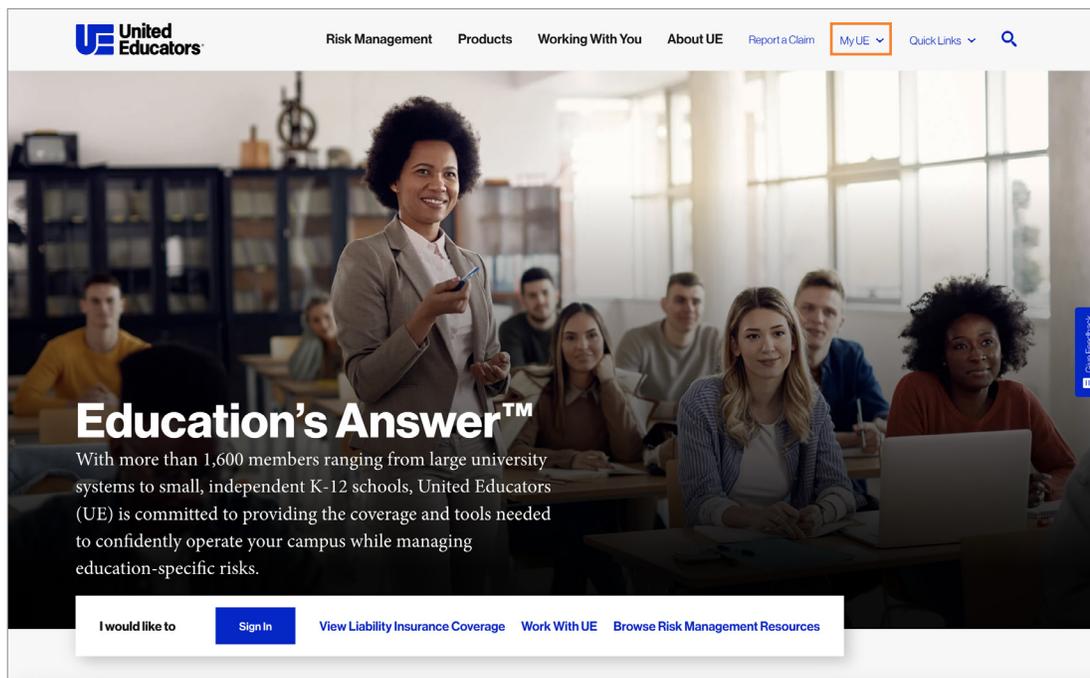


Guide to UE's Online Broker Contact Management Feature

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 My UE in the top right-hand corner to sign in.



United Educators

Risk Management Products Working With You About UE Report a Claim **My UE** Quick Links

Education's Answer™

With more than 1,600 members ranging from large university systems to small, independent K-12 schools, United Educators (UE) is committed to providing the coverage and tools needed to confidently operate your campus while managing education-specific risks.

I would like to [Sign In](#) [View Liability Insurance Coverage](#) [Work With UE](#) [Browse Risk Management Resources](#)

2. 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 interface. At the top, there is a navigation bar with the United Educators logo on the left and menu items: MyUE, Risk Management, Products, Working With You, About UE, Report a Claim, and Quick Links. A search icon is located on the far right of the navigation bar.

The main content area is titled "Dashboard" and includes a sub-section for "Institution A". Below this, there is a welcome message and instructions on how to select a client. A support contact information is provided: "For assistance with My UE, email uesupport@ue.org or call (301) 907-4908 and press option 3."

The dashboard features a grid of resource tiles, each with a title, a brief description, and a right-pointing arrow icon:

- Browse Resources:** United Educators' (UE's) risk management resources include claims studies, checklists, podcasts, webinars, and videos.
- Client List:** View your client list and quickly navigate to digital tools such as the online renewal application, interactive claims lists, and clients' RMPC status.
- UE Documents:** Browse this library for information about UE's audited financial statements, governance, and subscriber savings accounts (SSA).
- ProResponse:** Help clients recover from a crisis with expert services, including crisis communications, grief counseling, sexual misconduct investigation, and threat assessment providers.
- UE Policies:** Manage clients' online renewal applications and download their UE policies.
- Check Client RMPC Status:** Track client's status toward earning a renewal premium credit by completing the RMPC program. Additional information is available in the Member Benefit Report.
- View 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.
- Download Loss Reports:** Download client's UE claims history using these loss reports: Inception-to-date, Open Claims, Six-year Detail, and Six-year Summary.
- Client Team:** Update the point of contact for a client and grant colleagues access to client policy and claims information.

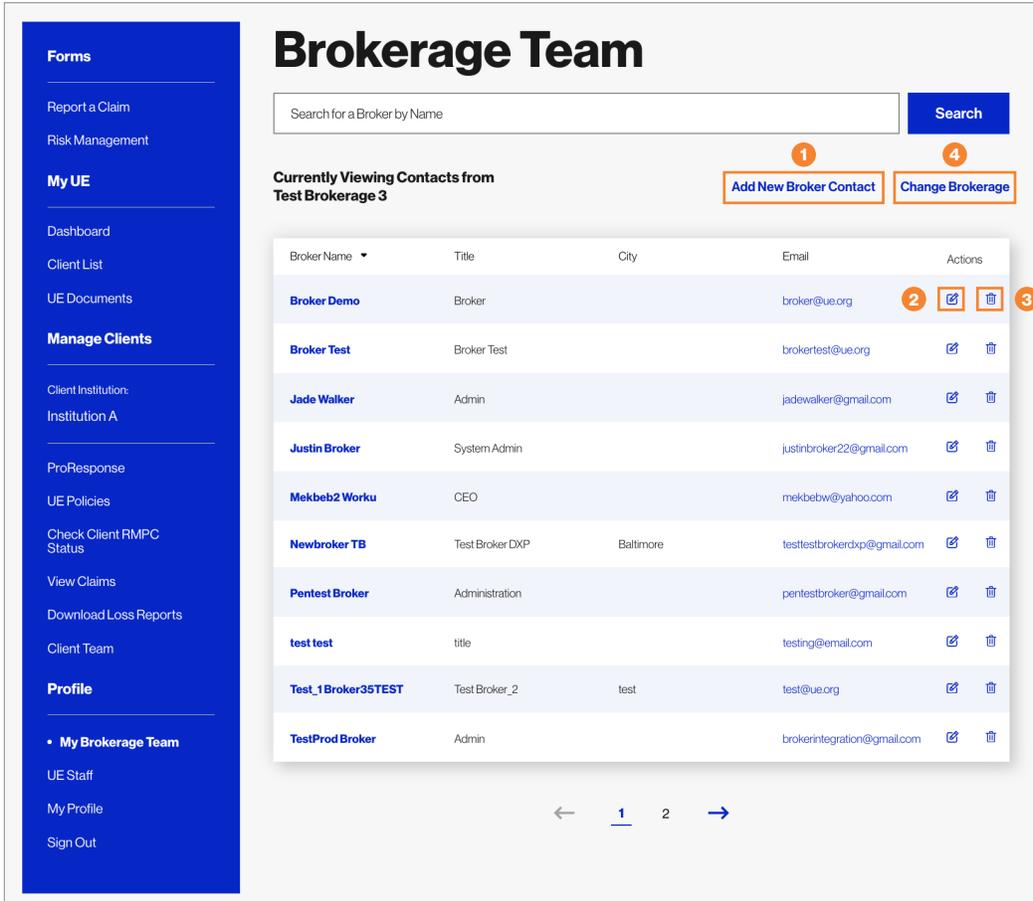
On the left side, there is a blue navigation sidebar with the following categories and items:

- Forms:** Report a Claim, Risk Management
- My UE:** Dashboard (highlighted with a red box and a circled '1'), Client List, UE Documents
- Manage Clients:** Client Institution: Institution A
- ProResponse:** UE Policies, Check Client RMPC Status, View Claims, Download Loss Reports, Client Team
- Profile:** My Brokerage Team (highlighted with a red box and a circled '2'), UE Staff, My Profile, Sign Out

At the bottom of the dashboard, there is a "Brokerage Team" tile, which is highlighted with a red box and a circled '2'. It contains the text: "Add, edit, or remove individuals from the list of contacts for your brokerage office(s)." and a right-pointing arrow icon.

- 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

1 Add New Broker Contact 4 Change Brokerage

Currently Viewing Contacts from Test Brokerage 3

Broker Name	Title	City	Email	Actions
Broker Demo	Broker		broker@ue.org	2  3 
Broker Test	Broker Test		brokertest@ue.org	 
Jade Walker	Admin		jadewalker@gmail.com	 
Justin Broker	System Admin		justinbroker22@gmail.com	 
Mekbebw2 Worku	CEO		mekbebw@yahoo.com	 
Newbroker TB	Test Broker DXP	Baltimore	testtestbrokerdxp@gmail.com	 
Pentest Broker	Administration		pentestbroker@gmail.com	 
test test	title		testing@email.com	 
Test_1 Broker35TEST	Test Broker_2	test	test@ue.org	 
TestProd Broker	Admin		brokerintegration@gmail.com	 

← 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.

2. 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

<p>Member Test</p> <p>Insurance Contact</p> <p>✉ Email</p> <p>Request Contact Update</p>	<p>TestDXP Member1</p> <p>Application Manager</p> <p>✉ Email</p> <p>Request Contact Update</p>
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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	✉ 🗑
Newbroker TB	ML Producer, GL Producer, PL Producer	Application, Loss Report, Member Benefit Report, Policy Documents	Baltimore	testtestbrokerdxp@gmail.com	✉ 🗑

3. 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](#) ³

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	✉ ¹ 🗑 ²

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.