

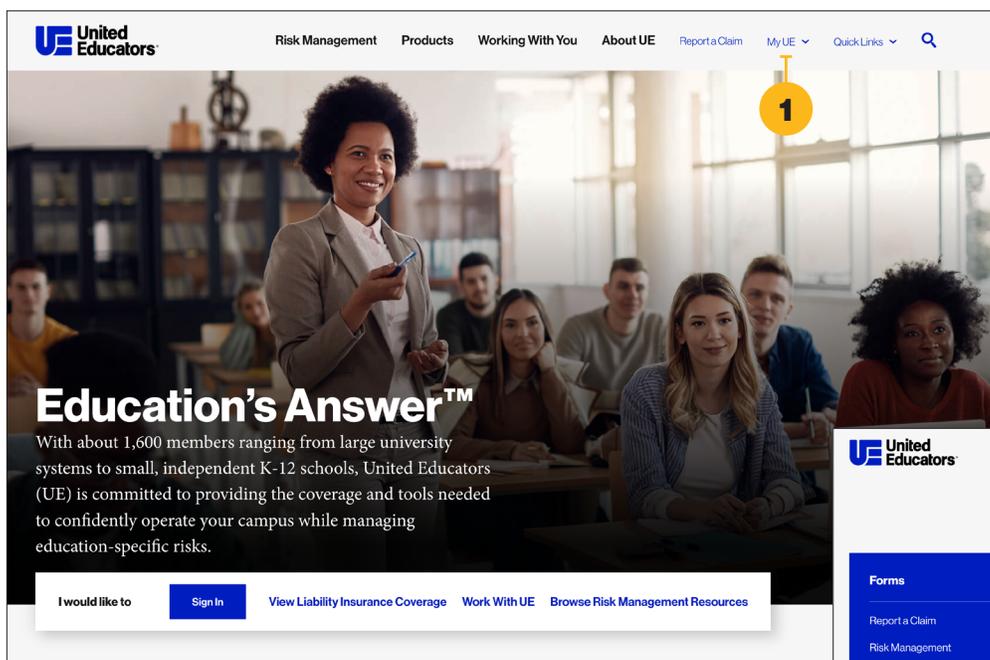
Tipsheet

My UE: Online Application Guide for Brokers

Use this guide to access and navigate your online renewal application.

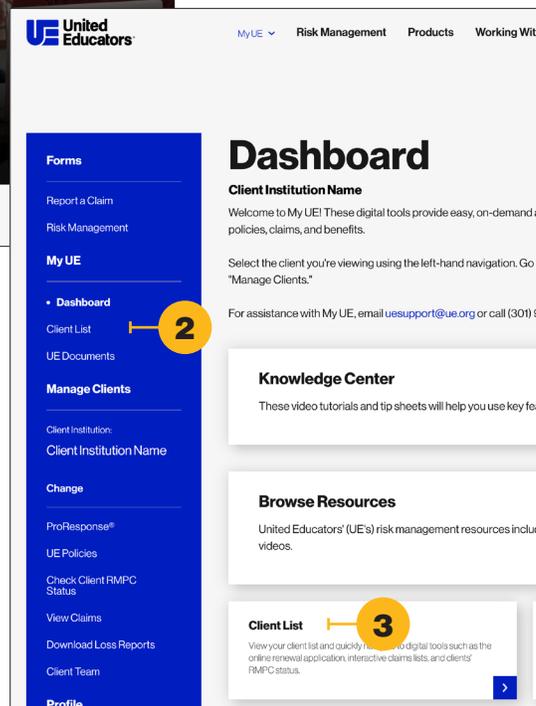
Find your clients' renewal applications

Click **1** "My UE" in the top right of the page on and sign in to your dashboard using your UE.org credentials. If you have trouble logging in, please contact uesupport@ue.org.



Once you have successfully logged in, you will be directed to your My UE Dashboard.

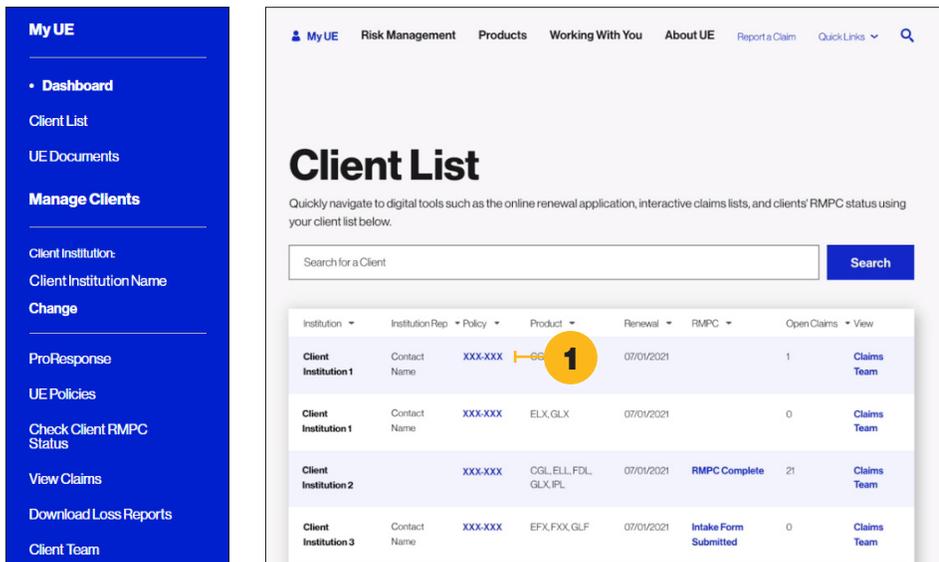
To view your list of UE members, click "Client List" in the left navigation **2** or at the bottom of the dashboard page **3**.



Accessing your clients' renewal applications

- 1 Click the policy number. You will be redirected to a policy page for the selected client.
- 2 Click "Review Application" and the application will open in a new window.

Note: You must enable pop-ups to access the application through your web browser. This can be done through the "Tools" or "Options" menu for most browsers. Enable all pop-ups by turning off the Pop-up Blocker. To only allow pop-ups for specific websites edit the Pop-up Blocker settings. Check with your IT resources or contact uesupport@ue.org for assistance.



My UE

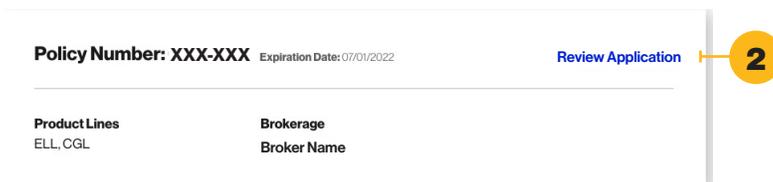
- Dashboard
- Client List
- UE Documents
- Manage Clients
 - Client Institution:
 - Client Institution Name
 - Change
 - ProResponse
 - UE Policies
 - Check Client RMPC Status
 - View Claims
 - Download Loss Reports
 - Client Team

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

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



Policy Number: XXX-XXX Expiration Date: 07/01/2022

Product Lines
ELL, CGL

Brokerage
Broker Name

Releasing the renewal application to your clients

- 1 Select the institution's name in the "Account Information" section
- 2 Click the button next to the "Renewing Policy"
- 3 Click on the button next to the open application and
- 4 Click "Edit". The application will appear below.

Review the instructions. At the bottom of the instructions, there will be two checkboxes.

- 5 Check "Assign Application to Application Manager." The application manager's email address will be pre-populated in the field adjacent to this option. Click "OK" in the pop up window to release the application to the client. Your client will receive an email notice indicating their renewal application is available for completion.



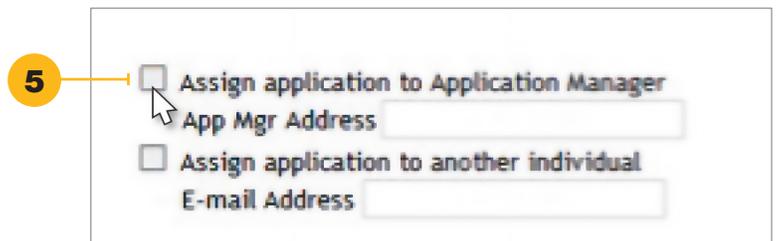
Account Information		
Sel	Member Number	Ins
<input type="radio"/>	3912	Ins



Renewals	
Sel	Product Name(s)
<input type="radio"/>	CGL, ELL



Open Applications		
View Application	Edit	View Signature Page
Sel	Renewal Date	
<input type="radio"/>	01/01/2023	



Assign application to Application Manager
 App Mgr Address

Assign application to another individual
 E-mail Address

Generate a PDF of the renewal application

Select the button next to the open application, click "Edit". Scroll to the bottom of the screen, click **6** "Generate Application PDF". This may take a minute or two. A new screen will pop up with a PDF of the application. Print the PDF or save it to your computer.



Release the renewal application UE

Select the open application and click “Edit.”
When the application appears, review the completed application.

If you are satisfied the application is complete, scroll to the bottom of the screen and click **1** “Submit”. An email notice will be sent to your UE underwriter.



View the signature page and submit a signed renewal application

Select the open application and click **2** “View Signature Page” to generate a blank signature page from the application.

Print the name, title, and email address of the individual with signing authority. Submit a signed signature page to your UE underwriter by email or upload directly into application attachments.

