

SERFF 7.1 Release Notes

SERFF 7.1 was released to production on Thursday, April 2, 2015. The 7.1 release contains enhancements to the Binder Wizard, a state Turnaround Report, and other enhancements related SERFF and SERFF Filing Access.

Enhancements in SERFF 7.1

Binder Wizard

The Binder Wizard has been condensed into two steps: 'Create Plan Binder' and 'Review & Confirm.' The first step, 'Create Plan Binder,' will require the industry user to enter the following fields before moving to step two: State, Company, Contact, Binder Name, Binder Type, Market Type, Plan Year, and Assign Authors. After confirming their entries, a draft Binder is created.

Industry users will no longer be required to enter '# of Plans to Create' or the 'Standard Component ID' (SCID) in the Binder Wizard.

Plan and Benefits Template Data Import

Upon initial upload to the draft Binder, the following field data will be imported from the Plans and Benefits Template: Standard Component ID (SCID), Plan Name, Metal Level, Availability, and Unique Plan Design (indicator).

To add and/or remove SCIDs after initial upload, users may 'Remove' or 'Update' the draft template attachment. Users may also update existing SCIDs by using the 'Update' functionality.

The 'Remove' function should be used to remove the draft template attachment and all corresponding plan data references on the Plans, Associated Schedule Items, and Fees tabs.

The 'Update' function should be used to add, remove, or update SCIDs on a draft Binder. Work completed on the Associated Schedule Items and Fees tabs related to existing plan data will remain on the Binder.

Once a Binder is submitted to the state, users will be unable to add and/or remove SCIDs.

Turnaround Report

This standardized turnaround detail & summary report, requested by the Operational Efficiencies Working Group, was created to help measure the success of speed-to-market initiatives. This report will allow the state to review filing turnaround data, at the state instance level, for filings closed within a specified date range.

Other Changes in SERFF 7.1

SERFF Filing Access (SFA) – Tracking Number Search: SFA users will now have the ability to search for Filings and Binders using the SERFF Tracking Number.

SERFF Filing Access (SFA) – Compact Filings, Statement of Intent (SOI): SFA users will now have the ability to include the SOI Filing Attachment and SOI Schedule Items in the downloaded zip file.

Statement of Intent Template: Industry users will no longer receive an error when attempting to upload an Excel file in the XLSX format.

2016 Plan Transfer Report: This report will allow a Plan Management state to view the most current transfer status of each transferred plan within the 2016 plan year.

Tracking Number Search: State and industry users will now have the ability to press 'Enter' after entering the SERFF Tracking Number or Binder Tracking Number. To search using the State or Company Tracking Number for both Filings and Binders, users must click 'Search' and select corresponding tracking number type.

Plan Management Correspondence: All Binder Correspondence is now sorted in reverse chronological order.

Please contact the SERFF Help Desk at serffhelp@naic.org or (816) 783-8990 if you have any questions about the release of SERFF 7.1.