



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

One-Time Fee: \$175 for U.S. & Canada Members; \$275 for U.S. & Canada Non-Members; \$100 for International Members; \$150 for International Non-Members.

This form is part of your permanent student record. Please fill in the information requested on this form and return this the IDMA office. **NOTE:** If you have already matriculated with IDMA, you do not to resubmit this form.

NAME: _____

TITLE: _____ COMPANY: _____

ADDRESS: _____

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 3)
- 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 **Fellow, Life Management Institute (FLMI) designation from LOMA:**

- LOMA 280 – Principals of Insurance
- LOMA 290 – Insurance Company Operations
- LOMA 361 – Accounting and Financial Reporting in Life and Health Insurance Companies
- LOMA 371 – Risk Management and Product Design for Insurance Companies

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

LOMA 280	Semester taken _____	date passed _____	
LOMA 290	Semester taken _____	date passed _____	
LOMA 361	Semester taken _____	date passed _____	
LOMA 371	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 _____		<u>Exam 2/FM</u>	_____	date passed _____	
Exam 3 OR 4	Semester taken _____	date passed _____		<u>Exam 3 (both 3F & 3L)</u>	_____	date passed _____	
Exam 5	Semester taken _____	date passed _____		<u>Exam 5 OR 8</u>	_____	date passed _____	
Exam 6 OR 7	Semester taken _____	date passed _____		<u>Exam 6</u>	_____	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: _____