

## 2015 MEDICARE SUPPLEMENT DATA CALL

Reporting Due Date: May 31, 2016

<b>DATE:</b>	March 2016
<b>TO:</b>	Insurers that transacted individual or group Medicare Supplement business in the Commonwealth of Pennsylvania in 2015
<b>ATTN:</b>	Chief Accident and Health Insurance Actuary
<b>RE:</b>	Medicare Supplement Refund Calculation
<b>FROM:</b>	Johanna Fabian-Marks, Acting Director Bureau of Life, Accident and Health Insurance Office of Insurance Product Regulation and Administration

Pursuant to 31 s 89.780(b) of the Pennsylvania Insurance Regulations, the Pennsylvania Insurance Department has prescribed the Excel worksheets contained in the workbook linked below as the applicable Medicare Supplement Refund Calculation forms to be used by insurers to submit the required annual refund calculation data to the Department for each individual or group standardized Medicare Supplement benefit plan.

Insurers must submit the refund calculation data in the prescribed format to the Commissioner by May 31 of each year.

Two worksheets are contained in the linked workbook - one for group business and the other for individual business. These worksheets should be copied and completed for each standardized Medicare Supplement benefit plan (SMSBP: A, B, C, D, E, F, G, H, I, J, K, L, M, and N). 1990 and 2010 form series experience of the same type must be reported in one exhibit for each SMSBP. High deductible Plan F and Plan J experience must be included in the exhibits for Plan F and Plan J, respectively. Experience for Standard and Select plans must be reported on separate worksheets.

These worksheets must also be completed for any pre-standardized individual or group plans (SMSBP: P) that have remaining inforce business in 2015. Individual and group plan experience must be submitted separately, with all the experience combined for all applicable policies on the individual and group worksheets. For purposes of calculating the refunds for pre-standardized plans, 1996 is considered the year of issue for all business. In the Calendar Year Experience section of the worksheet, data will be entered only for Year of Issue 1996.

The shaded areas on the worksheet are to be completed by the company; all other information will be calculated from the entered data. When completing the worksheets, it is essential that the correct calendar year be entered in the shaded area located in the heading of the worksheet. For worksheets filed in 2016 which include experience data through 2015, calendar year 2015 should be

entered in the heading of the worksheet.

Earned Premiums are to include all modal loads and fees charged. Incurred claims should exclude active life reserves.

If any of the experience submitted in the previous year's filing differs from the experience for the same period submitted in the current year's filing, provide an explanation of the reason(s) that the data has changed. This explanation must be included in a cover letter that accompanies the current year's filing.

**Medicare Supplement Refund Calculation filings must be submitted in Excel format via SERFF using:**

Type of Insurance (TOI) code MS-09 Medicare Supplement - Other 2010

Sub-Type of Insurance (Sub-TOI) code MS09.000 Medicare Supplement Other 2010

Filing Type Rate - Medicare Supplement Refund Calculation

**Submit each of the required worksheets in one Excel workbook, with formulas intact. Do not modify the formulas or formatting of the workbook, and do not convert the information to a pdf file.**

If you have any questions, please contact Michael Gurgiolo at (717) 783-2115 or email [mgurgiolo@pa.gov](mailto:mgurgiolo@pa.gov).

The prescribed workbook with individual and group pages can be found here:

[Workbook in Excel \(.xlsx\) format](#)

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