

**St. Joseph Real Estate Services Corp.
St. Luke Benefit and Insurance Services Corp.**

Claim Reporting Instructions

July 1, 2020 to July 1, 2021

Immediate, direct reporting of claims ensures that insurance adjusters are promptly notified of losses, enabling them to initiate appropriate investigation and timely resolution of your claim. Insurance adjusters have the capacity to receive reports of claims on a “24/7” basis. Therefore, while other claim reporting options are available to you, we encourage Direct Reporting of claims while providing you with Aon’s support to ensure proper handling and resolution of catastrophic losses, and coverage issues.

Instructions and contact information for submitting claim reports:

Discard any prior versions of the Claim Reporting Instructions and Incident Report Forms

Use the attached Incident Report Form to report all losses other than Workers’ Compensation. Your report may be completed longhand or typed and faxed or e-mailed as an attachment. You may also contact Aon or logon to the Diocese website, “Parish Resources” tab for an electronic format. The electronic format is “read-only”: Open as read-only, save as recommended below. Use the Tab Key or your cursor to move from text box to text box, entering the appropriate information.

- “Save As”, naming each report separately for ease of future access:
Example: 2020-07-01 Wind Claim - Church Roof.doc
OR: 2020-07-01 Slip & Fall Claim - Jones, Mary.doc

Property and Boiler & Machinery Claims

Insurance Carrier: Catholic Mutual Group (CMG)

Policy Number: 8878

Policy Term: 07/01/2020 to 07/01/2021

- Complete the Incident Report Form
- Submit form to CMG per below and send a copy to Aon at laura.erdmann@aon.com
E-mail to: reportclaim@catholicmutual.org
Phone: 1-800-228-6108 Ext. 2410

Liability Claims

Insurance Carrier: Catholic Mutual Group (CMG)

Policy Number: 8878

Policy Term: 07/01/2020 to 07/01/2021

- Complete the Incident Report Form
- Submit form to CMG per below and send a copy to Aon at laura.erdmann@aon.com

E-mail to: reportclaim@catholicmutual.org

Phone: 1-800-228-6108 Ext. 2410

Auto Claims

Insurance Carrier: Church Mutual Insurance Company

Policy Number: 0500232-09-118037

Policy Term: 07/01/2020 to 07/01/2021

- Complete the Incident Report Form
- Submit form to CMG per below and send a copy to Aon at laura.erdmann@aon.com

E-mail to: reportclaim@catholicmutual.org

Phone: 1-800-228-6108 Ext. 2410

Crime Claims – Money or Fidelity

Insurance Carrier: Catholic Mutual Group (CMG)

Policy Number: 8878

Policy Term: 07/01/2020 to 07/01/2021

- Complete the Incident Report Form
- Submit form to CMG per below and send a copy to Aon at laura.erdmann@aon.com

E-mail to: reportclaim@catholicmutual.org

Phone: 1-800-228-6108 Ext. 2410

Workers' Compensation

Insurance Carrier: United Heartland

Policy Number: 0400167986

Policy Term: 07/01/2020 to 07/01/2021

- Submit to United Heartland as instructed below
- Online go to www.unitedheartland.com
 1. On the top of the screen click on Log In/Policyholder Login
 2. Enter Log in details:
 3. USERNAME: GBDParishSchool#1
 4. PASSWORD: Hehasrisen#1
 5. Click on Report a Claim and follow instructions.
 6. Please enter **your location/parish/school number** in the "Employment Location Code" field for tracking purposes.
- E-Mail: uhadminsvc@unitedheartland.com
- Complete Incident/Accident Investigation form
- Submit form to Jennifer Arnold at Diocese (jarnold@gbdioc.org)
- Review Corrective Actions with Injured Employee

When to Call Aon

Any time you feel uncomfortable with a particular claim situation, please contact your Aon claims representative. Clients frequently seek our assistance and expertise when claims involve catastrophic losses, questionable liability issues, contract language issues, or claims involving questionable coverage. Some examples:

- Losses involving serious injury or death
- Major fire and other property losses
- Losses of a "sensitive" nature requiring confidential and discreet handling
- Losses requiring assistance in "crisis management"
- Situations where you are being asked to defend and/or indemnify another party due to contract language
- Situations involving additional insured coverage you provide to another party
- Questions as to which type of policy to report a claim under (e.g., auto versus general liability)
- Dissatisfaction with insurance company claims representative or their response time

Things You Should Know – Helpful Hints

- In the event of property damage you are responsible for protecting the property from further damage after the initial loss.
- Your policy allows you to make emergency repairs to protect your property from further damage. Keep all pertinent documentation.
- Discuss your claim only with those persons who properly identify themselves as your claims representative, your counsel or fire and law enforcement officers.

Other Considerations

Clearly identify to the insurance claims representative who in your organization will make final decisions during the adjustment process.

If you have contractors you prefer, or repair facilities you wish to use, please make them known to the claims representative.

The insurance company is entitled to inspect and appraise the damage. If they are aware of your repair preference, joint inspections can assist in arriving at agreed repair or replacement figures.