

# Forms Search Glossary

WCIRB Connect® now allows insurers to search for their own approved, disapproved or deactivated policy and endorsement forms, ancillary agreements and policyholder notices. Insurers can search by form name, form number, type of form, CDI File Number, SERFF Tracking Number and date range. The following are terms you may come across while using these search functions:

## Search by Form Type

**Standard Form:** An approved policy or endorsement form that was submitted to the Insurance Commissioner by the WCIRB on behalf of its members. Since the form is pre-approved for use in California, it does not need to be forwarded to the Insurance Commissioner for approval and insurers can begin using it after receiving written notice from the WCIRB that the form is ready for use. This form type also includes Advisory Policyholder Notices.

**Non-Standard Form:** A policy or endorsement form or ancillary agreement that is not pre-approved as a Standard Form in California. It is submitted to the Insurance Commissioner by the WCIRB on behalf of a single insurer and can only be used by an insurer as set forth in Title 10, California Code of Regulations, Section 2257.

## ***Search by Jurisdiction***

**California and Multi-State:** Policy and endorsement forms providing California workers' compensation coverage, as well as ancillary agreements and California policyholder notices.

**Excess Insurance:** Policy and endorsement forms providing excess workers' compensation insurance coverage (e.g., insurance that covers the policyholder only for the portion of losses that exceed a certain dollar limit), as well as excess policyholder notices.

**USL&H and Federal:** Policy and endorsement forms providing United States Longshore and Harbor Workers' Compensation Act (USL&H), maritime and other federal coverages.

**Other:** Policy and endorsement forms that do not fall under the other jurisdiction types.

## ***Search by Required Type***

**Policyholder Notice:** The policyholder notices that do not impact coverage and provide the information required by California Insurance Code Sections 11752.6 and 11752.8.

**Amendatory Endorsement:** A form containing provisions required to bring the Policy Conditions into compliance with California law.

**Cancellation Notice:** A form containing provisions required to bring the Policy Conditions into compliance with California law (see Insurance Code Section 676.8, pertaining to policy cancellation).

**Information Page:** A form that reflects details about the policyholder and specifies the policy coverage information.

**Policy Conditions:** A form that sets forth the terms and conditions of the workers' compensation insurance coverage agreement.

**Policy Conditions and Information Page:** A form that combines the Policy Conditions (sets forth the terms and conditions of the workers' compensation insurance coverage agreement) and the Information Page (reflects details about the policyholder and specifies the policy coverage information).

## ***Search by Category***

**Limiting and Restricting:** Endorsement forms used to exclude some portion of workers' compensation liability coverage from a policy, subject to the rules set forth in Title 10, California Code of Regulations, Sections 2250 through 2269.

**Labor Contractor:** Endorsement forms used for policies covering employee leasing arrangements as defined in the Employee Leasing Rule (see Section V, Rule 4 of the *California Workers' Compensation Experience Rating Plan—1995*).

**Policyholder Notice:** Filed as a policyholder notice to provide information to the policyholder.

## ***Other Terms***

**Deactivated by Insurer:** Policy and endorsement forms, ancillary agreements and policyholder notices that the insurer has advised the WCIRB are no longer in use.

**CDI File Number:** The file number assigned by the California Department of Insurance (CDI) to form filings that are forwarded by the WCIRB to the Insurance Commissioner for review.

**SERFF Tracking Number:** The tracking number assigned to form filings submitted to the WCIRB via the National Association of Insurance Commissioners (NAIC) System for Electronic Rates and Forms Filing (SERFF).

Please email [PolicyForms@wcirb.com](mailto:PolicyForms@wcirb.com) if you have questions.

*The WCIRB maintains copies of workers' compensation Forms and their dispositions. The information in the WCIRB's form database is intended to reflect the approval status and attributes of these Forms. The WCIRB is in the process of validating the information in this database. Search queries other than by form number may not retrieve all Forms, and an insurer should confirm the approval status of a Form before it is relied upon for any purpose. The WCIRB disclaims any liability arising from the reliance upon the information accessed or displayed.*