

Tipsheet

My UE: A New Interactive List of Claims

Use this interactive view to check the status of open UE claims, contact a Resolutions analyst assigned to a claim, or filter your clients' claims history for additional insights.

Viewing Your Clients' Claims

Click **1** "Claims" in the left navigation or your **2** Client List.

My UE

- Dashboard
- Client List
- UE Documents
- Manage Clients
- Client Institution: Client Institution Name Change
- ProResponse
- UE Policies
- Check Client RMPC Status
- View Claims **1**
- Download Loss Reports
- Client Team

Client List

Quickly navigate to digital tools such as the online renewal application, interactive claims lists, and clients' RMPC status using your client list below.

Search for a Client **Search**

Institution	Institution Rep	Policy	Product	Renewal	RMPC	Open Claims	View
Client Institution 1	Contact Name	XXX-XXX	CGL,ELL	07/01/2021		1	Claims Team 2
Client Institution 1	Contact Name	XXX-XXX	ELX,GLX	07/01/2021		0	Claims Team
Client Institution 2		XXX-XXX	CGL,ELL,FDL, GLX,IPL	07/01/2021	RMPC Complete	21	Claims Team
Client Institution 3	Contact Name	XXX-XXX	EFX,FOX,GLF	07/01/2021	Intake Form Submitted	0	Claims Team

Refine the list of claims using these options:

- 1 Search:** For a claim number or claimant
- 2 Filter:** By claim details
- 3 Select a view:** Open claims, a six-year history, or all UE claims

Dashboard

- Client List
- UE Documents
- Manage Clients
- Client Institution: Client Institution Name Change
- ProResponse
- Client UE Policies
- Download Loss Reports
- Check Client RMPC Status
- Claims **2**

To download your clients' claims history, use the Loss Reports tab. For assistance, email uesupport@ue.org or call (301) 907-4908 and press option 3.

View Claims

Search Claims **1** **Search**

Filter By

Date of Loss **2** Claims Status Line of Business Litigation Status

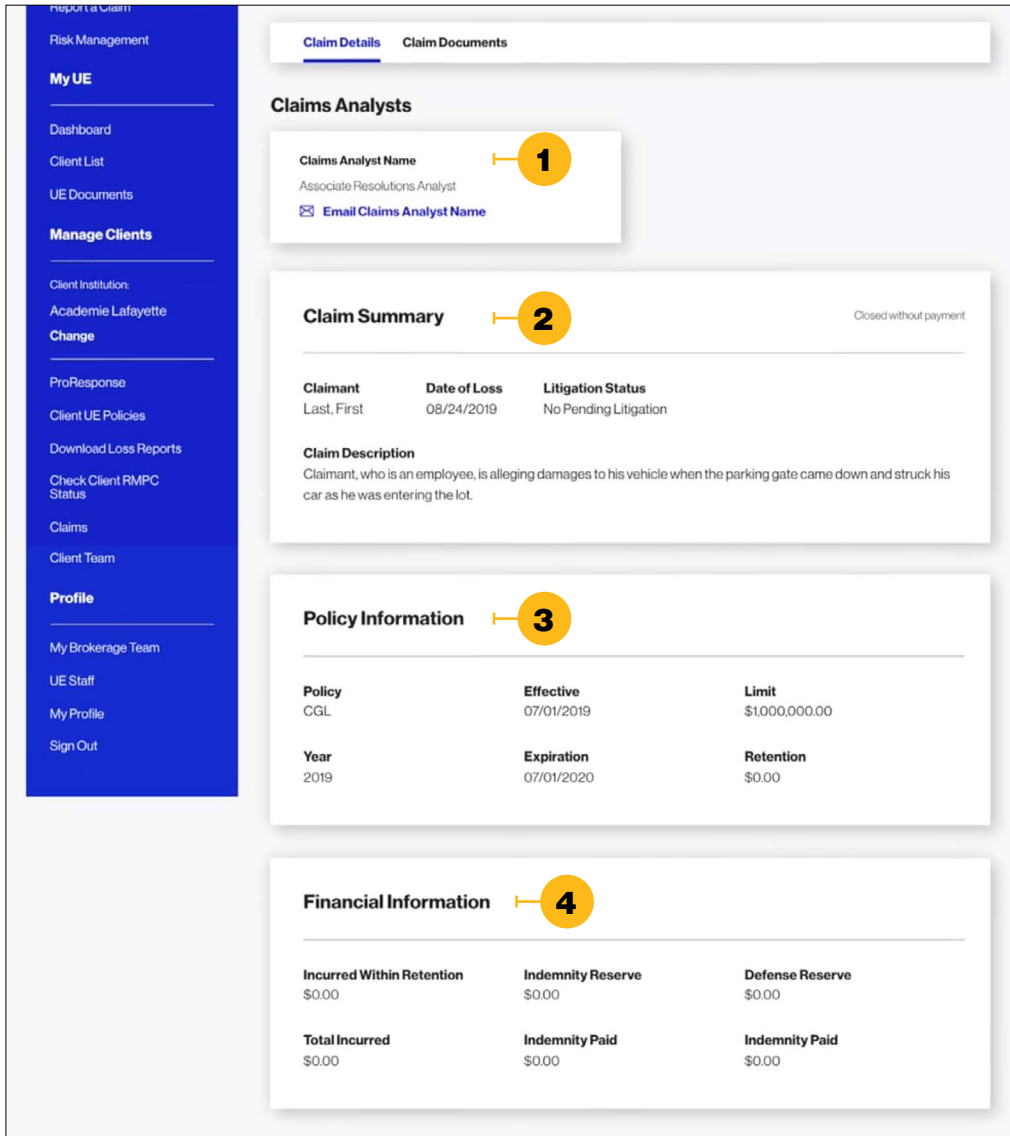
3 View Open Claims

Claim #	Claimant	Date of Loss	Status	Product	Litigation Status	Retention	Defense Paid	Total Incurred
XXXXX	LastName 1, First 1	10/09/2017	Closed without payment	CGL	No Pending Litigation	\$0	\$0	\$0
XXXXX	LastName 2, First 2	11/20/2017	Closed without payment	CGL	No Pending Litigation	\$0	\$0	\$0

Check the Status of a Claim

In the list of claims, click on a claim number to view additional information about that claim, including:

- 1 Contact information for the assigned claim analyst
- 2 Claim summary and status
- 3 Related policy information
- 4 Claim financial information



The screenshot displays the 'Claim Details' page in the United Educators system. The left-hand navigation menu includes sections for 'My UE', 'Manage Clients', and 'Profile'. The main content area is divided into four sections, each marked with a numbered callout:

- Claims Analysts:** Shows the assigned analyst as 'Associate Resolutions Analyst' with a link to 'Email Claims Analyst Name'.
- Claim Summary:** Displays the claim status as 'Closed without payment'. It includes a table with the following data:

Claimant	Date of Loss	Litigation Status
Last, First	08/24/2019	No Pending Litigation

 Below the table is a 'Claim Description' stating: 'Claimant, who is an employee, is alleging damages to his vehicle when the parking gate came down and struck his car as he was entering the lot.'
- Policy Information:** Displays a table with the following data:

Policy	Effective	Limit
CGL	07/01/2019	\$1,000,000.00
Year	Expiration	Retention
2019	07/01/2020	\$0.00
- Financial Information:** Displays a table with the following data:

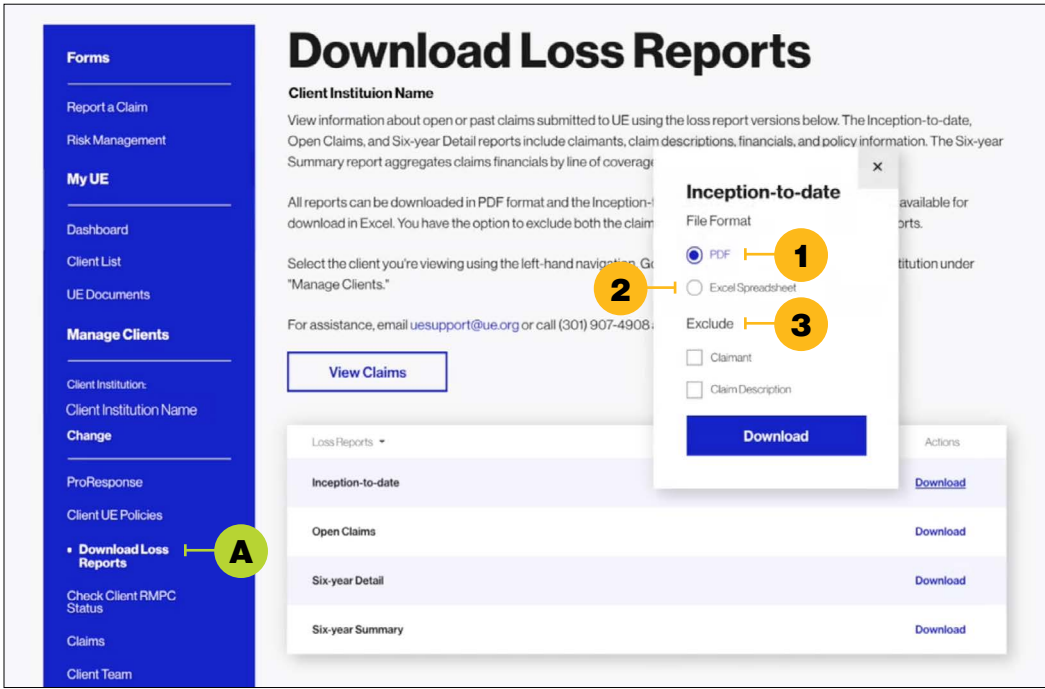
Incurred Within Retention	Indemnity Reserve	Defense Reserve
\$0.00	\$0.00	\$0.00
Total Incurred	Indemnity Paid	Indemnity Paid
\$0.00	\$0.00	\$0.00

Selecting a Client in My UE Digital Tools

Use the left-hand navigation to select the client you're viewing. Change the Client Institution under "Manage Clients."

Download Your Clients' Loss History

Click **A** "Download Loss Reports" in the left navigation.



Loss Reports	Actions
Inception-to-date	Download
Open Claims	Download
Six-year Detail	Download
Six-year Summary	Download

There are four loss reports available for download. These three versions include claimants, claim descriptions, financials, and policy information:

- Inception-to-Date
- Open Claims
- Six-Year Detail

The Six-Year Summary report aggregates claims financials by line of coverage and year.

You can download all reports in: **1** PDF format. The Inception-to-Date and Six-Year Detail reports are also available for download in **2** Excel. You also have the option to **3** exclude the claimant and claim description from the loss reports.

Selecting a Client in My UE Digital Tools

Use the left-hand navigation to select the client you're viewing. Change the Client Institution under "Manage Clients."