

## SERFF 7.54.4 Release Notes

SERFF 7.54.4 was released to production on Thursday, November 5<sup>th</sup>, 2020. The release contains the implementation of a new payment method for the NAIC transaction fee, credit card. Additionally, this release includes minor enhancements and bug fixes.

### Enhancements in SERFF 7.54.4

#### **Credit Card Payment Method Implementation (Industry)**

Industry users will now be able to pay NAIC Transaction Fees with a credit card at submission. Instances enabled for credit card payments, will be directed to enter payment information at submission for the filing/binder to submit.

This new payment method is available for instances that do not pay any state filing fees or the Form Filing Review Fee. Additionally, instances must not have any remaining prepaid block transactions.

Industry instances which are enabled for credit card payments, the NAIC Transaction Fee will display on the Filing Fees Tab for filings or the Fees tab for binders. The binder Fee Tab has been redesigned for industry users to display transaction fees and total fees as well as state fees, if applicable.

A new report has been added to the Reports tab to allow for reconciliation of credit card transactions. This report is modeled after the EFT Detail Report and is titled Credit Card Report.

PDF Pipeline has been updated to include all NAIC Transaction Fees on filings and binders.

The billing export has been updated to include NAIC Transaction Fees paid with credit card. Additionally, new columns have been added to capture the individual transaction price and how billing is being assessed: billed which includes pay as you go and block transactions or credit card.

#### **Binders (Industry)**

##### **Fees tab:**

- Users are now able to add a state fee amount and apply to all plans at once or bypass fees and apply to all plans at once.
- Users are still able to add or bypass fees on individual plans.
- Users will now submit additional state fees for individual plans post submission

##### **Templates tab:**

If a Plans and Benefits Template has been added to an Amendment Letter or a Response Letter but the correspondence has not been submitted, the template will be locked from further revision. To unlock the template, the draft template must be removed from the correspondence or the correspondence submitted to the state. Notification regarding the lock will show on the Templates tab as well as in each piece of applicable correspondence.

### **Role Change (State and Industry)**

The EFT Report role has been renamed to Payment Report. The description has been updated to “Allows state and industry users to generate the EFT report and industry users to generate the Credit Card report.”

### **LAH Filings (State and Industry)**

At the direction of the Speed to Market Working Group, the ‘Implementation Date’ label has been changed to ‘Effective Date’ in the following areas:

- Filing at a Glance
- Disposition
- PDF Pipeline
- Post Submission Update
- SFA

## **Bug Fixes in SERFF 7.54.4**

### **Billing Export**

- Binder Export has been updated to show the user who submitted the binder.
- The Excel version of the Billing Export has been modified to show only one row per transaction without shifting any columns of data.

### **Filings**

- The company name on the Filing Fees tab now retains the version of the company name at the time of filing submission.

## **SERFF Integrated Services (SIS) Enhancement in SERFF 7.54.4**

### **NAIC Transaction Fees**

- SIS users are now able to view the NAIC Transaction Fee which will be or has been paid. Fields which have been added are fee type and payment type. All fields which can be extracted for NAIC Fees are as follows:
  - Amount
  - Date Processed
  - Transaction Number
  - Company Name
  - Fee Type
  - Payment Type