

Medicare Supplement Refund Calculation FAQs

Why do we have to report this data?

As specified by 28 TAC §3.3307(f), issuers are required to submit refund calculation forms for all Medicare supplement policies to TDI annually. An issuer must submit a report even if they did not have any Medicare supplement business written or policies or certificates in force in Texas during the reporting year.

When is the report due?

The report is due on May 31st of each year. The reporting deadline is set in the rule (28 TAC §3.3307(f)). When the deadline falls on a weekend, the report is due by the close of business on the following Monday.

How do we submit the report?

Submit data to TDI by completing the interactive PDF form available on the TDI website on the [Medicare Supplement Refund Calculation Data Call Index Page](#). To prevent errors, TDI recommends downloading the form before entering data. The form contains fillable fields that must be completed electronically using Adobe Reader 9.0 or higher to ensure proper form functionality. When completed, click the “Submit by Email” button located at the bottom of the form. The interactive button will convert the data to an XML attachment. TDI will not accept any reports submitted as a PDF or in a different format, including scanned PDF files.

What if we receive an error when attempting to submit the data form?

The form has validation rules that must be cleared before it can be submitted. Follow the instructions to correct any errors listed. After the validation rules are cleared, click the “Submit by Email” button again.

What if we have other questions about the data call?

You can send any questions you have by email to MedSuppRefund@tdi.texas.gov.

For more information, contact: MedSuppRefund@tdi.texas.gov.