

Call for Fourth Quarter Experience – 2013 Workers’ Compensation Deductible Plans Due February 15, 2014

Instructions:

1. Complete this call on an individual carrier basis along with the *Call for Fourth Quarter Experience*.
2. Reported experience should be valued as of December 31, 2013.
3. If a company has no experience to report, please do **not** enter zeros (0) in the form fields. Instead, click the “NONE” boxes on both the summary page and the workers’ compensation deductible plans page, then follow the instructions on the top portion of the summary page to submit your report.

Script Errors: These forms contain internal programming and calculations. Entering zeros will cause script errors. To correct this problem, click the “Clear Form” button to restart the form.

4. Complete each deductible plan, as applicable, for the voluntary portion of the workers’ compensation market only.

“Number of Direct Policies Written This Period” [column (1)] is defined as Texas new and renewal policies issued by the company acting as the primary carrier during the quarter. Adjust for cancellations only if the policy was issued and canceled in the same quarter. Do not adjust for policies assumed or ceded. Report policies on an annual basis. For example, report a 12-month policy as a 1.0 policy, and report a six-month policy as a 0.5 policy.

Use the **accounting date**, rather than the effective date, to determine the calendar quarter when reporting policies.

Use an **“annual premium prior to deductible credit”** [column (2)] to determine the premium size category. For example, report a six-month policy with a premium of \$4,000 as a 0.5 policy in the \$5,000 - \$9,999 category for the appropriate plan.

5. “Estimated Annual Premiums on Direct Policies Written This Period **Prior to Deductible Credit**” [column (2)] are defined as total policy premiums on the policies reported in column (1) **before** the credit is given for the purchase of a deductible plan. Do not include premiums from any transaction on a policy issued prior to October 1, 2013, or after December 31, 2013. Report total policy premium even if initial premium collected was a deposit or fourth installment premium. For multi-state policies, report only the Texas portion.
6. “Estimated Annual Premiums on Direct Policies Written This Period **After Deductible Credit**” [column (3)] are defined as total policy premiums on the policies reported in column (1) **after** the credit is given for the purchase of a deductible plan. Do not include premiums from any transaction on a policy issued prior to October 1, 2013,

or after December 31, 2013. Report the total policy premium even if the initial premium collected was a deposit or fourth installment premium. For multi-state policies, report only the Texas portion.

7. For policies in which the insured did not purchase a deductible plan, complete section 5, "No Deductible Plan." In column (3), enter the annual premiums for the policies reported in column (1).
8. The response to question 6a, column (1) of this report should be equal to the response to question 3d, column (1) of the *Call For Fourth Quarter Experience*, Summary page.
9. The response to question 6a, column (3) of this report should be equal to the response to question 3d, column (2) of the *Call For Fourth Quarter Experience*, Summary page.
10. TDI will issue additional calls as experience for subsequent calendar quarters becomes available. Those calls will be due approximately 45 days after the end of the quarter.

Fax or mail the signed Affidavit to:

Julie Jones
Texas Department of Insurance
MC 105-5D
P.O. Box 149104
Austin, TX 78714-9104

Fax: 512-463-6122

Direct questions concerning this call to Julie Jones,
Texas Department of Insurance, phone: 512-475-3030, fax: 512-463-6122
email: julie.jones@tdi.texas.gov.

***The forms for the Quarterly Call for Experience are
available on the Internet at www.tdi.texas.gov.***