

# Getting Started with Online Agency Billing and Payments



As part of our mission, we are dedicated to making insurance simple. We're always looking for new ways to serve our customers so **we're excited to announce the launch of online agency billing in LIO's Payment Center** which brings you convenient digital payment management for all of the policies that you service.

**Please have your LIO Partner ID and at least one partner billing account number ready** to create your account and associate any accounts that you'd like to make payments for and then follow these steps to get started:

## **Step 1: Create a LIO user account if you don't already have one.**

- Go to the [sign-up page](#), enter your name, email address and Partner ID, and click "Create Account."
- Check your inbox for the verification email from LIO and click the "Activate Account" button. You will be directed back to LIO's portal to continue.

## **Step 2: Create a Payer profile and link your partner billing accounts.**

- [Log in to the Payment Center](#), or click on "Payment Center" in our portal's navigation bar if you are already signed in.
- The first time you access the Payment Center, you'll be prompted with questions by our payer "wizard." Enter your LIO partner billing account to link it to your profile.
- If you would like to link additional billing accounts, go to your [Account Management page](#) and click "Add an Account."
- **Note: Partner Billing Account Numbers can be found on your LIO agency statement(s).** If you manage multiple accounts, please note what partner billing account number is associated with each LIO Partner ID.

## **Step 3: Add a payment method.**

- Go to your [Payment Settings](#) and add your preferred payment method to use for future payments.
- We accept ACH and all major credit cards (A 3.5% fee applies to credit card transactions).

**That's it! Once you have your payer profile set up, you'll be able to administer your monthly agency statements in one unified interface:**

- [View and pay monthly statements](#) by partner billing account.
- Easily select which policies to pay and combine them into a single transaction.
- Apply available credits directly to selected policies.
- Download PDFs of monthly statements for your records and reconciliation.
- Review your payment history.
- Link additional Partner Billing Accounts in your [Account Management page](#).
- Add and remove payment methods in your [Payment Settings](#).

**We'd love to hear your feedback on this new experience!**

Please [fill out this short survey](#) to rate the payment process and share your thoughts.

Need help? Contact us at [service@lioinsurance.com](mailto:service@lioinsurance.com). Learn more at [lioinsurance.com/payments](https://lioinsurance.com/payments).