**Questions from 06/15/2022 Mortality Experience Data Collection Kick-off Meeting**

1. What is the timeline for data collection?

**A:** The NAIC is planning to open RDC to accept submissions on July 1, 2022. The first data submission is due by September 30, 2022. The deadline for final submissions is December 31, 2022.

1. The 2022 data call is for observation year 2020, so there is still a 2-year lag in reporting. I believe there has been a proposal to move up the data collection so that there is only a 1- year lag. What is the status of this proposal?

**A:** The proposal was discussed by the Life Actuarial (A) Task Force and was released for an exposure period. The consensus was that the proposal be delayed until the NAIC has collected several years of data.

1. When will the new data file layout be sent out?

**A:** The new layout is in the 2022 *Valuation Manual.* The *Valuation Manual* can be found on the NAIC website (<https://content.naic.org/pbr_data.htm>).

1. Who assigns the 9 digit Submitting Company ID (vs. NAIC company code)?

**A:** If the company submitting the data file does not have an NAIC assigned company code, then they should use their company’s Federal Employer Identification Number (FEIN). The FEIN is assigned by the government (similar to an individual’s Social Security Number).

1. Do hardship exemptions carry over from year to year?

**A:** Yes. If your company had any type of partial exemption previously, then that will automatically carry forward.

1. What software are you using to automate the data review process?

**A:** We use SAS, Excel, and Tableau for all our data analysis.

1. In the case of a joint life / last survivor policy, if one insured has died before the observation year, should that record be excluded from the data submission?

**A:** Yes. In the case of joint life / last survivor (i.e. second to die), in the year the first insured dies, that segment should be coded as a death but without a death benefit. In subsequent years, that segment should no longer be included. Please note that if the first insured to die is in segment 1, we are asking that you do not renumber the remaining segment. It is important to us to to do year over year validations that segment numbers do not change.

1. In the 2021 data collection, there was a 1% threshold for reconciling the data file to the Exhibit of Life. Will that threshold be the same for the 2022 data collection?

**A:** Yes. We want companies to target getting their reconciliations within 1%.