



Maintenance Request Process for Commercial Lines Data Standards

CSIO's Commercial Lines (CL) Data Standards serve as the comprehensive source for a common set of data elements used to quote and bind commercial lines insurance policies and ensure brokers and insurers exchange accurate information between their respective systems. The Standards include 43 underwriting questions (risk attributes) sent from the Broker Management System (BMS) to insurance companies that are required to quote and bind, in addition to individualized questions for [376 IBC codes](#).

Maintenance Requests (MRs) submitted to CSIO focus on changes to the additional questions required for each completed industry segment and the XML Standards that underpin them. These changes are crucial to maintain up-to-date and effective data exchange practices across diverse industries. By adhering to CSIO's CL Data Standards, insurers and BMS vendors ensure that data elements are consistently defined, allowing real-time Application Programming Interface (API) quotes to be generated in seconds, not hours or days.

CSIO insurers and BMS vendors can request changes to the CL Data Standards by submitting an MR through www.csio.com. Below is the detailed end-to-end process:

- a) Members log into www.csio.com and access the [Standards Maintenance Request Tool](#). This tool allows members to view all pending and past MRs, including date submitted, current status, business case, technical information and available resolution details. Members can also use the Standards MR Tool to submit new MRs and comment on pending MRs to streamline the approvals process.
- b) The CSIO Commercial Lines Working Group reviews all new MRs. CSIO may contact the requestor for more information or clarification. The MR is marked "Under Review" and added to the agenda for the next Commercial Lines Working Group.
- c) Open MRs are discussed during the Commercial Lines Working Group meeting, where MRs may be approved, deferred, or withdrawn.
- 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 formally incorporates all approved codes.

If you are an insurer or vendor member and would like to participate in the Commercial Lines Working Group to continue advancing CL Data Standards, please email standards@csio.com. CSIO will reach out to schedule an onboarding session to update you on what has already been developed regarding CL Data Standards and share what's to come.