

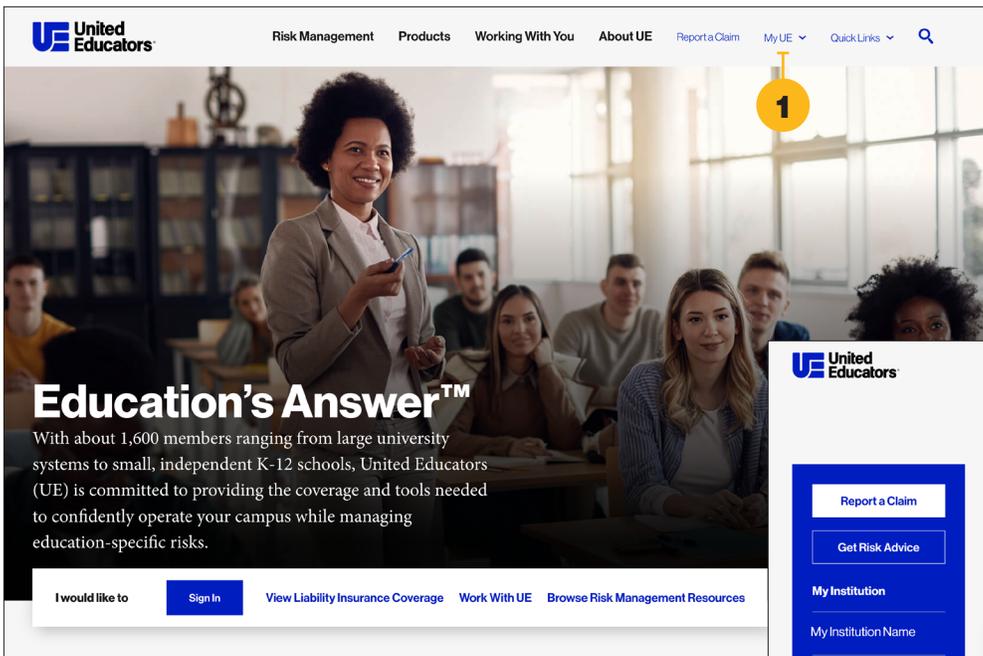
Tipsheet

My UE: Online Application Guide for Members

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

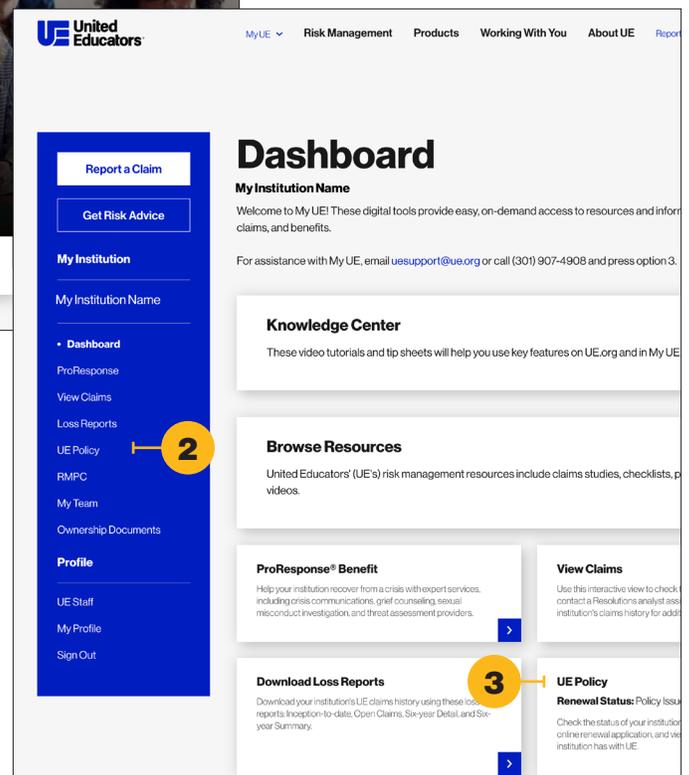
Find your renewal application

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.

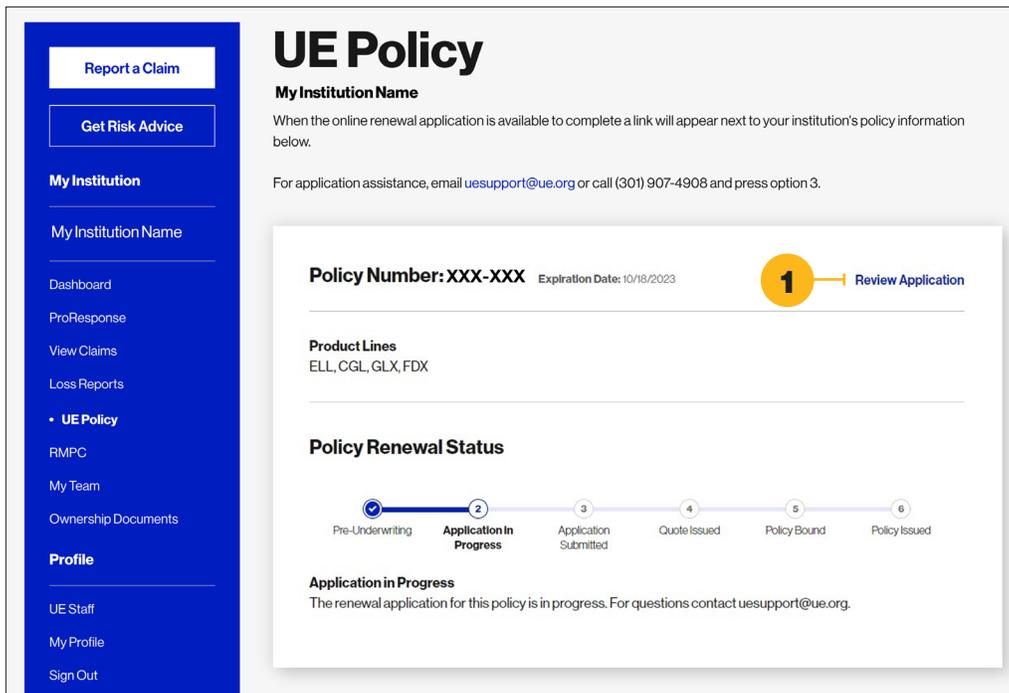
To view your UE policy, click “UE Policy” in the left navigation **2** or at the bottom of the dashboard page **3**.



Accessing your renewal applications

1 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.



The screenshot displays the 'UE Policy' dashboard. On the left is a blue sidebar with navigation options: 'Report a Claim', 'Get Risk Advice', 'My Institution', 'My Institution Name', 'Dashboard', 'ProResponse', 'View Claims', 'Loss Reports', 'UE Policy' (highlighted), 'RMPC', 'My Team', 'Ownership Documents', 'Profile', 'UE Staff', 'My Profile', and 'Sign Out'. The main content area features the 'UE Policy' header and 'My Institution Name' section. Below this, a 'Policy Number: XXX-XXX' and 'Expiration Date: 10/19/2023' are shown, with a yellow circle containing the number '1' and a 'Review Application' link. The 'Product Lines' section lists 'ELL, CGL, GLX, FDX'. The 'Policy Renewal Status' section includes a progress bar with six steps: 1. Pre-Underwriting (checked), 2. Application in Progress (highlighted), 3. Application Submitted, 4. Quote Issued, 5. Policy Bound, and 6. Policy Issued. Below the progress bar, the 'Application in Progress' section states: 'The renewal application for this policy is in progress. For questions contact uesupport@ue.org.'

Working on your renewal application

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

Review the instructions. At the bottom of the instructions, there will be two checkboxes. If you'd like to assign the entire application to another individual at your institution,

- 5 Check "Assign assign application to another individual", and enter their email address. As the application manager, you can also assign specific questions or sections of the application to different contacts at your institution.

- 6 To assign an entire section, enter the recipient's email address at the top of the section, and click the check box to the left. To assign an individual question, click the checkbox to the left of the question and enter the recipient's email address.

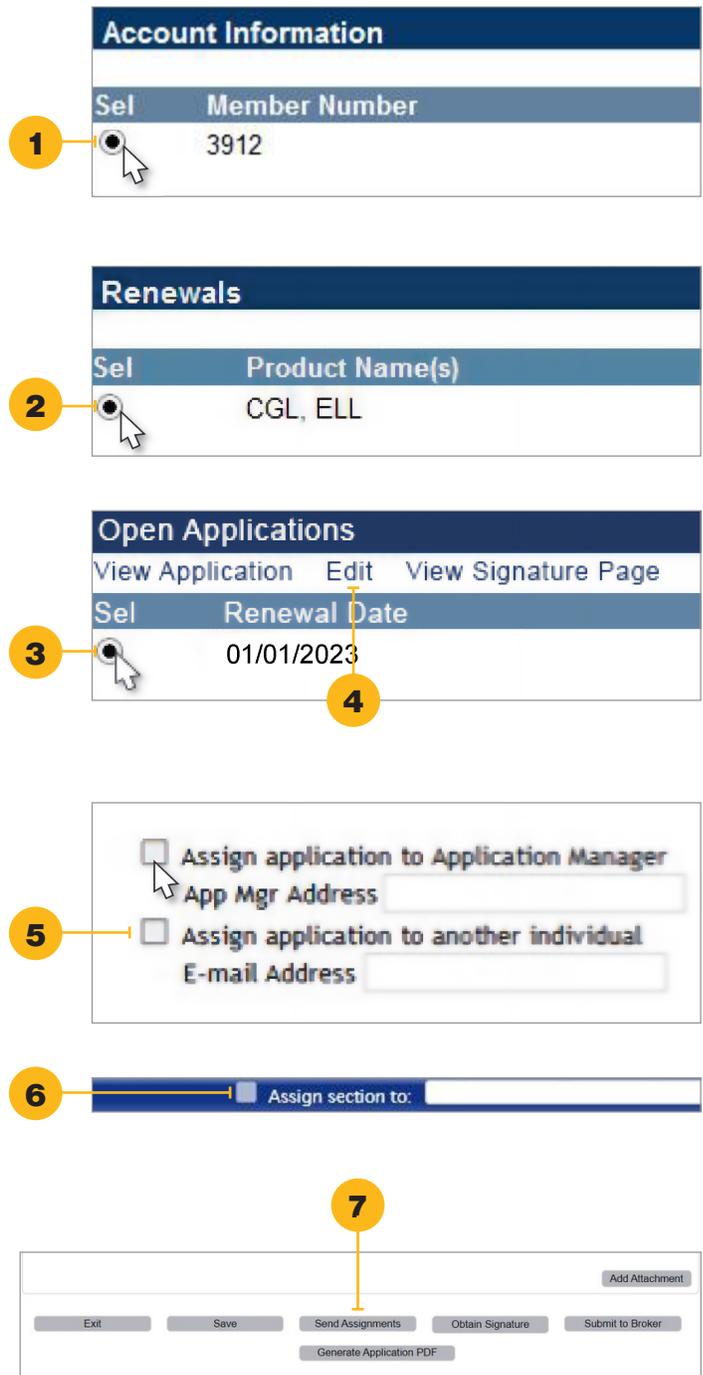
Please note that to send multiple questions within a section to the same email address, this process must be repeated for each question.

- 7 Once all selections have been made, click "Send Assignments" at the bottom of the page. Should you need to change an assignment for a section or question, simply edit or remove the email address in the corresponding box and click "Save" at the bottom of the application.

Individuals who are assigned a section or questions will receive an email notification with a link. They will be able to answer the assigned questions without logging in but cannot reassign them to anyone else.

Needing more room for answers

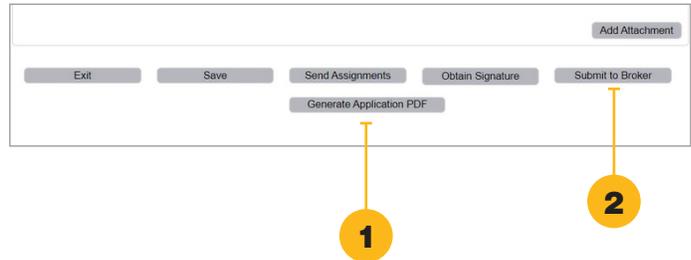
The last question of each section is a comment box that can hold up to 5,000 characters. Attach documentation to the application if you need to provide additional information.



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

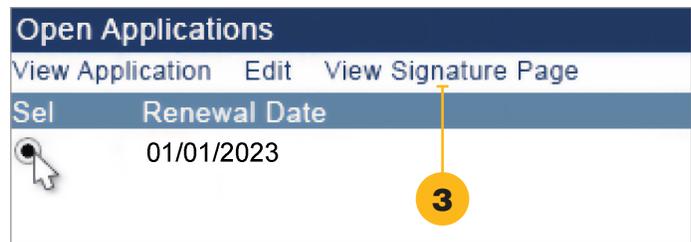
1 “Generate Application PDF”. This may take a minute or two. A new screen will pop up with a PDF of the application. Print the PDF or save it to your computer.



Submit the complete renewal application

You will receive an email notice indicating any assigned questions have been completed. Select the open application and click “Edit.” When the application appears, scroll to the bottom of the screen and click

2 “Submit to Broker”. An email notice will be sent to your broker.



View the signature page and submit a signed renewal application

Select the open application and click

3 “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.