



I received an invoice for SERFF usage. Which transactions generated this invoice?

If you have Filing Manager or the Billing Read-Only role, you can log in to SERFF and go to the Billing tab. You will then be able to click the Billing Export link, located on the left side of the Billing tab. Choose the billing month, year and report type, and then click Export.

If you only have access to one SERFF instance, that will be the only selection. If you have access to multiple instances, select the appropriate instances, and SERFF will pull all transactions that occurred based on the chosen criteria and export the data to a .CSV file. The export will contain all applicable filing information, including the SERFF Tracking Number, Company Name, Date Submitted and State.

Please note: By running the Filing Transaction report, you will only receive a detailed list of transactions that are rate and/or form filings (i.e., non-Plan Management submissions). To view both transaction types (i.e., Plan Management transactions and Filing transactions), you will need to run both reports separately.

The incorrect contact and/or mailing address is listed on my SERFF invoice. How do I update the billing contact and/or address?

You can easily update your billing contact and/or billing address by sending an email to: serffbilling@naic.org. Within the email, please include the customer ID and instance name (found on the Billing tab in SERFF), the previous billing contact and/or mailing address, and the new billing contact and/or address.

In the case of an updated billing contact, please include the new contact's name, email address and phone number. All changes will be made at the end of the month in which they are received and may take one to two billing cycles to display on the invoice.

What is the difference between these transaction fees and the EFT fees I pay in SERFF?

The Pay As You Go invoice relates to SERFF transaction fees. The Pay As You Go rate is \$13.50 per company, per state, per filing. These fees are associated with the use of SERFF, and payment method is required upon implementation of your SERFF account.

EFT is used to pay state fees within SERFF via ACH Debit, and EFT can be set up at any time. Some states require fees to be paid through SERFF on the Filing Fees tab within the filing. Once the filing has been submitted, the specified fees will be withdrawn immediately from the bank account on file and should appear on your bank statement within 5–10 business days.

SERFF Billing FAQ

I recently purchased a SERFF filing block, but I do not see it listed on my credit invoice.

Where can I find it?

The SERFF credit invoice reflects the prepaid filing block currently being used in your SERFF instance. Once the current block has been depleted, the new block will then be used for SERFF transactions and will appear on your credit invoice. To view all blocks on your SERFF instance, please log in to SERFF, and go to the Billing tab. SERFF uses blocks in the order of oldest to newest. If you have any additional questions, please contact: serffbilling@naic.org.

Contact Us

If you have any additional questions, please contact the SERFF Marketing Team.

Email: serffbilling@naic.org

Phone: 816.783.8787

How do I purchase a new filing block?

To purchase a new filing block, please send an email to: serffbilling@naic.org. List your SERFF instance name and customer ID, both of which can be found under the Billing tab in SERFF.

How are Plan Management transaction fees assessed?

Transaction fees for binders in the Plan Management tab are assessed by a transaction fee per plan on a binder. Therefore, if you submit 20 plans on a binder, the total number of transaction fees will be 20.

Transaction fees are deducted from the company's current SERFF prepaid filing block or are billed at the Pay As You Go rate based on the company's billing choice.