

Professional Employer Organization Requirements

Thank you for your interest in Texas Mutual Insurance Company. We have listed below the items we will need in order to provide a quote for your Professional Employer Organization (PEO).

- ❑ **Completed ACORD[®] 130.** The application should reflect information as it pertains to the Professional Employer Organization. Individual client company information will be gathered elsewhere.
- ❑ **Five years of Texas premium and payroll history for the PEO.**
- ❑ **Five years of currently valued loss runs for the PEO.** Loss runs must clearly indicate the state in which the loss occurred so that we can segregate Texas exposure. Since the quote will be based on the PEO's experience, loss runs must include all prior loss data for the PEO, not just loss information for current clients.
- ❑ **Copy of current PEO experience modifier worksheet**
- ❑ **Complete PEO Questionnaire, available at www.texasmutual.com in the Agent Forms section.** Individual client company information is requested under Question 8.
- ❑ **Complete the PEO Client Executive Data worksheet, available at www.texasmutual.com.** This information is required in order for Texas Mutual Insurance Company to properly apply experience modifiers per Rule 5A of the Experience Rating Plan Manual – Texas and Subchapter D, Sec. 91.042 of the Labor Code (Professional Employer Organizations).
- ❑ **Copy of Staff Leasing Services License.** For more information about the Professional Employer Organizations Labor Code, please visit www.tdlr.texas.gov.
- ❑ **Copies of all sample PEO service agreements in place.**
- ❑ **Signed Professional Employer Organization Exclusion & Pre-Approval Lists. This is a Texas Mutual Insurance Company form available from your underwriter.**
- ❑ **Details on PEO's risk management program, which may include but not limited to:**
 - Written safety program
 - PEO client selection criteria
 - Risk management department resumes

If you have questions regarding the required information, please contact your Texas Mutual underwriter at (800) 859-5995.