

---

# DELEGATED CONTRACT MANAGER (DCM)

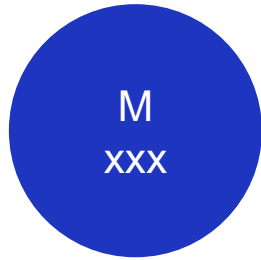
DCM Mandatory Field Guide

March 2021

---

## Delegated Contract Manager Field Guide - Definitions

This guide contains all Mandatory and Conditionally Mandatory fields in DCM. It does **not** contain Non Mandatory fields. The reference numbers ie 'Mxxx' or 'CM xxx' are traceable to the Data Capture for Registration Excel



**Mandatory fields:** Must be populated by users, regardless of responses to other questions





**Conditionally Mandatory fields:** Triggered by responses to previous questions – if triggered, must be populated

# Agreement Template

Create Registration **DRAFT**

Refresh Participant Data

Actions  

## Agreement template


To get started, choose the type of contract you wish to create

Agreement Template \*


M1

Select the organisation you are creating this contract on behalf of \*

M2

Select the Central Settlement Number relating to this organisation \* 

M3

Select user group(s) to provide access to this contract \* 

M4

## How it works

### Register contracts:

All contracts are bound offline and then added to DCM once completed and ready to register.

### Create a contract using contract builder:

If you choose to, you may use the registration process to create the contract wording which can then be taken to the market to place. Whether or not you choose to use contract builder to create the wording, the details entered here will form part of the registration submission after they have been submitted to the Lloyd's lead to review.

1. Select a contract template Choose the type of contract you wish to register.
2. Populate the required fields Before submitting your contract wording for review you must provide all the required information.  
  
You can complete this in any order as long as it is populated before submission. You can save and generate draft versions of the contract wording on the Actions page (step 7).
3. Submit for review Once complete send your contract wording for review by the named Lloyd's Lead(s).

# Core Contract Details & General Contract Information

M5

M6

M7

Create RegistrationContract ID: DA-CH-210310-0075Contract Type: Binding Authority AgreementDRAFT

Auto SaveRefresh Participant DataActions

Agreement TemplateGeneral Contract InformationBroker DetailsContract LeadsSection DetailsNon-Schedule DataActions

M9

Unique Market Reference Number (UMR)\*  
B - e.g. 1234 - e.g. 1234567890

M10

Agreement Number  
e.g. 1234567890

M11

Period From \*  
MM/DD/YYYY

M12

Period To \*  
MM/DD/YYYY

M13

Multi Year Contract  
☐ Yes ☒ No

M14

Any Time Zone \*  
☐ Yes ☒ No

CM1

Both Days Inclusive? \*  
☐ Yes ☒ No

CM2

Time Zone \*  
(GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, v

CM3

Time Period From \*  
-- -- --

CM4

Time Period To \*  
-- -- --

M15

Is this a sub-contract? \*  
☒ Yes ☐ No

M16

Master Contract UMR \*

M17

Is this a tripartite agreement? \*  
☐ Yes ☐ No

M18

What is the primary currency for this contract? \*  
Select...

M19

Date confirmation was received  
The confirmation date will automatically populate here once you have added this into the Section Details

Will contract be processed using Lloyd's Direct Reporting? \*  
☐ Yes ☒ No

**NOTE:**

- M8 not displayed on UI

# Broker Details

CM 5

CM 7

CM 8

CM 9

CM 11

CM 12

CM 13

CM 14

CM 15

CM 16

Agreement TemplateGeneral Contract InformationBroker DetailsContract LoadsSection DetailsNon-Schedule DataActions

Broker Details

☐ I am dealing direct

Search for a Broker \*

Maximum Number Reached, 1 for regular, 2 for twin contract

▼ Ausaf Suncross Tech

Broker reference

The Lloyd's Broker

Ausaf Suncross Tech

Broker Number

0281

Broker Address

815B Swallow Way

Timblin

DR3 7DE

M.

Tkvhcbrm.

VS3L 7IC

Contract Manager Email Address \*

?

Contract Manager details

Contract Manager First Name \*

?

Contract Manager Surname \*

?

Compliance Manager details

Compliance Manager

--

?

Compliance Manager Email Address

--

?

CM 10

Broker Pseudonym

RFU

Agreement TemplateGeneral Contract InformationBroker Details

Broker Details

☒ I am dealing direct

CM 6

Central Settlement Number (CSN) \*

6

# Contract Lead(s): Service Company

Agreement Template

General Contract Information

Broker Details

Contract Leads

Section Details

Non-Schedule Data

Actions

Contract Lead(s)

M20

Lead Type \*

Service Company ▾

M21

Lead \*

Search

Search

CM 21

Service Company Name

Adaptics Formers & Company

CM 22

Service Company PIN

338224HIN

CM 23

Service Company UMR \*

7

# Contract Lead(s): Non Lloyd's Insurer

Agreement Template

General Contract Information

Broker Details

Contract Leads

Section Details

Non-Schedule Data

Actions

Contract Lead(s)

M20

Lead Type ★

Non-Lloyd's Insurer ▾

M21

Lead ★

Other ★

CM 28

Other Non-Lloyd's Insurer

Type here

Add

Syndicate Name

Affairs Commerce Group

Syndicate Year of Account (SYOA)

2021

Syndicate Number

2019

Managing Agent

Finders Loveridge Inc

25

Non-Lloyd's Insurer Name

NLI

- NOTE:**
- Non Lloyd's Insurer fields in development (CM24;CM26;CM27)



# Contract Lead(s): Twin Only

COMMON SECTION DETAILS

INDIVIDUAL SECTION DETAILS

Here you can overwrite the data in each individual section. Only the section overwrites will appear in the contract.

+ Add Section

×

Delete

Sections

LMA3113A

001

Copy section

Enter Section Details

001

CM 29

☒ LMA3113A

☐ LBS0001A

By switching between London or Brussels sections, you may lose some data that you have entered

Description

Enter description

> Coverholder Details

Individual section

# Section Details: Coverholder Details

Agreement Template

General Contract Information

Broker Details

Contract Leads

Section Details

Non-Schedule Data

Actions

COMMON SECTION DETAILS

INDIVIDUAL SECTION DETAILS

Here you can overwrite the data in each individual section. Only the section overwrites will appear in the contract.

+ Add Section

×

Delete

Sections

001

M22

Copy

Enter Section Details

001

Enter section name

e.g. Property

▼ Coverholder Details

Individual section

All Coverholder(s) added on this contract will be able to see the data for this contract in Delegated Data Manager. If you want to avoid this, then please create a separate contract for each Coverholder

Search with Coverholder Name or PIN ★

M23

Coverholder

Search

▼ Aaken Powderflight Inc.

Trash

CM 30

Participant Name

Aaken Powderflight Inc.

CM 32

Trading Address

Broker Address

77 Nyla Rd.

Frazee

Ggyvoy.

Sea.

J e.

BW1 2PV

Approval Status

Approved

CM 31

PIN

395473RNE

CM 33

Postal Address

Broker Address

63 Leggitt Ave.

Overgaard

T gngo.

Dwsnd.

Ru.

WQ4W 3BI

**NOTE:**

- CM34 to be added

10

# Section Details: Service Company Details

Agreement Template

General Contract Information

Broker Details

Contract Leads

Section Details

Non-Schedule Data

Actions

COMMON SECTION DETAILS

INDIVIDUAL SECTION DETAILS

Here you can overwrite the data in each individual section. Only the section overwrites will appear in the contract.

+ Add Section

×

Delete

Sections

001

M22

Copy

Enter Section Details

001

Enter section name

e.g. Property

Service Company Details

Individual section

All Service Company(s) added on this contract will be able to see the data for this contract in Delegated Data Manager. If you want to avoid this, then please create a separate contract for each Service Company

Search with Service Company Name or PIN

M23

Type Name or PIN

Search

Aaken Exec Ltd.

CM 36

Participant Name

Aaken Exec Ltd.

Trading Address

CM 38

Broker Address

5 Gaze Ave.

Salt Rock

Oc.

Uqmab.

Ilhjasja.

EB19 6YB

CM 40

Domicile

--

CM 37

PIN

345310QOK

Postal Address

CM 39

Broker Address

18 Swabville Rd.

Saxapahaw

V humwu v.

Jiev bxfh.

Gr.

BO82 8AS

CM 41

Approval Status

Approved

# Section Details: Person(s) Responsible for Operation and Control

Person(s) Responsible for Operation and Control

Individual section

☐ Enter for each Coverholder?

The person(s) responsible for overall operation and control\*

M24

First Name

M25

Surname

M26

Email

First Name

Surname

email@address.cc

?

Add

Copy names from question above

The person(s) authorised to bind insurances\*

M27

First Name

M28

Surname

M29

Email

First Name

Surname

email@address.cc

?

Add

Copy names from question above

The person(s) with overall responsibility for the issuance of documents evidencing insurances bound\*

M30

First Name

M31

Surname

M32

Email

First Name

Surname

email@address.cc

?

Add

Copy names from question above

# Section Details: Authorised Class(es) of Business and Coverage(s)

Authorized Class(es) of Business and Coverage(s)

Individual section

M33

Distribution Method \*

Select....

M34

Premium level of authority \*

Select....

CM 42

Deductible(s) and/or excess(es)

Select....

If you select this, you may enter a deductible or excess for each High-Level Class Business and/or Generic Class or Business and/or Peril and or Max Limit/Sum Insured provided at least one excess or deductible is entered at High-Level or Generic Class level.

CM 43

☐ I want to enter values for deductibles and/or excesses.

If you select this, you may enter a deductible or excess for each High Level Class of Business and/or Generic Class of Business and/or Peril and/or Max Limit/Sum Insured provided at least one excess or deductible is entered at High Level or Generic Class level.

Insured Item Group / Insured Item Sub-Group

Type here

Search

## Section Details: Authorised Class(es) of Business and Coverage(s)

Search with high level or generic class of business \*

M35

Type here

Search

Please note that you should only add one High Level Class of Business per section. Where more than one is added the first one will be taken as the primary High Level Class of Business by Delegated Data Manager

High level Class of Business Aviation

Regulatory Client Classification \*

M36

Maximum limit(s) of liability or sum(s) insured

You may enter limits of liability or sums insured for each High Level Class of Business and/or Generic Class of Business and/or Peril, provided each High Level Class of Business has at least one limit entered at High Level or Generic Class level

CM 44

Currency

Select...

CM 45

Value

CM 46

Limit Basis

Other

CM 47

Add

Deductibles and/or excesses for this high level class of business

CM 48

Select...

CM 49

CM 50

Limit Qualifier

Other

CM 51

Add

14

# Section Details: Authorised Class(es) of Business and Coverage(s)

Generic Class of Business Space

M37

Insurance / reinsurance ★

Select....

M38

Risk code(s) and description ★

Maximum limit(s) of liability or sum(s) insured

CM 52

Currency

Select...

CM 53

Value

CM 54

Limit Basis

Other

CM 55

Deductibles and/or excesses for this generic class of business

CM 56

Select...

CM 57

CM 58

Limit Qualifier

Other

CM 59

Peril

Coastal Flood

Maximum limit(s) of liability or sum(s) insured

Currency

Select...

Value

Limit Basis

Select...

Add

Deductibles and/or excesses for this Peril

Select...

Limit Qualifier

Other

CM 60

Add

15

## Section Details: Territorial Limitations

Territorial Limitations

Individual section

CM 61

**Risk Location\***

Worldwide ☐ excluding

[Add/Edit](#)

M39

Region/Country/Division

No items

CM 62

**Insured Domicile\***

Worldwide ☐ excluding

[Add/Edit](#)

M40

Region/Country/Division

No items

CM 63

**Territorial Limits\***

Worldwide ☐ excluding

[Add/Edit](#)

M41

Region/Country/Division

No items



# Section Details: Gross Premium Income Limit & Period Of Insurances Bound

▼ Gross Premium Income Limit

Individual section

Gross premium income limit\*

M42

Select... ▼

M43

e.g. 0.00

Notifiable percentage of the limit not to exceed\*

M44

e.g. 0.00

%

▼ Period Of Insurances Bound

Individual section

Period of insurances bound\*

M45

Number of

month(s)

Maximum period of insurances bound\*

M46

Number of

month(s) including odd time

Maximum advance period for inception dates\*

M47

Number of

day(s)

# Section Details: Commissions

Commissions

Individual section

M48

The coverholder commission\*

%

M49

Will there be a profit commission?\*

☒ Yes
 ☐ No

CM 64

Profit commission\*

%

CM 65

Profit commission basis\*

Select...

CM 66

Underwriting expenses \*

Select

or

CM 67

%

CM 68

Underwriting expense description \*

CM 69

Profit Commission calculation/description \*

CM 70

Maximum ~~total~~ broker commission\*

%

M50

Maximum fees that may be charged in addition to premium \*

Select

e.g. 0.00

or

M51

%

M52

Maximum fees that may be deducted from premium in addition to commissions \*

Select

e.g. 0.00

or

M53

%

CM 71

Description of fees

Type here

M54

Maximum value of any other acquisition costs that may be deducted from premium or charged in addition to premium \*

Select

e.g. 0.00

or

M55

%

CM 72

Description of other acquisition costs

Type here

Total maximum of all permitted deductions from premium that are in addition to coverholder commission as a percentage

%

# Section Details: Claims and Complaints

Claims and Complaints

Individual section

All Delegated Claims Administrators added on this section will be able to see claims and each other's data for this section in Delegated Data Manager. If you want to avoid this, then please add Delegated Claims Administrators on separate sections.

Is claims handling authority being delegated to a?

M56

☒ Yes ☐ No

Coverholder

M57

☒ Yes ☐ No

Delegated Claims Administrator

Coverholder(s) selected do not have claims handling authority

Please enter the following details of delegation to the coverholder(s)

What is the per claim limit of authority being delegated?

CM 73

CM 74

Number of

The person(s) authorised to exercise any claims authority?

☐ Enter for each Coverholder?

First Name	Surname	Email
<div>CM 75</div> <input type="text"/>	<div>CM 76</div> <input type="text"/>	<div>CM 77</div> <input type="text"/>

Add

Please enter the following details of the delegated claims administrator

Search With Delegated Claim Authority Name or PIN

Search

Abrahams Belfast Group

Delegated Claim Authority Name	<div>CM 78</div> Abrahams Belfast Group	<div>CM 79</div> PIN
Address		800119BNX
Broker Address		DCA Contact Email
85 Bulkeley St.		<div>CM 81</div> <input type="text"/>
Golden City		
Xtuzl		
Hjzast		
Xcil		
CQSP 9IC		

Is complaints handling authority being delegated to a?

M58

☒ Yes ☐ No

Coverholder

M59

☒ Yes ☐ No

Delegated Claims Administrator

Will policies be issued to eligible complainants under this contract?\*

M60

☒ Yes ☐ No

# Section Details: Reporting and Aggregate Exposures

Reporting and Aggregate Exposures

Individual section

M61

Risks written reporting interval \*

Monthly

M62

Maximum number of days for reporting/submission of risks bordereau(x) \*

Number of day(s)

CM 83

Claims reporting interval \*

Select...

M63

Premium paid reporting interval \*

Select...

M64

Maximum period for remittance of settlements \*

Number of day(s)

M65

Fees and charges to be deducted by the coverholder \*

Type here

Reporting and Aggregate Exposures

Common section

CM 82

Please select the Scheme Canada option that will be used under this contract \*

Select...

Risks written reporting interval \*

Monthly

Maximum number of days for reporting/submission of risks written bordereau(x) \*

Number of day(s)

Aggregate reporting interval

Select...

Maximum number of days for reporting /submission of aggregate exposures

Number of day(s)

Premium paid reporting interval \*

Select...

Maximum number of days for reporting /submission of premium bordereau(x)

Number of day(s)

Maximum period for remittance of settlements \*

Number of day(s)

Paid claims bordereaux payable within \*

Number of day(s)

Fees and charges to be deducted by the coverholder \*

Type here

Who is responsible for the Contract Administrator role? Please note this role must be performed by the same participant for all sections.

Party \*

Underwriters

Participant \*

Who is responsible for the following roles in relation to Risks Written

Who is responsible for the Contract Administrator role? Please note this role must be performed by the same participant for all sections.

M66

Party \*

Underwriters

M67

Participant \*

Which of the section leads will be responsible for breach management in Delegated Data Manager?

M68

Participant \*

LMA 3115 only

# Section Details: Reporting and Aggregate Exposures

Who is responsible for the following roles in relation to Risks Written

Submission	M69	Party ★ Coverholder	Participant ★	M81
Transformation	M70	Underwriters		M82
Assignment	M71	Underwriters		M83
Approval	M72	Underwriters		M84

Who is responsible for the following roles in relation to Paid Premium

Copy from question above

Submission	M73	Party ★ Coverholder	Participant ★	M85
Transformation	M74	Underwriters		M86
Assignment	M75	Underwriters		M87
Approval	M76	Underwriters		M88

Who is responsible for the following roles in relation to Claims

Copy from question above

Submission	CM 86	Party ★ Coverholder	Participant ★	CM 90
Transformation	CM 87	Underwriters		CM 91
Assignment	CM 88	Underwriters		CM 92
Approval	CM 89	Underwriters		CM 93

Who is responsible for the following roles in relation to Aggregates

Copy from question above

Submission	M77	Party ★ Coverholder	Participant ★	M89
Transformation	M78	Underwriters		M90
Assignment	M79	Underwriters		M91
Approval	M80	Underwriters		M92

# Section Details: Capacity Details (Lead(s))

Capacity Details

Common section

M93

Is this a Non-Lloyds Insurer led section\*

Yes

•

No

M94

Section Lead(s)

Lead Type \*

Non-Lloyd's Insurer ▾

M95

Lead \*

Type here to begin search

CM95

Syndicate

M96

M97

CM96

CM97

Lead	SOYA	Company Reference	Written Line *	Signed Line *	PIN/Number	Managing Agent
Assistance Fortronic Tech	2021			%		2007 Plug Shilton Branch

98

Service Company

M96

M97

99

100

Lead	Company Reference	Written Line *	Signed Line *	PIN/Number	UMR Number *
Abacus Spirits Services			%		333980ERW

102

Non-Lloyd's Insurers

M96

M97

Lead	Company Reference	Written Line *	Signed Line *	PIN/Number
Insurer One			%	

Capacity Details

Common section

Is this a Non-Lloyds Insurer led section\*

Yes

•

No

Section Lead(s)

Lead Type \*

Non-Lloyd's Insurer ▾

Lead \*

Other \*

Type here

105

Add

NOTES:

•

CM95: SOYA to be updated to SYOA

•

Non Lloyd's Insurer fields in development (CM101; CM103; CM104)

Section Details: Capacity Details

Section Follow(s)

CM106

Capacity Type

Non-Lloyd's Insurer

CM107

Capacity

Type here

CM110

CM111

CM108

CM109

CM113

Capacity	SOYA	Company Reference	Written Line	Signed Line	Managing Agent
Affairs Commerce Group	2021		%		Finders Loveridge Inc

CM114

CM108

CM109

CM115

CM116

Capacity	Company Reference	Written Line	Signed Line	PIN/Number	UMR Number
Abacus Spirits Services		%	%	333980ERW	

CM118

CM108

CM109

Capacity	Company Reference	Written Line	Signed Line
NLI		%	

M98

Year of account

2021

M99

Date confirmation was received

MM/DD/YYYY

M100

Total capacity = 0.0000000 %

Apply

Section Follow(s)

CM121

Capacity Type

Non-Lloyd's Insurer

Capacity

Other Non-Lloyd's Insurer

Other

Type here

Add

- NOTES:
- CM111: SOYA to be updated to SYOA
  - CM112 to be added
  - Non Lloyd's Insurer fields in development (CM117; CM119; CM120)

## Section Details: Non-Schedule

### Non-Schedule

Individual section

Section specific non-schedule data can be added here.

M101

Currency \*

Select... ▼

M102

Value \*

e.g. 0.00

M103

Basis of written lines \*

Select ▼

M104

Basis of signed lines \*

Select ▼

M105

Signing provisions \*

Select ▼

M106

Total Lloyd's brokerage \*

e.g. 000

☐ Enter total Lloyd's brokerage as an amount

M107

Platform \*

Select ▼

Other deductions Lloyd's broker may make from premium

Type here

M108

Product risk rating \*

Select ▼

Route of business

Select ▼



# Non-Schedule Data

Create Registration

Contract ID: DA-CH-210309-0030

Contract Type: Binding Authority Agreement

DRAFT

Auto Save ?

Refresh Participant Data

Actions

Agreement Template

General Contract Information

Broker Details

Contract Leads

Section Details

Non-Schedule Data

Actions

Non-Schedule data

Contract level non-schedule data is added here.

Order hereon\*

M109

e.g. 0.00

%

of

M110

e.g. 0.00

%

Actions

Create RegistrationContract ID: DA-CH-210309-0030Contract Type: Binding Authority AgreementDRAFT

Auto SaveRefresh Participant DataActions

Set Contract Wording Visible

Sharing this contract draft gives visibility of this proposed wording to those people you select. Initially visibility of the managerial user group of each participant in the contract, will be delegated access to other users in the organisation.

Upload contract document

Here you can upload and tag documents relevant to your contract. The documents will be visible to those people you select. Before submitting your final contract, you must upload a document to the lead, you must upload a document to the contract.

Generate contract document

You may want to generate a document for your contract. Select the components you want to export and press generate. Once generated your document will be available to you in the Associated Contract.

Download registration document

You can generate a copy of the registration information you have populated. The system will generate a PDF document for you to download and print. This will be available to you in the Associated Contract.

Attach file(s)

M111

Drag and drop files here

or

Select file(s)

Name*	File	Classification*
Test doc	Test doc.docx	Select..

Supported file types: doc, docx, jpeg, jpg, pdf, ppt, pptx, rtf, tif, tiff, txt, vsd, vsd, xls, xlsx, xml, gif, jpeg, jpg, rtf, bmp, csv  
The maximum file size is 60MB

Cancel

Attach

Back

Save

Submit For Review

When the contract is complete and ready to be registered, you submit it