



**RICARDO LARA**  
CALIFORNIA INSURANCE COMMISSIONER

June 2020

TO: All admitted and non-admitted property & casualty and workers' compensation insurers who operate in California.

RE: Report per California Department of Insurance Bulletin 2020-8 on Premium Refunds, Credits, and Reductions in Response to COVID-19 Pandemic

The California Department of Insurance ("Department") issued new Bulletin 2020-8 to extend the reporting periods in Bulletin 2020-3 to cover the month of June, and potentially the months of July and August of 2020 on Premium Refunds, Credits, and Reductions in Response to the COVID-19 Pandemic. As part of Bulletin 2020-8, insurers writing business in the lines of insurance identified in Bulletin 2020-3 must submit a report to the Department no later than October 1, 2020 that covers the month of June and potentially the months of July and August as conditions warrant.

As stated in Bulletin 2020-3, the report must include "all actions taken and contemplated future actions to refund premium in response to or consistent with this Bulletin. The report shall include California-specific information and an explanation and justification for the amount and duration of any premium refund, and how those measures reflect the actual or expected reduction of exposure to loss." To satisfy the reporting requirement, an Excel workbook has been created.

General Instructions:

- The report pursuant to Bulletin 2020-8 is due no later than October 1, 2020.
- Report forms within the Excel workbook to be completed and returned to the Department include:
  - 1) Cover Page – To be filled out by all CA admitted and nonadmitted companies, and companies transacted through a surplus line broker.
  - 2) Questionnaire – To be filled out by all CA admitted and nonadmitted companies, and companies transacted through a surplus line broker.
  - 3) Explanatory Memorandum – To be filled out only by Companies that write in one of the six lines identified in the Bulletin and/or other line(s) impacted by the COVID-19 pandemic regardless whether a refund is involved.
  - 4) Worksheet – To be filled out only by Companies that write in one of the six lines identified in the Bulletin and/or other line(s) impacted by the COVID-19 pandemic and a refund is involved.
- Completed reports and related questions should be submitted to the Rate Specialist Bureau at email address: [RSBCovid19PR@insurance.ca.gov](mailto:RSBCovid19PR@insurance.ca.gov).

Additional instructions specific to each form is included separately.