

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.

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

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>
CMS Account Manager	Person working with claims on medical services payments
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 client's claims history
Member Benefit Report	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
Ownership Statement	Lets users download a report documenting the allocations to and balance of your client's 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)	