



MATRICULATION FORM Candidate # _____ (FOR INTERNAL USE ONLY/NOT SS#)

One-Time Fee: \$125 for U.S. & Canada Members; \$175 for U.S. & Canada Non-Members; \$50 for International Members; \$75 for International Non-Members.

This form is part of your permanent student record. Please fill in the information on this page, the semester and exam date information for any completed CPCU, LOMA, SOFE or CAS courses on the next page, and sign and return this form along with registration materials to the IDMA office. **NOTE:** If you have already matriculated with IDMA, you need not resubmit this form each time you register for an exam.

NAME: _____

TITLE: _____ COMPANY: _____

ADDRESS: _____ ZIP CODE: _____

TELEPHONE #: _____ FAX #: _____ E-MAIL: _____

SIGNATURE: _____ DATE: _____

IDMA Requirements for the Associate Insurance Data Manager (AIDM®) Designation:

Completion of these **four IDMA designed courses** will earn students the AIDM® designation:

- Insurance Data Collection and Reporting (IDMA 1)
- Insurance Data Quality (IDMA 2)
- Systems Development and Project Management (IDMA)
- Data Management, Administration, & Warehousing (IDMA 4)

Waiver Note: The AIT designation or a PMI-certified course will waive requirements for the IDMA 3 course.

IDMA Requirements for the Certified Insurance Data Manager (CIDM®) Designation:

The CIDM® designation is earned when students **complete the four IDMA courses and four select courses taken from one of four other curricula listed below:**

Option 1: IDMA requirements through the **Chartered Property-Casualty Underwriter (CPCU)** program:

Two required courses:

- CPCU 520 (previously CPCU 5)
- CPCU 540 (previously CPCU 8)

Plus any two of the following:

- CPCU 551 (previously CPCU 3)
- CPCU 552 (previously CPCU 4)
- CPCU 553
- CPCU 555 (previously CPCU 2)
- CPCU 556
- CPCU 557

Waiver Note: Passing all three of INS 21, 22, and 23 will waive the CPCU 551, 552, 553, 555, 556 and 557 requirement (CPCU 520 and CPCU 540 are required in addition to the INS courses). We will accept the MBA waiver to CPCU 540.

Option 2: IDMA requirements through the **Life Office Management Association (LOMA)** program:

- FLMI 280 (previously LOMA 1)
- FLMI 290 (previously LOMA 2)
- FLMI 361 (previously LOMA 7)
- FLMI 371 (previously LOMA 9)

Option 3: IDMA requirements through the **Society of Financial Examiners (SOFE)** program:

- Life and Health Insurance Fundamentals
- Property and Liability Insurance Fundamentals
- Life and Health Insurance Accounting
- Property and Liability Insurance Accounting

Option 4: IDMA requirements through the **Casualty Actuarial Society (CAS)** program:

- Exam 2 (Same as SOA Exam FM)
- Exam 3 (Both 3F (SOA Exam MFE) and 3L Segments)
- Exam 5
- Exam 6 (Any one of the three Nation Specific exams)

Waiver and Transcript Notice: ACAS, AFE, CPCU, FCAS or FLMI designations will waive the four non-IDMA courses required to receive a CIDM®. In order to receive a CIDM designation, IDMA will require an official transcript directly from the administrator of any non-IDMA curricula (such as CPCU, LOMA, SOFE or CAS) to demonstrate successful completion of the course requirements.

IDMA Requirements for the Associate Insurance Data Manager (AIDM®) Designation

INSURANCE DATA COLLECTION & REPORTING

Semester taken: _____ date passed _____

INSURANCE DATA QUALITY

Semester taken: _____ date passed _____

SYSTEM DEVELOPMENT & PROJECT MANAGEMENT

Semester taken: _____ date passed _____

DATA MANAGEMENT, ADMINISTRATION & WAREHOUSING

Semester taken: _____ date passed _____

CURRICULUM COMPLETED DATE: _____ CERTIFICATE AWARDED DATE: _____

IDMA Requirements for the Certified Insurance Data Manager (CIDM®) Designation

CPCU REQUIREMENT

transcript received date

After 6/1/2002

CPCU 5	Semester taken _____	date passed _____	_____	<u>CPCU 520</u>	_____	date passed _____	_____
CPCU 8	Semester taken _____	date passed _____	_____	<u>CPCU 540</u>	_____	date passed _____	_____

ANY TWO OF CPCU 2, 3, 4 and CPCU 556 or CPCU 557

CPCU 2	Semester taken _____	date passed _____	_____	<u>CPCU 553</u>	_____	date passed _____	_____
CPCU 555	Semester taken _____	date passed _____	_____				
CPCU 3	Semester taken _____	date passed _____	_____	<u>CPCU 551</u>	_____	date passed _____	_____
CPCU 4	Semester taken _____	date passed _____	_____	<u>CPCU 552</u>	_____	date passed _____	_____
CPCU 556	Semester taken _____	date passed _____	_____	<u>CPCU 557</u>	_____	date passed _____	_____

INS 21, 22, AND 23

INS 21	Semester taken _____	date passed _____	_____
INS 22	Semester taken _____	date passed _____	_____
INS 23	Semester taken _____	date passed _____	_____

LOMA REQUIREMENT

transcript received date

FLMI 280/LOMA 1	Semester taken _____	date passed _____	_____
FLMI 290/LOMA 2	Semester taken _____	date passed _____	_____
FLMI 361/LOMA 7	Semester taken _____	date passed _____	_____
FLMI 371/LOMA 9	Semester taken _____	date passed _____	_____

SOFE REQUIREMENT

transcript received date

L&H Fundamentals	Semester taken _____	date passed _____	_____
P&L Fundamentals	Semester taken _____	date passed _____	_____
L&H Accounting	Semester taken _____	date passed _____	_____
P&L Accounting	Semester taken _____	date passed _____	_____

CAS REQUIREMENT

verification received date

After 1/1/2011

Exam 2 OR 8	Semester taken _____	date passed _____	_____	Exam 2/FM	_____	date passed _____	_____
Exam 3 OR 4	Semester taken _____	date passed _____	_____	Exam 3 (both 3MF and 3L)	_____	date passed _____	_____
Exam 5	Semester taken _____	date passed _____	_____	Exam 5 OR 8	_____	date passed _____	_____
Exam 6 OR 7	Semester taken _____	date passed _____	_____	Exam 6	_____	date passed _____	_____

COLLEGE OR UNIVERSITY DEGREES

COLLEGE OR UNIVERSITY DEGREES: We do not require transcripts of college credits; however for purposes of your student record, please indicate when and from what institution you received your associate, baccalaureate or other degree.

Degree granted: _____ Date earned: _____ Granting Institution: _____