



NAIC **SERFF**

SERFF Product Steering Committee
May 28, 2025

Recording Link:

- <https://naic.webex.com/naic/ldr.phpRCID=810a08f1cc4a00e3b588a99d502d15ff>

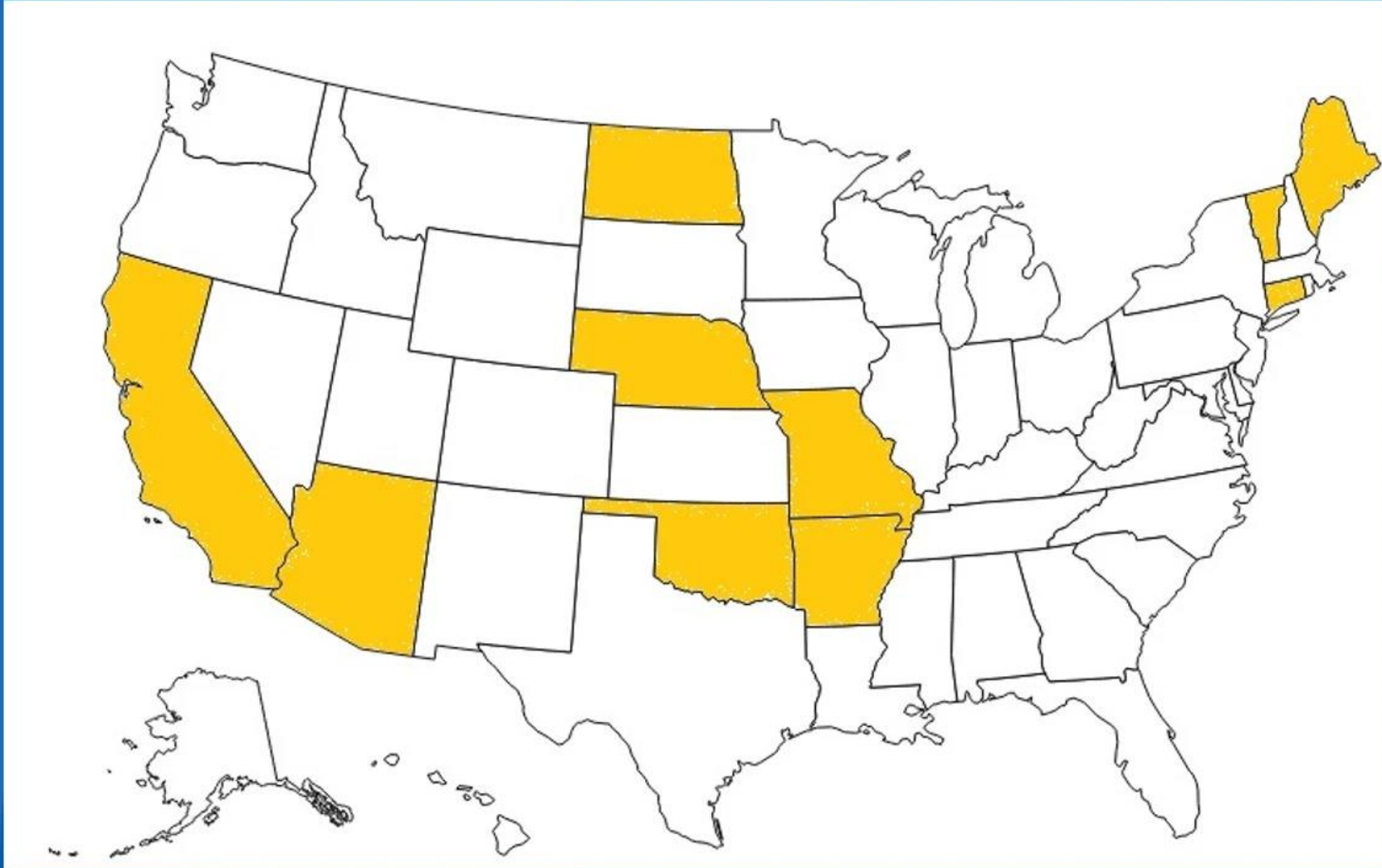
Project Update

- SERFF Legacy – focus is implementation of Okta, with single sign on (SSO) and multi factor authentication (MFA)
- SERFF Modernization Release 1 – ongoing warranty to address performance, feature gaps, and usability
- SERFF Early Adopters – analysis and planning underway

SERFF Modernization Warranty

- Three main areas of focus:
 - System performance/speed and reliability
 - Feature gaps
 - Usability
- Recent survey conducted to assess user perspective on current state
- Issues will be addressed before state implementations

Early Adopters



1. AR
2. AZ
3. CA
4. CT
5. ME
6. MO
7. NE
8. ND
9. OK
10. VT

Early Adopters

- Transition dates may vary
- States may be bifurcated with some TOIs in Legacy and some in SERFF Mod
- Lessons learned from Compact migration and transition to be applied
- Focusing on clear guidance for filers on which platform to use
- Platform will continue to be improved through this phase

Legacy SSO & MFA

- Updates on work completed
- FAQs
 - I currently use NAIC's Okta to log into other applications. Will I continue using the same login once SERFF begins using Okta?
 - I have three usernames today—will that be consolidated into one login?
 - How often will I need to update my password?
 - My password has expired, what do I do?
 - What exactly is changing?

Engagement Exercise

PSC Membership Interest Form

Link: [PSC Membership Form](#)

Will use this form to pull membership nominations

- 5 State Seats
- 1 Industry Seat



2025 Meeting Dates

- ~~June 25~~ - Reschedule in progress
- July 23
- August 27
- September 25
- October 22
- November 19*
- December 17*

**Revised date due to holiday.*

Questions?

bkieras@naic.org (or state liaison)
serffmodernizationquestions@naic.org