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**This document should only be used to supplement the General Instruction Manual for Texas Title Insurance Agent Experience Report Submission.**

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| **Topics** | **Question** | **Answer** |
| Firm ID Number | What is my agency's Firm ID number? | It is a five- to six-digit unique identification number found on your active Title Agent Certificate of License. You may find your firm ID by using the TDI "Data Lookup" page: <https://apps.tdi.state.tx.us/sfsdatalookup/StartAction.do>  At the link above, go to "Title Agent / Escrow Officers" > "Licensed Title Agents/Direct Operations and DBA Names" > click "Download Search Results in CSV Format" > click "Open." A spreadsheet will open which contains title agent names and firm IDs. |
| Employee Group Insurance | Where do I report my employee group insurance? | Report employee group insurance on Form A, Sec. B, line 2. Employee Benefits and Welfare. |
| Payroll Taxes  Unemployment Taxes | Where do I report payroll taxes and unemployment taxes? | Report payroll and unemployment taxes on Form A, Sec. B, line 2. Employee Benefits and Welfare. |
| Federal Income Tax  State Sales Tax | Where do I report federal income tax and state sales tax? | Do not report any federal income or state sales tax on your experience report. |
| Courier and Overnight Delivery Fees  Postage and Freight Fees | Where do I report courier, overnight delivery, and postage and freight expenses? | Postage and freight fees include expenses for the operation of your business and does not include expenses paid to third-party vendors for the benefit of the title insurance customer. Report postage and freight on Form A, Sec. B, line 14. Report courier and overnight delivery on Form A, Sec. B, line 15. Do not include in-house courier or runner expenses in this category. |
| Pass-Through Categories   * Tax Certificates * Recording Fees * Courier and Overnight Delivery Fees | What are pass-through categories? | A pass-through category, for the purpose of this report, is a line item in which the sum of the income and expense equals zero or comes close to zero. Pass-through categories on the experience report include tax certificates, recording fees, and courier and overnight delivery fees. Report the income and expense for these items under the title column even if it passed through escrow accounts or was paid to a tax service. If your agency is not being charged for tax certificates or recording fees by the county and, as a result, has no income or expense, submit a written statement to that effect. If there is a significant variance between the income and expense for any pass-through category, submit a detailed written explanation with your report. |
| Policy Guaranty Fees | Where do I report policy guaranty fees? | Do not report any policy guaranty fees on your experience report. |

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| Policy Totals | Where do I report my policy information? | Report policy totals on Form A, Sec. D., lines 1-6. Do not leave line 4 (Number of all other forms for which a premium was charged) or line 6 (Number of commitments issued for which no policy was issued) blank. If you do not have policy totals for line 4 or line 6, provide TDI with a written explanation as an attachment or on the Addendum page of the PDF form. |
| Contract Labor | Where do I report contract labor? | Report contract labor on Form A, Sec. B, line 1a. |
| Entertainment and Meal Expenses | Where do I report entertainment and meal expenses incurred to promote the title agency? | Report both entertainment and meal expenses incurred for promotional purpose on Form A, Sec. B, line 8. |
| Seminars  Employee Training | Where do I report seminars or employee training expenses? | Report seminar and employee training expenses on Form A, Sec. B, line 9. |
| Long-Term Vehicle Leases | Where do I report long-term vehicle leases? | Report long-term vehicle leases on Form A, Sec. B, line 19. |
| Short-Term Vehicle Rentals | Where do I report short-term vehicle rentals for business travel? | Report short-term vehicle rentals for business travel on Form A, Sec. B, line 9. |
| Political Action Committee (PAC)  Lobbying Expenses | Where do I report political action committee (PAC) or lobbying expenses? | Lobbying expenses include amounts paid to PACs, whether paid directly to the PAC or indirectly through other organizations or individual lobbyists. Report all fees paid to support PACs or lobbyists on Form A, Sec. B, line 30. |
| Trade Association Fees | Where do I report amounts paid to trade associations? | Report trade association fees on Form A, Sec. B, line 31. |
| Membership Dues and Fees for Dues, Boards, and Associations | Where do I report membership dues and fees for dues, boards, and associations? | Report amounts paid for membership in associations and on boards on Form A, Sec. B, line 22. Do not include charitable contributions or PAC expenses. |
| Automobile Expenses | Where do I report automobile expenses (other than leases)? | Report automobile expenses other than leases on Form A, Sec. B, line 9. Report automobile leases on Form A, Sec. B, line 19 (Equipment and Vehicle Leases). |
| Charitable Contributions | Where do I report charitable contributions? | Report all charitable contributions on Form A, Sec. B, line 30. |
| Capital Expenditures | Where do I report capital expenditures? | Do not report capital expenditures on the experience report. |
| Management Fees  Corporate Charges  Intercompany Allocations | Where do I report management fees, corporate charges, or intercompany allocations? | Report on Form J. If you are reporting a sizable amount for these line items, provide additional information as to the type of payment reported. |
| S-Corp or Subchapter S Distributions  Partnership Distributions | Where do I report  S-Corp or partnership distributions? | Do not report partnership or S-Corp distributions on the experience report. |

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| Net Income or Loss | Should my net totals reconcile with another statement? | Form A, Sec. C Income or Loss total from operations should reconcile with the net income or loss reported on the title agency financial statements for each business area, title, escrow, and nonpolicy abstract. |
| Home Office Issue (HOI) | Do I report HOI premium? | Report all HOI premiums as a net-retained amount on Form D by underwriter. Title premium reported on Form A, Form B, and Form L should include your licensed county premiums only. |
| E-Filing Fees  E-Filing Charges | Where do I report electronic filing fees and charges to third parties? | Report electronic filing fees for third parties under Form A, Sec. B, line 7 and line 26 (Recording Fees Paid to the County Clerk). As with other pass-through categories, report both the income and expense, even if they are passed through the escrow accounts. |
| Written Explanation  Supporting Documentation | Where can I add additional information or supporting documentation on my report? | You can voluntarily provide TDI with additional information or supporting documentation as an attachment to your report or at the bottom of the addendum page of the PDF form. |
| Office Supplies  Telephone and Fax  Printing and Photocopying | Where do I report office supplies? | Report office supply expenses on Form A, Sec. B, line 18 (Office Supplies).  Do not include any office supply expenses on the lines for telephone and fax or printing and photocopying. |