**CLAIMS INTERIM REPORT #**

| **Date:** | {today} | **Applicable Policy Limits:** | {applicablePolLimit} | **LOB:** | {lob} |
| --- | --- | --- | --- | --- | --- |
| **Claim/Matter No:** | {claimNumber} | **Aggregate:** | {aggregate} | **Policy No:** | {policyNumber} |
| **Examiner:** | {examiner} | **Claim Expense (Defense) Inside: Y/N** | {claimExpense} | **Policy Period:** | {policyPeriod} |
| **Underwriter:** | {underwriter} | **Broker/Producer:** | {broker} | **Retro Date:** | {dateRetro} |
| **Deductible/SIR:** | {deductible} | **Insured State:** | {stateInsured} | **Loss State:** | {stateLoss} |
| **Insured:** | {insured} | | | | |
| **Claimant(s):** | {claimants} | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date of Loss or Wrongful Act:** | {dateLoss} | **Date Claim Made to Insured:** | {dateClaim} | **Date RN Notified:** | {dateRNNotified} |
| **CAT #:** | {catCode} | | **Cause of Loss:** | {causeOfLoss} | |
| **In Litigation? Y/N** | {litigation} | **Mediation Date:** | {catNumber} | **Trial Date:** | {dateTrial} |

|  |  |
| --- | --- |
| **Loss Details** | {loss} |
| **Coverage** | {coverage} |
| **Liability** | {liability} |
| **Damages** | {damages} |
| **Reserves** | {reserves} |
| **Resolution Strategy** | {resolution} |

**Policyholder Financials**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Reserve** | **Paid** | **Recovery Paid** | **Current Total Incurred** | **Reserve Increase/ (Decrease)** | **Updated Total Incurred** |
| **Loss** | {amountPolLossReserve} | {amountPolLossPaid} | {amountPolRecoveryPaid} | {amountPolIncurred} |  |  |
| **Expense** | {amountPolLaeReserve} | {amountPolLaePaid} | {amountPolLaeRecoveryPaid} | {amountPolTotalIncurred} |  |  |
| **TOTALS** | {amountPolReserve} | {amountPolTotalPaid} | {amountPolTotalRecoveryPaid} | {amountPolCurrentIncurred} |  |  |

**RN Financials**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Reserve** | **Paid** | **Recovery Paid** | **Current Total Incurred** | **Reserve Increase/ (Decrease)** | **Updated Total Incurred** |
| **Loss** | {amountRnLossReserve} | {amountRnLossPaid} | {amountRnLossRecoveryPaid} | {amountRnLossTotalIncurred} |  |  |
| **Expense** | {amountRnExpenseReserve} | {amountRnExpensePaid} | {amountRnExpenseRecoveryPaid} | {amountRnReserveTotalIncurred} |  |  |
| **TOTALS** | {amountRnTotalReserve} | {amountRnTotalPaid} | {amountRnTotalRecoveryPaid} | {amountRnTotalIncurred} |  |  |

* **Unpaid Reserve + Paid - Recovery Paid = Current Total Incurred**
* **Current Total Incurred + Reserve Increase/(Decrease) = Updated Total Incurred**