

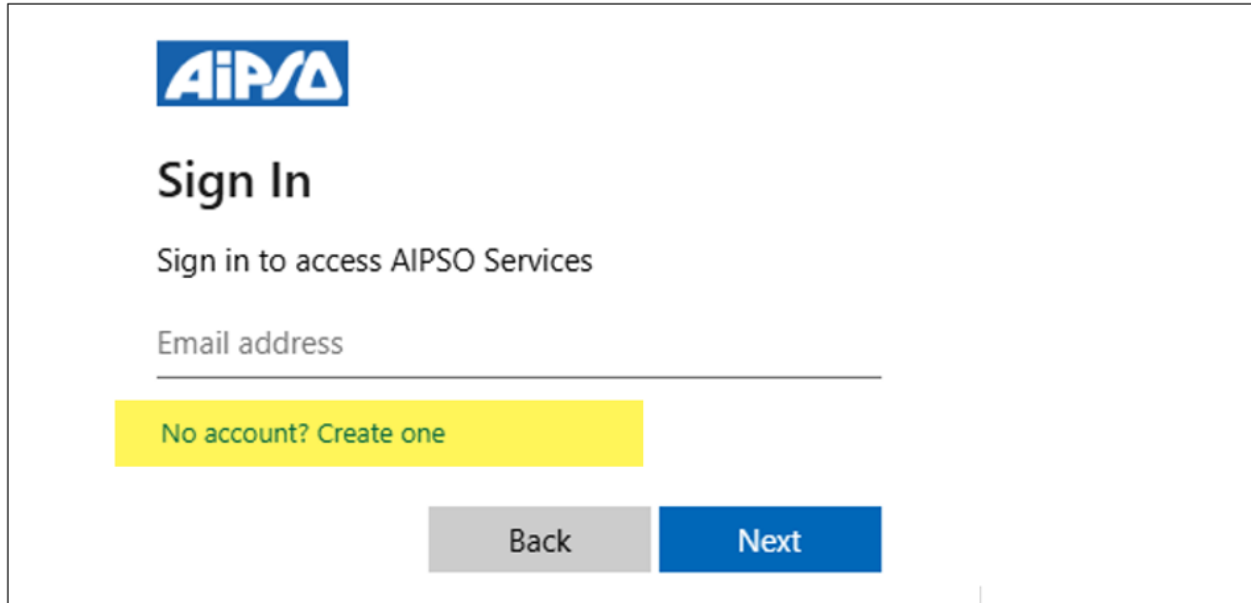
# INSTRUCTIONS FOR MFA AND MANAGING INDIVIDUAL USER LOGONS

Updated April 10, 2026

1. [Create your Producer Portal account](#). You will only need to do this **once**.
2. [Logon to the Producer Portal](#)
3. IF YOU ARE A PRODUCER OF RECORD:
  - a. [Link your License\(s\) to your Producer Portal logon](#). You will only need to do this **once**.
  - b. [Set up employees in your office](#). You will need to do the initial set up **once**, and you will manage new or terminated employees in the future.
4. Navigate to EASi through the [EASi Portal](#)

# CREATE AN ACCOUNT

1. If you do not already have an account you must create one. **Click “No account? Create one”**



**AIPSO**

## Sign In

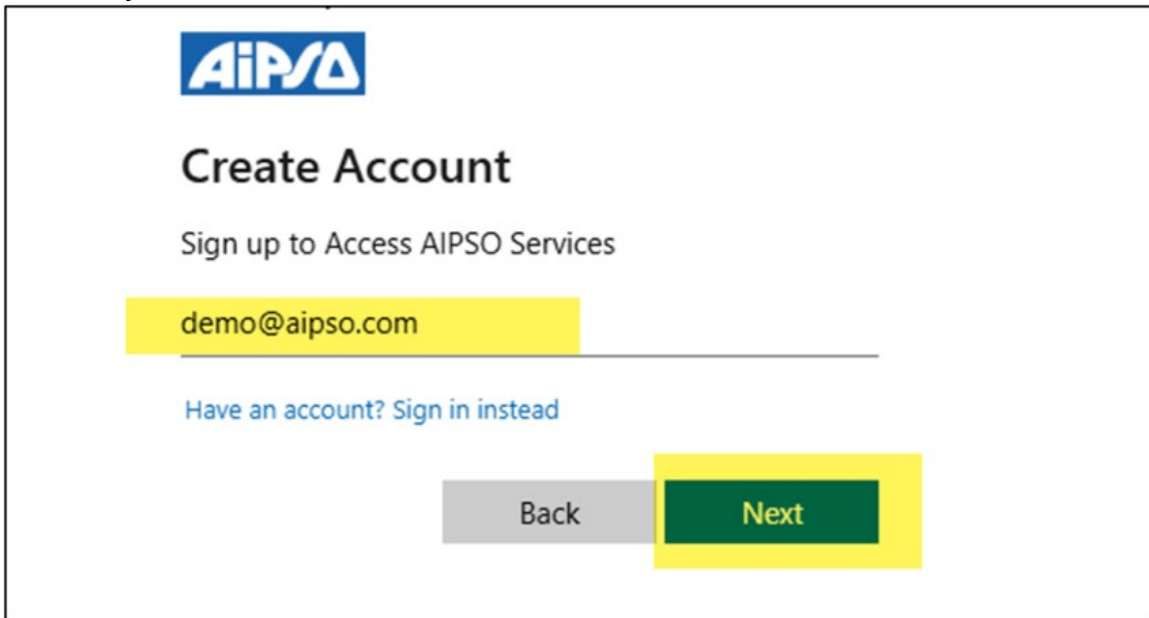
Sign in to access AIPSO Services

Email address

No account? Create one

Back Next

2. Enter your email address and click **Next**.



**AIPSO**

## Create Account

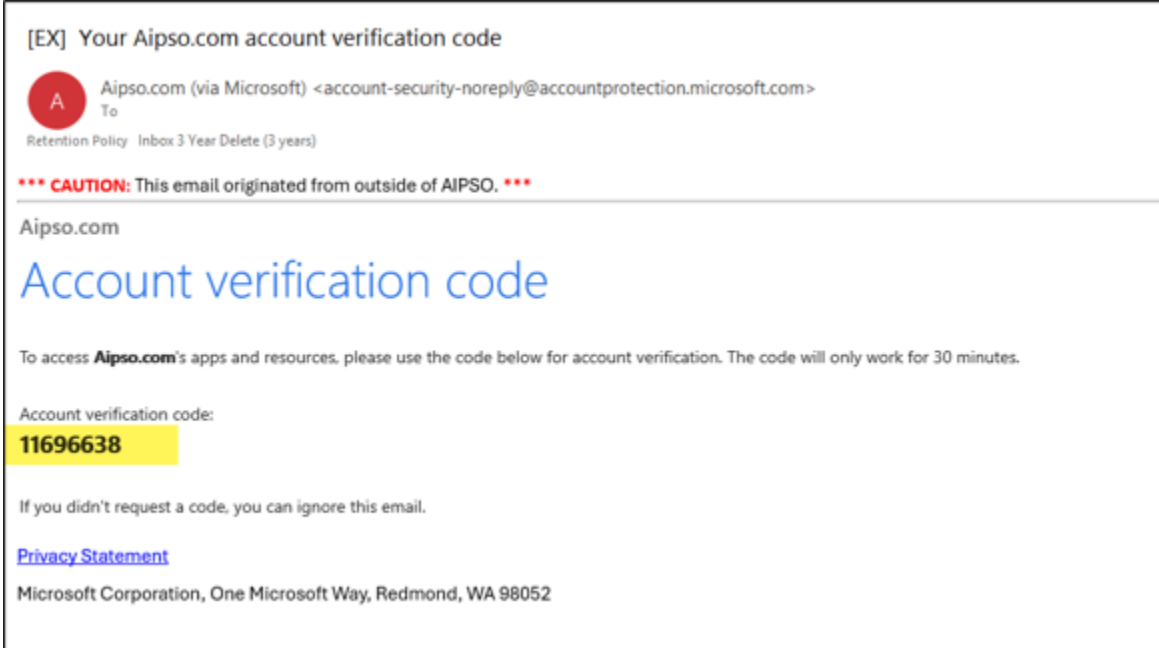
Sign up to Access AIPSO Services

demo@aipso.com

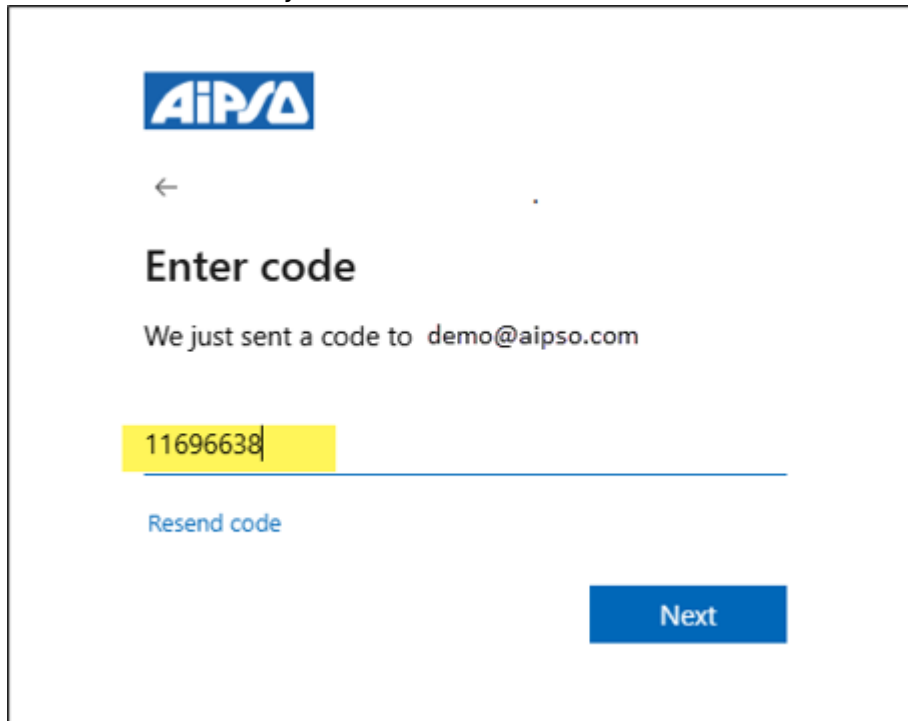
Have an account? Sign in instead

Back Next

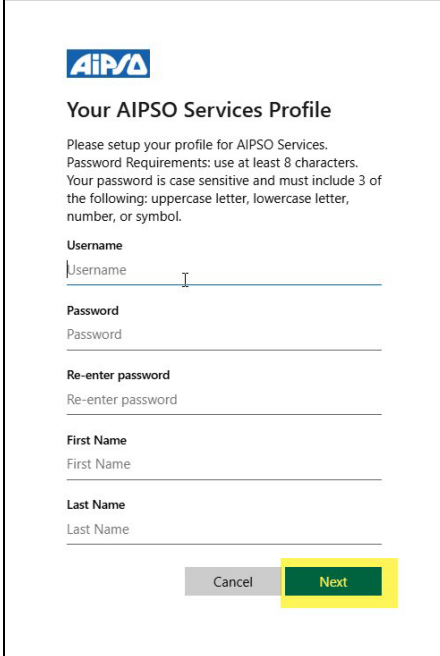
3. You will receive an email from Aipso.com (via Microsoft) that appears similar to this



4. Enter the code sent to your email on the screen and click **Next**.

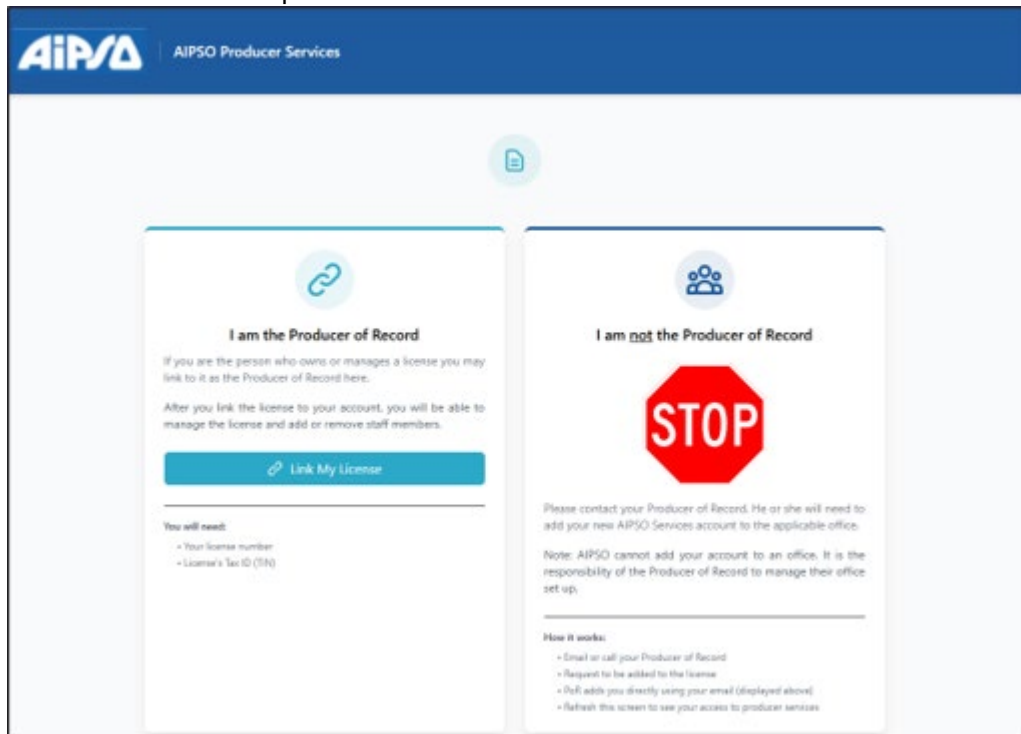


5. Set up your profile by entering all the information on the screen, then click **Next**.
  - Note: When creating your username it must be between 4- 32 characters, and must start and end with a letter or a number. Special characters are allowed, but you may not have more than one special character in a row.
  - When creating your password it must be at least 8 characters. Your password is case sensitive and must include 3 of the following: uppercase letter, lowercase letter, number or symbol



The screenshot shows a registration form titled "Your AIPSO Services Profile" with the AIPSO logo at the top. Below the title, there is a paragraph of instructions: "Please setup your profile for AIPSO Services. Password Requirements: use at least 8 characters. Your password is case sensitive and must include 3 of the following: uppercase letter, lowercase letter, number, or symbol." The form contains five input fields: "Username", "Password", "Re-enter password", "First Name", and "Last Name". At the bottom, there are two buttons: a grey "Cancel" button and a green "Next" button with a yellow highlight.

## 6. Account creation completed



### Troubleshooting: IF You Did not Receive an Email

- **Spam or Junk Folder:** Check your spam, junk, or promotions folder. Mark the email as “Not Spam” to ensure future delivery.
- **Incorrect Email Address:** Make sure you are logging in with the correct user credentials associated with this account.
- **Delayed Delivery:** Wait a few minutes. Some email providers may delay delivery.

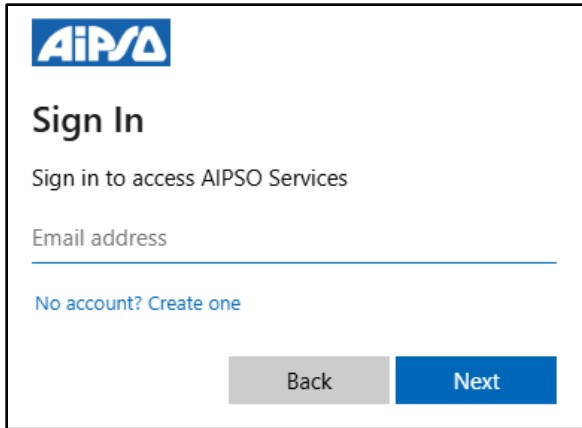
### Troubleshooting: I Received the Email but My Code Does Not Work

- Common Reasons Could Be:
  - **Typo or extra spaces:** Copy-paste errors or manual entry mistakes.
  - **Multiple requests:** If you requested multiple codes, only the most recent one will work.
  - **Expired code:** Please request a new code.

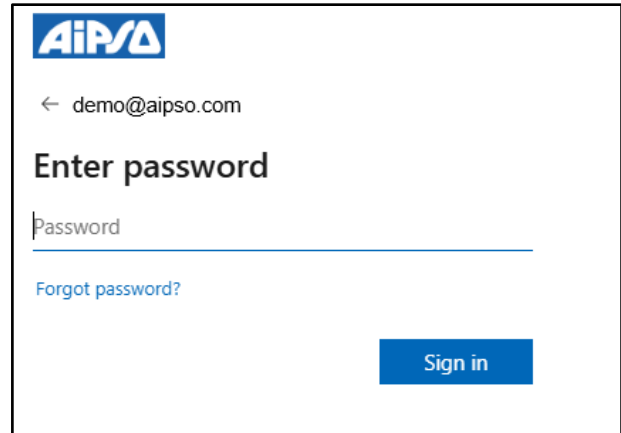
# LOG ON TO PORTAL

If you have not yet created an account, **click “No account? Create one”** to create an account before they log in.

1. Sign in

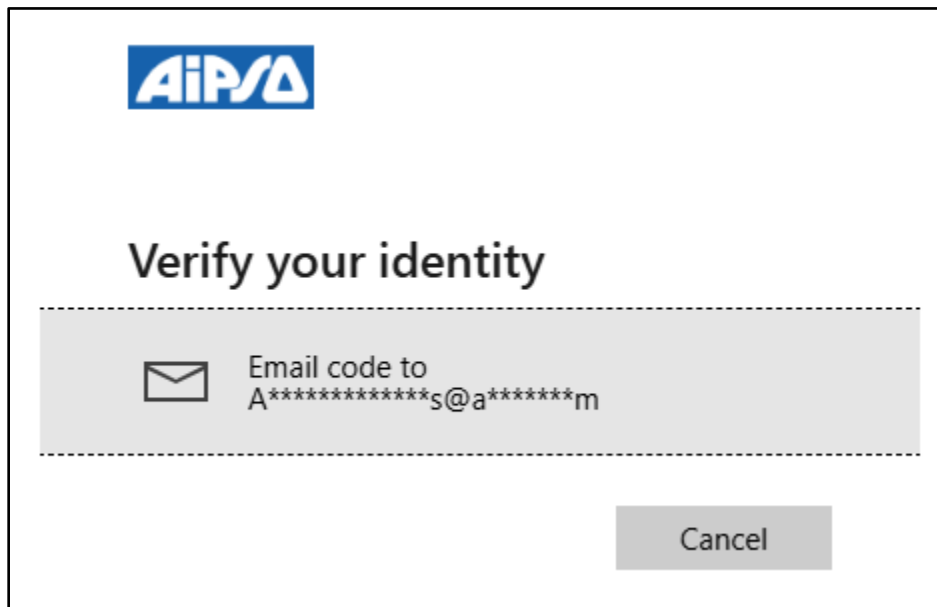


The screenshot shows the AIPSO Sign In page. At the top left is the AIPSO logo. Below it is the heading "Sign In" and the subtext "Sign in to access AIPSO Services". There is an input field for "Email address" with a blue underline. Below the input field is a link that says "No account? Create one". At the bottom right, there are two buttons: a grey "Back" button and a blue "Next" button.



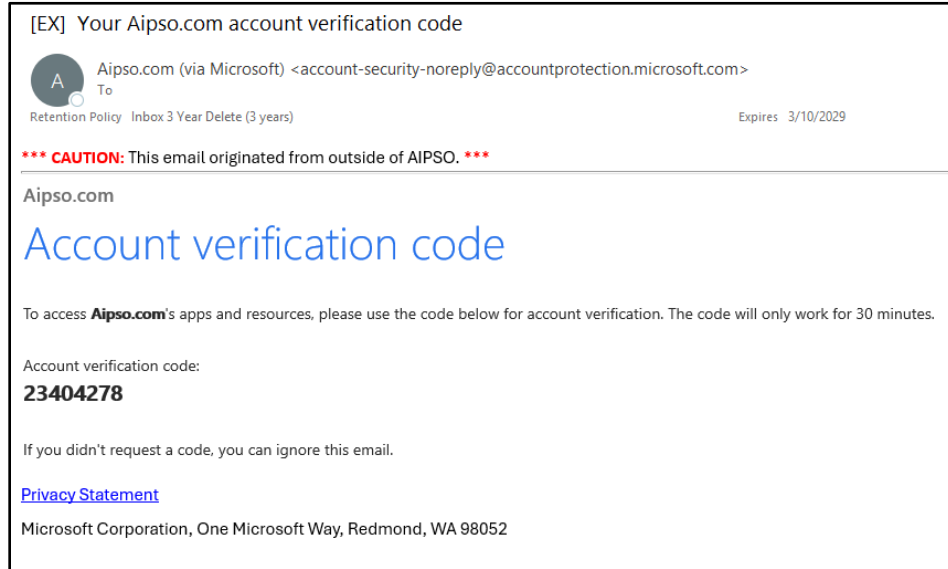
The screenshot shows the AIPSO Enter password page. At the top left is the AIPSO logo. Below it is a back arrow and the email address "demo@aipso.com". The heading is "Enter password". There is a password input field with a blue underline. Below the input field is a link that says "Forgot password?". At the bottom right, there is a blue "Sign in" button.

2. Verify your identity – click “Email code to...” in order to receive an email with your MFA code.

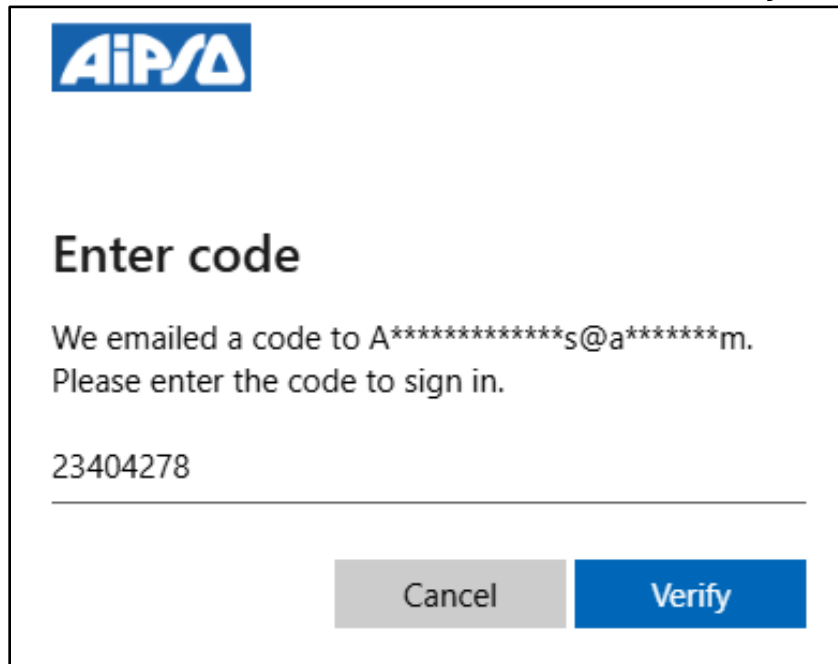


The screenshot shows the AIPSO Verify your identity page. At the top left is the AIPSO logo. The heading is "Verify your identity". Below the heading is a dashed line. Under the dashed line is a grey box containing an envelope icon and the text "Email code to A\*\*\*\*\*s@a\*\*\*\*\*m". At the bottom right, there is a grey "Cancel" button.

3. Check your email. You will receive an email from Aipso.com (via Microsoft) that appears similar to this:

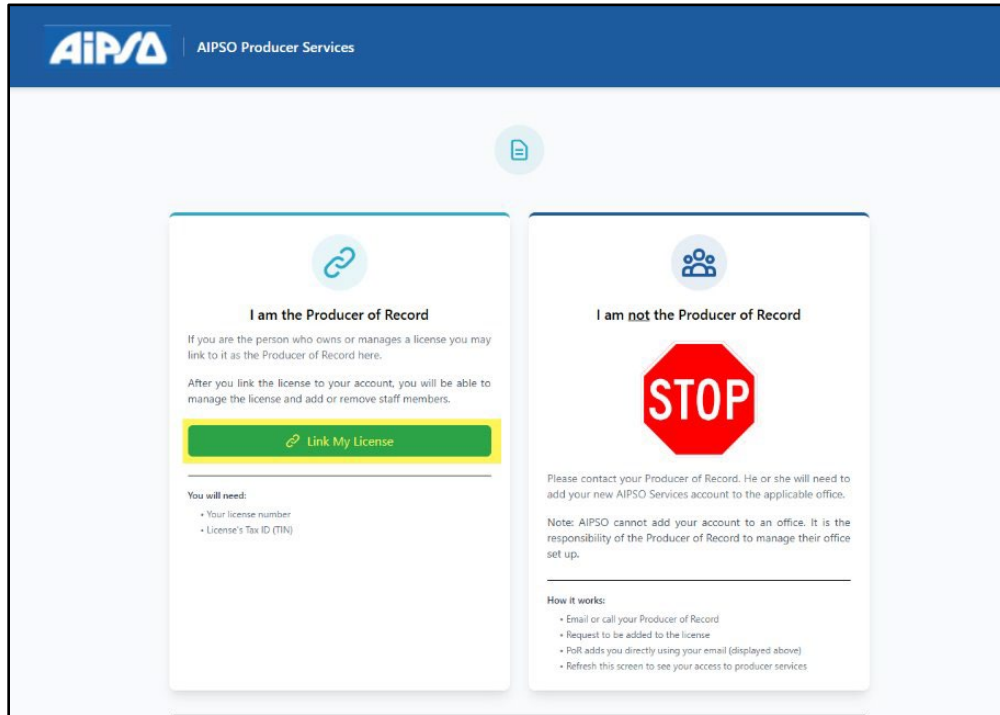


4. Enter the code from the email on the verification screen and **click Verify**



# LINK LICENSE(S) TO PRODUCER PORTAL LOGON

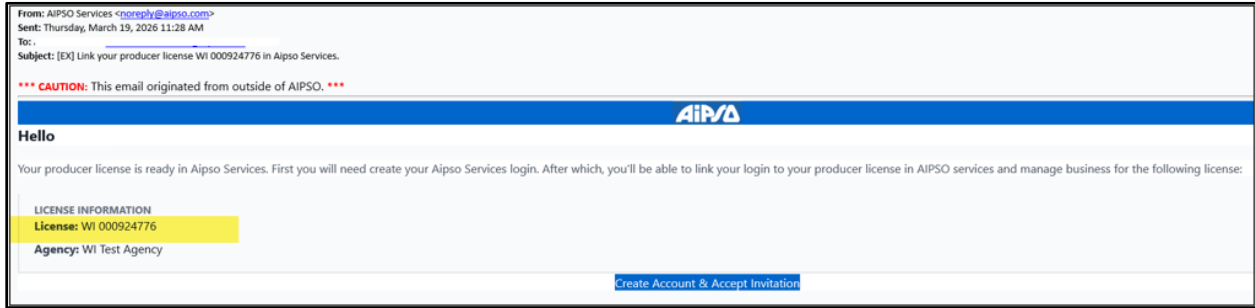
1. After you log in to the Producer Portal, if you do not have any Licenses linked to your logon you will see the following screen. **Click Link my License**



2. Enter your License Number, State, and Tax ID, then click **Verify and Continue**.

The screenshot shows the 'Link to My License' form in the AIPSO Producer Portal. The header is blue with the AIPSO logo, a 'Back to Menu' link, and the title 'Producer of Record Link'. The form is titled 'Link to My License' and includes the instruction: 'Enter your license information for which you are the Producer of Record. We will verify your identity using information on file.' The form contains three input fields: 'License Number (enter exactly as shown in invite email or on EASI applications)' with a placeholder 'e.g., 9247776', 'License State' with a dropdown menu showing 'Select a state', and 'Tax ID (SSN or TIN)' with a placeholder 'XXX-XX-XXXX or XX-XXXXXXX'. Below the input fields, there is a note: 'Enter your Social Security Number (SSN) or Tax Identification Number (TIN)'. At the bottom of the form, there are two buttons: 'Cancel' and 'Verify and Continue'.

If you're unsure of your License Number, you can find it in your Producer Portal invitation email or on most applications under the Producer of Record section.



SECTION 1. PRODUCER OF RECORD		The producer of record must be licensed to transact automobile insurance in this state and authorized to transact business with the Plan			
Producer Last Name/Agency Name <b>CATEST</b>		Producer First Name <b>PRODUCER</b>		MI	
DBA Name					
Mailing Address <b>TEST ADDRESS AVENUE</b>		Ste./Apt. No.	City <b>TEST CITY</b>	State <b>CA</b>	Zip Code <b>90001</b>
Individual California Producer License No. <b>000924776</b>	NPN No.	Telephone No. <b>(123)456-7890</b>		Fax No. <b>(123)789-7890</b>	

- IF YOU HAVE **NOT** VALIDATED AN EMAIL IN EASI: Enter your existing EASi credentials to verify your identity, then **click Verify and Complete.**

Note: \*If you have already validated an email in EASi you will automatically skip this step.

**AIPSO**   ← Back to Menu   Producer of Record Link  

**Link to My License**

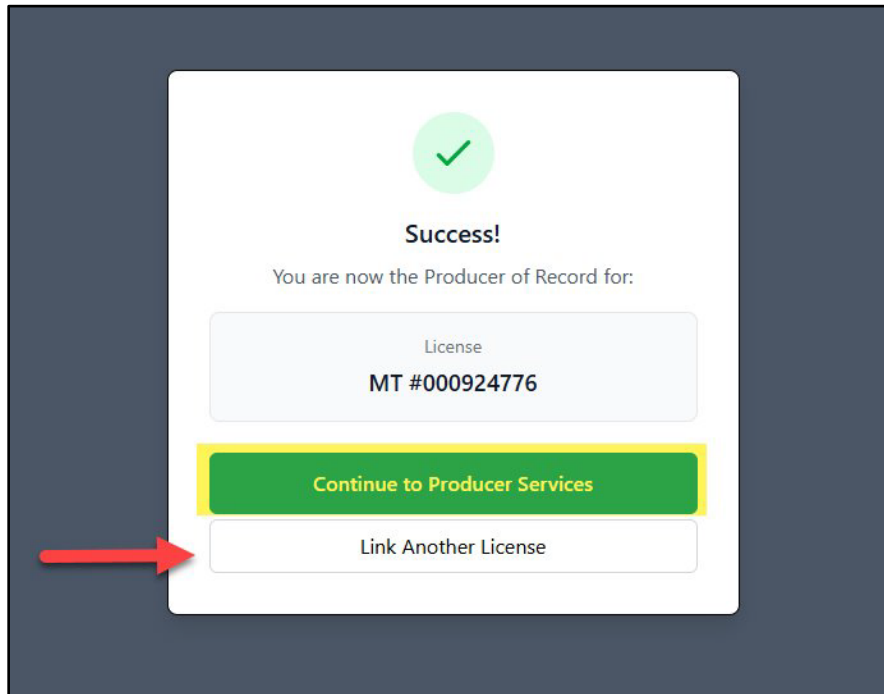
**Verify Your Identity**

The email address you used to create your AIPSO Services Account either does not match the email address you verified in EASI as belonging to the Producer of Record, or no email address was verified in EASI. You must enter your old EASI credentials to continue to link this license.

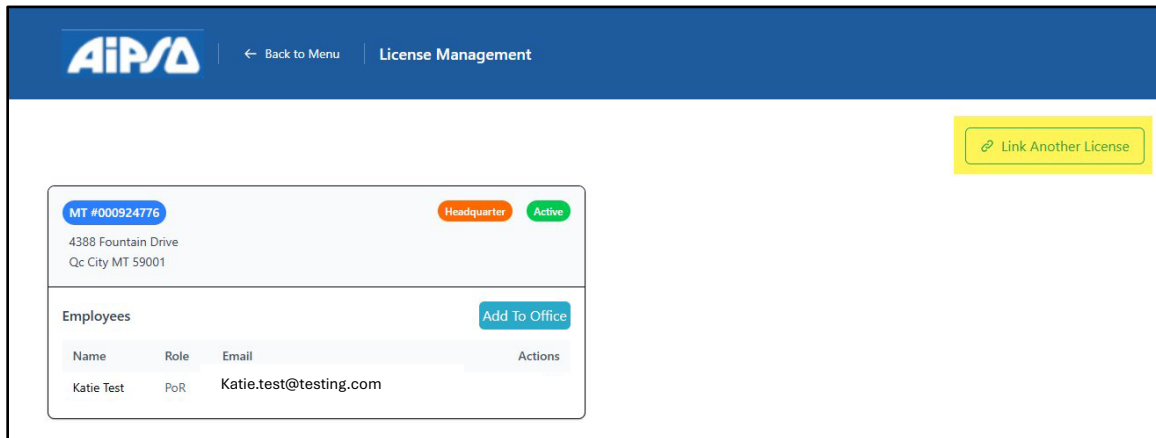
**EASI Username**

**EASI Password**

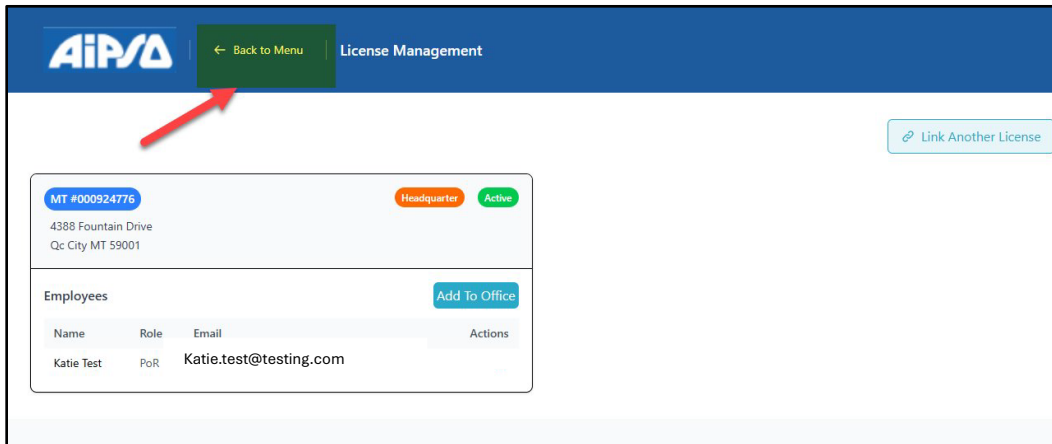
4. If you are successfully verified, you will see a success screen
- If you have another license that is registered or certified, that you would like to link you can do so by clicking Link Another license
  - If you do not need to link another license, select continue to producer services



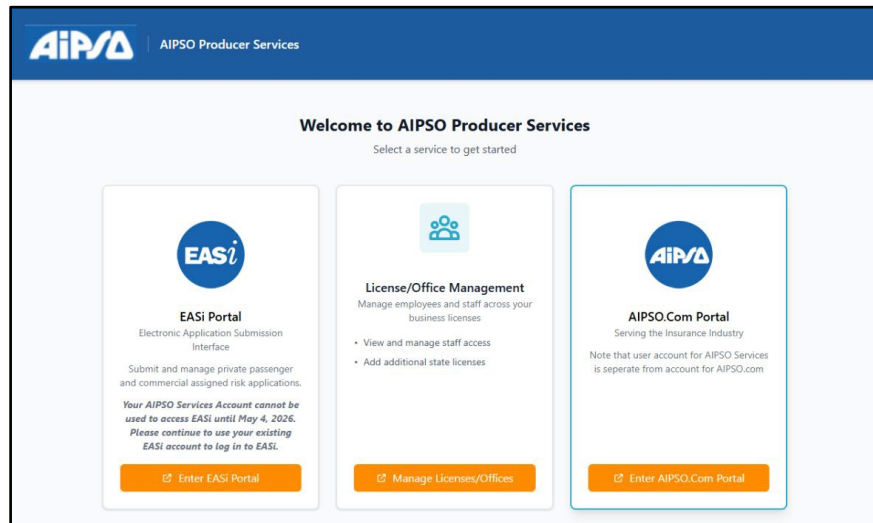
5. After selecting continue to producer Services you will now see your license listed
- a. You will have the option to link another license on this page if needed



6. Click back to menu to return to the homepage

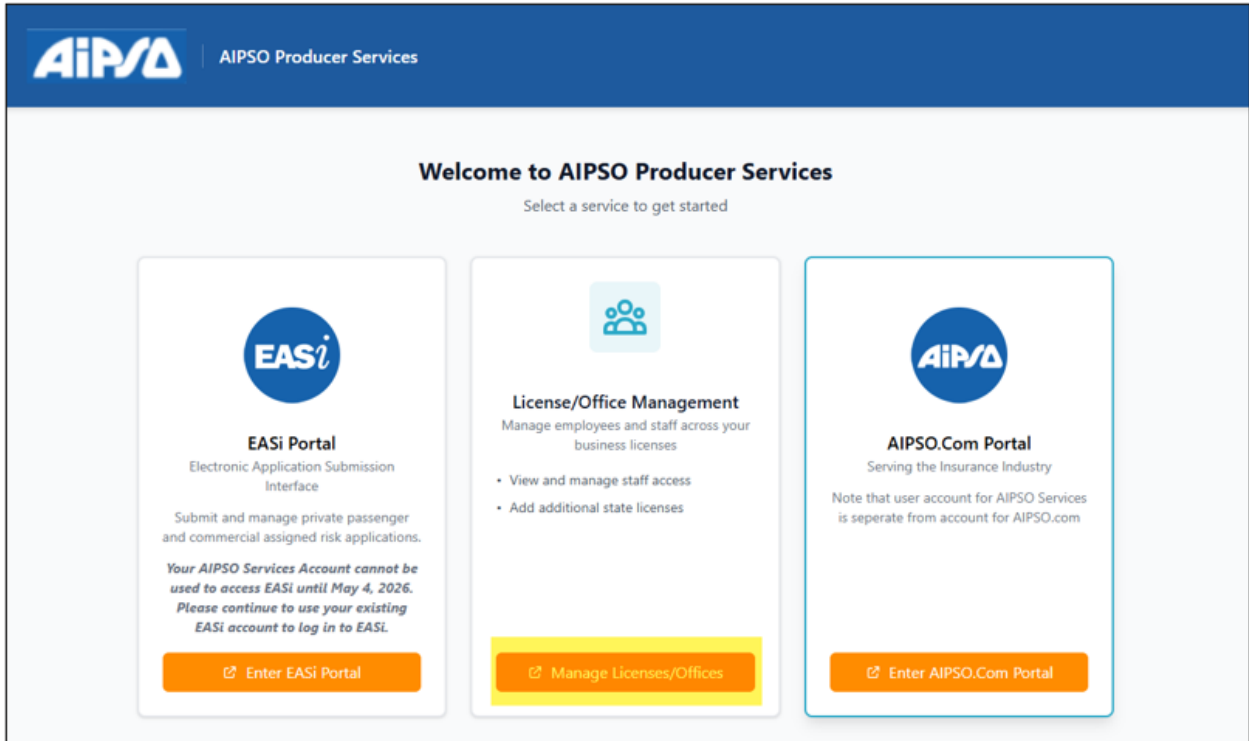


7. If you would like to add a new license or manage your office click License/Office Management

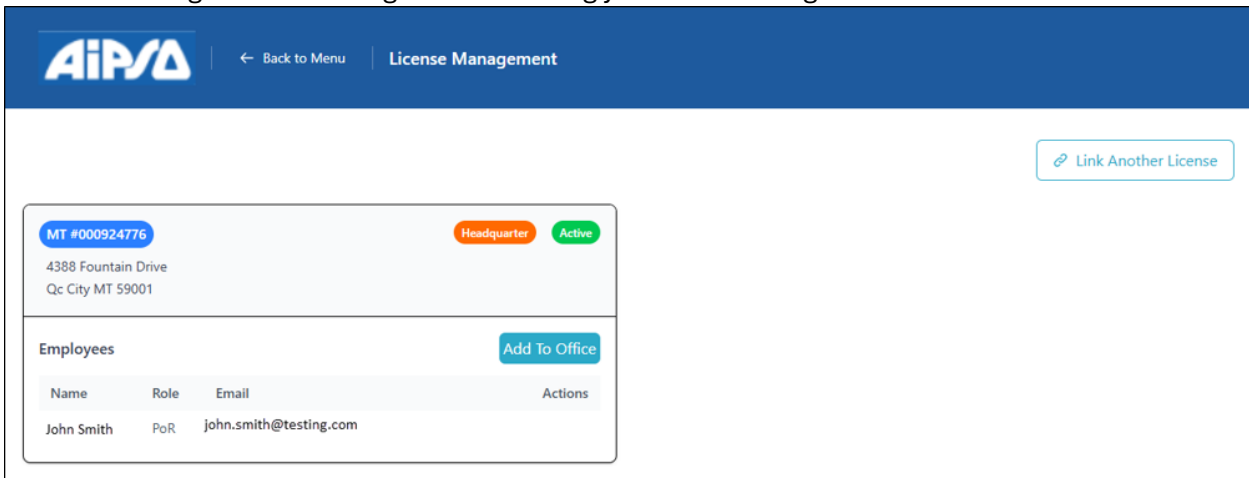


# SET UP YOUR OFFICE

1. Click the **License Management** tile

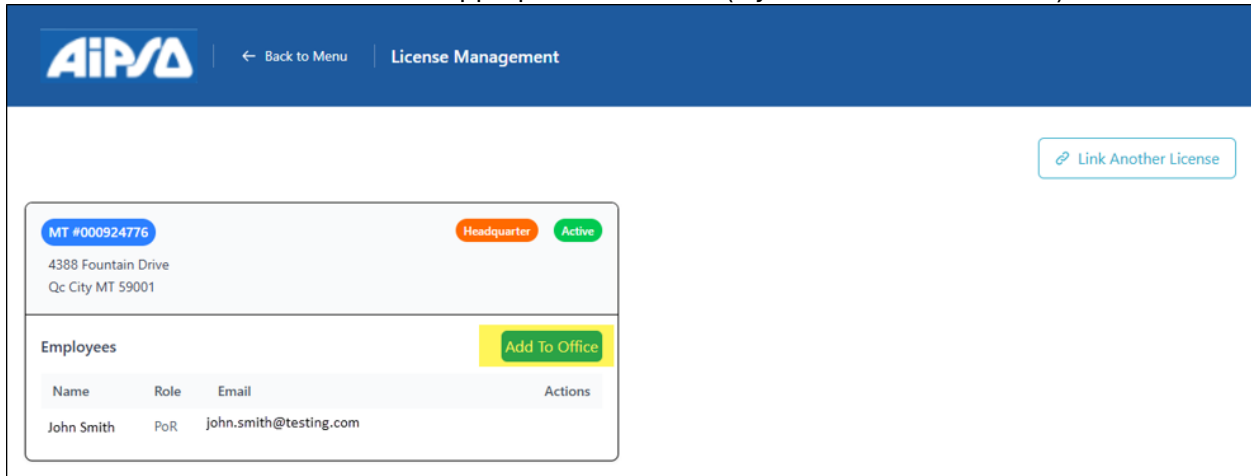


2. Clicking License Management will bring you to the Management screen:

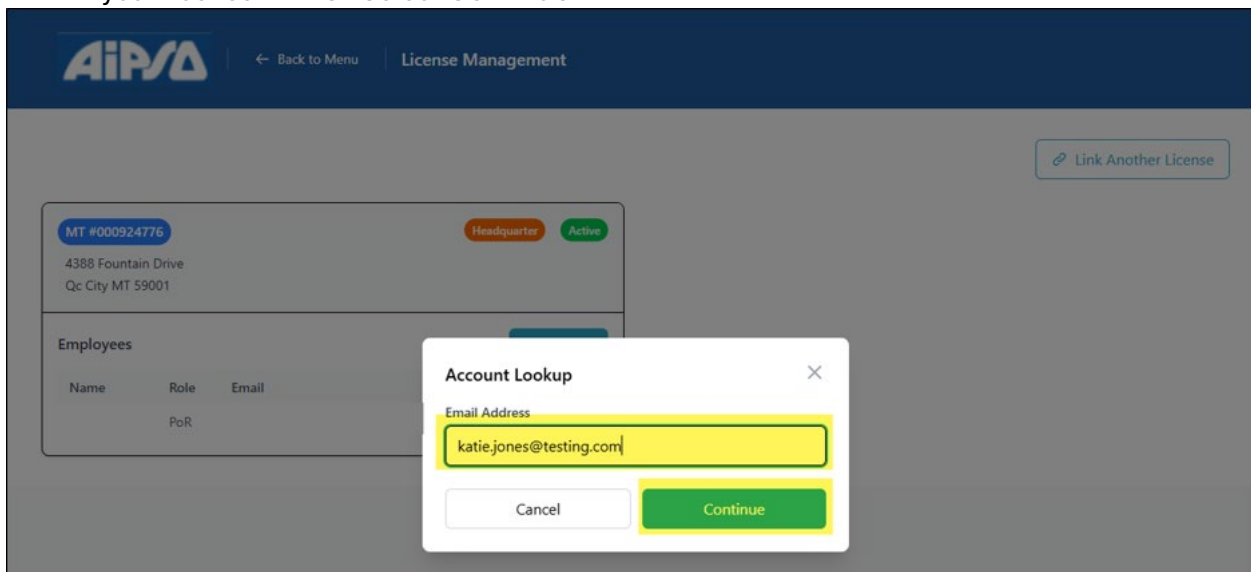


You may add Offices by linking another license. Click Link Another License and follow the appropriate [steps](#).

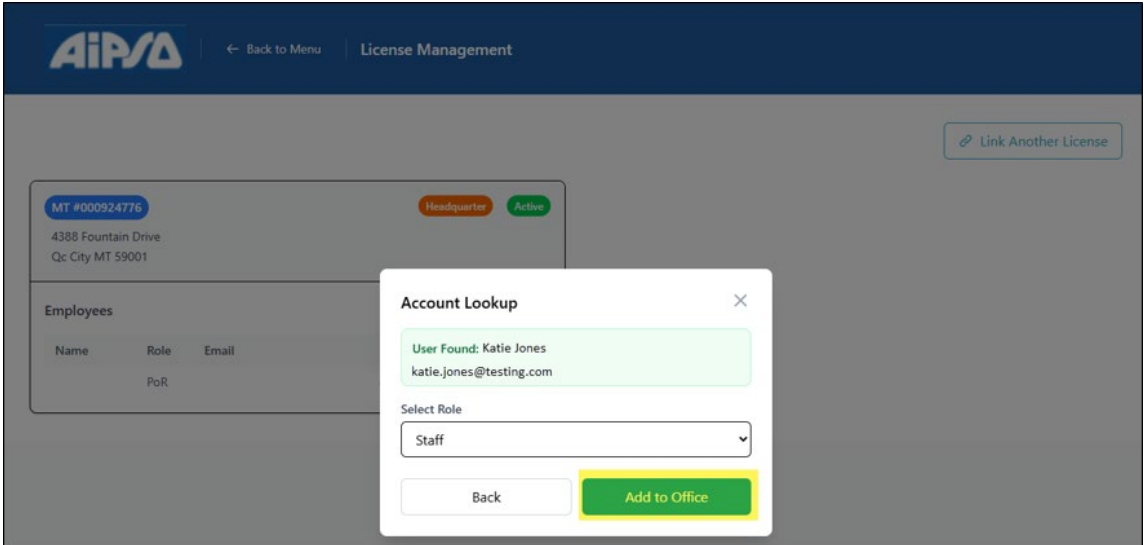
3. Click “Add To Office” in the appropriate Office tile (if you have more than one).



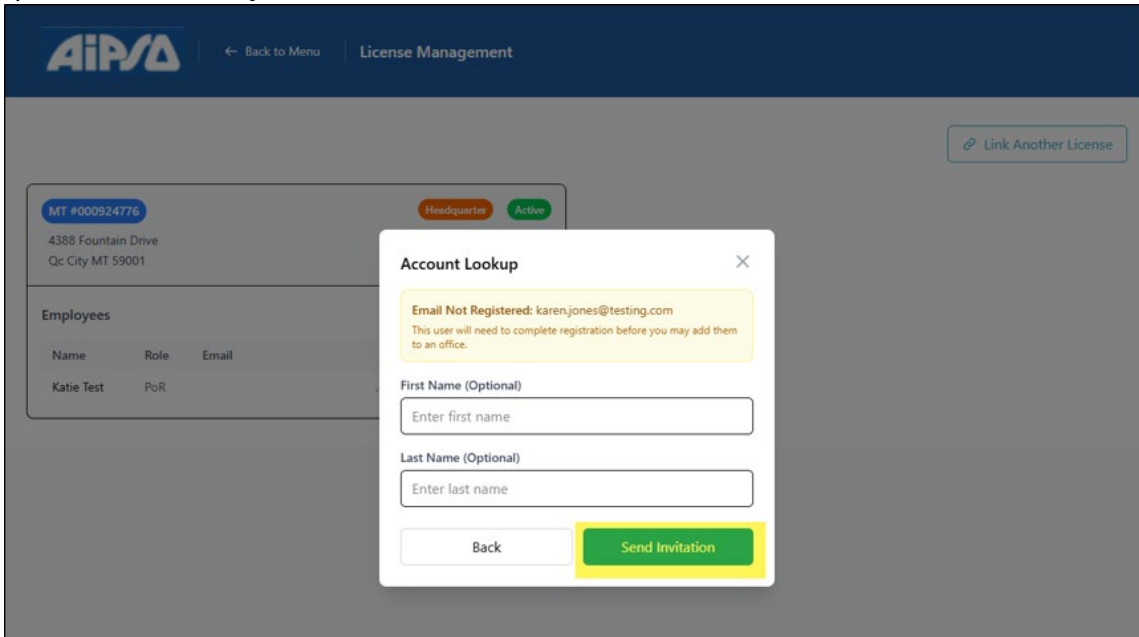
4. Enter the email address of the person you want to be able to add or view applications under your license in EASi. Select **Continue**



5. If the person already has a Producer Portal logon, they will be found in the database. **Click Add to office**



If the user does **not** yet have a Producer Portal logon, click Send Invite to prompt them to create one. Once they have created their account you will be able to return to Account look up and add them to your office.



6. Deleting a User: If you need to delete a staff member select the trash icon. Please note you cannot delete the Producer of Record

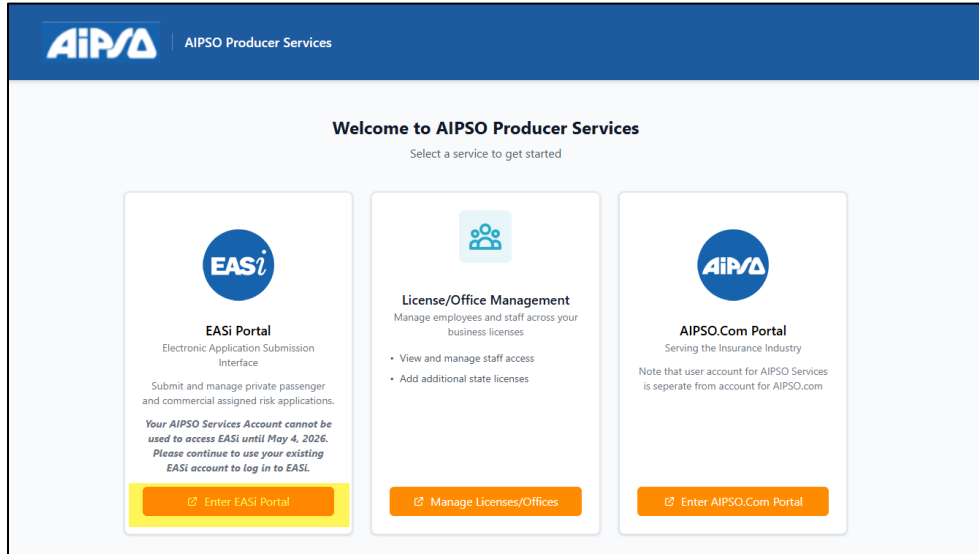
The screenshot shows the AIPSA License Management interface. At the top, there is a blue header with the AIPSA logo, a "Back to Menu" link, and the text "License Management". On the right side of the main content area, there is a button labeled "Link Another License".

The main content area features a license card for "MT #000924776". The card includes the address "4388 Fountain Drive, Qc City MT 59001" and two status tags: "Headquarter" (orange) and "Active" (green). Below the address, there is an "Employees" section with an "Add To Office" button. The employees are listed in a table:

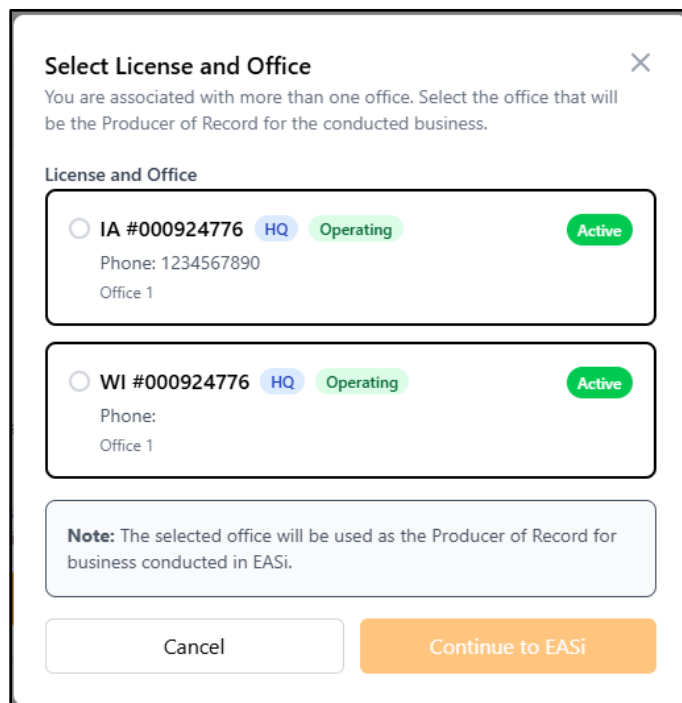
Name	Role	Email	Actions
Katie Jones	Staff	katie.jones@testing.com	
John Smith	PoR	john.smith@testing.com	

# THE EASI PORTAL

1. Click on the Enter EASi Portal tile



2. If you are linked to one office, you will be directed to EASi. If you have multiple offices, please Select the Office/License where you are going to create/view applications and click Continue to EASi.



3. You will now be logged into EASi and the EASi Home page will be displayed.