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Bulletin 2017-004

May 10, 2017

**TO: ALL INSURANCE CARRIERS THAT OFFER OR ADMINISTER LIFE OR
HEALTH RELATED INSURANCE PLANS**

RE: DATA CALL

THE FOLLOWING Bulletin is issued pursuant to NMSA 1978 Sections 59A-4-3, 59A-6-1.Z(3), 59A-18-12, 59A-18-13, 59A-18-14, 59A-18-17 and Sections 13.1.2.1 to 13.1.2.10 and 13.10.23.11 NMAC.

The purpose of this Bulletin is to announce a data call by the Office of Superintendent of Insurance ("OSI" or "the Superintendent").

This data call requires that all Life Insurance and Health Insurance forms used in matrix filings (i.e., insert-page filings) that have been previously approved and that the insurer intends to continue to use in any context be submitted to OSI **no later than January 1, 2018**. A "matrix" is a policy or certificate complied of multiple "insert pages" with different form numbers; a "matrix" is also a policy document made up of interchangeable bracketed provisions or paragraphs.

The list or lists of forms to be submitted in compliance with this data call shall be as follows:

- For forms that have been approved via the System for Electronic Rate and Form Filing (SERFF), carriers shall provide the SERFF Tracking Number.
- For forms that were approved prior to OSI's use of SERFF on October 31, 2006, or that were approved outside of SERFF prior to mandatory electronic filing on June 19, 2009, carriers shall provide a copy of the form in its entirety and the date the form was approved.
- Carriers shall also submit any riders, endorsements, or amendments that have been approved for matrix forms.

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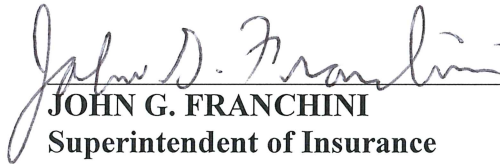
The list or lists and required forms must be submitted as an **informational** filing through SERFF and the lists and forms must be included in the SERFF Supporting Documents tab. All informational filings are subject to applicable fees, pursuant to §59A-6-1 NMSA 1978.

Any policies that have been issued and are currently in use in this state or that the carrier anticipates utilizing in this state and that employ a matrix format are subject to this requirement. Please note that OSI has not approved any new forms utilizing a matrix format since 2013 and will not approve any new forms utilizing a matrix format.

Any person aggrieved by a bulletin may request a hearing before the Superintendent in accordance with NMSA 1978 Section 59A-4-15.

If you have additional questions regarding this Bulletin, please contact the Life and Health Bureau, Office of Superintendent of Insurance, at LHRFF.osi@state.nm.us.

DONE and ORDERED this 10th day of May 2017.



JOHN G. FRANCHINI
Superintendent of Insurance