

DISALLOWED EXPENSES DATA CALL INSTRUCTIONS

DUE AUGUST 30, 2024

Instructions:

1. Report **countrywide** data only for lines written in Texas (where the Texas premium is greater than \$0). Do not report Texas premium only. If you did not have Texas premium for any of the lines specified in the report template, then you will file a "NONE" submission. If you file a "NONE" submission (i.e., you have no data to report), you must still include a signed and notarized affidavit.
2. Include data from licensed casualty, fire, fire and casualty, county mutual (except industrial fire county mutual), Lloyds, and reciprocal companies that wrote premium in 2023 for any of the following lines of insurance in Texas: fire, allied lines, private crop, farm owners multiple peril, homeowner's multiple peril, commercial multiple peril, inland marine, medical malpractice, general liability, products liability, private passenger automobile, commercial automobile, fidelity, or surety in this submission. Exclude data from accredited P&C reinsurers, risk retention groups (domestic or foreign), fire and casualty government created insurers, farm mutuals, surplus lines, and TPA Authority insurers.
3. Enter countrywide direct premium written from the annual statement Insurance Expense Exhibit (IEE) Part III, Column 1.
4. Report premium in thousands. *Note:* This is how it is already listed on IEE Part III, Column 1.
5. For group filings, complete the "Group Info" tab. If you are filing by individual company, you do not need to complete the "Group Info" tab.
6. Save your file using the following naming convention:
 - For group filings, enter "GRP" followed by your four-digit group number. For example, "GRP [1234] DER2023.xlsx".
 - For individual company filings, enter the group number as "GRP 0" followed by the five-digit NAIC company number. For example, "GRP 0 [12345] DER2023.xlsx".
7. Do not send your submission with hidden or deleted columns.
8. Your email should include two attachments:

- the Disallowed Expenses Data Call Excel reporting form in Excel format, and
- the signed/notarized affidavit in PDF format.

9. Send the email with the file name as the subject line to DataCall@tdi.texas.gov. Be sure to include both attachments.

Direct questions concerning this call to TDI's Data Services team at 512-676-6691 or DataCall@tdi.texas.gov.