



Number of claims reported (regardless of the current disposition)

Lines A, B, C, D — Enter the number of industrial-related workers' compensation claims incurred during calendar year 2023, regardless of their current disposition. Report all medical-only claims even if not reported to BWC for claim number assignment.

Line E — Total lines A, B, C and D, and enter the number.

Compensation payments made

Line 1 - Temporary total (TT) — Enter amount of TT disability compensation paid to workers' compensation claimants during calendar year 2023 regardless of date of injury. Note: If weekly TT rate exceeds the maximum rate of \$1,149, report only \$1,149 per week.

Line 2 - Wages in lieu of compensation — Enter amount paid to workers' compensation claimants in lieu of TT disability compensation during calendar year 2023 regardless of date of injury. Note: If weekly wages exceed the maximum rate of \$1,149, report only \$1,149 per week.

Line 3 - Sick and accident benefits — Enter amount of sick and accident benefits paid to injured workers from the company's fully funded non-occupational insurance program during calendar year 2023, regardless of date of injury. Note: If weekly benefits exceed the maximum rate of \$1,149, report only \$1,149 per week.

Line 4 - Wage loss — Enter amount paid to workers' compensation claimants because of loss in earnings, paid during calendar year 2023, provided the date of injury occurred on or after Aug. 22, 1986.

Line 5 - Temporary partial — Enter amount of temporary partial disability compensation paid to workers' compensation claimants pursuant to an Industrial Commission of Ohio (IC) order because of impairment of earnings capacity or medical impairment resulting from the allowed conditions of the claim paid during calendar year 2023, provided the date of injury occurred prior to Aug. 22, 1986.

Line 6 - % permanent partial — Enter full amount of percentage of permanent partial disability compensation paid during calendar year 2023 pursuant to an order, regardless of date of injury.

Line 7 - Scheduled loss awards — Enter full amount of scheduled loss awards paid to workers' compensation claimants for loss of, or loss of use of body parts in calendar year 2023 regardless of the date of injury.

Line 8 - Permanent total — Enter full amount of permanent total disability compensation paid to workers' compensation claimants pursuant to IC orders, including permanent total disability benefits required pursuant to IC Interlocutory orders in calendar year 2023 regardless of the date of injury. Do not reduce this amount by reimbursements from excess carrier insurance.

Line 9 - Living maintenance — Enter amount of living maintenance benefits paid to workers' compensation claimants participating in a rehabilitation program during calendar year 2023 regardless of the date of injury.

Line 10 - Living maintenance wage loss — Enter amount of living maintenance wage loss benefits paid to workers' compensation claimants during calendar year 2023 regardless of the date of injury.

Line 11 - Death — Enter amount of death benefits paid in calendar year 2023 to persons wholly or partially dependent on the deceased for support at the time of death. Do not reduce this amount by reimbursements from excess carrier insurance.

Line 12 - Violation of specific safety requirements (VSSR) — Enter amount of VSSR awards paid to workers' compensation claimants during calendar year 2023 regardless of date of injury.

Line 13 - Less SI reimbursements — Enter amount of previously reported compensation paid in a claim that was overturned by an Industrial Commission or court order. Also, enter amount of compensation collected in 2023 from subrogation. Include any amount you determined not to have been payable to, or on behalf of, a claimant in any final administrative or judicial proceeding. The reported subrogation amount must not exceed previously reported compensation. **Do not report reimbursements from excess insurance or recoveries for medical expenses.**

Line 14 - Grand total of paid compensation — Add together lines 1 through 12 and subtract line 13.

Line 15 - Total paid to medical providers — Enter amount paid to medical providers, including reimbursements to claimants during calendar year 2023.

Line 16 - Total benefits paid — Add together lines 14 and 15.

Please note: You do not have to report lump-sum settlements and Disabled Workers' Relief Fund payments on the SI-40 report. However, you must report lump-sum advancements against a permanent disability award or an allowed death award under the type of compensation against which it is advanced.

Please check the addition of the columns after preparation as BWC cannot alter the report as received. This will prevent a request for you to file an amended report.

Open claims and case-reserve data

Line 1 - Number of open medical-only claims (pre-1987 date of injury) — Enter the number of open claims as of Dec. 31, 2023, in which you only paid medical benefits.

Line 2 - Number of open indemnity claims (pre-1987 date of injury) — Enter the number of open claims as of Dec. 31, 2023, in which you made indemnity payments.

Line 3 - Total outstanding case reserves for medical-only claims (pre-1987 date of injury) — Enter the amount of reserves for claims that include only medical and other expenses. Report total case-reserves data not covered by excess insurance (i.e., the outstanding reserves intended to cover the remaining costs of a claim up to the point excess insurance attaches).

Line 4 - Total outstanding case reserves for indemnity claims (pre-1987 date of injury) — Enter the amount of reserves for claims that include medical and other expenses, and indemnity payments. Report total case-reserves data not covered by excess insurance (i.e., the outstanding reserves intended to cover the remaining costs of a claim up to the point excess insurance attaches).

Line 5 - Number of open medical-only claims (1987 and post 1987 date of injury) — Enter the number of open claims in which you only paid medical benefits.

Line 6 - Number of open indemnity claims (1987 and post 1987 date of injury) — Enter the number of open claims in which you made indemnity payments.

Line 7 - Total outstanding case reserves for medical-only claims (1987 and post 1987 date of injury) — Enter the amount of reserves for claims that include only medical and other expenses. Report total case-reserves data not covered by excess insurance (i.e., the outstanding reserves intended to cover the remaining costs of a claim up to the point excess insurance attaches).

Line 8 - Total outstanding case reserves for indemnity claims (1987 and post 1987 date of injury) — Enter the amount of reserves for claims that include medical and other expenses, and indemnity payments. Report total case-reserves data not covered by excess insurance (i.e., the outstanding reserves intended to cover the remaining costs of a claim up to the point excess insurance attaches).

SI-40 Back Up Report

Self-insuring employers must submit the backup detail for the annual reported compensation and reserves. Please upload the backup report from your SI Policy page as you complete your online submission of your SI-40 report. The backup report should contain the following information:

- Payment category, for example: temporary total, wage loss, permanent total, etc.
- Individual payments within each category, with date of payment, check number and amount.
- Total paid for each category (which should equal the reported amount on your SI-40.).
- Grand total combined from all payment categories.
- Individual Reserve amounts by claim for each claim number as of Dec. 31, 2023:
 - Claimant name.
 - Date of injury.
 - Indemnity, medical, and expense paid amounts.
 - Indemnity, medical, and expense reserve amount.
 - Total incurred amount.
 - Excess retention amount.
 - Reported reserve net of excess retention.
- Documentation for any recoveries reported on the SI 40 report