

Form Usage Table

Long Version (up to 470 forms)

Instructions

Complete each step as instructed below. If you don't, we may reject your filing as incomplete. See [28 TAC § 5.9324](#).

1. First, list the forms in your filing on the table in the **same order** as they appear on the Form Schedule. For personal lines, list referenced forms after any filed forms.
2. Next, indicate how you will use each form. The form usage options are:

- **Mandatory**

The form is required for all customers in the program.

Example: The policy form or Special Provisions – Texas endorsement.

- **Conditional mandatory (at insurer's discretion)**

The form is required for certain customers, but not all customers depending on certain conditions or situations. You must tell us what the conditions are.

Example: A wind and hail exclusion in the catastrophe area.

Special instructions for conditional mandatory forms: Attach a document that describes the conditions that make the forms mandatory. ([28 TAC § 5.9321\(c\)\(7\)\(C\)](#))

- **Customer choice (optional)**

The form will be used only if the customer chooses to add it to their policy.

Examples: A roadside assistance endorsement or personal articles endorsement.

Special instructions for new customer choice forms: Address new customer choice forms in a rate/rule filing. The rate/rule filing must:

1. show an appropriate premium charge or credit; and
2. provide actuarial support, explaining why the charge or credit is reasonable; or
3. explain why not providing a rate adjustment is actuarially sound and not discriminatory. (Insurance Code § 2251.052)

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Note: This list does not necessarily reflect the final approved forms in the filing.