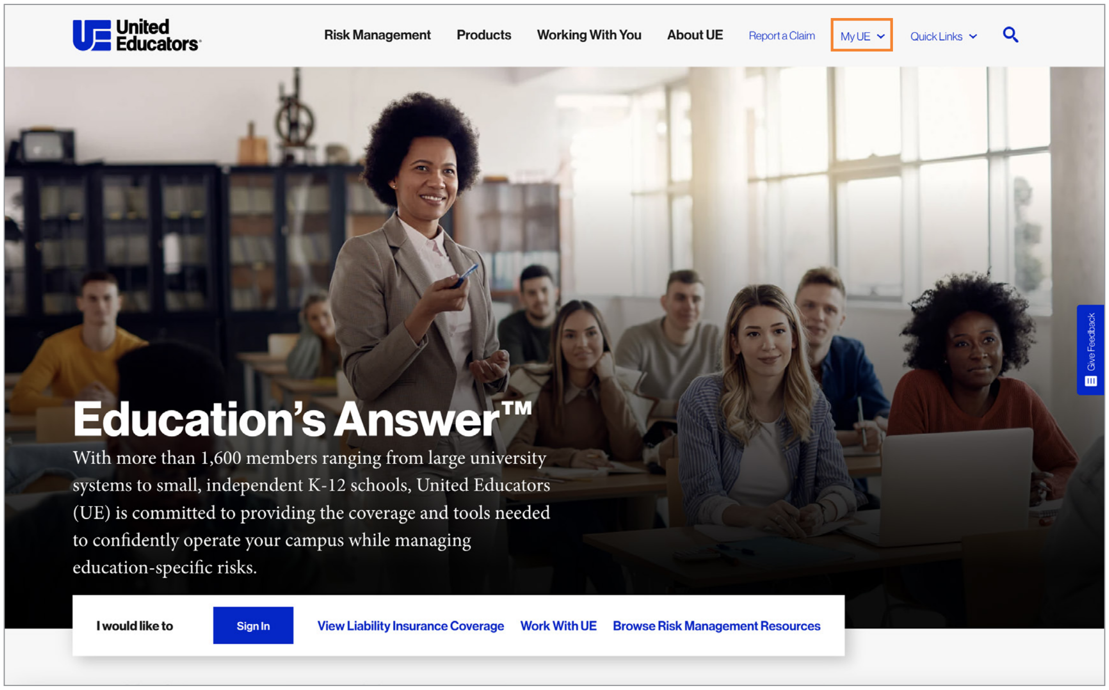
Guide to UE's Online Broker Contact Management Feature

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.



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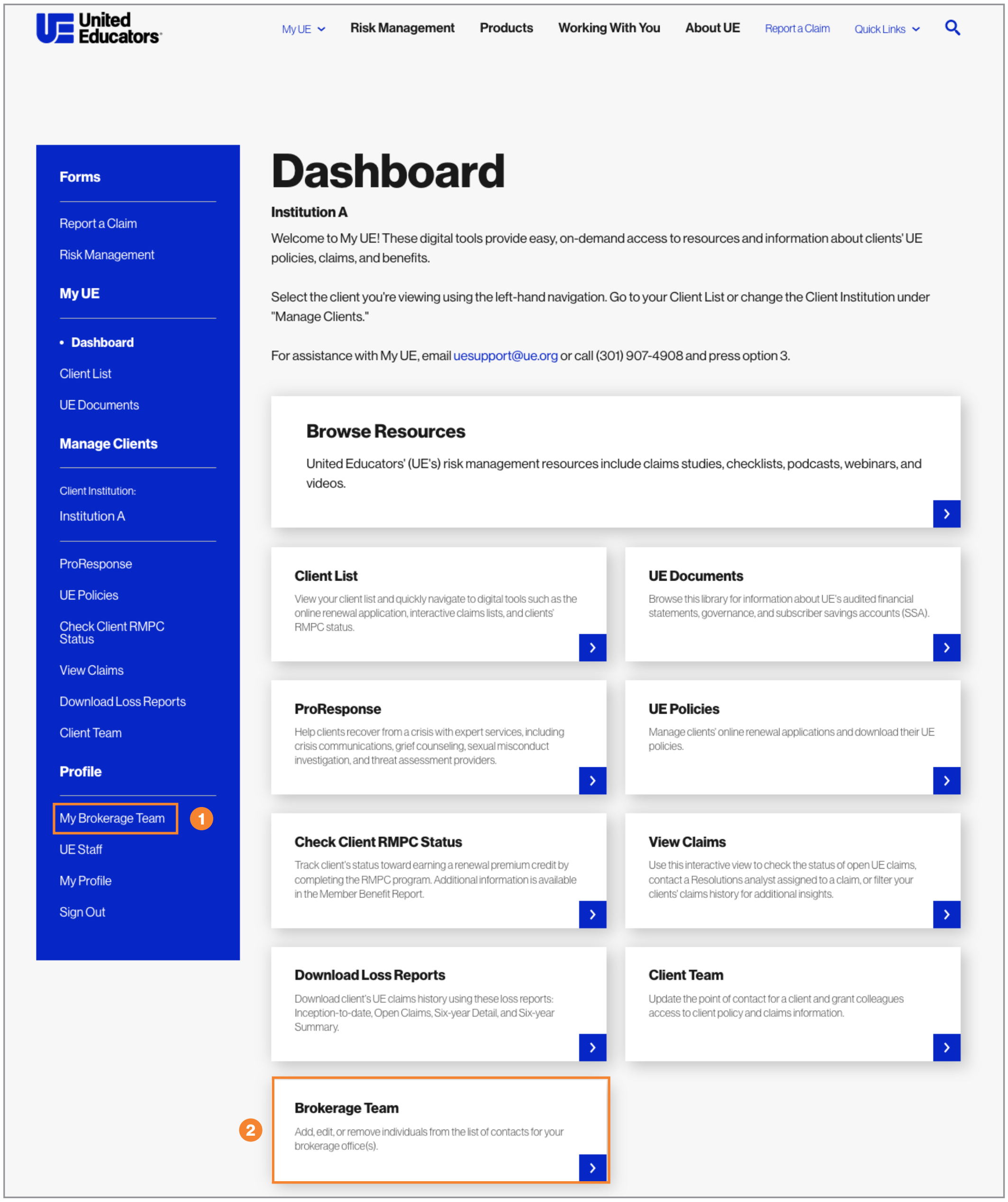
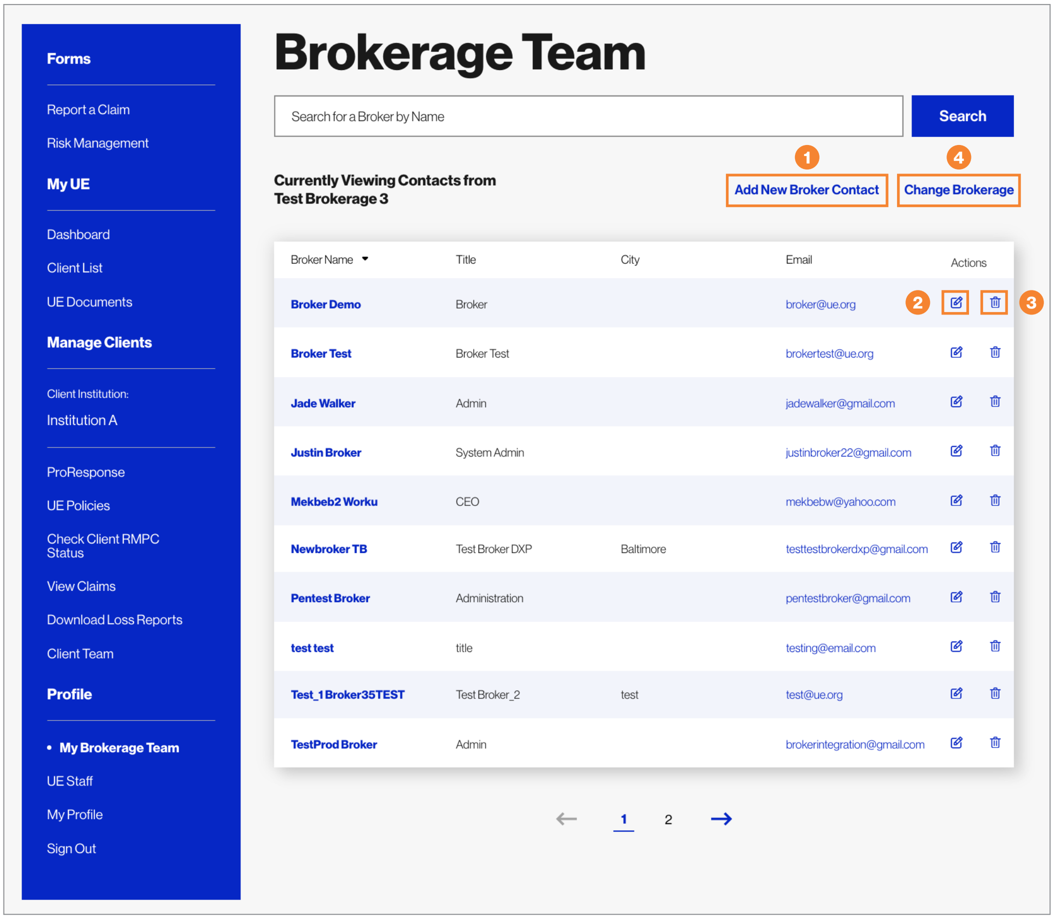
2. After signing in, click "My Brokerage Team" in the left-hand navigation (1) or on your dashboard landing page (2).



3. 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.



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

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

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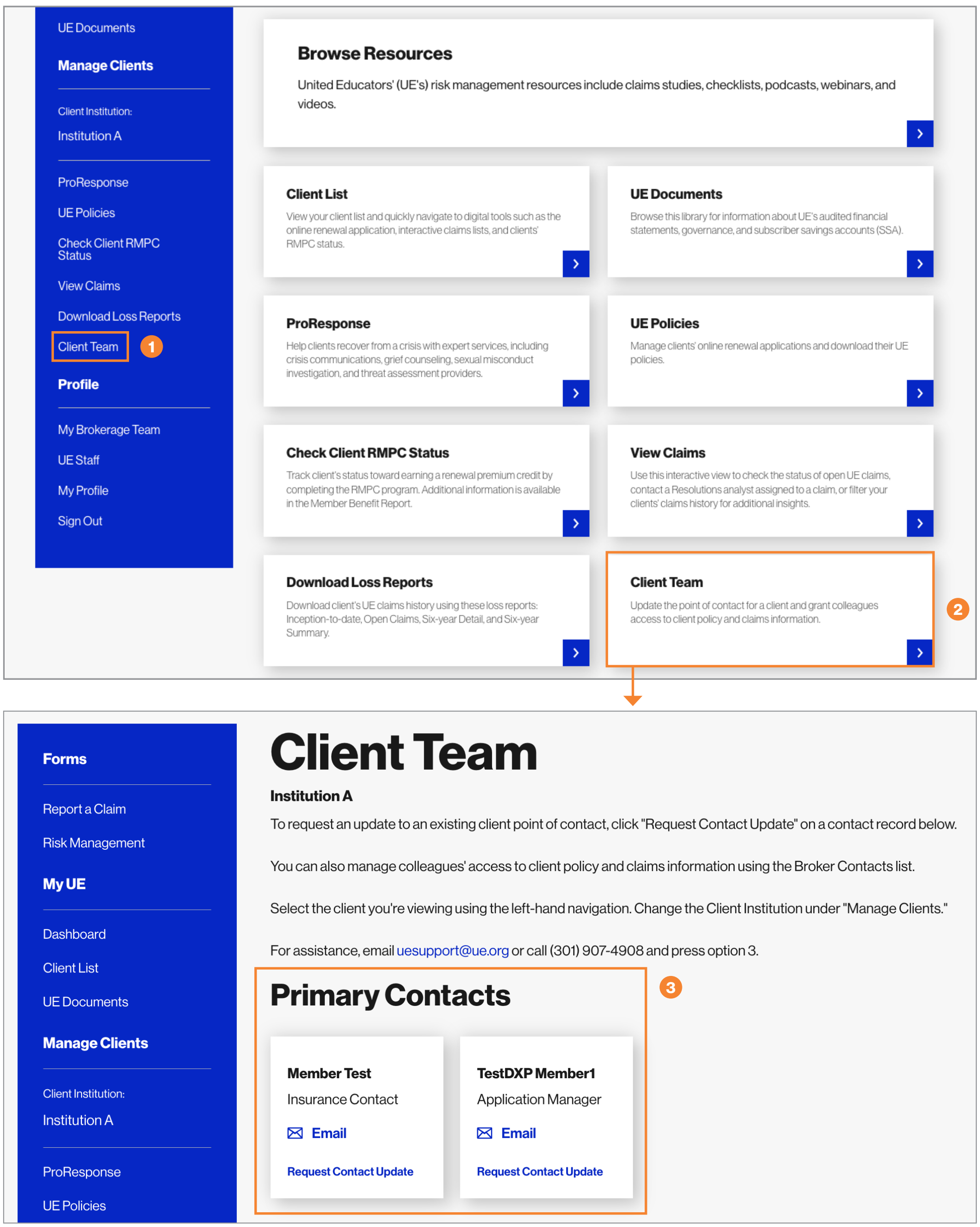
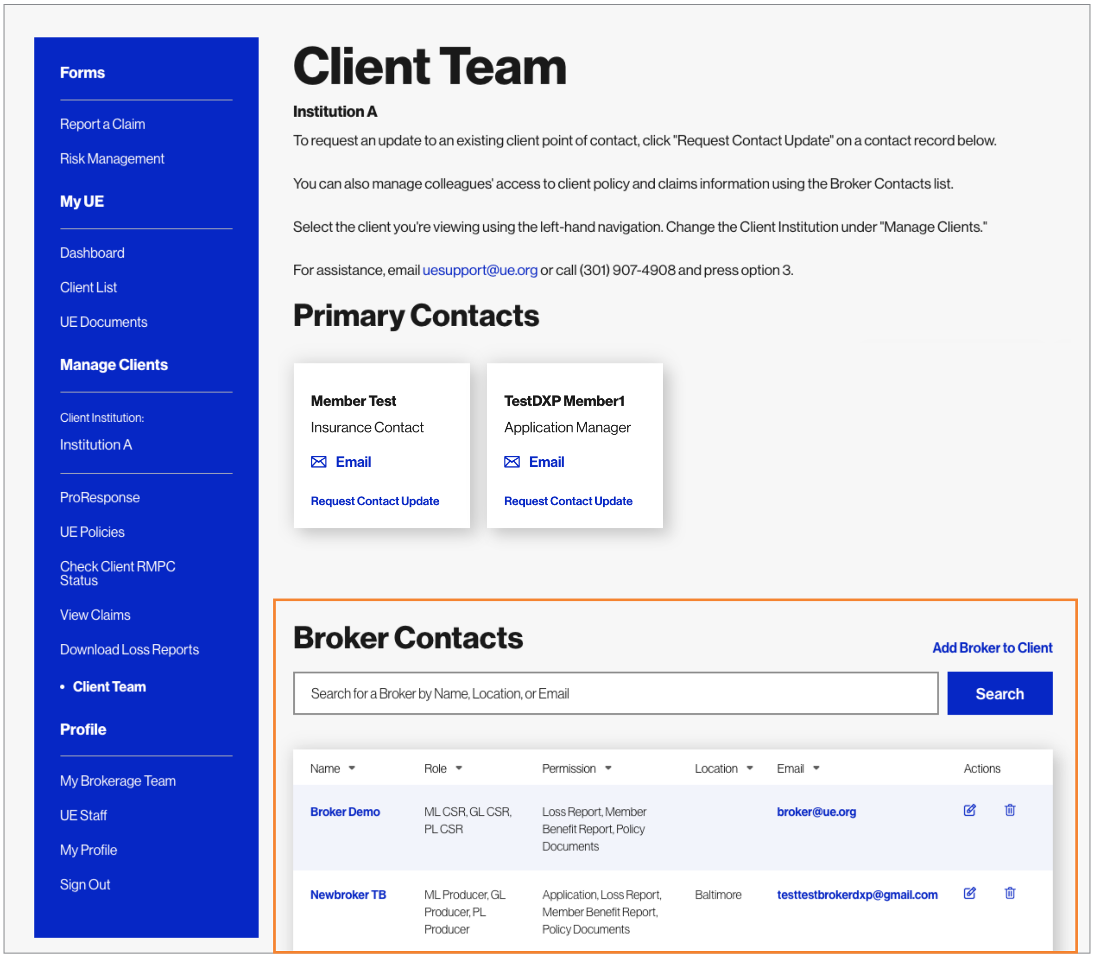
Manage Contacts at Your Clients' Institutions

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.

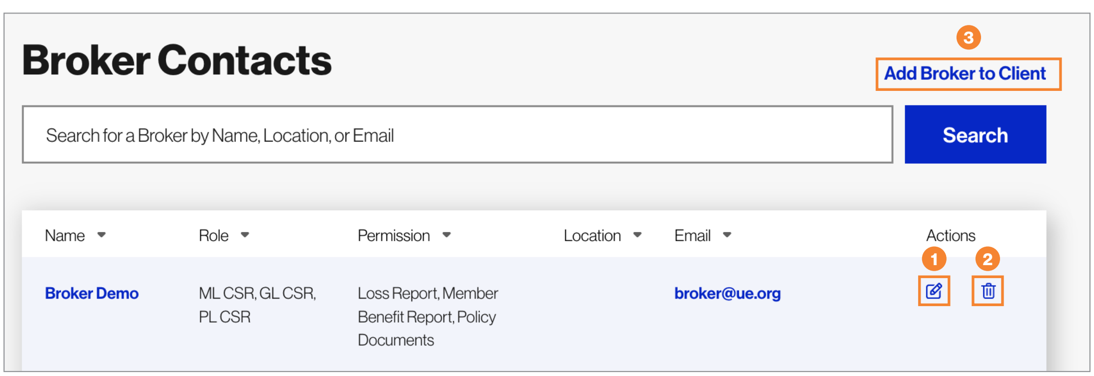
1. To see both options, click "Client Team" in the left-hand navigation (1) or on your dashboard landing page (2). On the client team under "Primary Contacts" (3), you will see the name of institution contact(s) who have the Application Manager and/or Insurance Contact role(s). To update this information, 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.



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



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.