

CoreFiling Portal

User Access Guide

Issued: 18 August 2025

Contents

A. Summary	3
B. New user request for CoreFiling MFA	4
C. Existing Identity user request for CoreFiling MFA	9
D. CoreFiling Portal MFA activation process	10
E. CoreFiling user access request	13

A. Summary

Access to the CoreFiling Portal is a two-step process, requiring:

1. CoreFiling MFA approval (Security)
2. CoreFiling Portal user profiles

As part of Lloyd's on-going commitment to improve our customers' experience and further enhance security of applications and data, we have enabled Multi-Factor Authentication (MFA) via Identity for the CoreFiling application. This means that as a user of the CoreFiling Portal, you will need to have MFA setup in order to access the application.

This guide provides instructions on the steps to be completed, as follows:

To set up MFA approval:

New user request for CoreFiling MFA	Refer to section B
Existing Identity user request for CoreFiling MFA	Refer to section C
CoreFiling Portal MFA activation process	Refer to section D

To set up Portal user profiles:

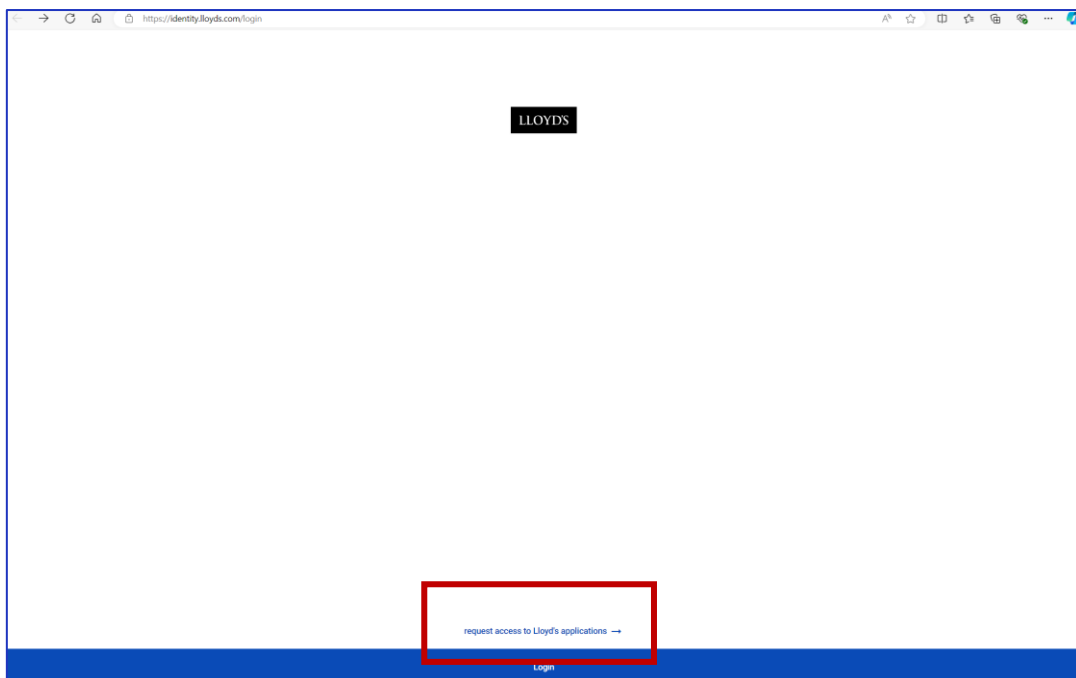
CoreFiling user access request	Refer to section E
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B. New user request for CoreFiling MFA

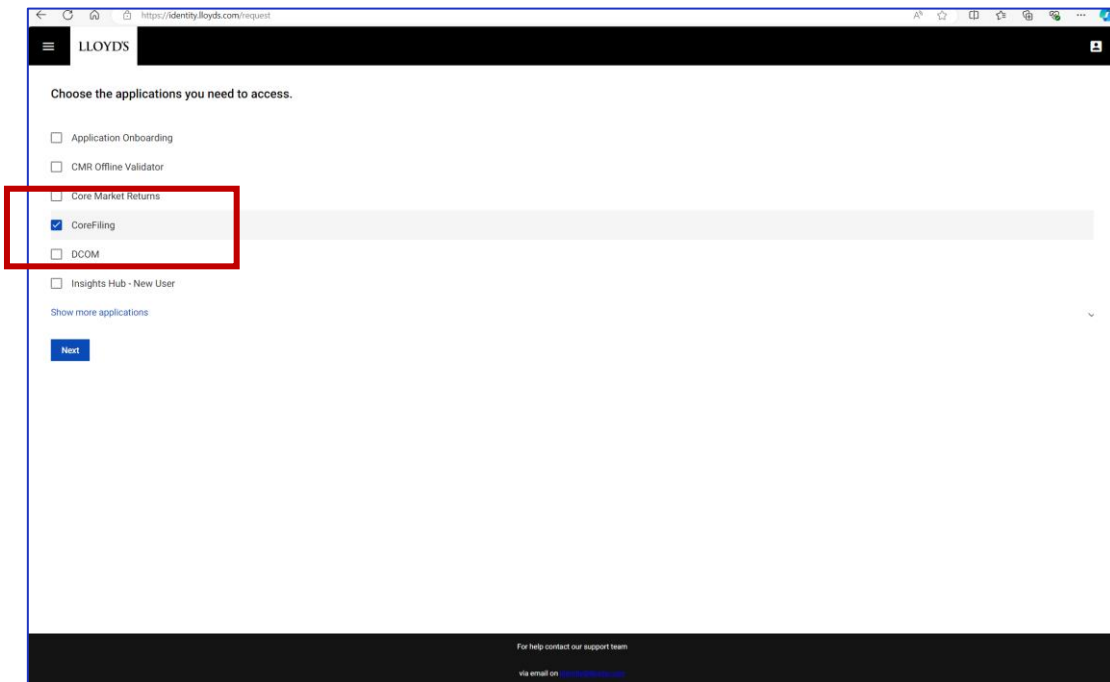
A new user can request their CoreFiling MFA access from their organisations Devolved Administrator (DA) via <https://identity.lloyds.com/>

Instructions:

1. Click on 'Request access to Lloyd's applications' from the link at the bottom of the screen

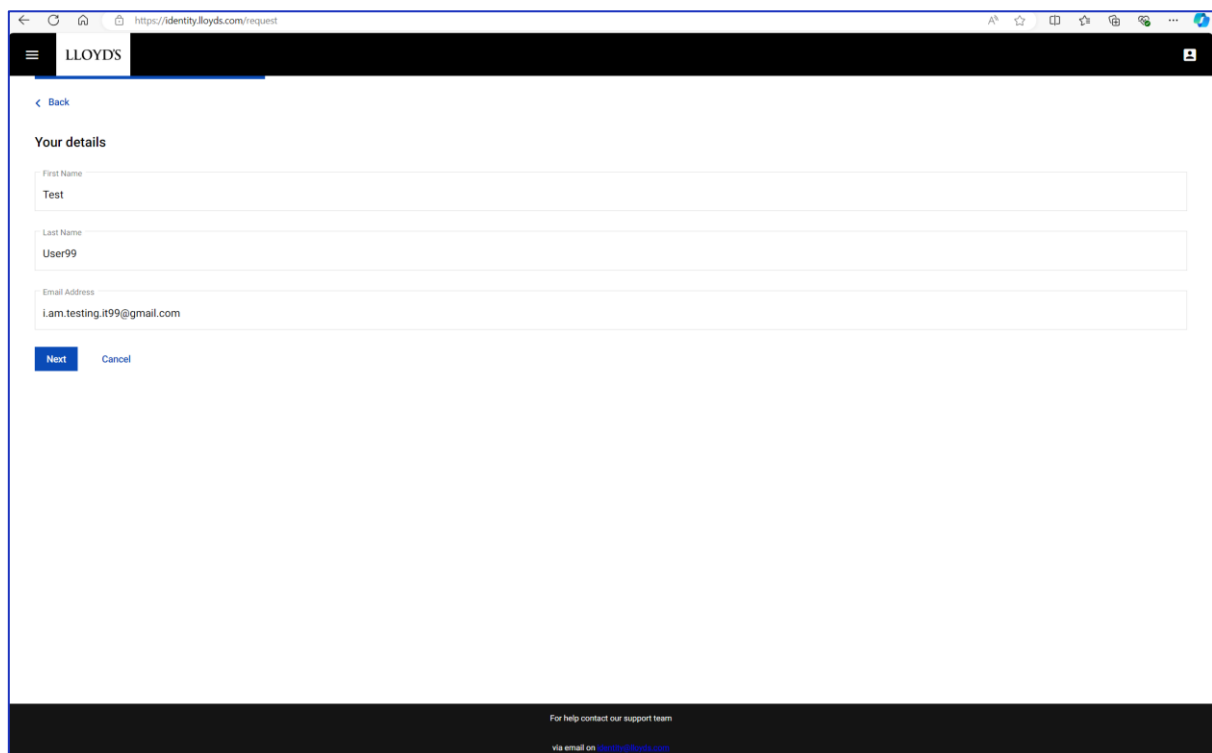


2. Select CoreFiling from the list and click Next



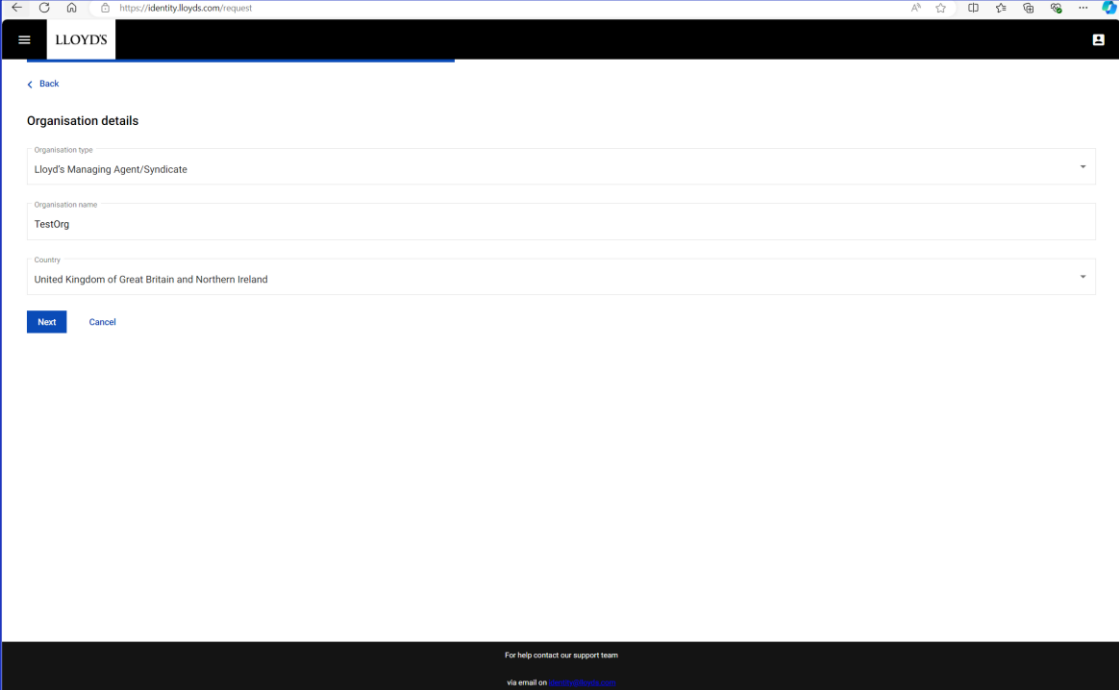
The screenshot shows a web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo and a user profile icon. Below the header, the text "Choose the applications you need to access." is displayed. A list of applications is shown with checkboxes: "Application Onboarding", "CMR Offline Validator", "Core Market Returns", "CoreFiling" (which is checked and highlighted with a red rectangle), and "DCOM". Below this list is a "Show more applications" link and a blue "Next" button. At the bottom of the page, there is a footer with the text "For help contact our support team" and "via email on identity@lloyds.com".

3. Enter your details as requested and click Next



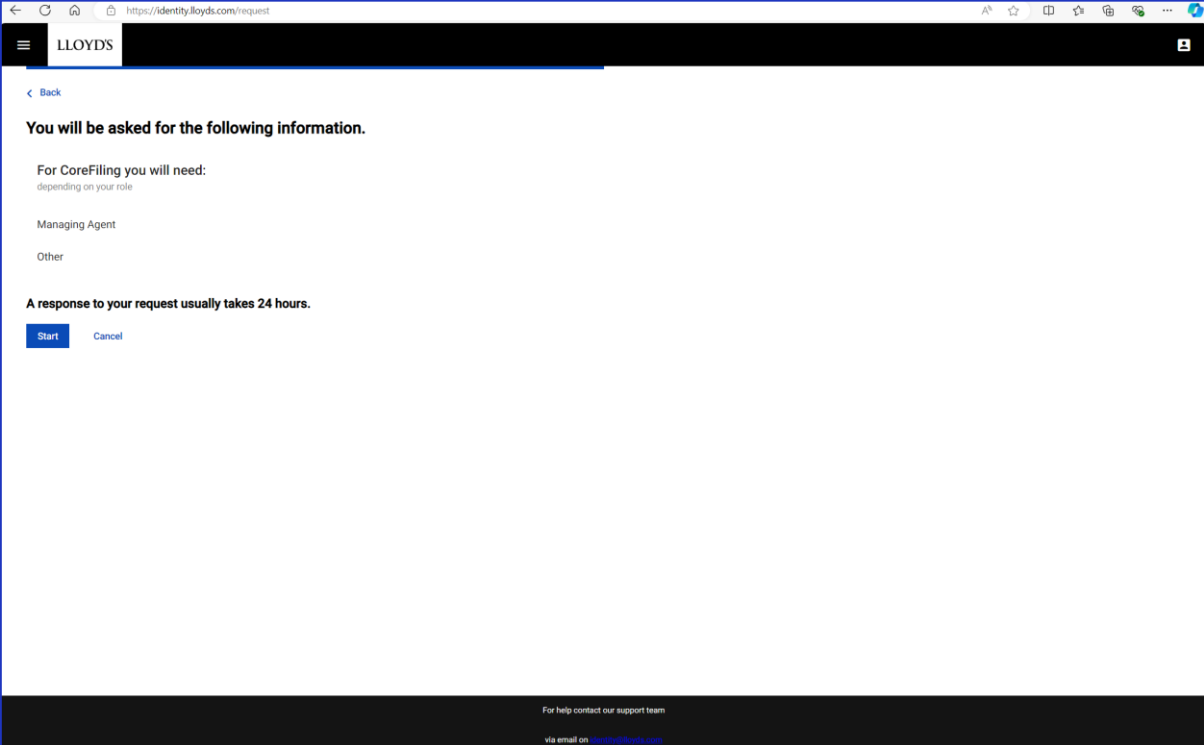
The screenshot shows a web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo and a user profile icon. Below the header, there is a "< Back" link. The section is titled "Your details". It contains three input fields: "First Name" with the value "Test", "Last Name" with the value "User99", and "Email Address" with the value "i.am.testing.it99@gmail.com". Below these fields are two buttons: a blue "Next" button and a "Cancel" button. At the bottom of the page, there is a footer with the text "For help contact our support team" and "via email on identity@lloyds.com".

4. Select Organisation Type (usually Lloyd's Managing Agent/Syndicate) and specify your Organisation name and Country then click Next



The screenshot shows a web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo and a hamburger menu icon. Below the header, there is a blue link for "< Back". The main section is titled "Organisation details" and contains three input fields: "Organisation type" with a dropdown menu showing "Lloyd's Managing Agent/Syndicate", "Organisation name" with the text "TestOrg", and "Country" with a dropdown menu showing "United Kingdom of Great Britain and Northern Ireland". At the bottom of the form, there are two buttons: "Next" (highlighted in blue) and "Cancel". A footer bar at the bottom of the page contains the text "For help contact our support team" and "via email on identity@lloyds.com".

5. A summary screen is shown, click Start



The screenshot shows the same web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo and a hamburger menu icon. Below the header, there is a blue link for "< Back". The main section is titled "You will be asked for the following information." and contains the following text: "For CoreFiling you will need: depending on your role", "Managing Agent", "Other", and "A response to your request usually takes 24 hours." At the bottom of the form, there are two buttons: "Start" (highlighted in blue) and "Cancel". A footer bar at the bottom of the page contains the text "For help contact our support team" and "via email on identity@lloyds.com".

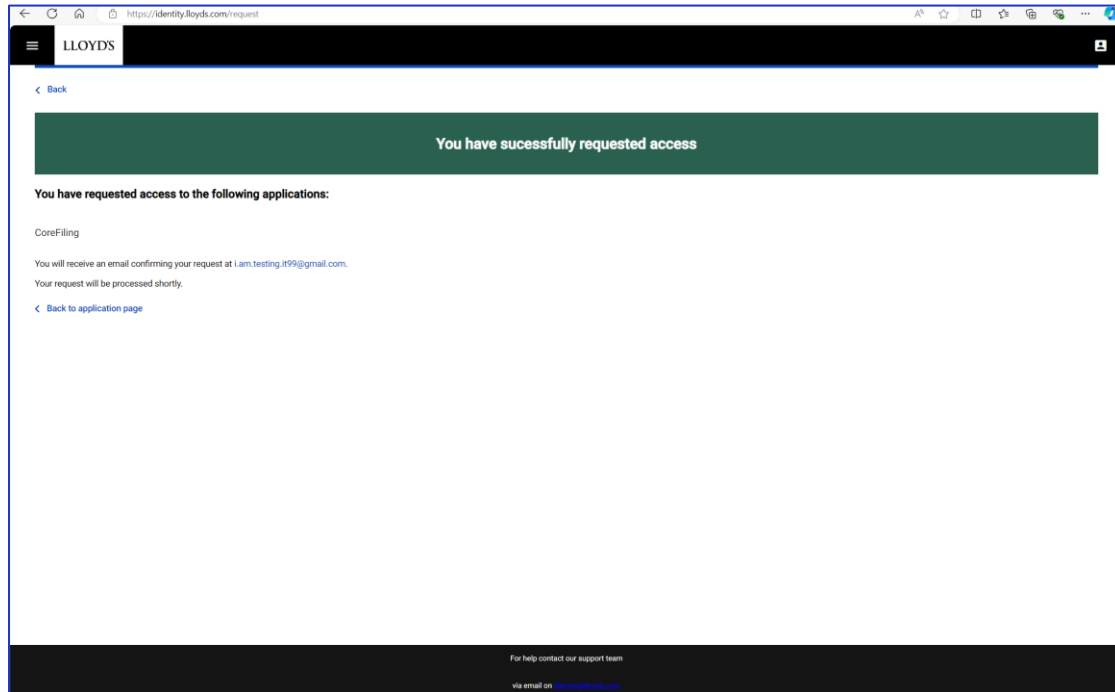
6. Select Managing Agent from the dropdown menu and click Next

The screenshot shows a web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo. Below the header, there is a blue link for '< Back'. The main heading is 'For access to CoreFiling'. A sub-heading says 'Please select only one of the following:'. There are two input fields: 'Managing Agent' with a dropdown menu showing '0021A - Talbot Underwriting Ltd', and 'Other'. At the bottom of the form, there are two buttons: 'Next' (in blue) and 'Cancel'.

7. You are presented with a summary screen where you can check and edit your information, after which click Send Request

The screenshot shows a web browser window with the URL <https://identity.lloyds.com/request>. The page has a black header with the LLOYDS logo. Below the header, there is a blue link for '< Back'. The main heading is 'Review your information before sending the request.' There are three sections: 'Your details' with fields for Name (Test User99) and Email (I.am.testing.it99@gmail.com), 'Your organisation' with fields for Type (Lloyd's Managing Agent/Syndicate), Name (TestOrg), and Country (United Kingdom of Great Britain and Northern Ireland), and 'For CoreFiling' with a dropdown menu showing 'Managing Agent' and '0021A - Talbot Underwriting Ltd'. Each section has an 'Edit' or 'Change' link. At the bottom of the form, there are two buttons: 'Send Request' (in blue) and 'Cancel'.

8. You will then see a confirmation screen that the DA has received your request. This will be reviewed and approved accordingly.



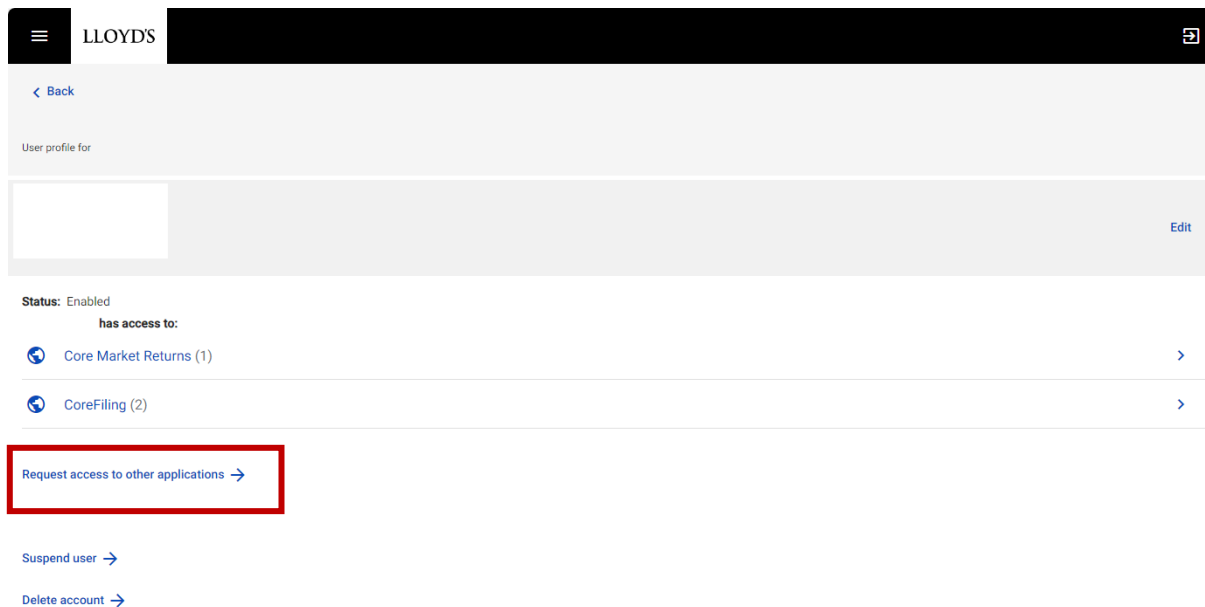
9. As confirmation that your user MFA access has been approved, you will receive three emails from donotreply@lloyds.com
- Two of which you will need to action:
 - i. Confirm your account by clicking link shown in the e-mail
 - ii. Reset your password
 - An information only email just confirming your MFA access request.
10. You will also receive a 4th email from donotreply@lloyds.com once your access request has been approved by the DA.

C. Existing Identity user request for CoreFiling MFA

If you already have access to the Lloyd's applications via 'Identity', you will need to add the CoreFiling application to your account.

To do this:

1. Log into your user account via Identity <https://identity.lloyds.com/>
2. Once logged in, select 'request access to other applications'



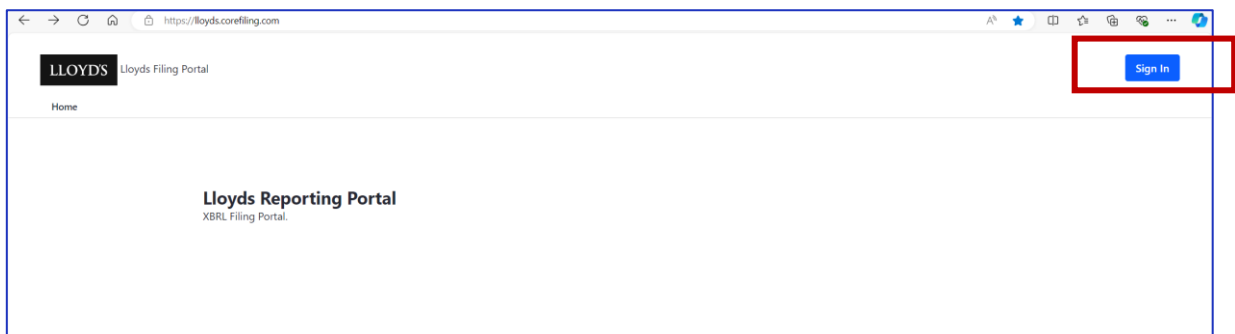
3. Follow the instructions, per the above from Section B 2-4.

D. CoreFiling Portal MFA activation process

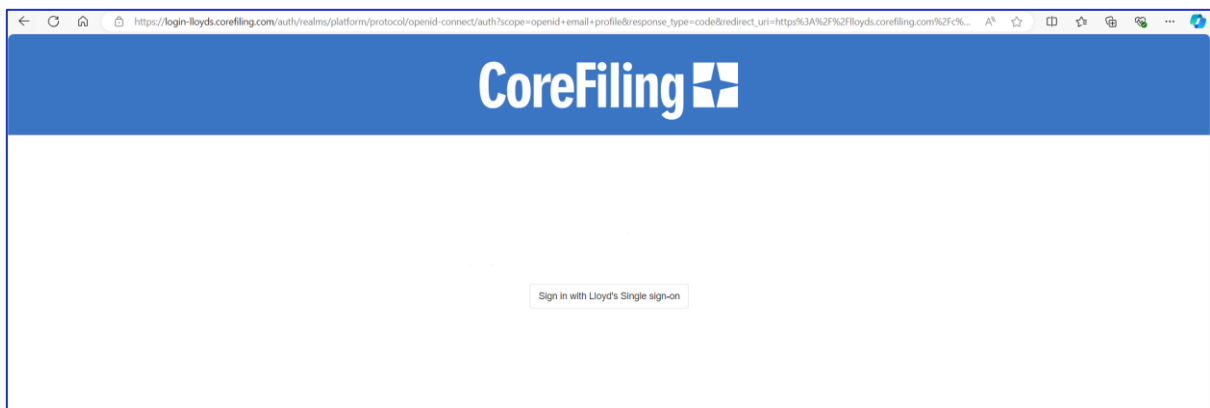
Once you have received your CoreFiling MFA approval from your DA (Section B above), you can now setup your access to the CoreFiling Portal.

Note: Without MFA being enabled, a user will not be able to login/access the CoreFiling Portal.

1. Go to the CoreFiling Portal: <https://lloyds.corefiling.com/> and click on Sign In at the top right of the page

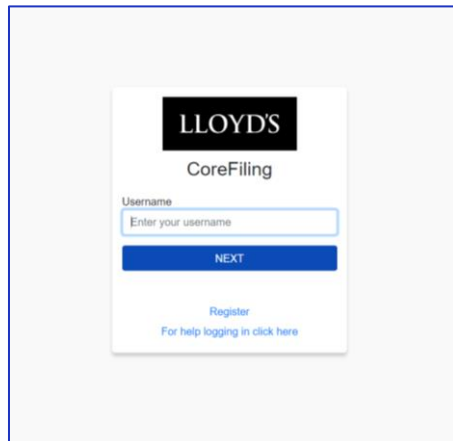


2. Click on Sign in with Lloyd's Single sign-on



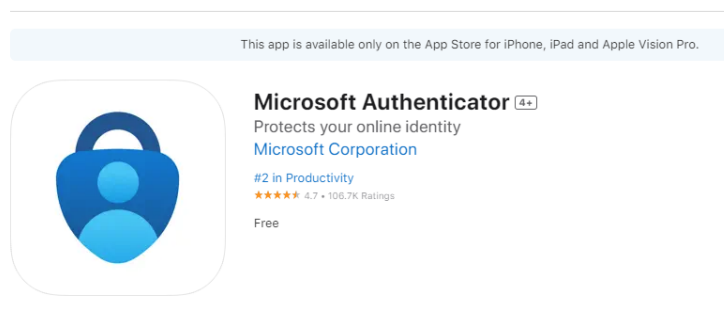
3. Enter your username and password when prompted

- Username = e-mail address
- Password = you should have received an e-mail when setting up your MFA, (you should have reset this)

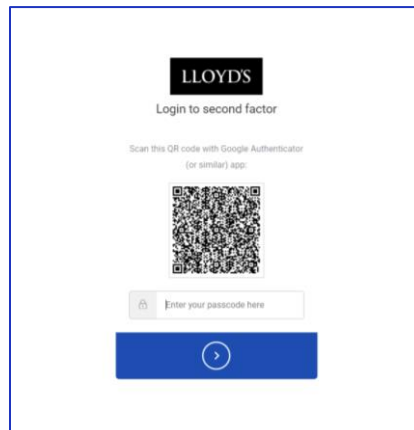


4. You will be presented with a screen for MFA (Multi Factor Authentication)

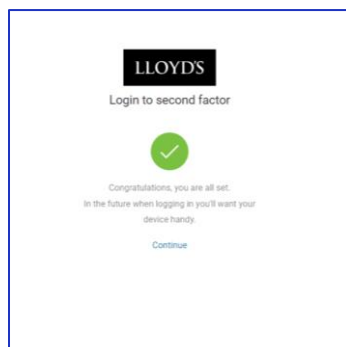
- To setup MFA with Lloyd's applications, download and/or open MS Authenticator on your phone and click on Verified IDs from the menu at the bottom of the screen



- Select 'Scan QR code' and scan the presented QR code from the app
- A new entry for **societyoflloyds** will appear in your Authenticator list along with your email address you registered with and a code that refreshes every 30 seconds
- Enter the code in the box shown on the screen
- You will be asked to record a backup code on the next screen which you should copy and keep somewhere secure
- Click the blue button at the bottom of the screen once you have entered the code



5. You will then see confirmation for MFA and once you click 'Continue' you will be redirected and can log directly into the CoreFiling Portal



E. CoreFiling user access request

The above process will only set up your CoreFiling MFA access and will **not** setup any access rights within CoreFiling Portal itself.

In order to ensure your CoreFiling Portal access is setup and obligations allocated to your accounts, please complete the 'Corefiling User Request' form and send to the Lloyd's Central Finance team: reporting.rationalisation@lloyds.com.