|  |  |  |
| --- | --- | --- |
| Each paper claim file or email notification requires one of these forms, which should be completed and held in the paper file / attached to email to provide the information required for XCS Claims Processing (CP) to issue the SCM. Full details can be found at [www.lloyds.com/claimscheme](http://www.lloyds.com/claimscheme).  If this form is not properly completed the file may be rejected by CP, resulting in a delay. Note: where a claim has more than one claim entry or SCM associated with it (e.g. multiple layers, separate fee entries, entries for different currencies) a separate form will be required for each entry. | | |
| **Section** | **Who Should Complete?** | **When To Complete** |
| A | Leader, and Second Lead if Complex | **At every presentation**. |
| B | Leader | Complete in full **for any first advice**.  For existing claims where an SCM has already been issued, only complete any fields that need changing. |

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| Section A - Triage | | | | Date: | | | | | |
| Triage Category:  Standard  Complex | | | | | | | | | |
| Lead Syndicate Name and Number: | | | | Second Lead Syndicate Name and Number: | | | | | |
| Lead Adjuster Name:  Telephone:  Email: | | | | Second Lead Adjuster Name:  Telephone:  Email: | | | | | |
| O/S Loss / Indemnity & Orig. Ccy | | | | TBA Code (if O/S Loss is zero, please specify):  Choose an item. | | | | | |
| Urgent Settlement? *Please check this box if Settlement being presented requires urgent processing* | | | | | | | | | |
| **Expert Information**: Please complete *where only one expert is appointed to a claim.* Where multiple experts appointed, please compete the ‘CP Instruction: Experts, Fees and Expenses’ on page 4. | | | | | | | | | |
| Type of Expert:  Lawyer / Adjuster | Name of Firm: | | | Individual Expert’s Name (if known): | | | | Expert’s Reference (if known): | |
| O/S Fee (including Reserve & Sett. Ccy, e.g. GBP/GBP) | | | | O/S Expense (including Reserve & Sett. Ccy, e.g. GBP/GBP) | | | | | |
| Transaction / SCM Narrative (max 50 characters): | | | | | | | | | |
| Section B - Data | | | | | | | | |
| The leader **must complete this section in full for a first advice**.  On existing claims, only fields that need changing must be completed / altered – therefore please check the existing SCM. | | | | | | | | |
| Original Signing Number and Date (OSND) | | | | | | | | |
| Cat Code | | | PCS Cat Code | | | Cause Code | | |
| Loss Fund?  Yes  No | | In Subrogation?  Yes  No | | | In Coverage Litigation?  Yes  No | | Direct Report?  Yes  No | |
| Claim Narrative (short description of claim) | | | | | | | | |
| Insured name | | | | | | | | |
| Reinsured name, if applicable | | | | | | | | |
| Claimant name, if applicable | | | | | | | | |
| Coverholder, if applicable | | | | | | | | |
| Current broker (broker number, contact name and telephone) | | | | | | | | |
| Medicare claimant, if applicable | | | | | | | | |
| Date of Loss | | | | | Date Claim Made (liability only) | | | |
| Loss Date Narrative | | | | | | | | |
| Loss Location | | | | | Voyage (marine and energy only) | | | |
| Loss Name | | | | | | | | |
| Vessel / Aircraft / Conveyance if applicable | | | | | | | | |
| Limits | | | | | | | | |
| Excess | | | | | | | | |
| Slip Order | | | | | | | | |
| Cover Period | | | | | | | | |
| Policy Period | | | | | | | | |
| Perils / Conditions | | | | | | | | |
| Settlement Currency | | | | | Settlement Currency Rate of Exchange | | | |

Where multiple experts are appointed to a single Claims Office Reference (COR), details of **all** third party experts (loss adjusters, lawyers etc) should be captured on this form by the lead. All details for all experts advising on the claim are held in CLASS. In CLASS you can enter details for up to 30 expert organisations against a single COR. An SCM can only contain the details of one adjuster **and** one lawyer. The lead must select which **one** lawyer and **one** adjuster should be advised on the SCM at each movement by ticking the appropriate box below.

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

|  |  |  |  |
| --- | --- | --- | --- |
| Expert’s Reference |  | Advise on SCM? |  |
| PTT Fee |  | O/S Fee |  |
| PTT Expense |  | O/S Expense |  |