



How to Upload Insurance Certificates to Agent Office Portal

Each RE/MAX office is required to have an up-to-date Errors & Omissions Insurance policy and a General Liability Insurance policy on file. Follow these steps to learn how to easily upload your policies inside of the Agent and Office Portal within MAX/Center.

Look for the Agent Office Portal Tile in MAX/Center to get started!



1. Log into MAX/Center using your remax.net username and password
2. Navigate to the Agent Office Portal Tile within your Apps & Tools
3. Once inside the Agent Office Portal, click on 'Insurance Certificates' on the side navigation menu
4. If there are multiple offices within your brokerage, use the 'My Office(s)' dropdown to select which office you are uploading insurance certificates for
5. Before you upload a new document, make sure that it is saved to your computer with the correct filename format that includes your office name, office ID, insurance type, and year of policy

For example:

- [Professionals_1000423658_EO_2022](#) - use for Errors & Omissions (E&O) Insurance policy
- [Professionals_1000423658_GL_2022](#) - use for General Liability Insurance policy

6. Click 'Upload File'
7. Use the dropdowns to select the 'Document Type' and 'Insurance Type'
8. Then, upload your document by clicking the 'Choose File' button and selecting your file
9. Click 'Save' to save your Insurance Certificate



If you have any questions about uploading your insurance certificates in the Agent Office Portal, please reach out to product support