

DISALLOWED EXPENSES DATA CALL INSTRUCTIONS

DUE JULY 24, 2026

Instructions:

1. Report **countrywide** data only for lines written in Texas. 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.

Exception for grouped lines (9.1 + 9.2; 11.1 + 11.2; 17.1 + 17.2; 18.1 + 18.2):

If one part of the grouped lines has Texas premium, report countrywide premium for both. For example, if you have Texas premium for line 9.1, you will report Countrywide premium for grouped lines 9.1 + 9.2, even if you did not have Texas premium for line 9.2.

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 in thousands. *Note:* This is how it is already listed on the Insurance Expense Exhibit Part III, Column 1.
4. 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.
5. Save your file using the following naming convention:
 - For group filings, enter the file name as GRP # DER2025.xlsx. For example, "GRP 1234 DER2025.xlsx".
 - For individual company filings, enter the group number as "0" followed by the five-digit NAIC company number. For example, "GRP 0 12345 DER2025.xlsx".
6. Do not send your submission with hidden or deleted columns.
7. 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.
8. Send the email, with the Excel file name as the subject line, to DataCall@tdi.texas.gov.

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