Claim Form: Updates

In order to comply with CMS Section 111 reporting, we’re required to collect claimants’ Social Security Number and Date of Birth. Claims forms that include bodily injury report options have been updated with these as required fields.

Additional information regarding the CMS mandate, and other resources, may be found here.

SORM may work with members to gather this information, or may contact claimants directly.

Additional Claim and Incident fields have been updated, as noted below.

Instructions: Claimant

To ensure claim information is accurately captured, we’ve recognized and updated the following:

1. Claimant Vehicle Driver and Claimant Vehicle Owner information is pulled from the panel above for Other Vehicle and Other Vehicle Driver.
   a. So, for vehicle drivers and vehicle owners, the information must be put into the Other Vehicle panel. The names do not need to be re-entered in the Claimant panel.
   b. But, the Other Vehicle Driver is Owner field is now required. This will determine how to record the Other Vehicle Driver / Owner information within the Claimant panel below.
      i. Users must select either yes/no. Then under the Claimant information panel
      ii. Claimant Type must be selected
Instructions: Claimant (continued)

iii. If the claimant type is either Member, Other Party – Driver, or Other Party – Owner, the names for those individuals will be pulled in from other parts of the form, and users should only add other relevant information not previously recorded, like claimant phone, email, age, ssn, gender, etc.

iv. The claimant’s name will be required if Claimant Type is either Other, Passenger or Pedestrian. This would not be auto-filled from other parts of the form, since that information was not previously input at other parts of the form.

Removed: Fields

Injury fields have been removed from Incident Types: Damaged or Stolen Vehicle, Boiler and Machinery, Inland Marine, Fine Arts, Property, Damaged non-Member Property, and Hull and Machinery. We recognize that such fields are both unnecessary and that they can cumbersome.

Case Status is being removed from the Incident form, for Risk Transfer incidents. We recognize that incidents converted to claims, are essentially “accepted” as a claim. Conversely, those not converted to claims, are essentially denied as giving rise to a claim. Other potential uses for the case status field would apply at the claim phase, where the field will remain.

Employer Notified Date is a field that’s more applicable to WCI losses, not Risk Transfer; and is now removed from Risk Transfer forms.