



**Boston Insurance Brokerage, Inc.**

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**ALLIED MEDICAL GENERAL APPLICATION**

**I. APPLICANT INFORMATION**

- 1. Desired Effective Date: \_\_\_\_\_
- 2. Applicant Name: \_\_\_\_\_
- 3. Mailing Address: \_\_\_\_\_
- 4. City, State, Zip: \_\_\_\_\_
- 5. County: \_\_\_\_\_ 6. Telephone Number: \_\_\_\_\_
- 7. Inspection Contact: \_\_\_\_\_ 8. Website Address: \_\_\_\_\_
- 9. Date Established: \_\_\_\_\_ 10. Years in Business Under Current Management: \_\_\_\_\_
- 11. Type of Enterprise:  Corporation  Individual  Partnership  Joint Venture  
 Municipality  In-Patient -Psychiatric  
 Other (describe): \_\_\_\_\_
- 12. Enterprise is:  For Profit  Not For Profit
- 13. Estimated receipts/operating budget for the next twelve (12) months: \_\_\_\_\_
- 14. Estimated payroll for the next twelve (12) months: \_\_\_\_\_
- 15. Type of Operation:  Mental Health Inpatient  Group Home (Non-Elderly)  
 Prison/Jail  Boot Camp  Lock-down Facility  Shelters/Halfway House  
 Alcohol/Drug Detox.  Alcohol/Drug Inpatient  Apartments  Foster Care (children)  
 Independent Living (Elderly)  Assisted Living Facility  
 Other (describe): \_\_\_\_\_
- 16. Full description of services rendered: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. CURRENT INSURANCE**

This section must be completed for prior acts consideration. Attach a copy of expiring policy declarations page.

- 1. Has Applicant had previous insurance for this enterprise?  Yes  No

If Yes, complete the following for prior three (3) years of general/professional liability coverage:

Name of Carrier	Effective Date	Expiration Date	Limit	Deductible	Premium	Claims Made (CM) or Occurrence?	CM Retroactive Date

### III. CLAIMS ACTIVITY AND PROCEDURES

**Important Notice:** All known claims and/or potential claim circumstances that could result in a claim are specifically excluded from coverage. Report all such claims and/or circumstances to your current insurer. Failure to disclose such claim, act, or circumstance may result in the proposed insurance being void and/or subject to rescission.

1. After inquiry of all Applicants' personnel, is there any known circumstance, situation, act, error or omission which could reasonably be expected to result in any claim being made against the Applicant?  Yes  No
2. Are procedures in place that require the documentation of accidents with a written report?  Yes  No
3. Please indicate total number of incidents recorded from retroactive date on existing policy until today's date? \_\_\_\_\_
4. How many of these incidents have NOT been reported to any insurance carrier? \_\_\_\_\_
5. Are you or any of your officers, managers, partners or directors aware of any incidents or accidents which may give rise to a claim for which no incident report has been completed?  Yes  No  
If "Yes", how many such undocumented incidents or accidents have there been from retroactive date on existing policy until today's date? \_\_\_\_\_
6. On a separate sheet of paper please describe each undocumented accident including a description of the accident, date, types of injuries, etc.
7. Has any license or accreditation ever been suspended, denied or revoked?  Yes  No
8. Of what professional association(s) is Applicant a member in good standing? \_\_\_\_\_
9. During the past five (5) years, have any claims been presented to your current or prior insurance carrier or to you? If "Yes," complete the following (attach a separate sheet if necessary):  Yes  No

Date of Loss	Current Reserve or Amount Paid	Description of Loss

### IV. OPERATIONS

1. Indicate current staffing levels:

Staff	Employed		Contracted	
	Full Time	Part Time	Full Time	Part Time
Administrators				
MD/Physicians				
Nurses				
Homemakers/Nurse Aids				
Psychologists				
Counselors				
Therapists				
Students or volunteers				
Other (describe): _____				

2. Check the hiring procedures that apply or are performed by this operation:
- Criminal Background Checks     Verification of certification or professional licensing
- Drug, alcohol and sexual abuse screening or testing     Reference Checks
- Questioning of employees in their previous involvement as defendants in professional malpractice litigation

3. **Schedule of Physicians – on Staff or Contracted:**

Name & Specialty	Board Certified	Board Eligible	Hours/Week Worked	Volunteer, Contracted or Employed	Has Malpractice Insurance
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

4. Do you want any listed physician to be covered under the facility's policy?  Yes  No
5. Are any drugs or medications administered or prescribed?  Yes  No
- If Yes, please explain: \_\_\_\_\_
6. List the duties of the physician(s) above: \_\_\_\_\_

**V. LOCATION INFORMATION**

1. **Schedule of Locations:** If more than five locations, please attach a separate sheet of locations.

	Address	Types of Services Provided
# 1		
# 2		
# 3		
# 4		
# 5		

2. Are there any camp, adventure/wilderness, ropes courses or any type of recreational programs?  Yes  No
- If Yes, please submit brochure or describe activities: \_\_\_\_\_
3. Are there any firearms on the premises?  Yes  No
- If Yes, please describe: \_\_\_\_\_
- Are the firearms locked in a secure place away from the residents?  Yes  No
- If No, please describe: \_\_\_\_\_
4. Are there any animal exposures on the premises?  Yes  No
- If Yes, are the animal exposures:  Owned?  Non-owned?
- If Yes, please describe, including number of animals and type/breed: \_\_\_\_\_

5. a. Are there any lakes, ponds, rivers, pools or other bodies of water on the premises?  Yes  No  
 If Yes, please describe: \_\_\_\_\_
- b. Are there any swimming or boating activities?  Yes  No
- c. If there is a pool or body of water, then is it fenced with a self-locking gate?  Yes  No
- d. If there is a pool or body of water, then is there a diving board and/or slide?  Yes  No

**VI. COVERAGE REQUESTED**

1. Complete and attach the appropriate supplemental application with your submission.
2. Check the coverages and limits that the Applicant would like quoted:  
 Coverages:  GL  Professional  Excess (Attach Acord App)  
 Limits:  \$100,000/\$100,000  \$300,000/\$300,000  \$500,000/\$500,000  
 \$1,000,000/\$1,000,000  \$1,000,000/\$2,000,000  \$1,000,000/\$3,000,000
3. Do you want physical abuse/sexual molestation coverage to protect you for alleged acts of your employees?  Yes  No  
 If Yes, at what limits?  \$25,000/\$50,000  \$50,000/\$100,000  \$100,000/\$300,000  
 \$250,000/\$250,000  \$500,000/\$500,000  Other: \_\_\_\_\_

**Please attach a copy of the following with your submission:**

- Five (5) years of currently dated loss runs (if in business less than five (5) years, please attach a resume of the owner/director)
- Brochure(s) available or other information pertaining to the programs offered

\* Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, may be committing a fraudulent insurance act, and may be subject to a civil penalty or fine.

\* Not applicable in all states

**DECLARATION AND SIGNATURE:**

The undersigned declares that to the best of his/her knowledge the statements in this application and its attachments are true. The company is hereby authorized to make any investigation and inquiry deemed necessary in regard to this application.

\_\_\_\_\_  
 Authorized Signature on behalf of Applicant

\_\_\_\_\_  
 Sub-Producer

\_\_\_\_\_  
 Title/Date

\_\_\_\_\_  
 Producer

**SIGNING THIS FORM DOES NOT BIND THE COMPANY TO ISSUE THIS INSURANCE. Application MUST be currently signed, completed and dated to be considered for quotation.**