

**Data Call for Direct California Workers' Compensation Experience  
Expense Information for Calendar Year 2022 (CA-EX-2022)**

Due Date: April 28, 2023

Draft

**I. Expense Exhibit**

	Calendar Year 2022	
	Amount	% of EP <sup>3</sup>
1. Earned Premium <sup>1</sup>		
2. Incurred Losses <sup>2</sup>		
3. Incurred Allocated Loss Adjustment Expenses		
4. Unallocated Loss Adjustment Expenses		
a. Incurred		
b. Paid		
5. Commission and Brokerage Incurred		
6. Taxes, Licenses and Fees Incurred		
7. Other Acquisition Expenses		
8. General Expenses		
9. Total All Expenses (sum of 3., 4a., and 5 to 8.)		

1. Must agree with Part b, Column (1) Total of Section III, Calendar Year Exhibit of CA-QT-4Q2022. Please go to page 8 for the explanation.
2. Must agree with Column (6), Line (e) "YTD Change" in Section II, Accident Year Exhibit of CA-QT-4Q22. Please go to page 8 for the explanation.
3. % of Earned Premium
4. Actual California (C) or Apportionment (A)

Name	Title
Email	Date Filed
Telephone No.	Fax No.
Mailing Address:	9999 Group Code
	Sample Data Call Group Name

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**I. Expense Exhibit (continued)**

Calendar Year 2022

10. Please report the amount of civil or criminal fines, penalties or punitive damages pertaining to or arising from California workers' compensation. (These amounts are also to be included in items 2 to 8 as appropriate.)

\_\_\_\_\_

11. Please report the amount of additional fines and penalties pertaining to California workers' compensation. (These amounts are also to be included in items 2 to 8 as appropriate.)

\_\_\_\_\_

12. Please report the amount of applicant attorney expenses paid pertaining to or arising from California workers' compensation claims.

\_\_\_\_\_

13. Please report the amount of defense attorney expenses paid pertaining to or arising from California workers' compensation claims.

\_\_\_\_\_

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**I. Expense Exhibit (continued)**

14. Does your company write workers' compensation large deductible policies in any state? \_\_\_\_\_

If yes, please explain how the premium and losses for these policies were adjusted to a full coverage basis in making apportionments of national workers' compensation expense data to California. Show reconciliation, if appropriate. If this cannot be done using the explanation field below, after submitting this Expense Call please email an attachment with the full reconciliation details and include your reporting group name and code, data call code, and version / revision # to: eSCAD@wcirb.com.

15. Does your company act as an assigned risk servicing carrier for workers' compensation in other states? \_\_\_\_\_

If yes, please explain how reimbursements for assigned risk servicing carrier expenses are accounted for; and if the expense reimbursements are netted against actual expense incurred, explain how national workers' compensation expenses were adjusted to a basis gross of reimbursements. Show reconciliation, if appropriate. If this cannot be done using the explanation field below, after submitting this Expense Call please email an attachment with the full reconciliation details and include your reporting group name and code, data call code, and version / revision # to: eSCAD@wcirb.com.

16. Please provide explanations for any negative amounts reported on this call for 2022 expenses.

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**I. Expense Exhibit (continued)**

17. Countrywide Amounts

For Questions 17a-g, please provide the countrywide (direct business) information from Part III, line 16 of the Insurance Expense Exhibit (IEE) or on a basis that is comparable to IEE information for the calendar year for the insurers that are represented in this Expense Call. (Please use whole dollars.) For Question 17h, please provide on a basis consistent with other open indemnity claim count information provided to the WCIRB (see instructions).

- a. IEE Incurred ULAE (Adjusting & Other Expenses Incurred or AOE on IEE) \$ \_\_\_\_\_
- b. IEE ULAE Reserves (Unpaid AOE on IEE) \$ \_\_\_\_\_
- c. Paid ULAE (see instructions) \$ \_\_\_\_\_
- d. IEE Incurred Losses \$ \_\_\_\_\_
- e. IEE Loss Reserves (Unpaid Losses on IEE) \$ \_\_\_\_\_
- f. Paid Losses (see instructions) \$ \_\_\_\_\_
- g. Countrywide Paid Loss Below Deductibles (i.e., paid losses up to a loss deductible amount which are not included in reported IEE paid loss amounts) \$ \_\_\_\_\_
- h. Countrywide Open Indemnity Claim Counts as of December 31, 2021 for Accident Years 1989 and forward (i.e., end of the prior calendar year) \_\_\_\_\_

18. Claims-handling and Other Service Fee Adjustments in ULAE

- a. Does your company record any negative ULAE amounts in the IEE for reimbursement of claims-handling provided to policyholders (such as for claims below a deductible amount) or other service fees which reduce the amount of ULAE reported on Part III, line 16 of the IEE?  
\_\_\_\_\_
- b. If "Yes", please provide the total amount for which Paid ULAE is reduced on the IEE for all adjustments as described above:  
\$ \_\_\_\_\_

19. Handling of Third-Party Administrator (TPA) Expenses in ULAE (Deductible Policies)

- a. For business written on a deductible basis, does your company (or the policyholder) make use of TPAs to handle claims below the deductible, for which the associated claims-handling costs or fees of the TPA are not included in ULAE reported on Part III, line 16 of the IEE?  
\_\_\_\_\_
- b. If "Yes", please provide the countrywide amount of total calendar year paid losses OR the approximate percentage of business from policies that are handled by TPA on this basis  
\$ \_\_\_\_\_

20. Handling of Third-Party Administrator (TPA) Expenses in ULAE (Non-Deductible Policies)

- a. Does your company make use of TPAs to handle claims on non-deductible policies, for which the associated claims-handling costs or fees of the TPA are not included in ULAE reported on Part III, line 16 of the IEE?  
\_\_\_\_\_
- b. If "Yes", please provide the countrywide amount of total calendar year paid losses OR the approximate percentage of business from policies that are handled by TPA on this basis  
\$ \_\_\_\_\_

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**II. Reconciliation Report Exhibit**

	<u>Direct Earned Premium</u>	<u>Direct Incurred Losses</u>
1. Amount from Section I, Expense Exhibit <sup>1</sup>		
2. Deductible credit or loss deductible amounts excluded from 1		
3. Net of Deductible Amount {1. minus 2.}		
4. Excess Insurance		
5. USL&H Insurance		
6. Private Residence Employees Insurance		
7. National Defense Projects Insurance		
8. Charge For Terrorism Coverage		
9. Retrospective Rating Plan Adjustments		
10. Voluntary Reserves		
11. TOTAL (sum of 3. to 10.)		
12. California Annual Statement Exhibit of Premiums and Losses <sup>2</sup>		
13. Difference (11. minus 12.)		
14. Grand Total Annual Statement Exhibit of Premiums and Losses <sup>2</sup>		

1. Line 1 for premium and line 2 for losses.

2. Statutory Page 14, line 16, column 2 for earned premiums and column 6 for incurred losses.

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**II. Reconciliation Report Exhibit (continued)**

In the table below, please list each company included in the group separately with the individual insurer Exhibit of Premiums and Losses (Statutory Page 14) – California data from the 2022 Annual Statement:

**2022 Annual Statement Exhibit of Premiums and Losses (Statutory Page 14) - California**

Individual Insurers in Group	1 Direct Written Premium	2 Direct Earned Premium	3 Dividends Paid	4 Direct Incurred Losses	5 NAIC Code
1. 9999, Sample Data Call					N/A
<b>Total:</b>					

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### Companies included in the report

Code	Name	Status
9999	Sample Data Call	Active