

DISALLOWED EXPENSES DATA CALL INSTRUCTIONS

DUE SEPTEMBER 26, 2025

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), then you must still include a signed and notarized affidavit.
2. Include only data for admitted companies in this submission. Exclude data for farm mutual and surplus lines insurers.
3. Enter countrywide direct premium written from the Insurance Expense Exhibit (IEE) Part III, Column 1.
4. Report premium in thousands. *Note:* This is how it is already listed on the IEE Part III, Column 1.
5. For group filings, complete the "Group Info" tab. If you are filing by individual company, then 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 DER2024.xlsx".
 - For individual company filings, enter the group number as "0" followed by the five-digit NAIC company number. For example, "GRP 0 12345 DER2024.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
 - the signed/notarized affidavit in PDF format
9. Send the email to DataCall@tdi.texas.gov. Put the Excel file name in the subject line. Be sure to include both attachments.

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