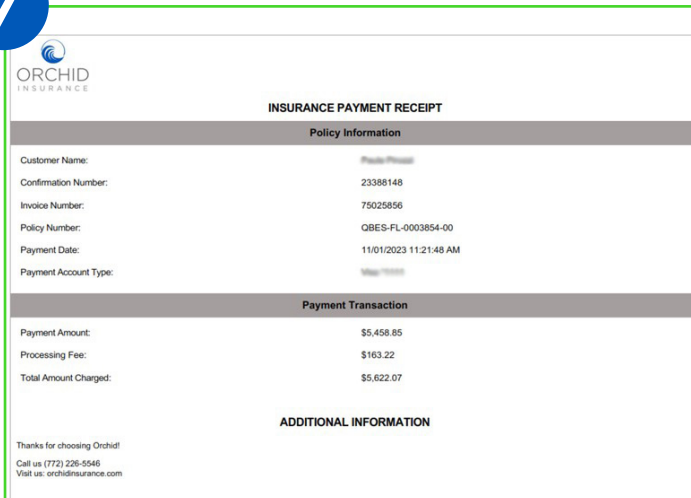
6

After your payment has been processed, you will have the option to email, print, or download a copy of your receipt.

NOTE: Once the window is closed, there is no way to retrieve your receipt.

Notes:

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Making A Payment

7

Your receipt will look like this.

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Once the payment has been posted, the status will change to "Issued" and the amount due will show $0.00.

Notes:

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If the insured prefers to make the payment themselves through Orchid's Payment Portal, they will need the policy number and the invoice number.

10

The insured will select the payment method by clicking the radio button.

NOTE: There is an additional fee added by the processing vendor for payments made with credit or debit cards.

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Making A Payment

11

If paying by credit or debit card, the insured will be able to split the payment between two cards by selecting the button. To make the payment on one card select "Review".

12

After entering their credit card information, the insured will see this screen showing the payment amount, processing fee (if any), and total payment. Select "Pay" to proceed with payment or "Go Back" to choose another method.
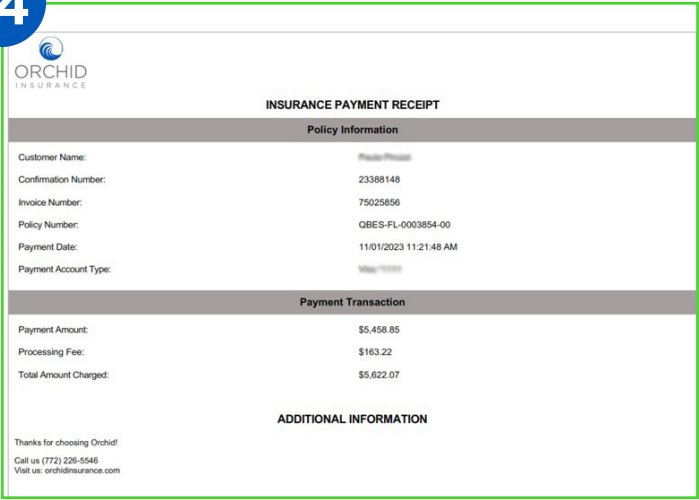
Notes:

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13
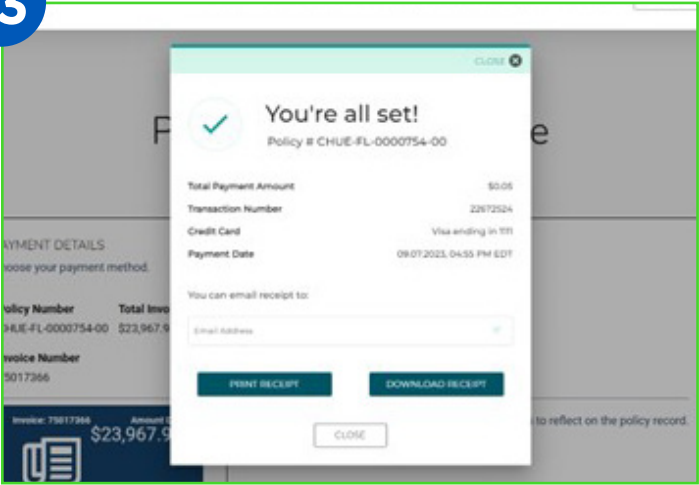
After their payment has been processed, they will have the option to email, print, or download a copy of your receipt.

NOTE: Please advise the insured that once the window is closed, there is no way to retrieve their receipt.

14

Their receipt will look like this.

Notes:

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DASHBOARD

Orchid has introduced the new Dashboard to assist with managing your book of business. When you log in to Marketplace you will still land on the page to start a quote. Select "Dashboard" to navigate to this screen.

Let's take a look at the function of each tile:

Open Quotes allows you to view any quotes that are pending additional action such as e-signatures, or payments. Simply hover over the pending action and select it, this will bring you to the list of quotes.

Polices allows you to see the processing status on policies that need your attention such as pending cancellations.

Upcoming Renewals provides you with of upcoming renewals that need attention. You will also be able to select the button "View All Upcoming Renewals" soon to see what renewals are coming up.

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VIEW POLICY DETAILS

From the agent landing page, select Quotes & Policies. You are able to search by scrolling through the policies or by selecting "Filter" and entering the policy number or risk address then select "Search". Once you select the policy, it will direct you to the policy where you can view the policy details, documents, and can initiate an endorsement.

NOTE: If a policy is not in an issued and active status, It will not show the Endorsement button.

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View Policy Details

The new policy view makes it easier for you to locate the information you need. You can view the payment history, policy history, policy information (all insured, risk, and coverage details), and documents.

Notes:

3

DOCUMENTS

COLLAPSE DOCUMENTS **+**

NAME	DOCUMENT	CREATED BY	CREATED
Insured Invoice	Insured_Invoice_DEC-21-2024-6-4-10_-1927033460.pdf	Policy_Migration	12-21-2024 06:04:10
Cover Letter	Cover_Letter_DEC-21-2024-6-4-10_1238482484.pdf	Policy_Migration	12-21-2024 06:04:10
Renewal Offer Document	Renewal_Offer_Document_DEC-21-2024-6-4-10_3500211.pdf	Policy_Migration	12-21-2024 06:04:10

Use the blue hyperlinks in the Documents section to download documents that have been generated for the policy.

Notes:

ENDORSEMENTS

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.

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

Notes:

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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.

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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:

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

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

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Coverage Details, your endorsement reason should be Coverage Changes.

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

Notes:

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

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

Notes:

Endorsements

Underwriting Details, your endorsement reason should be Mortgagee Changes.

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

Notes:

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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.

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AGENT RENEWAL

Once logged in select "Dashboard". You will see active quotes, policies and renewals. From this dashboard you can select any item to drill down further.

Search by "Policies" from Quotes & Policies form the Marketplace landing page. From the" Policies" screen select "Filters", enter the policy number and select "Search".

Notes:

The results should include the policy you searched for. Once you select the policy you will see the renewal offer and its status. You will notice the Processing Status is Pending Payment/Compliance Docs. To view the renewal package, scroll to the bottom of the page.

NOTE: If you need to make any revisions to the quote, please contact our Renewal Underwriting team by emailing renewals@orchidinsurance.com or calling (772)226-5546.

Notes:

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By selecting "Diligent Effort Form" you will complete any compliance documents required and obtain electronic signatures. Selecting "Pay Policy Now" allows you to make a payment on behalf of the insured. The policy will not issue unless both are completed.

Once the Diligent Effort is completed you will need to obtain the required e-signatures. Ensure the email address is correct, select "ESIGN". Once the e-signatures are completed the button will show "Competed" and be inactive.

NOTE: You are able to edit the Inspection Contact details on this page.

Notes:

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Documents

NAME ⊤	DOCUMENT ⊤	CREATED BY ⊤
Esigning Disclosure	ESigned_Surplus Lines Broker Notice to Insured-eSign_NOV-12-2024-11-42-2.pdf	ESignature
Esigning Diligent Effort Agent	ESigned_Statement of Diligent Effort - eSign_NOV-12-2024-11-40-52.pdf	ESignature
Insured Invoice	Insured_Invoice_NOV-5-2024-11-5-45_1786322273.pdf	Orchid_Underwriter
Renewal Offer Document	Renewal_Offer_Document_NOV-5-2024-11-5-44_945869549.pdf	Orchid_Underwriter

Below the policy details you will find the Document section. You can download the quote to review and present to your insured by selecting the links in blue.

6

Quote #0354576

Renewal Policy Number: #20UADE04250007613-01   Insured: [illegible]   Address: [illegible]

Policy History:

POLICY NUMBER ⊤	TRANSACTION TYPE ⊤	EFFECTIVE DATE ⊤	CARRIER ⊤	PREMIUM ⊤
		Not found		

Renewal Offer List:

QUOTE NUMBER ⊤	EFFECTIVE DATE ⊤	CARRIER ⊤	PREMIUM ⊤	PROCESS STATUS ⊤
0354576	2024-12-04	Accredited Specialty Insurance Company	$2,906.23	Policy Active

$2,926.23 PREMIUM

R&Q ACCREDITED

Rule Type:
- Underwriter Review Required: Validate Coverage A($800000) to RCE Value($395000)
- Underwriter Review Required: Backdated Coverage Request

STATUS

Policy Active

Thank you for your continued partnership with us! We are pleased to present you with a renewal offer. Please take a moment to review this offer and proceed with completing the necessary compliance documentation and payment for the renewal policy to be issued successfully. If you wish to make any adjustments to the offer, click on 'Go to Quote' below to initiate the revision process.

Once all compliance docs are received, and the payment has been made and processed, the Policy Status will change to "Policy Active" and the policy documents will be issued.

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ORCHID
INSURANCE

FAQs

Where do I start a quote in Orchid Marketplace?

Once you log in using your single sign on, you will start a quote from the page you land on. It is important to take note of the submission and the full quote number as the status will change throughout the process. For example, it may start as 0218383, and once you complete the application, it will become 0218383-01. If you generate the quote and go back to select a different carrier, a new quote number will be generated. Please be sure to update the Replacement Cost Estimator and the risk information.

How can I get an additional quote?

From "My Dashboard" search for the submission number. Select the desired result. On the top line select the quote number. Scroll down and select "Go To Quote". Then select "Return To Available Markets". Please be sure to update the Replacement Cost Estimator and the risk information on the new quote.

What do I do if I am not able to navigate to the next page?

Verify that each field has a valid response, these are mandatory fields. Once all are completed you will be able to move forward.

Where do I go to see a policy status?

From Orchid Marketplace, select "My Dashboard" from the top left corner of the page. Search for the policy in question. The status will determine the next steps. If it is referred contact Orchid at 866-370-6505. Please check the Agent Dashboard frequently for any updates.

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What do I do if my application is referred or there are no open markets?

Contact Orchid at 866-370-6505 for further assistance. Please have the quote number available. Once the issue has been reviewed, you will receive an email notification.

What is the difference between the status of "Bound" and "Issued"?

"Bound" indicates that an offer of insurance has been made and generates a binder. Once the payment has been received and processed, the status will update to "Issued", and the policy package will be available.

How do I enter a claim?

When you select "Go To Application", there is a section called "Agent Questions". Select "Add Claim" under "Claims History".

How do I make a payment?

Login to the Orchid Marketplace and select My Dashboard to search for the policy that needs payment. Select "Pay Policy Now". On the right side you will see the options to make payment. You MUST select the invoice – in the gray box on the left – before you can select a payment option (credit card, ACH, or mail a payment). It may take up to 24 hours to reflect the payment. You may also direct your insured to the Payments tab on our public website www.orchidinsurance.com. Orchid does not provide a payment plan, but you may seek financing from external sources.

NOTE: If the invoice has already been paid, it will remain gray rather than changing to blue when you attempt to click on it to make payment.

There is an additional fee applied on payments made by credit card.

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When does payment need to be made?

Insured billed policies must be paid in 15 days and mortgagee billed policies must be paid in 30 days.

What is the new overnight payment address for Orchid?

Orchid Insurance

SL-MO-R1LB #956397

3180 Rider Trail S.

Earth City, MO 63045

If a mortgage exists on a policy, will it automatically bill the mortgagee?

Yes, as long as escrow billed was selected.

Are declarations pages being hard copy mailed to the insured?

Yes

Why am I having a problem uploading a document?

File names cannot contain special characters or spaces.

How far in advance can I quote?

Quotes are good for 30 days. If a change is made to the quote, it will be good for 30 days after the change.

Can my new business policy be agency bill?

No, all policies will be insured billed or escrow billed.

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How do I find Policy Documents?

Login to the Orchid Marketplace, select My Dashboard to search for the policy you want the documents for. From the Policy details screen scroll down to the Document section. There may be multiple pages be sure to use the scroll on the bottom left of the screen.

How do I make an endorsement?

From My Dashboard, search for the policy. Once you are at the policy details screen scroll down. You will see a list of any processed endorsements. Below that select "Add Endorsement". Please note that the policy must be in the "Issued" status for you to initiate an endorsement. Issued means that we have received payment. The endorsement will refer to our underwriting team for completion. Once completed you will receive notification.

You may also submit a case for the endorsement in the Agent Servicing Portal.

How do I cancel a policy?

A cancellation request must be made through the Agent Servicing Portal. Please include the Lost Policy Release (LPR) signed by the insured along with any supporting documentation such as closing documents for a sale of a home, or proof of other coverage. Once completed you will receive notification.

How do I reset my password for Orchid Marketplace?

Select "Forgot Password" after entering your User ID.

Please contact Orchid by phone, 866. 370. 6505 for further assistance.

How do I obtain credentials for a new user at my agency?

The principal for the agency will need to submit a request through the Agent Servicing Portal.

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www.orchidinsurance.com   1-866-370-6505

Corporate Office: 1201 19th Place, Suite A110, Vero Beach, FL 32960
Tampa Office: 4030 W Boy Scout Boulevard, Suite 200, Tampa, FL 33607