

Texas Title Insurance Agent Experience Report Submission Frequently Asked Questions

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

Question	Answer
What is my agency's firm ID?	<p>It is a five-to-six-digit unique ID number found on your active Title Agent Certificate of License. You may find your firm ID by using the TDI "Data Lookup" page: appscenter.tdi.texas.gov/tdireports/p/externalReports</p> <p>Using the link above:</p> <ul style="list-style-type: none"> - go to "Agent Licensing – Escrow Officers and Title Agencies"; - select "Licensed title agents / direct operations and DBA names"; and - click "Run Report." <p>You may click "Export" to open a spreadsheet that contains title agent names and firm IDs.</p>
Why can't I enter my phone number and/or ZIP Code?	The phone number field allows 10 digits, numbers only. Do not enter any dashes or parentheses. After entering your phone number, tab to the next field. Dashes and parentheses will appear automatically. The ZIP Code field allows only five digits.
Where can I download a free version of Adobe Reader?	A free version of Adobe Acrobat Reader DC can be downloaded here: get.adobe.com/reader/
Why won't the form load after I click on the PDF link?	<p>Adobe-fillable forms work with Microsoft Edge. If you do not have Microsoft Edge, you can download the form to your computer using any browser:</p> <ul style="list-style-type: none"> - right-click on the fillable form link in the bulletin; - select "Save As..." or "Save Target As..."; - rename the form using the "Firm ID_Agency Name" naming convention; - save the renamed file as a PDF; and - open the form and fill it out.
Can I use something other than Adobe Reader to fill out the form?	No. While you may be able to fill out some items using non-Adobe products such as Foxit, the form will not save and import your data correctly into our database. You must use Adobe Reader to fill out the form.
Where do I report my employee group insurance?	Report employee group insurance on Form A, Section B, line 2 (Employee Benefits and Welfare).

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Where do I report payroll taxes and unemployment taxes?	Report payroll and unemployment taxes on Form A, Section B, line 2 (Employee Benefits and Welfare).
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.
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 do not cover expenses paid to third-party vendors for the benefit of the title insurance customer. Report postage and freight on Form A, Section B, line 14 (Postage and Freight). Report courier and overnight delivery on Form A, Section B, line 15 (Courier and Overnight Delivery). Do not include in-house courier or runner expenses in this category.
What are pass-through categories?	A pass-through category, for 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 expenses for these items under the title column, even if they passed through escrow accounts or were 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 expenses, 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.
Where do I report policy guaranty fees?	Do not report any policy guaranty fees on your experience report.
Where do I report my policy information?	Report policy totals on Form A, Section 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.
Where do I report contract labor?	Report contract labor on Form A, Section B, line 1a (Employees, Incl. Temp and Contract).
Where do I report entertainment and meal expenses incurred to promote the title agency?	Report both entertainment and meal expenses incurred for promotional purposes on Form A, Section B, line 8 (Advertising and Promotions).

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Where do I report seminars or employee training expenses?	Report seminar and employee training expenses on Form A, Section B, line 9 (Employee Travel, Lodging, and Education).
Where do I report long-term vehicle leases?	Report long-term vehicle leases on Form A, Section B, line 19 (Equipment and Vehicle Leases).
Where do I report short-term vehicle rentals for business travel?	Report short-term vehicle rentals for business travel on Form A, Section B, line 9 (Employee Travel, Lodging, and Education).
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, Section B, line 30 (Donations/Lobbying).
Where do I report amounts paid to trade associations?	Report trade association fees on Form A, Section B, line 31 (Trade Association Fees).
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, Section B, line 22 (Dues, Boards, and Associations). Do not include charitable contributions or PAC expenses.
Where do I report automobile expenses (other than leases)?	Report automobile expenses other than leases on Form A, Section B, line 9 (Employee Travel, Lodging, and Education). Report automobile leases on Form A, Section B, line 19 (Equipment and Vehicle Leases).
Where do I report charitable contributions?	Report all charitable contributions on Form A, Section B, line 30 (Donations/Lobbying).
Where do I report capital expenditures?	Do not report capital expenditures on the experience report.
Where do I report management fees, corporate charges, or intercompany allocations?	Report management fees, corporate charges, or intercompany allocations on Form J (Other Expenses). If you are reporting a sizable amount for these line items, provide additional information as to the type of payment reported.
Where do I report S-Corp or partnership distributions?	Do not report S-Corp or partnership distributions on the experience report.
Should my net totals reconcile with another statement?	Form A, Section C, line 1 (Income or Loss from Operations) should reconcile with the net income or loss reported on the title agency financial statements for each business area, title, escrow, and non-policy abstract.
Do I report Home Office Issue (HOI) premiums?	Report all HOI premiums as a net-retained amount on Form D (Fees Received for Closing Services) by underwriter. Title premiums reported on Form A (Summary of Experience for

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	<p>Texas Title Insurance, Escrow, and Non-Policy Abstract Business), Form B (Distribution of Title Policy Premiums), and Form L (Title Insurance Premiums by County) should include your licensed county premiums only. See the General Instruction Manual for details.</p>
<p>Where do I report electronic filing fees and charges to third parties?</p>	<p>Report electronic filing fees for third parties under Form A, Section B, line 7 (Accounting and Auditing) and line 26 (Recording Fees Paid to the County Clerk). As with other pass-through categories, report both the income and expenses, even if they are passed through the escrow accounts.</p>
<p>Where can I add additional information or supporting documentation on my report?</p>	<p>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.</p>
<p>Where do I report office supplies?</p>	<p>Report office supply expenses on Form A, Section B, line 18 (Office Supplies).</p>
<p>My agency's PPP Loan was forgiven in 2023. Where do I report this?</p>	<p>Report any PPP loans forgiven in 2023 on Form E, Other Income. In the text box on Form E, describe the income item as "Forgiven portion of PPP loan." Agents should only report the portion of a forgiven PPP loan as other income once it has been formally forgiven. Do not report it as other income if it has not yet been forgiven.</p>