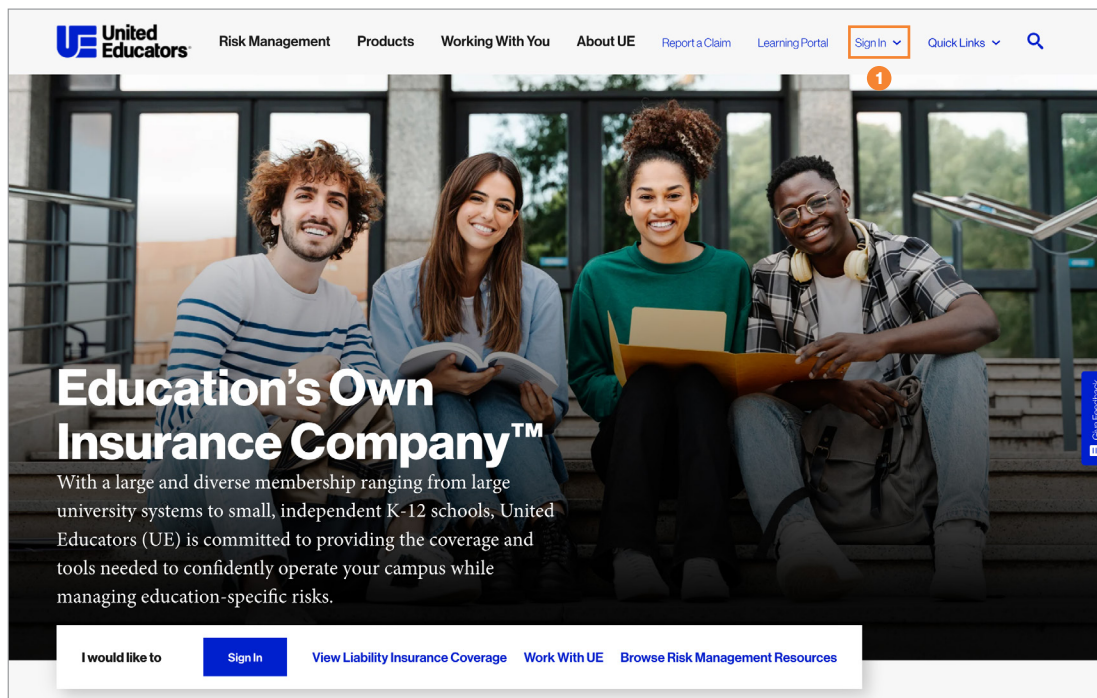


Guide to Manage Your Institution's Contacts on My UE

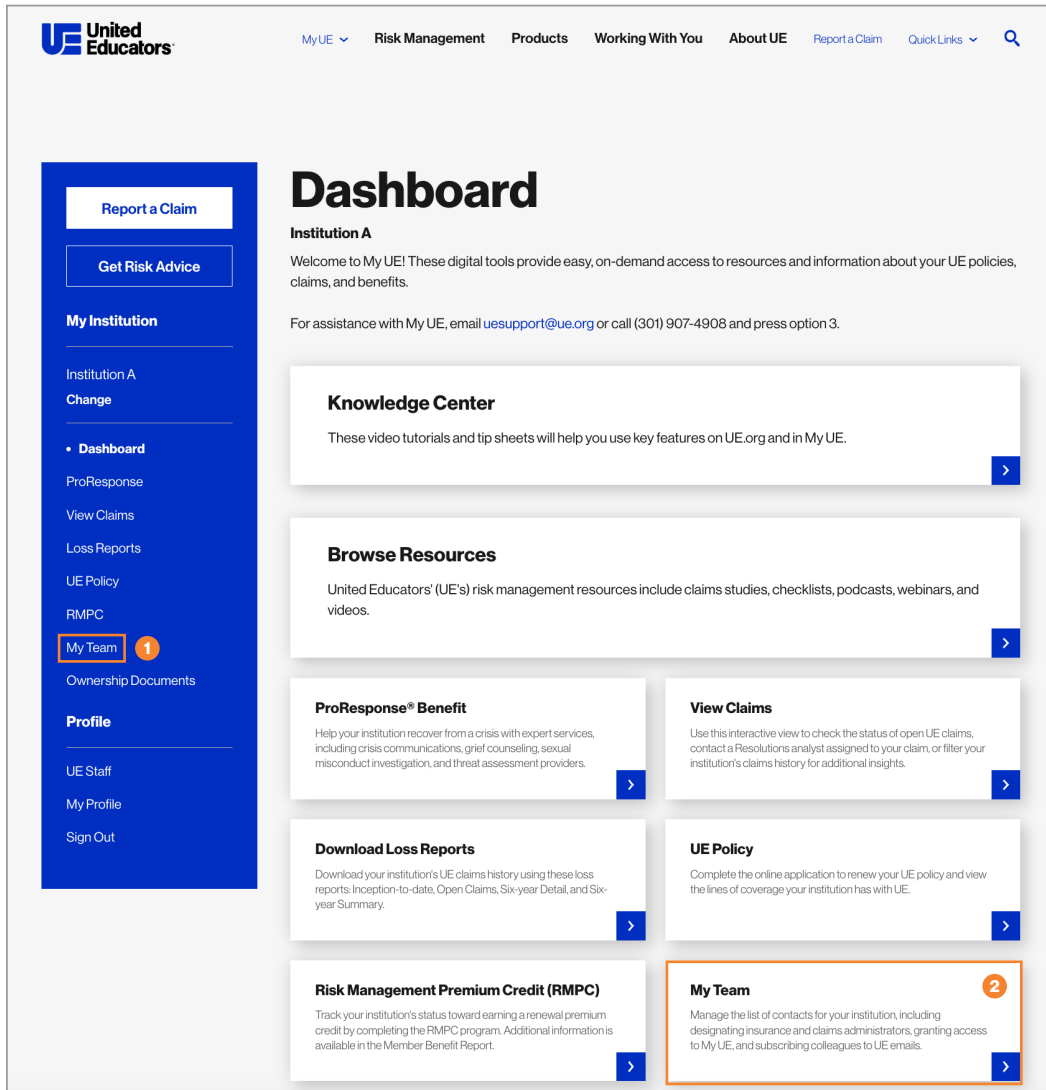
As a contact manager for your institution, you can maintain the list of contacts at your institution who should have access to online tools to manage your United Educators (UE) policy and claims, as well as those contacts who receive news and information about the latest risk management resources.

To view and manage the list of contacts at your institution:

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



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

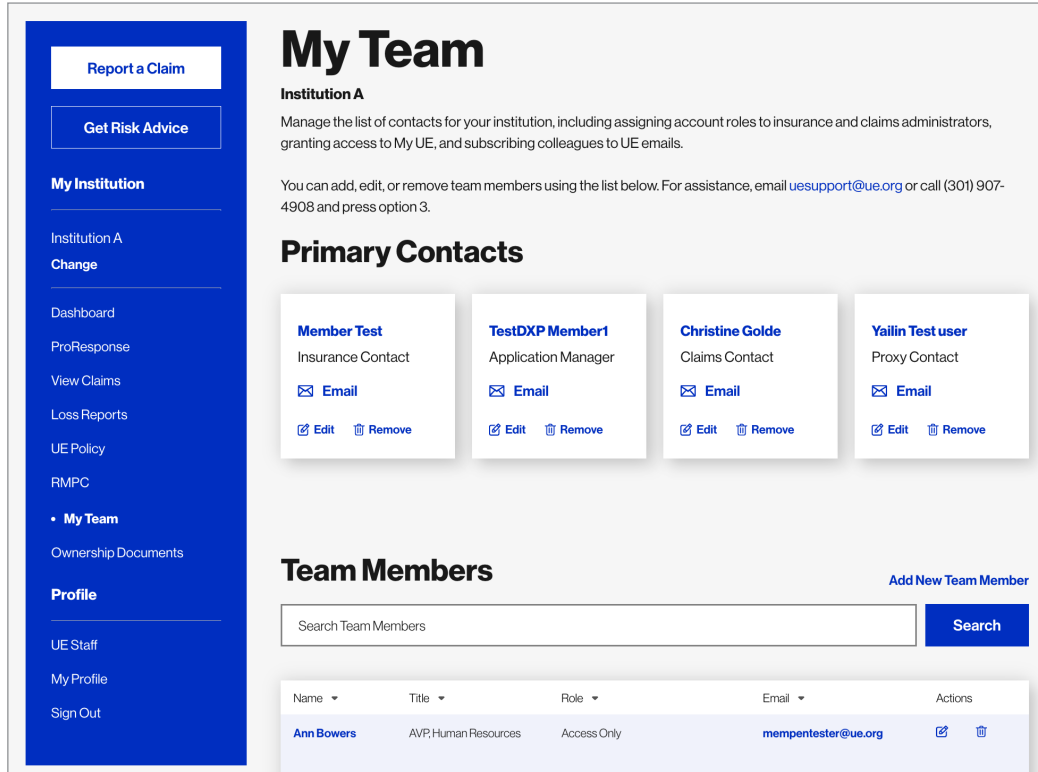


The screenshot shows the United Educators My UE Dashboard. The top navigation bar includes the United Educators logo, a user menu (My UE), and links for Risk Management, Products, Working With You, About UE, Report a Claim, and Quick Links. A search icon is also present.

The left-hand navigation menu is highlighted in blue and includes the following items: Report a Claim, Get Risk Advice, My Institution (with a sub-link for Change), a list of navigation options (Dashboard, ProResponse, View Claims, Loss Reports, UE Policy, RMPC, My Team, Ownership Documents), Profile (with sub-links for UE Staff, My Profile, and Sign Out), and My Team. The 'My Team' item is marked with a red circle and the number 1.

The main content area is titled 'Dashboard' and includes a welcome message for 'Institution A'. Below this, there are several sections: Knowledge Center, Browse Resources, ProResponse® Benefit, View Claims, Download Loss Reports, UE Policy, Risk Management Premium Credit (RMPC), and My Team. The 'My Team' section is highlighted with a red border and a red circle with the number 2.

- On the My Team page under “Primary Contacts,” you’ll see the contacts assigned key roles for managing your institution’s claims, insurance policy, online renewal, and UE membership. Definitions for these roles are available at the end of this document.



My Team

Institution A

Manage the list of contacts for your institution, including assigning account roles to insurance and claims administrators, granting access to My UE, and subscribing colleagues to UE emails.

You can add, edit, or remove team members using the list below. For assistance, email uesupport@ue.org or call (301) 907-4908 and press option 3.

Primary Contacts

Member Test	TestDXP Member1	Christine Golde	Yailin Test user
Insurance Contact	Application Manager	Claims Contact	Proxy Contact
Email	Email	Email	Email
Edit Remove	Edit Remove	Edit Remove	Edit Remove

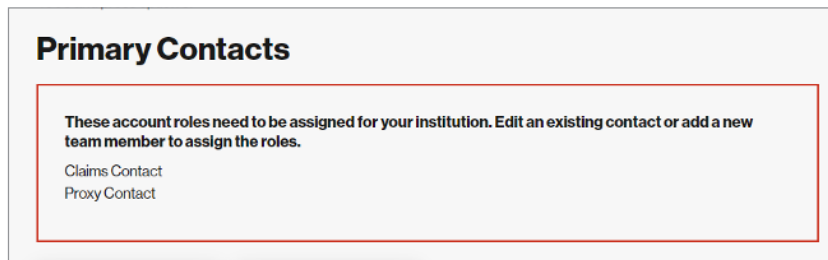
Team Members

[Add New Team Member](#)

Search Team Members [Search](#)

Name	Title	Role	Email	Actions
Ann Bowers	AVP, Human Resources	Access Only	mempentester@ue.org	Edit Remove

You’ll be alerted if any of these roles are unassigned.

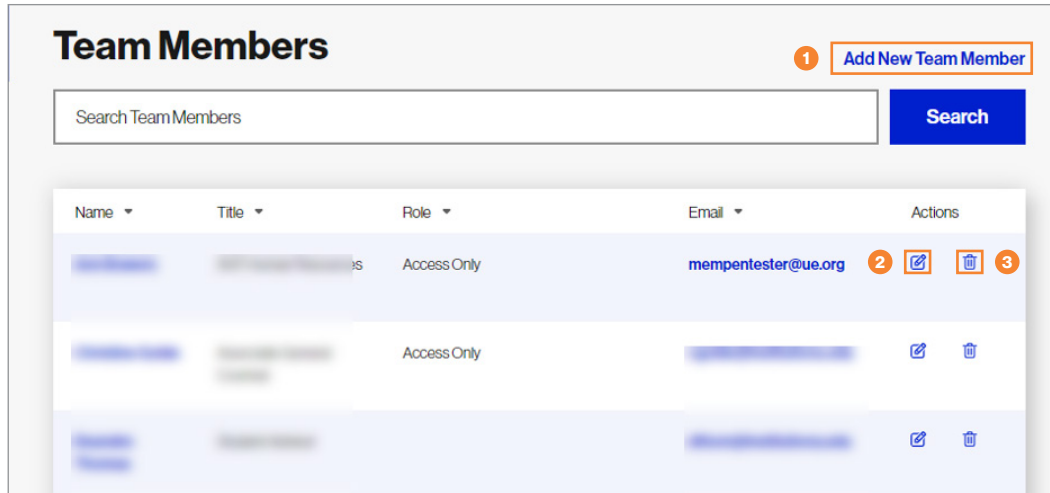


Primary Contacts

These account roles need to be assigned for your institution. Edit an existing contact or add a new team member to assign the roles.

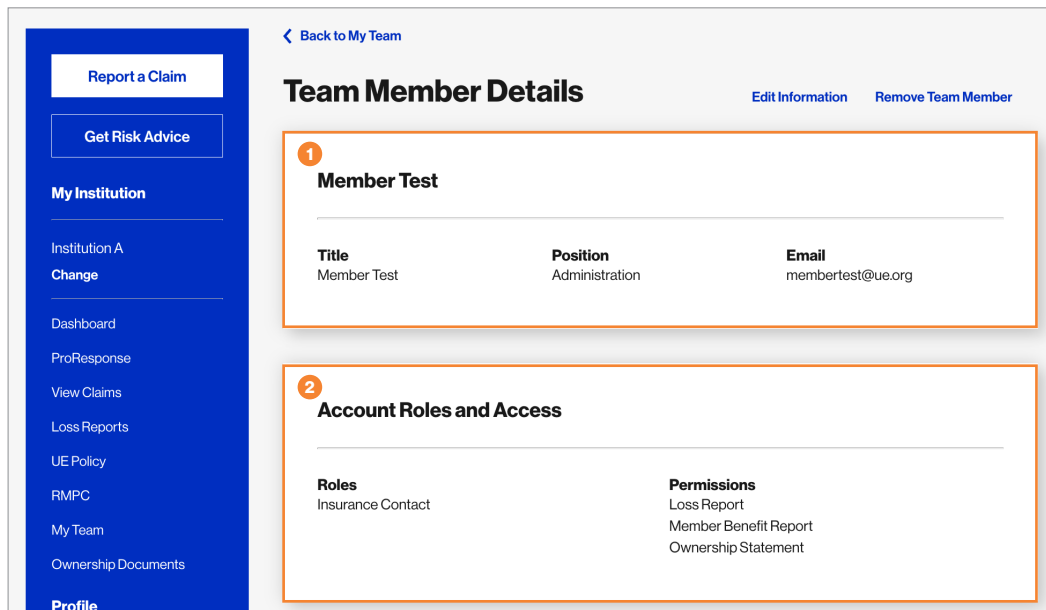
- Claims Contact
- Proxy Contact

4. On the My Team page under “Team Members,” you’ll see the entire list of contacts for your institution. You can add to (1), edit (2), or remove (3) contacts from this list.



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

5. When you edit or add a contact you can manage their profile information (1) and assign Account Roles and permissions (2) to My UE as necessary. Please refer to the end of this document for additional information on Account Roles and My UE permissions.



6. Send questions about managing your contacts to uesupport@ue.org. You also can call (301) 907-4908 and press option 3.

Reference Guide

Roles and Permissions

Use this guide to designate which people at your institution should have roles in managing United Educators' (UE's) insurance policies, claims matters, and contacts. The permissions described below grant users access to the referenced information in My UE. For questions or assistance, email uesupport@ue.org.

Your institution only should have one Proxy Contact, one Insurance Contact, and one Application Manager account role. The person holding the Application Manager account role also must hold the Application proprietary permission.

Members' Account Roles and Their Definitions

Application Manager	Person receiving the online insurance renewal application
Claims Billing Contact	Person receiving claims payments
Claims Contact	Person who, unless otherwise specified, receives claims correspondence for all lines of business — general liability (GL); management liability (ML), including educators legal liability (ELL) and fiduciary liability (FDL) <i>Note: Additional Claims Contacts refers to other people who, unless otherwise specified, receive claims correspondence for all lines of business.</i>
DRI Contact	The DRI Contact (deductible reimbursement invoice) is a member contact who receives the deductible receivable invoice report or is otherwise contacted regarding any deductible reimbursements owed to UE.
Insurance Contact	Person responsible for insurance-related decisions, including decisions related to the Risk Management Premium Credit (RMPC) program
Online Course Administrators	People who access and run reports for UE's online courses
Proxy Contact	Person casting votes for UE's annual board meeting
Risk Management Contact	Person responsible for risk management activities

Members' My UE Proprietary Permissions Definitions

Application	Allows users to manage the online insurance renewal application
Loss Run	Lets users download reports detailing your claims history
Member Benefit Report	Allows users to manage your RMPC program and download a report providing a comprehensive view of your membership activity with UE, including a policy and claims summary
Ownership Statement	Lets users download a report documenting the allocations to and balance of your subscriber savings account

Brokers' Roles and Their Definitions

Producer	Individual who is the client's day-to-day contact and manages the online renewal application
Account Owner	Individual who oversees the account, but isn't the client's day-to-day contact
Billing	Individual who should receive premium invoices
Claims	Individual who should receive claims correspondence
CSR	Individual who assists on the account
Marketing	Individual who works on new business opportunities
Regional Manager	Individual who oversees the account in a regional area
Risk Manager	Individual at the brokerage who helps the member with its risk management services
Wholesaler	Individual who acts as an intermediary between a retail broker and an insurer

Brokers' My UE Proprietary Permissions Definitions

Proprietary Permission / Proprietary Permission Definition

Application	Allows users to manage the online insurance renewal application
Loss Run	Allows users to download reports detailing their clients' claims history
Member Benefit Report	Allows users to view their clients' RMPC program status and download a report providing a comprehensive view of their clients' membership activity with UE, including a policy and claims summary
Policy Documents	Allows users to view and download insurance policies

Product Access / Product Access Definition

All Products	Access to all products for the selected line of business
Excess Only	Access to only the excess products for the selected line of business
Primary Only	Access to only the primary products for the selected line of business

Line of Business Code / Line of Business Definition

General Liability (GL)	Access to the general liability products and policies
Management Liability (ML)	Access to the management liability products and policies
Professional Liability (PL)	Access to the professional liability products and policies

Line of Business (As Defined Above):	Primary Product(s)	Excess Product(s)
GL	Buffer liability (BLX), primary general liability (CGL), public school liability (PSL) products and services	Excess general liability (GLX)
ML	ELL, FDL, school board legal liability (SBL)	Excess ELL (ELX) and excess FDL (FDX)
PL	Internships and professional services liability (IPL)	