



## Migrating an account using 2-step verification

This document will review how to update your account in our Policyholder Portal, using our 2-step verification process.

**NOTE: If you need assistance, please call us at 888.513.8797 any time between 8:00 a.m. – 6:00 p.m. ET, Monday through Friday.**

1. Visit the [Policyholder Portal](#)
  - A. ENTER your **Username or Email** as normal.
  - B. CLICK **Login to Policyholder Portal**.

2. When your account is ready for migration to the new system, you will have an option to defer if needed. The screen will show a countdown of days until the migration is required.
  - A. To Defer: CLICK **Defer this update until next time** and login as normal.
  - B. To continue the process: CLICK **Authenticate my account now**.

**NOTE: if you stop and exit at any time during this update process, it will reset and you can start over on your next visit.**

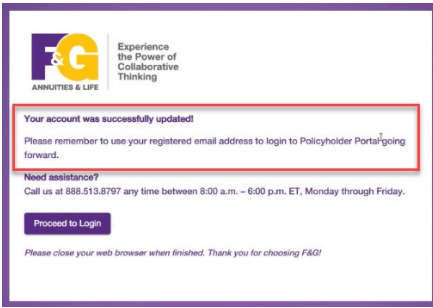
3. Complete any missing fields in your **Policy Information Form**:
  - A. The Email shown is the original email entered when your account was opened. **This email will be your Username after the migration is complete.** If you wish to use a different email, you may change it at this time.
  - B. CLICK **Continue**.

**NOTE: If any fields are missing or incorrect, the system will prompt you to correct them before moving on.**



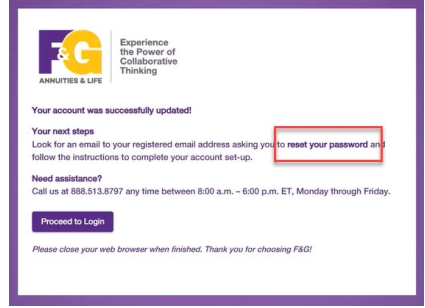
4. The information entered will be verified, and you will see a Success message. You will receive one of 2 success messages depending on whether or not your existing password matches our new requirements.

At this point, it is recommended you close the current browser window, especially if you are using a shared computer.



**Scenario 1:** Your password does match our new requirements.

**Continue to step 5.**

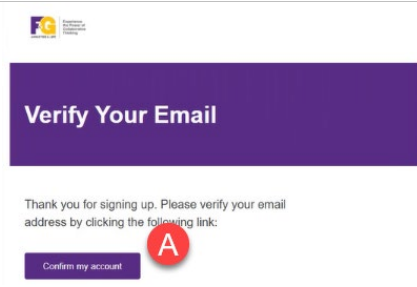


**Scenario 2:** Your password does not match our new requirements.

**Skip to step 7**

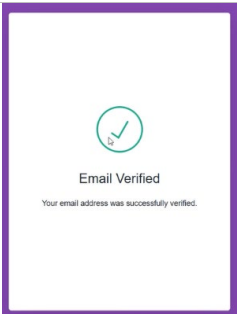
5. You will receive an email message asking you to do a verification. Open your email client and access the **Verify Your Email** message.

A. **CLICK Confirm my account.**



6. Once you the verification has been completed, you will receive a success message. At this point you are ready to return to the Policyholder Portal and continue the login process.

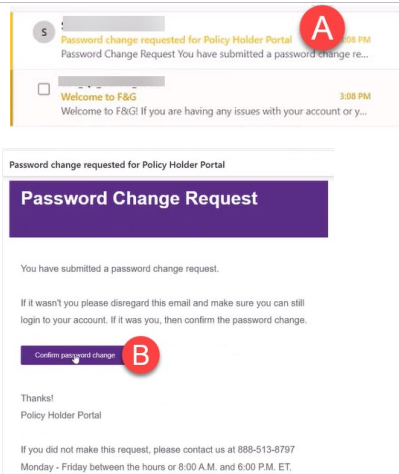
**Please skip to Step 9**



7. Open the email account you used for registration. You will receive 2 messages: a welcome message, and a message to reset your password.

A. **OPEN** the **Password change requested** email

B. **CLICK Confirm password change**





8. COMPLETE The Password reset:
- A. CLICK into one of the **Password** fields
  - B. The Required criteria will show. As each is met, the text will turn **Green**
  - C. To verify your passwords match, CLICK the **eye**
  - D. VERIFY you have them typed the way you want
  - E. CLICK **Reset password**
  - F. Your password is now ready. CLICK **Back to Policy Holder Portal**

Change Your Password  
Enter a new password below to change your password.

New password\* **A**

Re-enter new password\*

Reset password

Change Your Password  
Enter a new password below to change your password.

New password\*

Re-enter new password\*

Your password must contain:

- At least 8 characters
- At least 3 of the following:
  - ✓ Lower case letters (a-z)
  - ✓ Upper case letters (A-Z) **B**
  - Numbers (0-9)
  - Special characters (e.g. !@#%&\*)
- ✓ No more than 2 identical characters in a row

Reset password

**C**

New password\*  
Test12345@

Re-enter new password\*  
Test12345@ **D**

Reset password **E**

**F**

✓

Password Changed!

Your password has been changed successfully.

Back to Policy Holder Portal



9. From the main login screen:
- A. ENTER your **Email address**
  - B. CLICK **Login to Policyholder Portal**

10. On the Password screen:
- A. ENTER your **Password**
  - B. CLICK **Continue**

11. From the 2-Step Authentication screen, you have 2 options available.
- A. If you currently use an authenticator app (like Google Authenticator, DUO Mobile, etc.)
  - B. Use a phone for either a Text Message (SMS) or a phone call



### OPTION A: Use an Authenticator App

12. SELECT the button for **Authenticator**
- A. Follow the instructions for your Authenticator App to add a new account and scan the QR code shown.
  - B. ENTER the **code** from the App
  - C. CLICK **Continue**

### OPTION B: Use a phone

13. SELECT the button for **Phone**
- A. ENTER the **Phone** number you will use
  - B. SELECT whether you want a **Text message** or a **Voice Call**
  - C. CLICK **Continue**

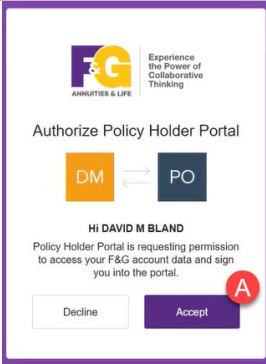
14. Once you have received the code to your chosen phone:

- A. ENTER the **Code**
- B. CLICK **Continue**



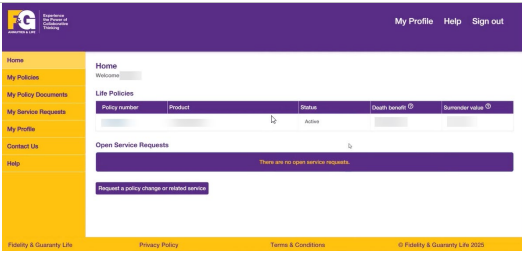
15. From the Authorization screen:

- A. CLICK **Accept** to complete your phone registration



**IMPORTANT:** If you **Decline** this screen, your registration will be stopped and you will have to start over from the Login process with registering your phone again.

16. Your Registration is now complete.



17. For your second login, you can authorize the system to remember you for 30 days:

- A. ENTER your **Email** and CLICK **Login**
- B. ENTER your **Password** and CLICK **Continue**
- C. CHECK MARK the box to **Remember this device for 30 days**
- D. CLICK **Continue**

The system will remember this device and not require the 2-step authentication provided the device, browser, network, etc. are the same for a 30 calendar day period.

