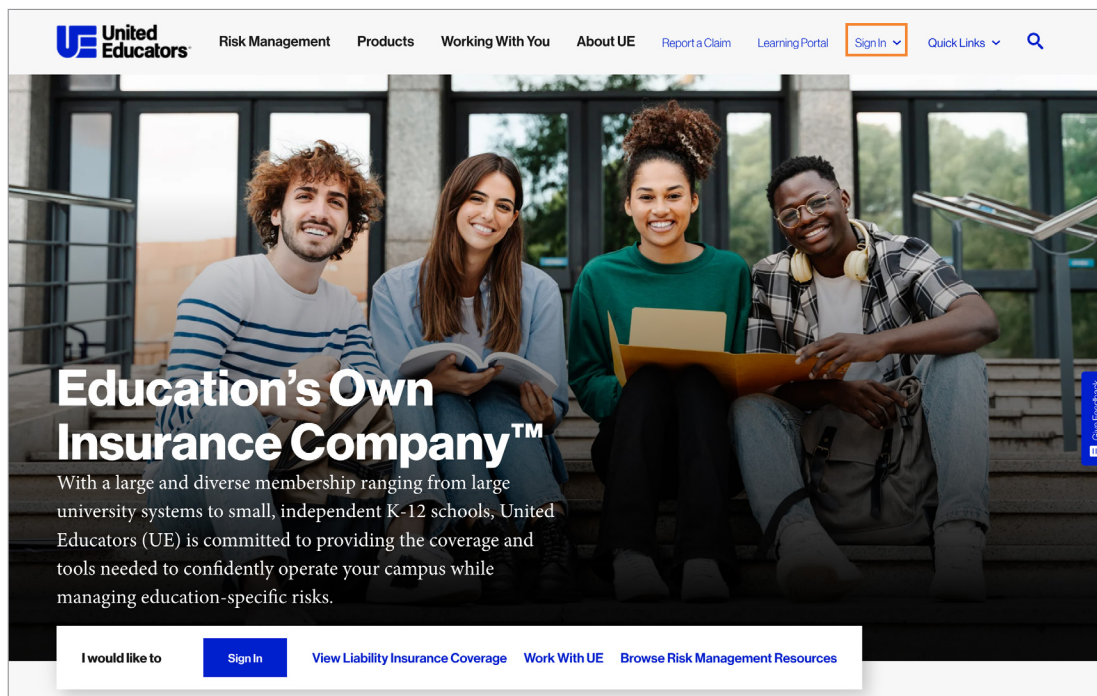


Guide to UE's Online Broker Contact Management Feature

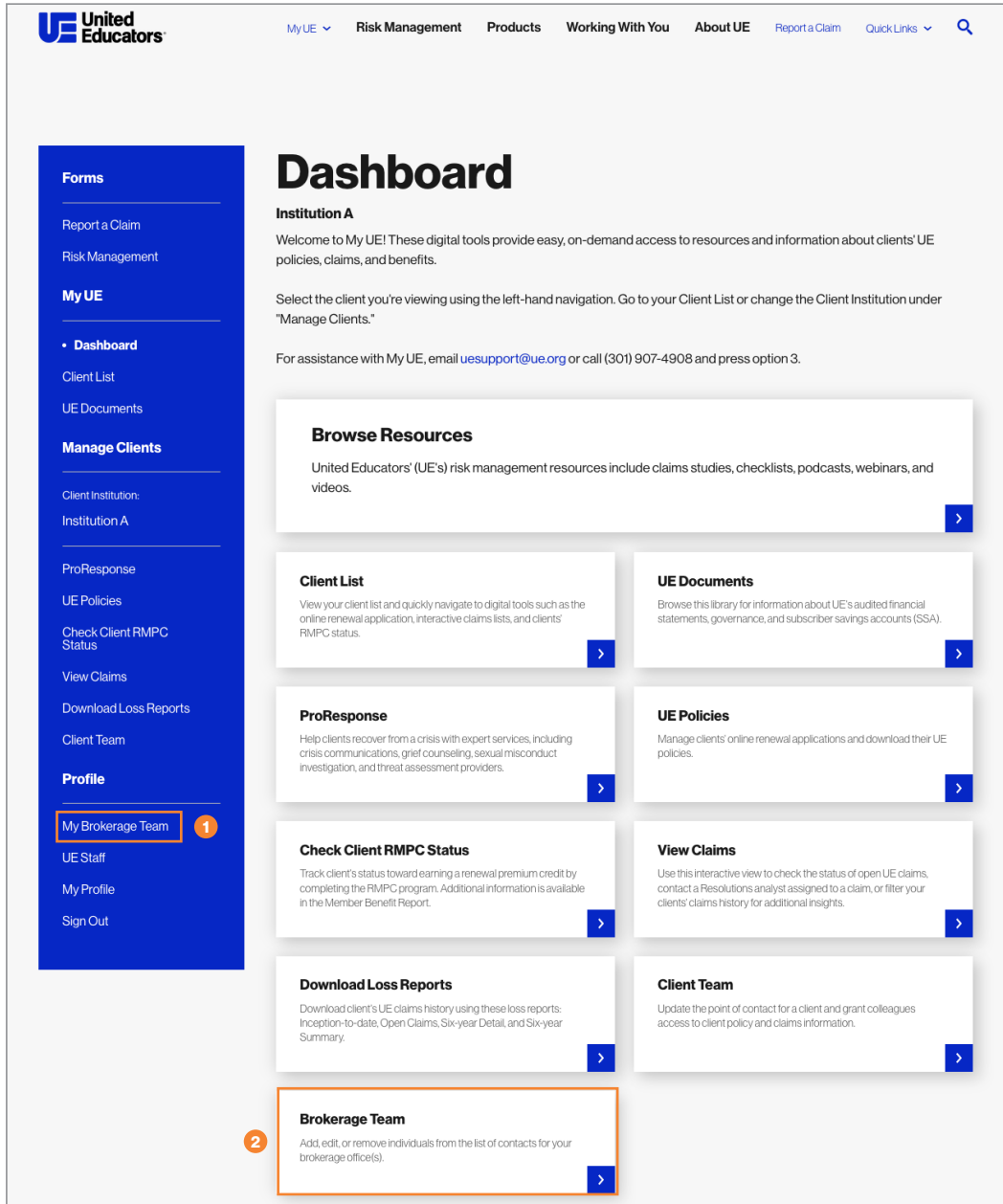
Manage Contacts at Your Brokerage

As a contact manager for your brokerage, you have the ability to manage broker contacts at your office and key contacts at your client's institutions. Take the following steps on United Educators' (UE's) website to view and manage the list of contacts at your brokerage(s).

1. Visit www.ue.org and click Sign In in the top right-hand corner to sign in.



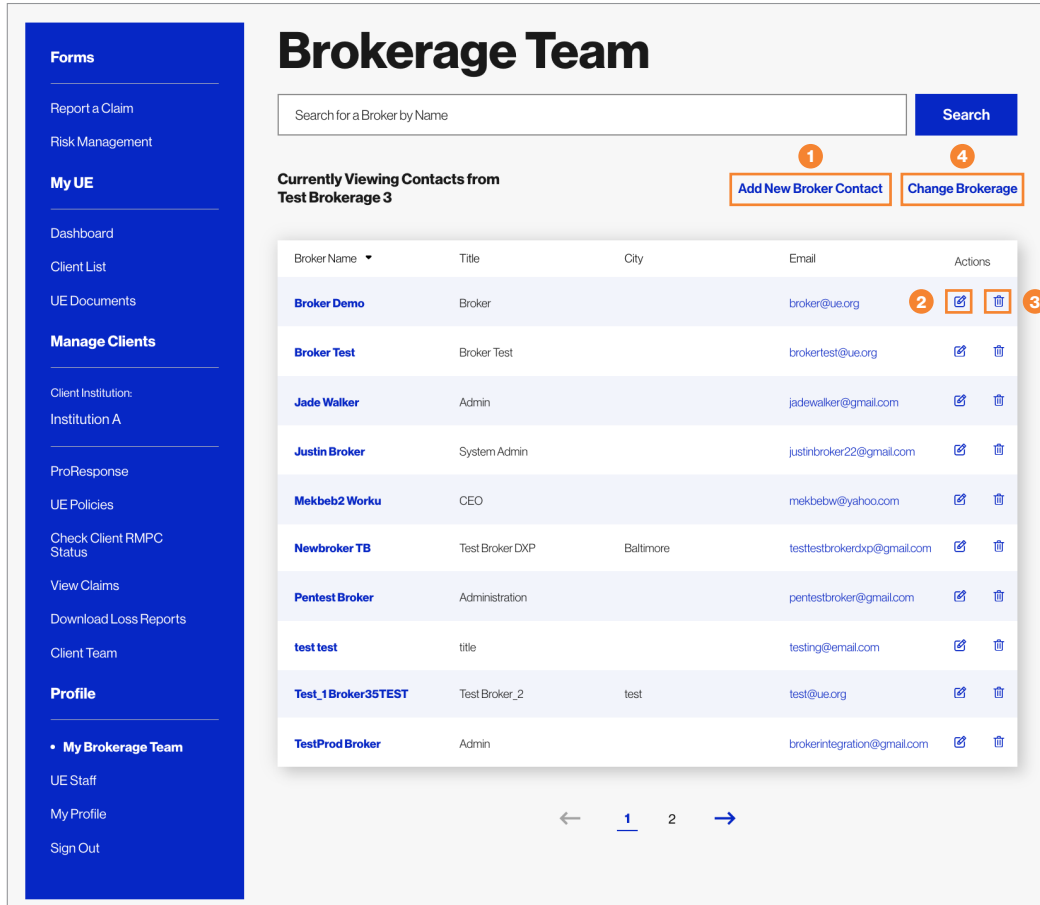
- After signing in, click “My Brokerage Team” in the left-hand navigation (1) or on your dashboard landing page (2).



The screenshot displays the United Educators dashboard. On the left, a blue navigation sidebar contains sections: Forms, My UE, Manage Clients, and Profile. The 'My Brokerage Team' link is highlighted with an orange box and a red circle labeled '1'. The main dashboard area features a 'Dashboard' heading, a welcome message for 'Institution A', and a 'Browse Resources' section. Below these are several tiles for Client List, UE Documents, ProResponse, UE Policies, Check Client RMPC Status, View Claims, Download Loss Reports, and Client Team. At the bottom, a 'Brokerage Team' tile is highlighted with an orange box and a red circle labeled '2'.

- The Brokerage Team is where you can add to (1), edit (2), or remove (3) brokers from a brokerage office.

If you manage broker contact information on behalf of more than one office, you can change the office you're viewing by using the "Change Brokerage" (4) option.



Brokerage Team

Search for a Broker by Name Search

Currently Viewing Contacts from **Test Brokerage 3**

Add New Broker Contact Change Brokerage

Broker Name	Title	City	Email	Actions
Broker Demo	Broker		broker@ue.org	Edit Delete
Broker Test	Broker Test		brokertest@ue.org	Edit Delete
Jade Walker	Admin		jadewalker@gmail.com	Edit Delete
Justin Broker	System Admin		justinbroker22@gmail.com	Edit Delete
Mekbeeb2 Worku	CEO		mekbeebw@yahoo.com	Edit Delete
Newbroker TB	Test Broker DXP	Baltimore	testtestbrokerdxp@gmail.com	Edit Delete
Pentest Broker	Administration		pentestbroker@gmail.com	Edit Delete
test test	title		testing@email.com	Edit Delete
Test_1Broker35TEST	Test Broker_2	test	test@ue.org	Edit Delete
TestProd Broker	Admin		brokerintegration@gmail.com	Edit Delete

← 1 2 →

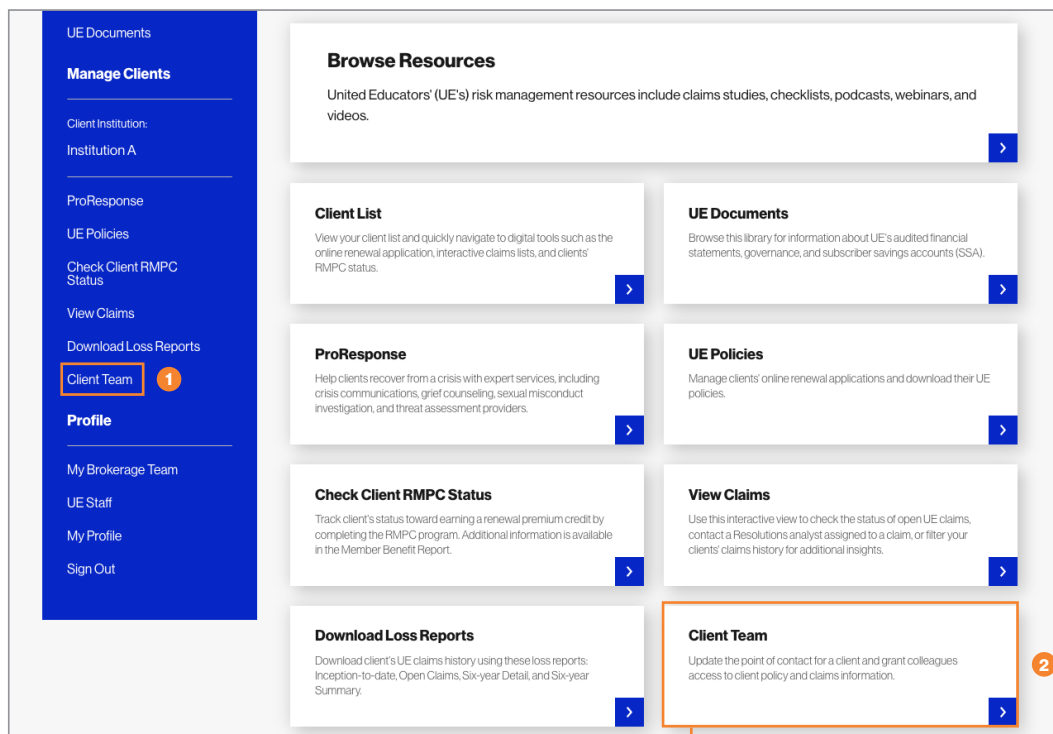
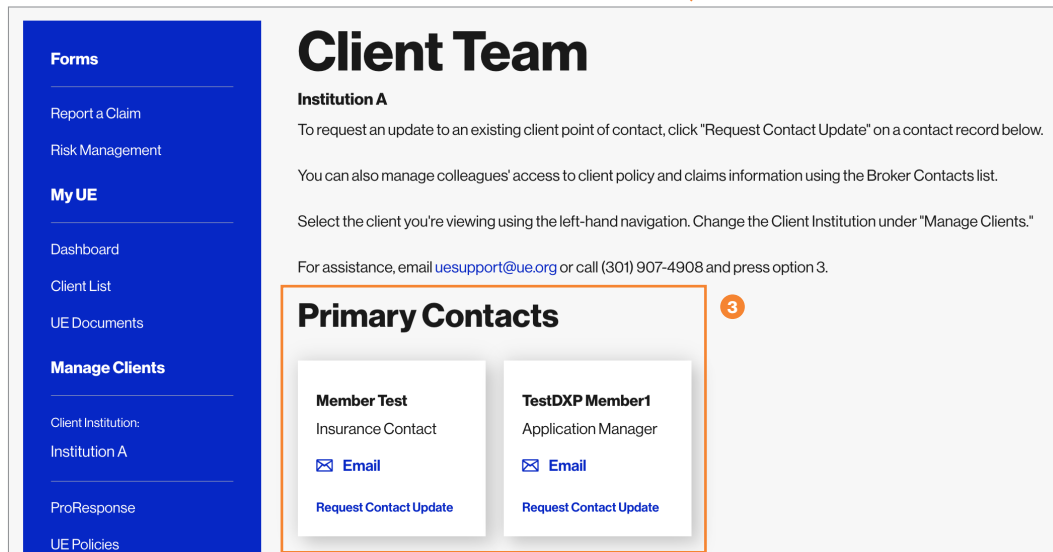
If you need to replace a broker with someone new, delete the old record first and then add the new broker.

- Questions about managing your broker contacts can be sent to uesupport@ue.org.

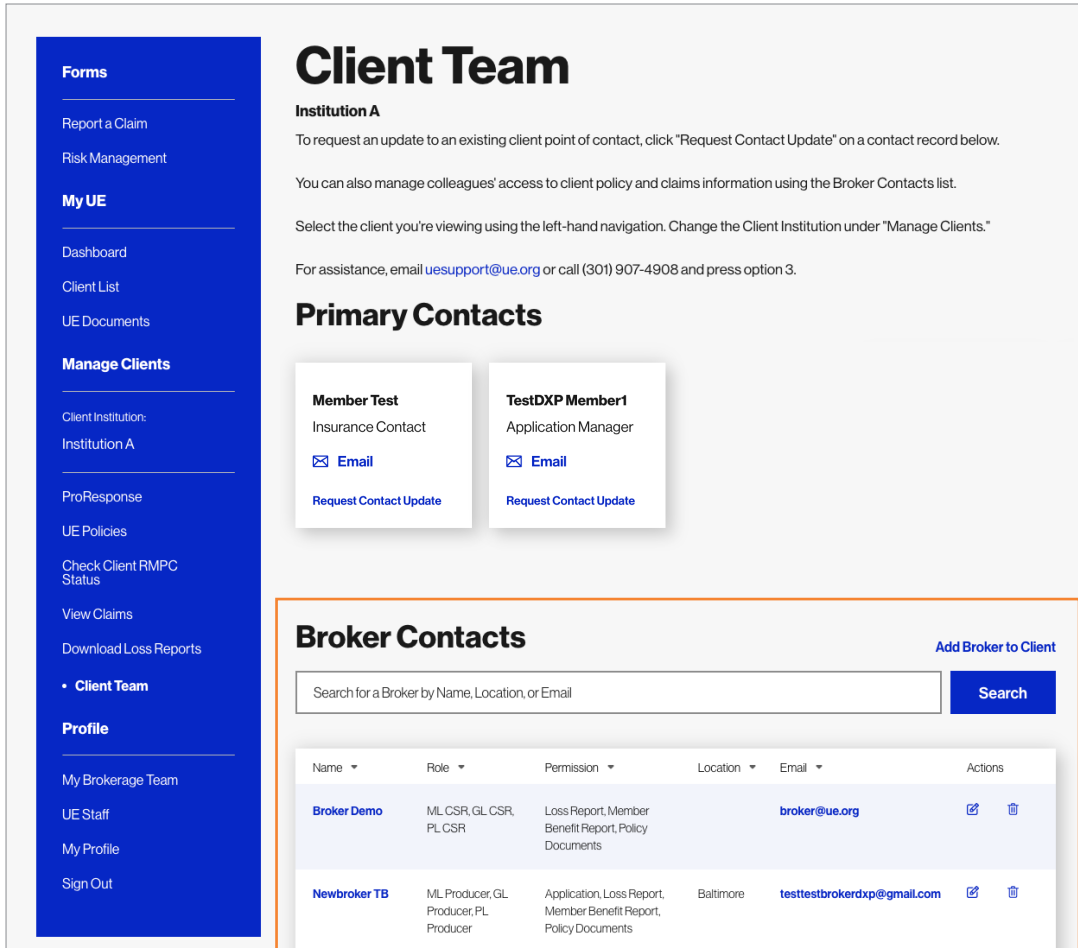
Manage Contacts at Your Clients' Institutions

You also can view contacts at your clients' institutions who have the Application Manager and Insurance Contact roles, as well as the brokers who are assigned broker roles at your clients' institutions.

- To see both options, click "Client Team" in the left-hand navigation (1) or on your dashboard landing page (2). On the client team under "Primary Contacts" (3), you will see the name of institution contact(s) who have the Application Manager and/or Insurance Contact role(s). To update this information, click "Request Contact Update" and submit your request to UE's Underwriting department. We will process requests within one to two business days.

- Under “Broker Contacts,” you’ll see the brokers assigned roles for your client.



Client Team

Institution A

To request an update to an existing client point of contact, click “Request Contact Update” on a contact record below.

You can also manage colleagues’ access to client policy and claims information using the Broker Contacts list.

Select the client you’re viewing using the left-hand navigation. Change the Client Institution under “Manage Clients.”

For assistance, email uesupport@ue.org or call (301) 907-4908 and press option 3.

Primary Contacts

Member Test

Insurance Contact

[Email](#)

[Request Contact Update](#)

TestDXP Member1

Application Manager

[Email](#)

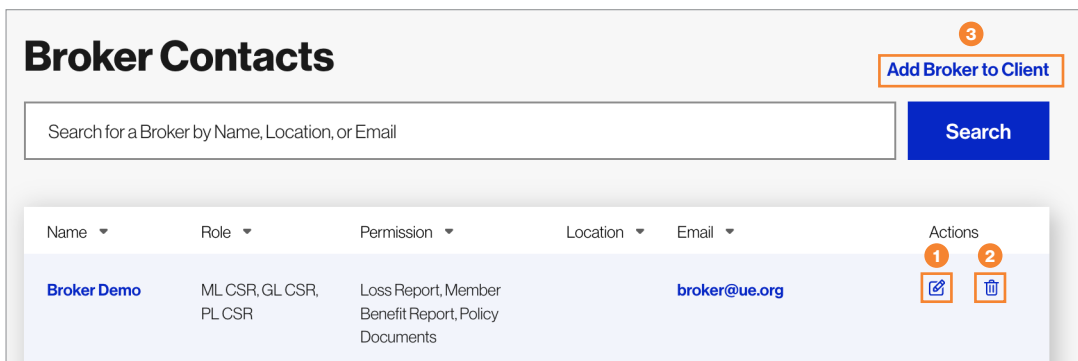
[Request Contact Update](#)

Broker Contacts [Add Broker to Client](#)

Search for a Broker by Name, Location, or Email [Search](#)

Name	Role	Permission	Location	Email	Actions
Broker Demo	ML CSR, GL CSR, PL CSR	Loss Report, Member Benefit Report, Policy Documents		broker@ue.org	Edit Delete
Newbroker TB	ML Producer, GL Producer, PL Producer	Application, Loss Report, Member Benefit Report, Policy Documents	Baltimore	testtestbrokerdxp@gmail.com	Edit Delete

- Use “Edit” (1) or “Delete” (2) to modify existing broker roles. Click “Add Broker to Client” (3) to assign a new role.



Broker Contacts [Add Broker to Client](#)

Search for a Broker by Name, Location, or Email [Search](#)

Name	Role	Permission	Location	Email	Actions
Broker Demo	ML CSR, GL CSR, PL CSR	Loss Report, Member Benefit Report, Policy Documents		broker@ue.org	Edit Delete

Before you delete a broker from your brokerage, you must delete any roles they are assigned for your clients. You can then add those roles to a new broker’s record.