

# Agent Portal FAQs



## **If I had previous access to the legacy portal, will I still need to complete a First Time Portal Sign In?**

Yes, you will need to create new credentials to access the new broker portal.



## **How do I gain access to the New Broker Portal?**

Visit the [New Broker Portal](#) and click on "First Time Sign In".

You will be instructed to enter your agency principal's email that J.C. Taylor Insurance has on file. Once submitted, you will receive a no reply email from J.C. Taylor to set up your new credentials. After you create your credentials you will be prompted to complete a two factor authentication.



## **What can I do if I have previously logged into the New Broker Portal but forgot my username?**

On the login screen of the [New Broker Portal](#) click "Forgot Password". You will be instructed to enter your username, the email associated with the username will receive a security code to change to change your password.



## **How do I add agency personnel so they can access the new agent portal?**

On the [New Broker Portal](#) please click on Agency, scroll down to the bottom of the page to find "Add an Affiliate" button. The affiliate will receive a no reply email from J.C. Taylor to create a login.



## **Where do I find my commission statement(s)?**

Commission statements are currently not available in the new broker portal. If you need a commission statement sent to you, please email [support@jctaylor.com](mailto:support@jctaylor.com). We are working on adding this functionality in the near future.



## **When can I access a policy in the new broker portal versus the current environment of AAIS?**

Policies will be renewing in the new broker portal after April 1st 2024. The policy will need to be within 30 days of the renewal date. Any policies that previously renewed to the date of April 1st 2024 will still be able to be accessed in the Legacy portal.

If you cannot find a quote or policy or are experiencing technical issues, please email [support@jctaylor.com](mailto:support@jctaylor.com) or call 855.568.3528.