



LIO INSURANCE COMPANY

STEP-BY-STEP INSTRUCTIONS FOR SIGNING UP TO JOIN THE LIO BROKER PORTAL

To begin, enter this URL in your favorite Internet Browser application: <https://lioinsurance.com/broker-login/>

You will have the choice of two different portal experiences, depending on which insurance products you wish to quote. For the purpose of creating your account with LIO, it does not matter which portal experience you choose. While the screen graphics are somewhat different, the functionality for account creation is the same. Here we show the screens for our original portal experience, used for HOA/Condo GL.

You will see the authentication widget on the main screen.

The form is titled 'LIO'. It has a 'Username' field with a placeholder 'Enter Username'. Below it is a 'Remember me' checkbox. A large red 'NEXT' button is at the bottom. Below the button is a link 'Need help signing in?'. At the very bottom, it says 'Don't have an account? [Sign up](#)'.

Figure 1

Click the Sign-up link near the bottom of the widget.

Figure 2 appears.

The form is titled 'Create Account'. It has five input fields: 'Email *', 'Password *', 'First name *', 'Last name *', and 'Partner ID *'. Below the fields is a note '* indicates required field'. A large red 'REGISTER' button is at the bottom. At the very bottom, it says 'Back to Sign in'.

Figure 2

Enter your email address, a password (follow the hints provided), first name, last name, and your pre-assigned Partner ID. (Note: The Partner ID is a six-digit number and is included in your Welcome Email.)

After you have entered the required information, click on the Register button.
You should now see a notice that a verification email has been sent to your inbox.

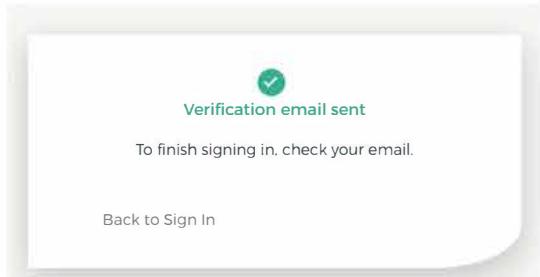


Figure 3

Open the app you use to read email and navigate to the verification email just sent. Note: This email comes from Okta.com, our 3rd party authentication service. If you do not see the email in your Inbox, check your Spam/Junk folder.

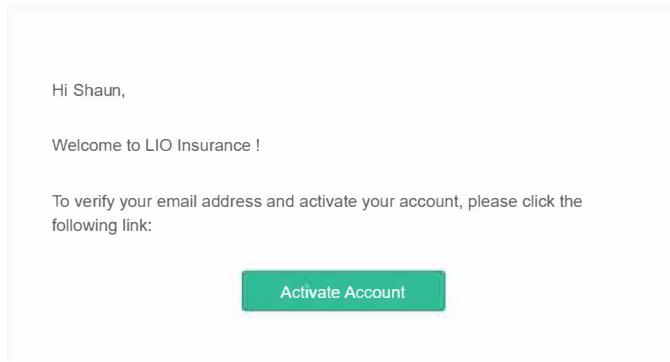


Figure 4

Click on the Activate Account button in the email.

You should now be brought back to the LIO Broker Portal main login screen. It may appear as if you are starting over, but you now have an account.

Enter your email and password that you used to create your new account. You will be taken to the final step in the sign in process – creating your Multi-factor Authentication scheme. (MFA)

MFA Setup

You should now see the following screen (*Figure 5*):

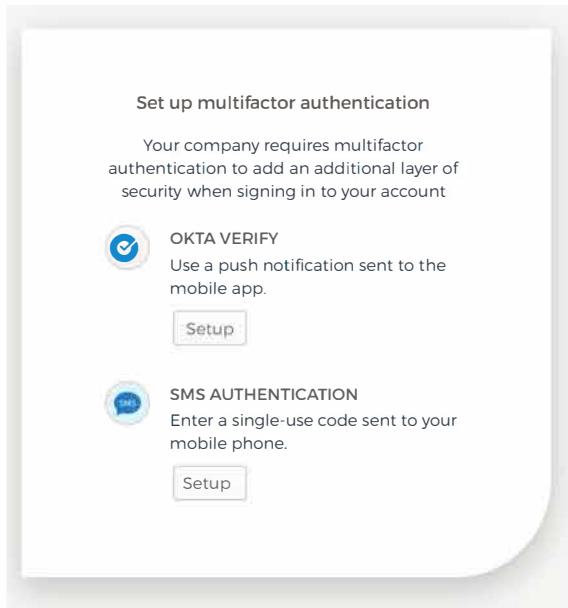


Figure 5

There are two (2) options for your MFA setup:

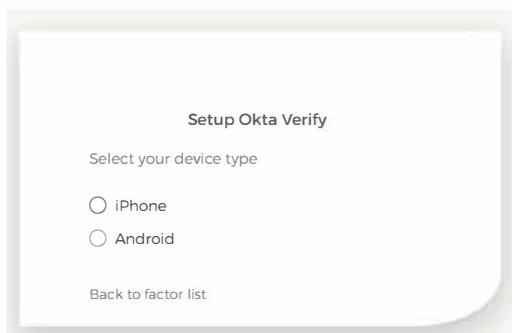
- 1) Use the Okta Verify phone app (free from the AppStore or Google Play store)
- 2) Use your SMS/Text Messaging phone app

You may choose whichever MFA option you prefer, though both options require the use of your phone to verify your identity.

How to setup for Okta Verify MFA:

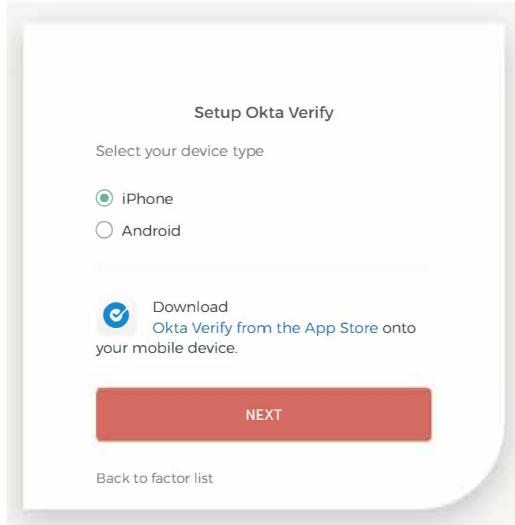
Click the Setup button under Okta Verify.

On the next screen, select what type of phone you use:



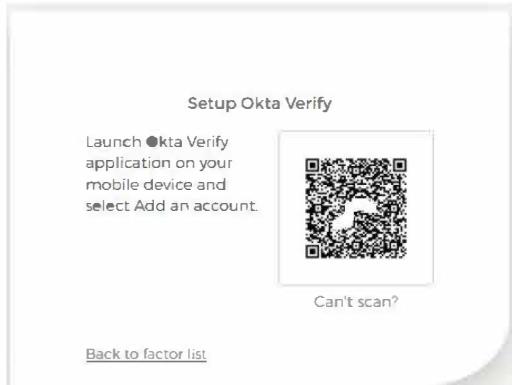
If you have not already done so, download the Okta Verify from the Apple AppStore or Google Play Store.

After you have installed the Okta Verify app, click the Next button on your computer screen.

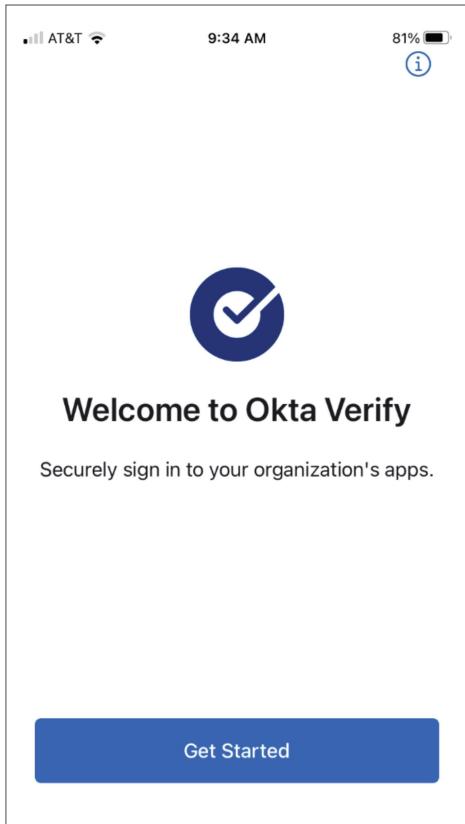


You will be shown a screen with a unique QR code that is exclusively for your account. It is only valid for a limited time.

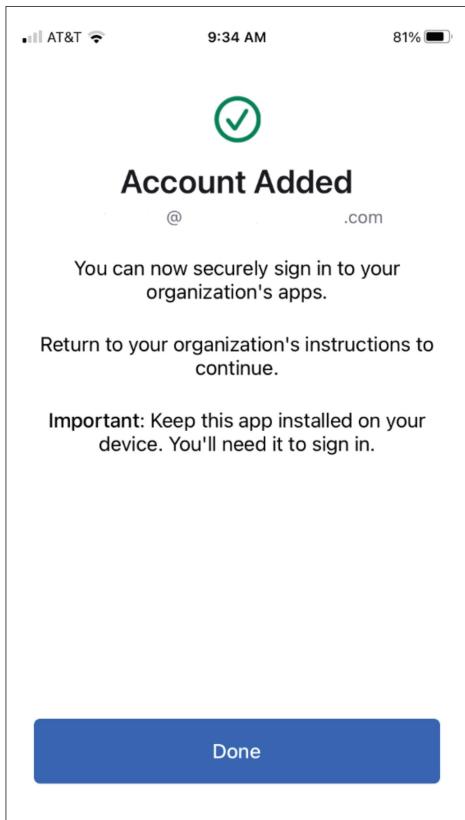
Open your phone's Camera app and aim it at your computer screen, focusing on the QR code. You should receive a prompt to open the QR code in the Okta Verify app.



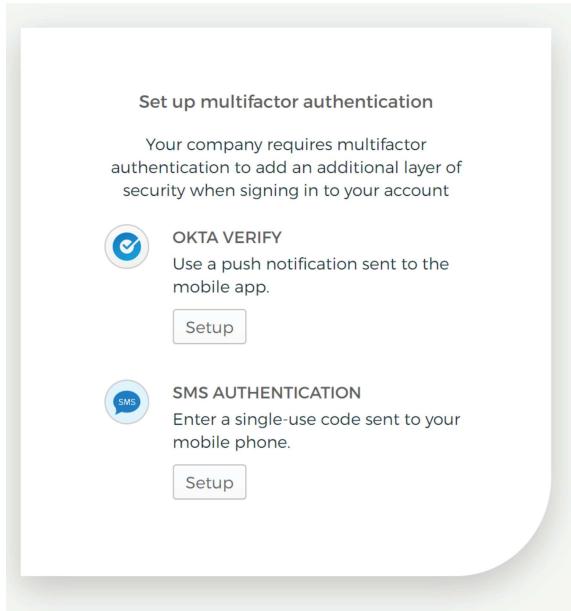
Your phone should now open the Okta Verify app and prompt you to complete your account setup.



Click on the Get Started button and you will be immediately taken to the following screen, indicating you have successfully setup the Okta Verify MFA option.

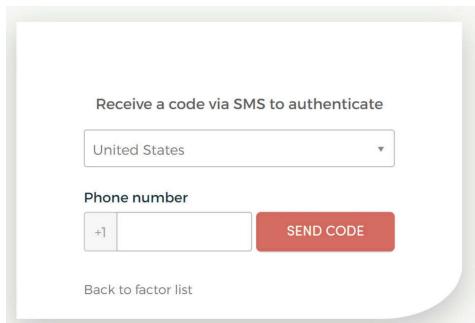


How to setup SMS (Text Message) MFA:

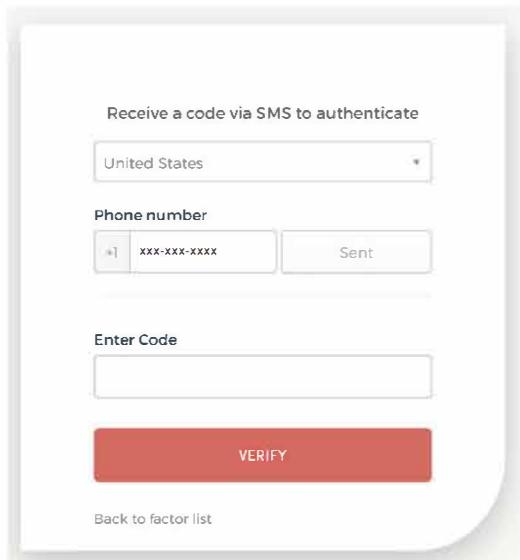


Click the Setup button under the SMS Authentication option.

Enter the phone number to which you want the SMS/Text messages sent and press the Send Code button.



You should receive an authentication code to your SMS/Text messaging app in less than a minute. Enter that 6-digit code in the screen and click the Verify button.



Receive a code via SMS to authenticate

United States

Phone number

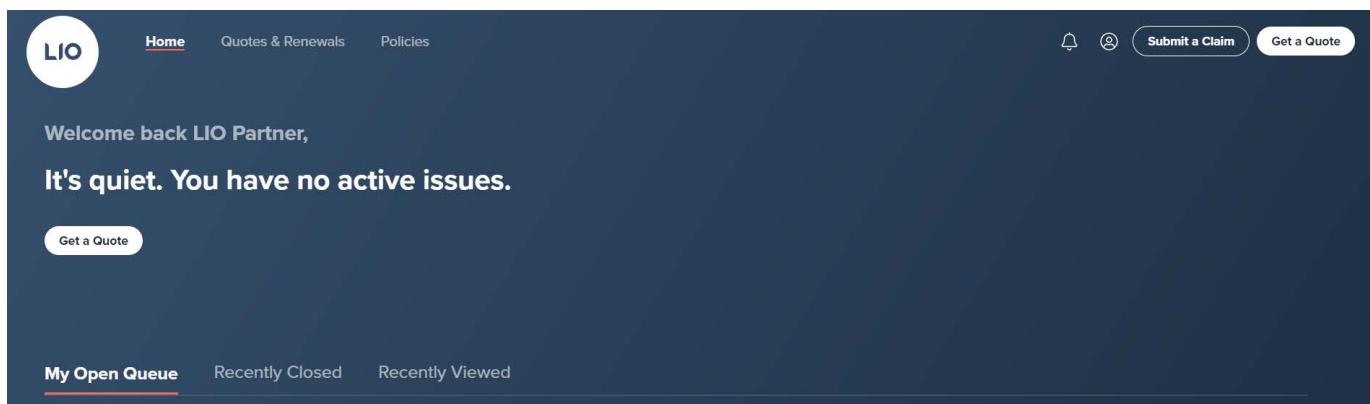
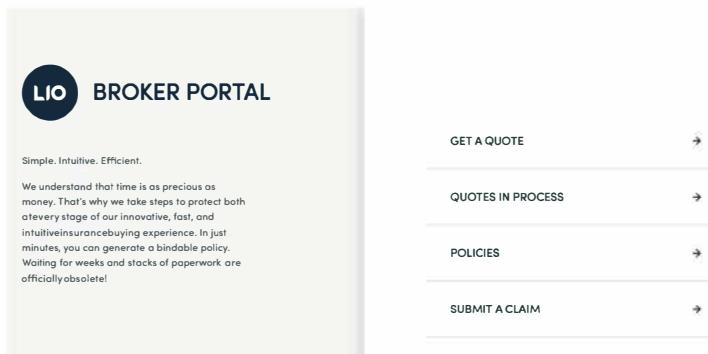
xxx-xxx-xxxx Sent

Enter Code

VERIFY

Back to factor list

Once you have successfully setup your MFA of choice, you should be taken to the main page in the LIO Broker Portal you have selected.



Welcome back LIO Partner,

It's quiet. You have no active issues.

Get a Quote

Submit a Claim

Get a Quote

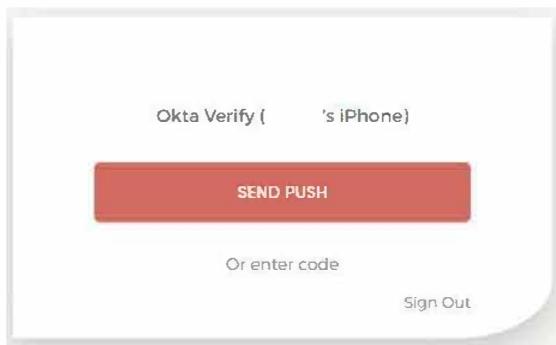
My Open Queue Recently Closed Recently Viewed

BROKER PORTAL LOGINS

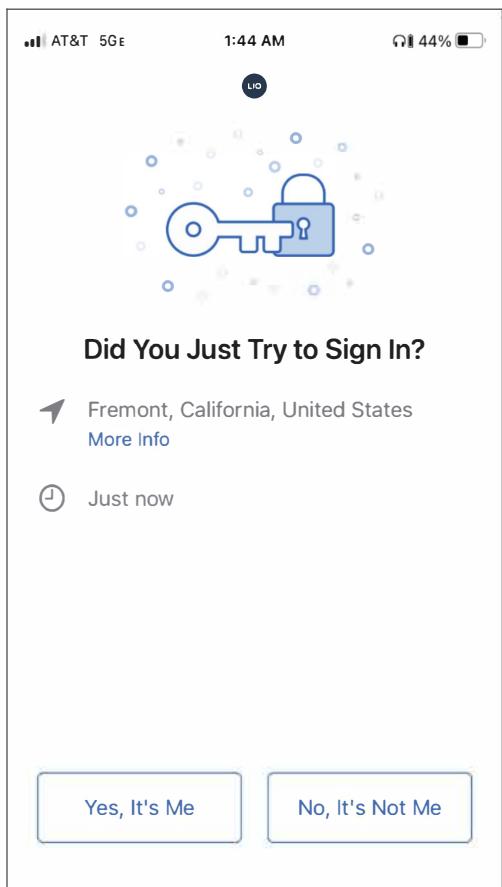
You only need to setup your account and MFA options once. All logins require you to enter your username (email address) and your password. You will then be prompted for your MFA credentials.

For Okta Verify:

You will see the following screen.

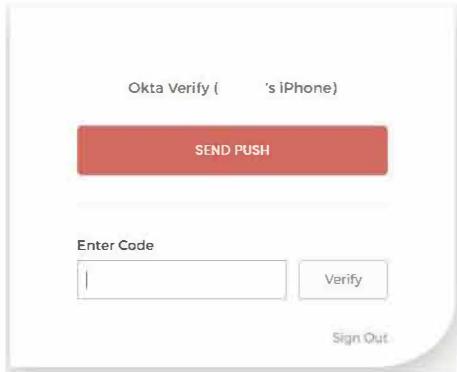


The PUSH option – Click the SEND PUSH button. A notification is sent to your Okta Verify phone app. You should receive this notification.



Click the "Yes, It's Me" button

The Enter Code option: Click the "Or enter code" option link

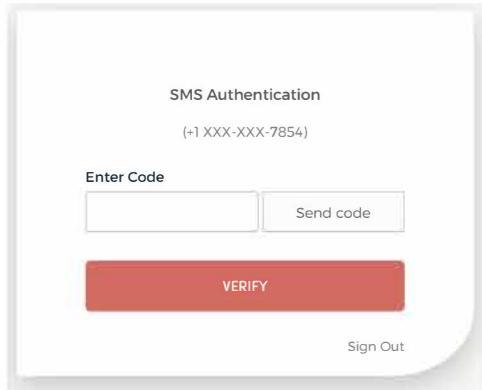


Open your Okta Verify app. You will see a six-digit code on the screen. Enter this code into the login form and click the Verify button. Note: the six-digit code changes every 30 seconds. You may need to wait a few seconds until the code changes and then enter it.

For SMS/Text Messaging:

You will see the form below popup on your browser screen.

You must first click the Send code button to create the SMS/Text message to be sent to your phone. Once you receive the code in your SMS/Test messaging app, enter the six-digit code in that message into the Enter Code box on the form.



Click the Verify button to complete the login process.

If you need assistance or have any questions, please contact your Service Representative.