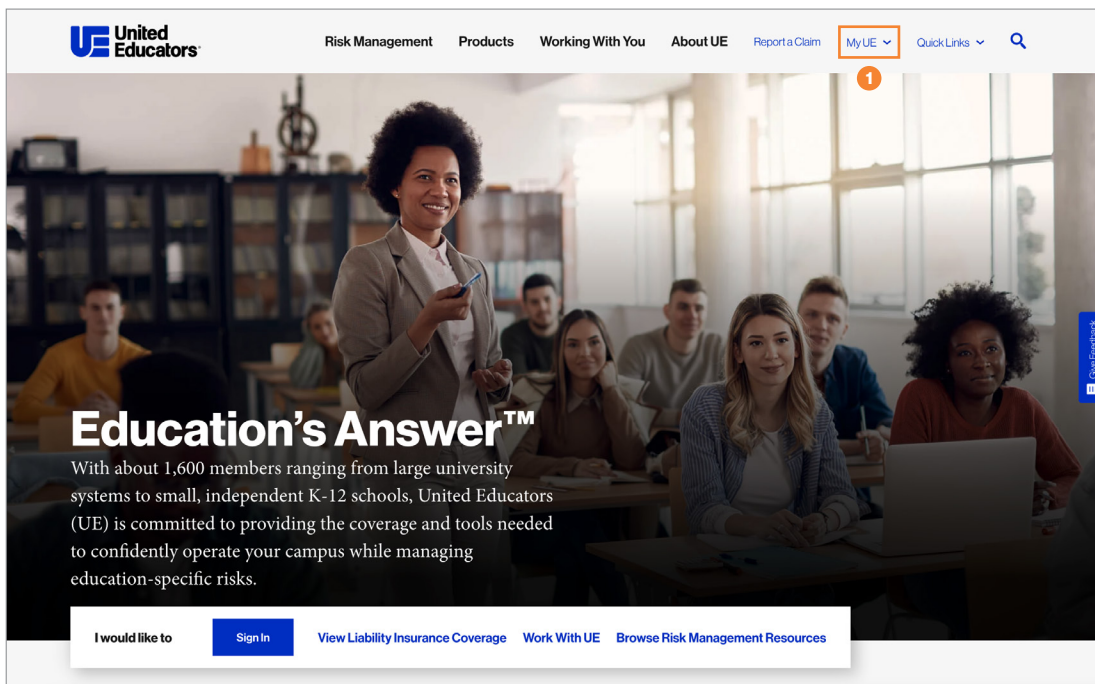


# Guide to Manage Your Institution's Contacts on My UE

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](http://www.ue.org) and click My UE in the top right-hand corner to sign in (1).

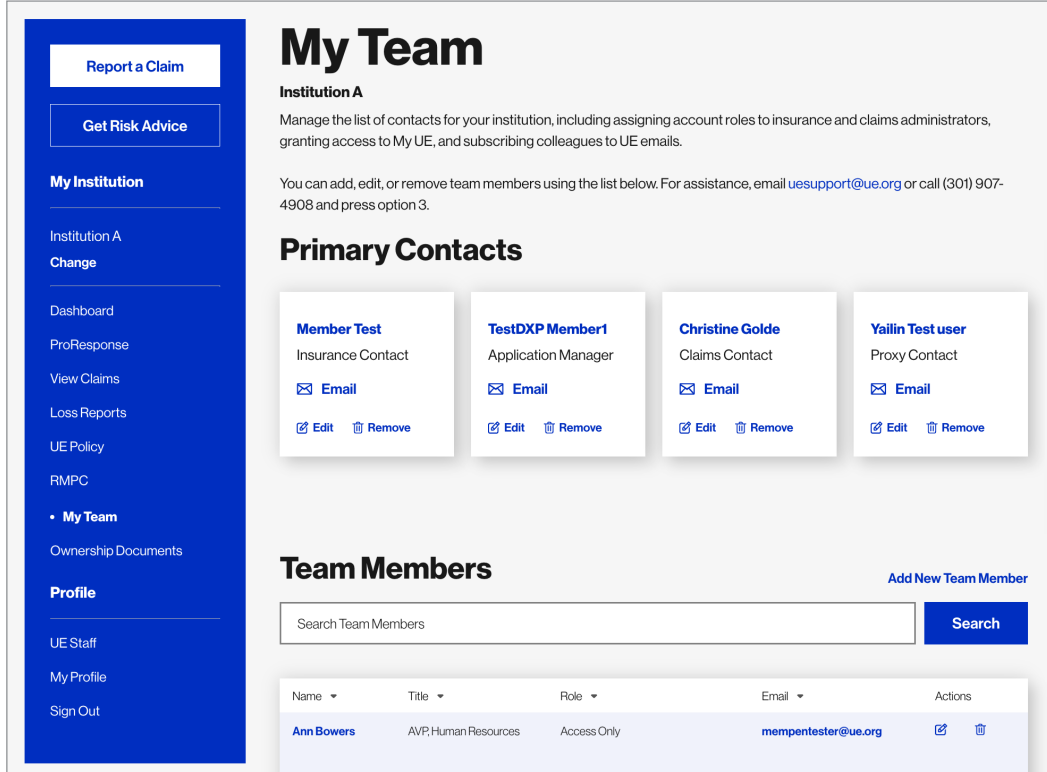


The screenshot shows the United Educators website homepage. The navigation menu at the top includes: Risk Management, Products, Working With You, About UE, Report a Claim, My UE (highlighted with a red box and a red circle containing the number 1), and Quick Links. Below the navigation is a large banner image of a smiling woman in a classroom setting. The banner text reads: "Education's Answer™" followed by "With about 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." At the bottom of the banner, there is a white bar with the text "I would like to" followed by a blue "Sign In" button and several links: "View Liability Insurance Coverage", "Work With UE", and "Browse Risk Management Resources". A "Give Feedback" button is visible on the right side of the banner.

- 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. On the left is a blue navigation sidebar with the following items: 'Report a Claim', 'Get Risk Advice', 'My Institution' (with sub-items: 'Institution A', 'Change'), 'Dashboard' (highlighted with a red box and a circled '1'), 'ProResponse', 'View Claims', 'Loss Reports', 'UE Policy', 'RMPC', 'My Team' (highlighted with a red box and a circled '1'), 'Ownership Documents', 'Profile' (with sub-items: 'UE Staff', 'My Profile', 'Sign Out'). The main content area is titled 'Dashboard' and includes a 'Report a Claim' button, a 'Get Risk Advice' button, and a 'My Institution' section. Below this, there are several tiles: 'Knowledge Center', 'Browse Resources', 'ProResponse® Benefit', 'View Claims', 'Download Loss Reports', 'UE Policy', 'Risk Management Premium Credit (RMPC)', and 'My Team'. The 'My Team' tile is highlighted with a red box and a circled '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](mailto:uesupport@ue.org) or call (301) 907-4908 and press option 3.

**Primary Contacts**

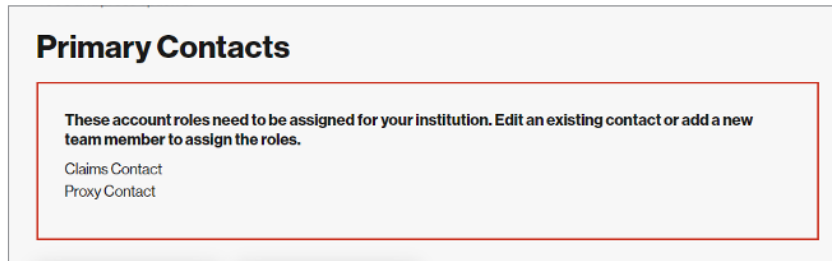
<p><b>Member Test</b> Insurance Contact</p> <p><a href="#">✉ Email</a></p> <p><a href="#">✎ Edit</a> <a href="#">🗑 Remove</a></p>	<p><b>TestDXP Member1</b> Application Manager</p> <p><a href="#">✉ Email</a></p> <p><a href="#">✎ Edit</a> <a href="#">🗑 Remove</a></p>	<p><b>Christine Golde</b> Claims Contact</p> <p><a href="#">✉ Email</a></p> <p><a href="#">✎ Edit</a> <a href="#">🗑 Remove</a></p>	<p><b>Yailin Test user</b> Proxy Contact</p> <p><a href="#">✉ Email</a></p> <p><a href="#">✎ Edit</a> <a href="#">🗑 Remove</a></p>
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**Team Members** [Add New Team Member](#)

Search Team Members  [Search](#)

Name	Title	Role	Email	Actions
Ann Bowers	AVP, Human Resources	Access Only	<a href="mailto:mempentester@ue.org">mempentester@ue.org</a>	<a href="#">✎</a> <a href="#">🗑</a>

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

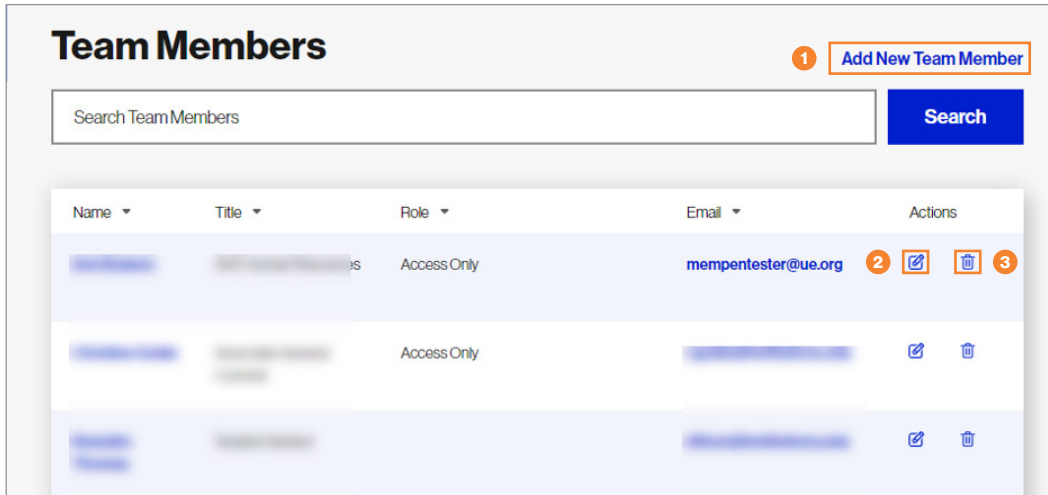


**Primary Contacts**

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

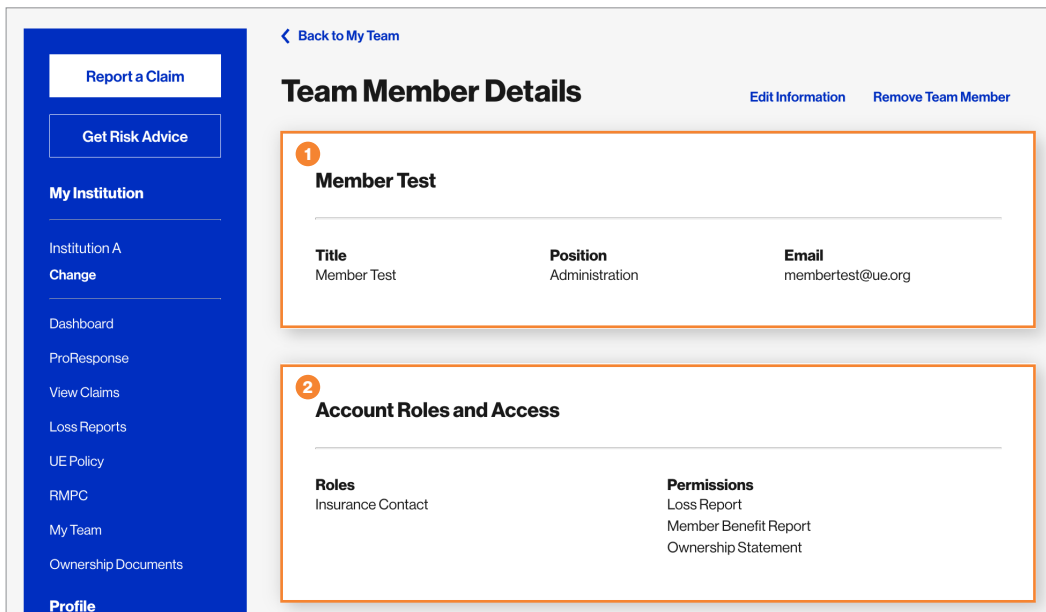
Claims Contact  
Proxy Contact

- 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.*

- 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.



- Send questions about managing your contacts to [uesupport@ue.org](mailto: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 client institutions or brokerage 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](mailto:uesupport@ue.org).

Each 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.

Brokerages, meanwhile, only can list one Producer broker role per client. The broker contact holding the Producer broker role must hold the Application proprietary permission.

## Members' Account Roles and Their Definitions

<b>Application Manager</b>	Person receiving the online insurance renewal application
<b>Claims Billing Contact</b>	Person receiving claims payments
<b>Claims Contact</b>	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>
<b>CMS Account Manager</b>	Person working with claims on medical services payments
<b>Insurance Contact</b>	Person responsible for insurance-related decisions, including decisions related to the Risk Management Premium Credit (RMPC) program
<b>Online Course Administrators</b>	People who access and run reports for UE's online courses
<b>Proxy Contact</b>	Person casting votes for UE's annual board meeting
<b>Risk Management Contact</b>	Person responsible for risk management activities

## Members' My UE Proprietary Permissions Definitions

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

## Brokers' Roles and Their Definitions

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

## Brokers' My UE Proprietary Permissions Definitions

### Proprietary Permission / Proprietary Permission Definition

<b>Application</b>	Allows users to manage the online insurance renewal application
<b>Loss Run</b>	Allows users to download reports detailing their clients' claims history
<b>Member Benefit Report</b>	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
<b>Policy Documents</b>	Allows users to view and download insurance policies

### Product Access / Product Access Definition

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

### Line of Business Code / Line of Business Definition

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

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