



**ACORD Forms Notification Service  
May 2023 Bulletin**

**ACORD Form Changes and Additions**

The following pages include both a list of any new and revised ACORD forms and an Explanation of the Changes made.

While there are no changes in this release for Life and Annuity, ACORD reminds all that a mid-cycle release occurred on May 15, 2023 concerning ACORD 951 and ACORD 951e.

Forms can be found on the **ACORD Forms Portal** page at [www.acord.org](http://www.acord.org). The effective date included on the footer of all forms will match the date the form must be used in order to ensure compliance with our filings. To download forms, you will need to “sign-in” as an ACORD member with your user name and password.

If you need assistance, a sample of a form, or you would like to join ACORD, please call Member Services at (800) 444-3341, Option 2 or email us at [memberservices@acord.org](mailto:memberservices@acord.org).

If you do not wish to receive this notification, please email [memberservices@acord.org](mailto:memberservices@acord.org) requesting that we unsubscribe you to this Forms Notification Service.



**Forms Release 6/1/2023**

Form Number	Replaces	Title	For Use on or after:	Regulatory Change
<b>REVISIONS</b>				
<b>P&amp;C Countrywide</b>				
<b>NONE</b>				
<b>P&amp;C – State Specific</b>				
<b>NEW</b>				
<b>NONE</b>				
<b>REVISED</b>				
<b>ACORD 66 MI (2023/07)</b>	<b>2020/07</b>	<b>MICHIGAN SELECTION OF PERSONAL INJURY PROTECTION (PIP) MEDICAL COVERAGE - INDIVIDUAL</b>	07/01/2023	X
<b>ACORD 136 MI (2023/07)</b>	<b>2020/07</b>	<b>MICHIGAN SELECTION OF PERSONAL INJURY PROTECTION (PIP) MEDICAL COVERAGE - COMMERCIAL BUSINESS</b>	07/01/2023	X
<b>Elabel Changes:</b>				
<b>ACORD 137 NY (2023/08)</b>		<b>NEW YORK COMMERCIAL AUTO APPLICATION (No change to static text)</b>		
<b>NEW</b>				
<b>P&amp;C-Countrywide</b>				
<b>NONE</b>				
<b>P&amp;C -Withdrawn</b>				
<b>Life &amp; Annuity</b>				
		While there were no form releases in life and annuity this release, ACORD wanted to ensure that as a result of a vote, changes were made in a a May 15, 2023 release. Please see enclosed for more information concerning the mid-cycle release concerning <b>ACORD 951 and ACORD 951e.</b>		
<b>Withdrawn Forms</b>				
<b>NONE</b>				



**May 2023**  
**EXPLANATION OF CHANGES**  
**P&C FORMS**

**Countrywide**

None

**State Specific**

Revised Forms:

**MICHIGAN**

Michigan's DIFS has recently issued two PIP Choice Forms: one for individual / personal policies, and one for commercial policies.

**1. ACORD 66 MI (2023/07)**  
**MICHIGAN SELECTION OF PERSONAL INJURY PROTECTION (PIP)**  
**MEDICAL COVERAGE – INDIVIDUAL**

Pursuant with the requirements of Public Acts 21 and 22 of 2019, the Michigan Selection of Personal Injury Protection (PIP) Medical Coverage Form for individual / personal policies has been amended to restate the definition of qualified health coverage (QHC); to increase the relevant annual individual QHC deductible to \$6,579 or less (effective July 1, 2023; see MCL 500.3107d(7)(b)(B)); and to specify proof requirements for QHC purposes. The form also includes an expanded notice section to clarify policy renewals for unlimited coverage (Option 1), \$500,000 per person per accident (Option 2), or \$250,000 per person per accident with no excluded persons (Option 3), as well as a supplemental section to identify any additional excluded persons.

Automobile insurers must offer applicants and insureds a choice of PIP medical limits for policies issued or renewed after July 1, 2023.

It is recommended that this form be treated like a new form. ACORD has a marked up copy for the changes if you would like to review.

ACORD has filed these forms.

**2. ACORD 136 MI (2023/07)**  
**MICHIGAN SELECTION OF PERSONAL INJURY PROTECTION (PIP)**  
**MEDICAL COVERAGE - COMMERCIAL BUSINESS**

Michigan's DIFS has issued two PIP Choice Forms: one for individual / personal policies, and one for commercial policies. Pursuant with the requirements of Public Acts 21 and 22 of 2019, the Michigan Selection of Personal Injury Protection (PIP) Medical Coverage Form for individual / personal policies has been amended to restate the definition of qualified health coverage (QHC); to increase the relevant annual individual QHC deductible to \$6,579 or less (effective July 1, 2023; see MCL 500.3107d(7)(b)(B)); and to specify proof requirements for QHC purposes. The form also includes an expanded notice section to clarify policy renewals for unlimited coverage (Option 1), \$500,000 per person per accident (Option 2), or \$250,000 per person per accident with no excluded persons (Option 3), as well as a supplemental section to identify any additional excluded persons.

The Michigan Selection of Personal Injury Protection (PIP) Medical Coverage Form for commercial policies has been amended to expand the notice section regarding the renewal of an expired policy.

Automobile insurers must offer applicants and insureds a choice of PIP medical limits for policies issued or renewed after July 1, 2023.

ACORD has filed this form.

**Elabel Changes:**

**ACORD 137 NY (2023/08)**  
**NEW YORK COMMERCIAL AUTO COVERAGES / LIMITS SECTION**

ACORD made changes to the recently released ACORD 137 NY to update the elabels for this form. The updated version is on the ACORD's website. There is no change to the static text.

## Life & Annuity Forms

For the Life and Annuity domain, there have been no impacted forms in this release. Please note that on May 15, 2023, ACORD had a mid-cycle release for the following forms:

- 1. ACORD 951 (2023/06)  
1035 Exchange/Rollover/Transfer Form**
- 2. ACORD 951e (2023/06)  
1035 Exchange/Rollover/Transfer eForm**

These form changes were the result of a Standard Enhancement request (DLAF-43) that was voted on by the Life and Annuity community. The request was to add a fax number field to the Surrendering Company section of ACORD 951 and ACORD 951e.

Please review the May 15, 2023 Forms Notification for more information and/or reach out to ACORD for more information.

In addition, with the mid-month release, ACORD made an elabel change to ACORD 951e. The change concerns an elabel on page 4 of the ACORD 951e; there is a field in Section 6A elabeled:

“The receiving company will deposit funds received into a: (blank field)”.

This is a screen shot from ACORD 951e for the particular section at page 4 of the ACORD 951e:

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**6. SIGNATURES (For the receiving company's use only)**

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**6 A. ACCEPTANCE OF 1035 EXCHANGE / TRUSTEE TRANSFER / DIRECT ROLLOVER**

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By signature of an authorized officer below, the receiving company accepts assignment of all (or a portion of the assets if this is a partial exchange) to the above contract for purposes of complying with the client's intention of effecting a nontaxable exchange under IRC Section 1035. Please issue payment payable to the receiving company, the owner of the contract, for the full cash surrender value of the contract or a portion if it is a partial surrender.

For Trustee Transfers / Direct Rollovers from Tax-Qualified Accounts / Contracts:

The receiving company will deposit funds received into a:

The elabel on the fillable form and the FIG said:

“Enter text: The description of the type of account. As used here, indicates the type of account in which the receiving company will place the assets upon receipt.”

As a result of discussions in various forums, it was decided that a modification of modify the elabel to the ACORD 951e could help improve clarity:

The new elabel reads:

“Enter text: The description of the account type: non-qualified, IRA, Roth IRA, etc. As used here, the type of account from which the funds are being transferred. Please confirm the availability of this option with both the surrendering and receiving company.”

This change is reflected on the ACORD 951e label and on the Forms Information Guide.

**This does not impact the static text of the ACORD 951e.**

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## **UPCOMING FORMS CHANGES**

While we are monitoring legislative and regulatory changes, we advise of the following potential impacts. Please be advised that this is not meant to be exhaustive. If there is something additional ACORD should be reviewing/monitoring, do not hesitate to reach out.

### **CALIFORNIA**

The California Fair Plan has requested changes to be made to ACORD 854 CA, California Fair Plan Property Insurance, Application for Dwelling Insurance. We are awaiting advice from the Fair Plan when the application is approved.

### **COLORADO**

Colorado recently enacted House Bill 1174. Impacts to ACORD 69 CO (Homeowner's Insurance Replacement-Cost Policy Applicants is being reviewed and the Homeowner Application will be reviewed.

### **IDAHO**

Idaho released attachment B to Idaho Rule (IDAPA) 18.02.02 – Automobile Insurance Policies. This resulted in a revision to a pre-existing ACORD form, ACORD 61 ID, and a new form: ACORD 62 ID. We have filed these forms and are awaiting advice/approval.

- 1. ACORD 61 ID (2023/08)  
IDAHO AUTO SUPPLEMENT – IDAHO UNINSURED MOTORIST AND  
UNDERINSURED MOTORIST DISCLOSURE STATEMENT**
- 2. ACORD 62 ID (2023/08)**

## **IDAHO AUTO SUPPLEMENT – IDAHO UNINSURED MOTORIST AND UNDERINSURED MOTORIST COVERAGE REJECTION FORM**

Idaho revised the uninsured motorist and underinsured motorist coverage disclosure form. On note, *Difference in Limits (Offset)* will be replaced with *Offset UIM*.

We will also be changing ACORD 90 ID, 290 ID and 137 ID.

The forms will be released after they are approved, as filing is required.

Please contact us with questions or comments.

### **MARYLAND**

Maryland passed new legislation that in part provides that effective 10/1/2023 EUIM coverage will be subject to an opt out as opposed to an opt in. The Department has advised ACORD there will be a new form reflecting changes to Underinsured Motorist coverages and plan to distribute it to industry with a Bulletin by the end of June. We will be monitoring and review for changes to the ACORD forms library.

### **MINNESOTA**

Minnesota recently enacted legislation which prohibits refusing to issue or renew or from cancelling a homeowner's policy based on the specific dog breed. We will be reviewing the legislation and making changes, if necessary, to the homeowner's application.