Maintenance Request Process for eDocs Codes and Descriptions

To eliminate ambiguities and improve the usability of the electronic documents (eDocs) solution, CSIO has brought the industry together to develop 40 codes and descriptions that align with the eDocs sent by insurers today.

The eDocs Standard is designed to evolve with business needs, and CSIO's Standards team is ready to support members with mapping their eDocs to the appropriate code. Brokers, insurers, and software vendors can reach out to CSIO at Standards@csio.com with the following details and CSIO will review the request to determine if the eDocs Standard has an appropriate code and description:

- The subject 'eDocs Code Request'
- A description of the eDoc that you would like a code for,
- A copy of the eDoc (if possible), and
- A proposed code for the use case, either existing or new

If a new eDoc code and description needs to be added to the Standard, insurer and vendor members can submit a Maintenance Request (MR) by following these steps:

a) Log into CSIO.com and access the Standards Maintenance Request tool. From here, you can submit new MRs, comment on pending MRs to streamline the approvals process, and view all pending and past MRs, including date submitted, current status, business case, technical information and available resolution details.
b) MRs are reviewed by the CSIO Standards team and CSIO may contact the requestor for more information or clarification. The MR is marked as "Under Review" and added to the agenda for the next National Standards Working Group.
c) CSIO hosts a monthly National Standards Working Group to discuss open MRs. Together, members may approve, defer or withdraw an MR.
d) The resolution is noted in the Working Group minutes and the Standards Maintenance Request tool.
e) Approved MRs can be programmed in members' systems immediately.
f) The bi-annual Standards Release will formally incorporate all approved codes and descriptions.

The MR process administered through the National Standards Working Group ultimately benefits the P&C insurance industry by providing a frequent, responsive way for brokers, insurers and vendors to collectively produce unambiguous and reusable Data Standards. We encourage insurer and vendor members to visit the Standards Maintenance Request tool regularly and to participate in our monthly working group. Visit our Upcoming Events page to register.