



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-Designed Courses: (completion of these four courses will earn students the Associate in Insurance Data Management (AIDM®) designation)

- Insurance Data Collection and Reporting (IDMA1)
- Insurance Data Quality (IDMA2)
- Systems Development and Project Management (IDMA3)
- Data Management, Administration, & Warehousing (IDMA4)

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

Outside 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 from a choice of other curricula)

Chartered Property-Casualty Underwriter (CPCU) - the two required courses are:

- 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 do not accept the MBA waiver to CPCU 540, though we will accept the AIAF or CAS.

Life Office Management Association, (LOMA) course requirements:

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

Society of Financial Examiners (SOFE) course requirements:

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

Casualty Actuarial Society (CAS) course requirements:

- CAS Exam 3 OR CAS Exam 4
- CAS Exam 5
- CAS Exam 6 OR CAS Exam 7
- CAS Exam 2 OR CAS Exam 8

TRANSCRIPT NOTICE: 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. This cannot be a photocopy, screen shot or e-mail – verification must be directly from the institute.

Waiver Note: ACPCU, CAS, FCAS, LOMA or SOFE designations will waive the four additional tests required to receive a CIDM®. To claim the waiver, IDMA must receive an official transcript from the institute. (See transcript notice above.)

COURSE RECORD

IDMA - DESIGNED COURSES

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: _____

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

CPCU REQUIREMENT transcript received date After 6/1/2002

CPCU 5 Semester taken _____ date passed _____ CPCU 520 _____ date passed _____

CPCU 8 Semester taken _____ date passed _____ CPCU 540 _____ date passed _____

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

CPCU 2 Semester taken _____ date passed _____ CPCU 553 _____ date passed _____

CPCU 555 Semester taken _____ date passed _____

CPCU 3 Semester taken _____ date passed _____ CPCU 551 _____ date passed _____

CPCU 4 Semester taken _____ date passed _____ CPCU 552 _____ date passed _____

CPCU 556 Semester taken _____ date passed _____ CPCU 557 _____ 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 _____

CAS REQUIREMENT verification received date After 1/1/2000

CAS Part 3A Semester taken _____ date passed _____ CAS Module 3 or 4 _____ date passed _____

CAS Part 3B Semester taken _____ date passed _____ CAS Module 5 _____ date passed _____

CAS Part 5A Semester taken _____ date passed _____ CAS Module 2 or 8 _____ date passed _____

CAS Part 5B Semester taken _____ date passed _____ CAS Module 6 or 7 _____ date passed _____

CAS Part 6 Semester taken _____ date passed _____

CAS Part 7 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 _____

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: _____