SERFF Product Steering Committee Meeting

Wednesday, June 22

NAIC NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS

Table of Contents

Roll Call

- Roll was called for current PSC members
- Interested parties who wish their attendance to be recorded can email lbandle@naic.org

7.67 Release – June 9

- Technical Updates
  - Will have no impact to users
- Bug Fixes
  - Corrected an error message in the State Rate Data fields to the correct error text.
  - Link to a binder in the Most Recently Viewed Binders window now takes the user to the binder when the user has no open binders.

SERFF Modernization Update

- We are near the end of Month 4! Seems like we've been working a lot longer, but things are coming along nicely.
- The team has just completed planning sessions for July-October.
- Work continues for the OpenSearch Index to improve the speed and results for Advanced Search and Document Search. Hope to announce a release date soon!
- In the coming months, we'll start loading SERFF data to the NAIC's Enterprise Data Warehouse to prepare for the introduction of Tableau and other reporting improvements.
- On the filing side, we've completed most of the work for the "Filing Rules" rewrite and are moving on to Compact registration and Compact Product Filings.
- More focus groups and other outreach will be launched soon!

Industry Focus Group Survey

- Link: [Focus Group Survey]
- Only for industry users
  - State users are being contacted separately for focus group participation
- Focus groups will be spun up gradually during the project

SERFF Modernization Engagement Activity

- Used online tool – Menti
- 70 PSC attendees participated
- Main topic covered: Filings
- Questions from the activity are on page 9
- Results from the Menti Activity start on page 11
- **If you were not able to participate in the activity or would like to expand on your answers, feel free to email responses to the questions to Lauren (lbandle@naic.org) and Bridget (bkieras@naic.org)**

Engagement Activity Questions: Filings

When answering, please provide what type of user you are (state or industry) and how often you use SERFF (daily, weekly, etc).

- **For the following tabs on a filing, what changes/improvements would you like to see? Please share any ideas large or small. No request is too big.**
  - General Information
  - Form Schedule
  - Rate/Rule Schedule
  - Supporting Documentation
  - Statement of Intent (compact filings only)
  - Filing Fees
  - Companies and Contacts
  - Filing Correspondence

PSC Membership Interest Form

- Link: PSC Membership Form
- 5 state seats, 1 industry seat up for new membership in 2022
- Will use this form to pull membership nominations going forward.

2022 Call Dates –
all calls start at 12:30 Central

- July 20
- August 17
- September 14
- October 19
- November 16
- December 14

June SERFF PSC Engagement Activity

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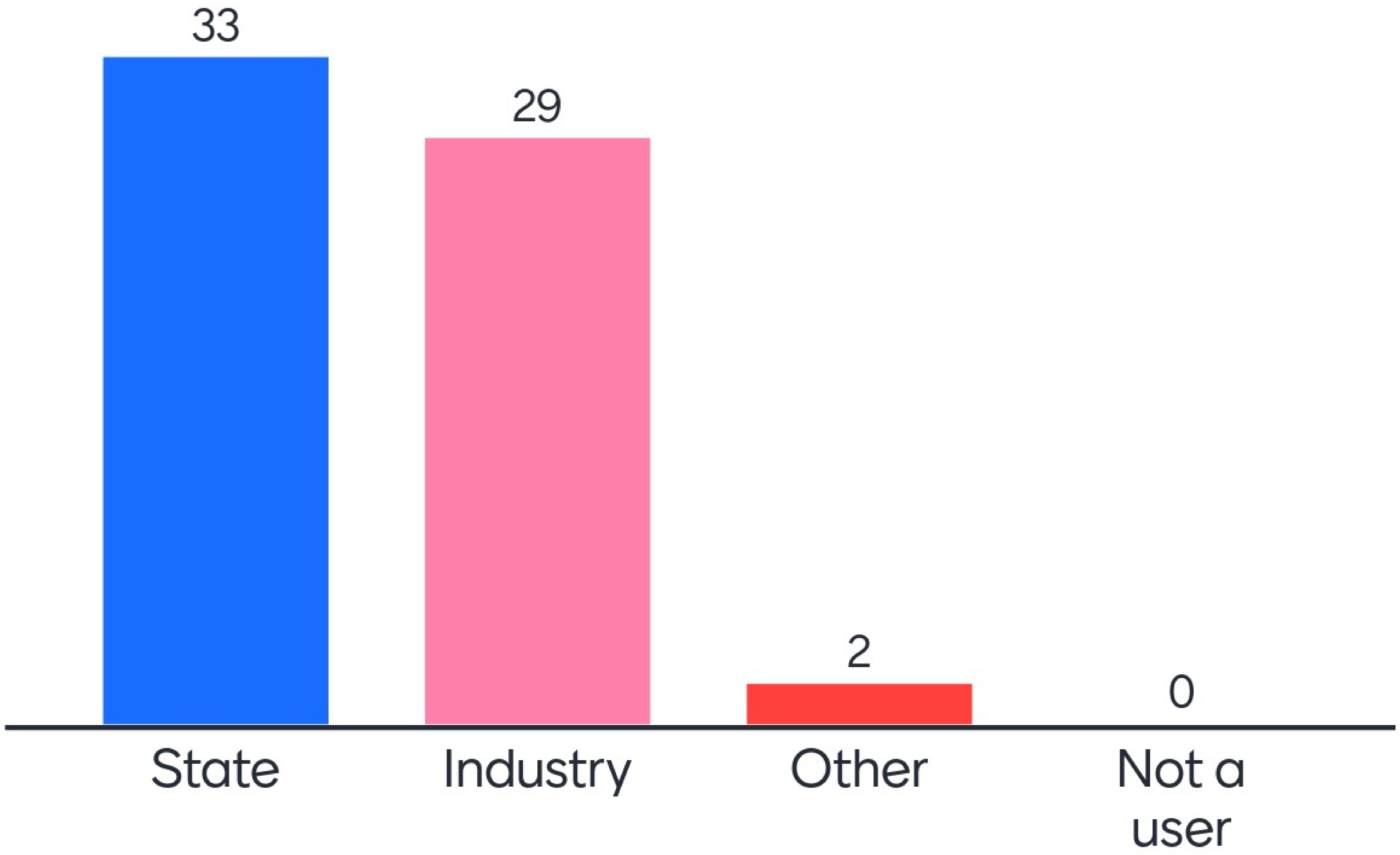
What type of user are you?



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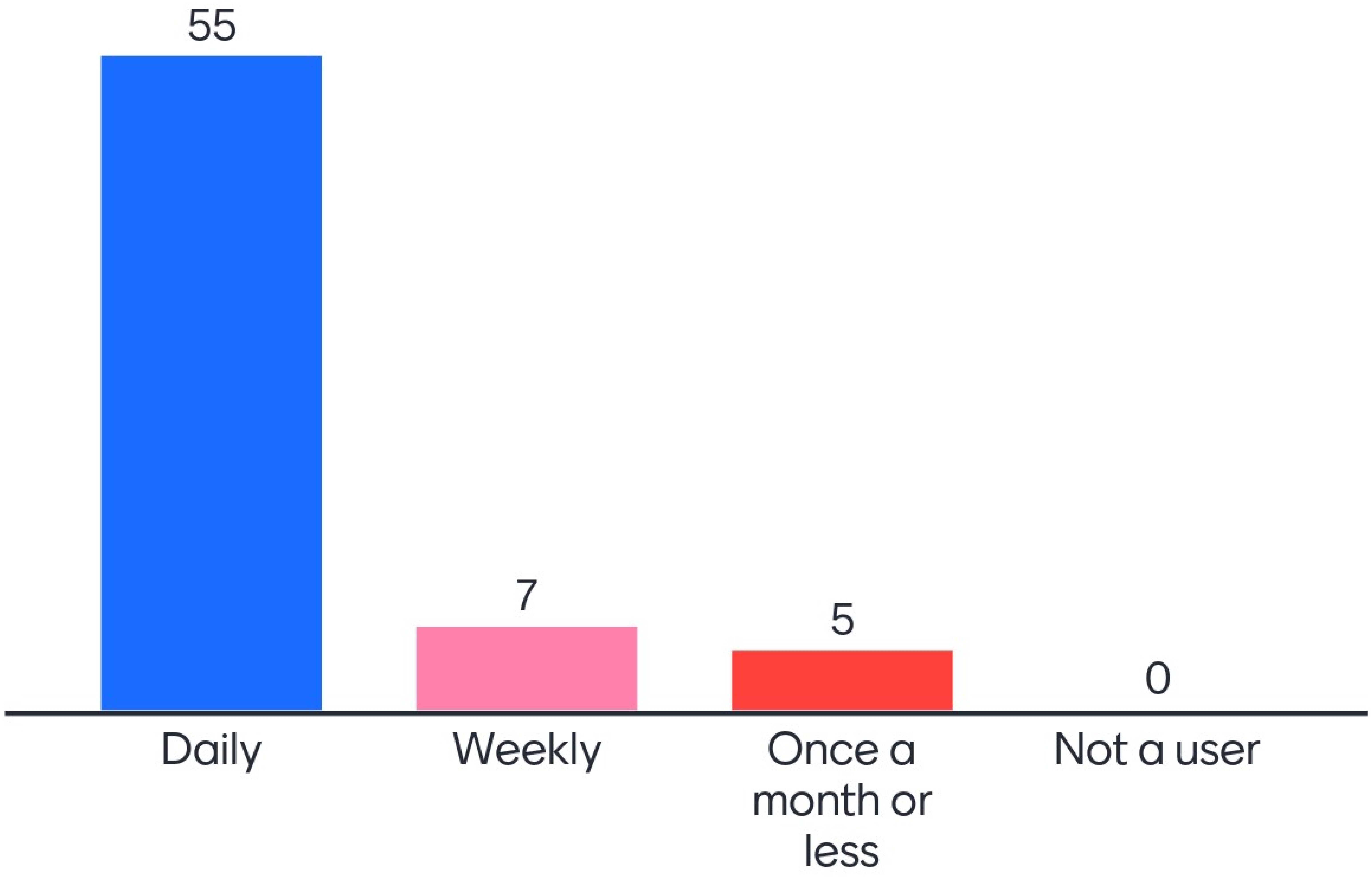
How often do you use SERFF?



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Product Filings

8

General Information Tab Changes

Mentimeter

No suggestions

Can the Domicile Status field highlight if required and information not typed into it?

No suggestions

no suggestions

None

No suggestions.

When editing, make the Filing Description box bigger and longer.

allow for the correction of toi/subtoi after submission

Linking to an explanatory that is within the filing may be useful.

50

General Information Tab Changes

Mentimeter

none

no suggestions

expanded window for the general instructions.

No changes.

Prepopulate the Disposition with the requested effective dates on the General Information tab. If the company entered On Approval, prefill with the current date.

would prefer they use the cover letterLove the effective date field

Please add Request Filing Mode to filing wizard.

no suggestions

Reviewer's contact information

50

General Information Tab Changes

Mentimeter

Project number auto fill

Agreed on correcting toi/sub toi post filing.

allow change via other ways, not post submission update. Make all characters visible when editing

Easily change or add authors. Have a primary and secondary authors for industry.

Auto link to previous filings, only allow submitter to select certain options based on previous selections

No suggestions

None

Prior tracking number, Program Name, Whether new product or change to current product,

Allow presets to be set up and can interchange when needed.

50

General Information Tab Changes

Mentimeter

Can the Filing Description box be formatted to allow tables to be included with the cover letter language?

With the introduction of the Post Submission update, I don't think companies should be able to change or revise the red asterik fields in a Post Submission

When editing, make the filing description box longer and bigger.

Indication of company compliance with the General rules?

Add approved effective dates

Ability to add multiple State-TOIs/Sub-TOIs

Any state specific requirements for the GI tab could be here so it prompts the filer to be sure they complete it. like if MN needs the certification statement, the MN filing's GI tab prompts it

ability to check a box when it is a reference filing and the fields that are needed then populate.

Include the contact number of the state reviewer the file is assigned to.

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General Information Tab Changes

Mentimeter

Multiple Sub-TOIs to be added to a single filing

If a state requires a field be completed, make it mandatory

Delete one of the "project fields"

Corresponding Filing Tracking numbers should be hyperlinked to the designated filing.

Maybe allow "hot links" to other referenced filings in the filing descrption.

allow regulator to modify/correct TOI/Sub-TOI with permission of company

Make filing description searchable on the Search Filings screen.

Whether it included predictive model or not

Brief description of filing.

50

General Information Tab Changes

Mentimeter

Ability to format the Filing Description.

Want visual that filing contains use of confidentiality functionality

Make fields changeable if needed after submission.

Status of Domicile,- option for when the filing is in domicile state

make it so items can be in BOLD

Is "Status of filing of Domicile" necessary? I do not know if other states require this.

Allow companies to correct TOI/sub-TOIs

When the company selects the Filing Type, the filing should request the filer put something under that corresponding Schedule. ie if it's a form filing, you must provide something under the Form Schedule

Post-submission updates of large text boxes should generate red-line so we can easily see what's being changed.

50

General Information Tab Changes

Mentimeter

Allow bolding on the Filing Description

None

None.

Domicile status - include a selection for filing not required in state of domicile.

The GI tab flags when there is a post submission update so post approval, when someone looks at the FD, it directs to notice the post submission update.

allow the order of froms to be changed via dragging versus moving up/down one at a time

When adding multiple corresponding filing tracking numbers have them hyperlink. Sometimes when commas are added the hyperlink will not work.

Remove cap on character length for filenames.

Drag all the forms needed into a template or the forms schedule and all the info populate vs entering and then attaching

50

General Information Tab Changes

Mentimeter

Would like to see the form number auto populated from the uploaded form

If form is replaced, make previous state filing number a mandatory field.

Allow for minor corrections like "flash updates" instead of requesting reopening.

Drag and drop documents onto the schedule. Add multiple forms at once.

Automatic form comparison (with changes tracked) from prior to proposed form for regulators to verify carrier tracked changes.

Ability to load multiple forms.

Drag and drop feature

Number of pages of the forms and not just form count

Want ability for filer to edit/correct form #, name, etc without having to supersede.

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General Information Tab Changes

Mentimeter

Drag and drop

I feel as though the Form Type Legend may be out of date. Our state doesn't use ADV=Advertising for example because that would not be something filed in SERFF

No change.

Edits to stop company from being able to enter a readability score that is lower than the requirements for the state.

Allow the state to select certain combinations of TOI/Sub TOI that require a readability score. Do not allow the user to proceed without the score.

Change # of policy holders affected for this program to:# of policyholders # of policyholders affected by the changes in this filing

Ability to order the forms by assigning number order. Or make it easier to reorder forms.

Make rate information mandatory on any filing identified as a rate filing.

Allow states to designate some items as "required" and do not allow industry to bypass those items.

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General Information Tab Changes

Mentimeter

Keep it simple. Have one section for: Actuarial Explanatory Memorandum & Supporting Exhibits (PC) and then any state specific sections needed. Otherwise we may end up having to attach the same document several times.

2) Allow for multiple-state filings (select all the states for which the material is applicable).

N/A

1) Allow for Producers to file materials with system capability of capturing Insurer consent to file.

3) When an Advertisement piece is created by a Producer and is applicable to multiple insurers, allow the producer to file the material selecting all applicable insurers.

Should be able to open 2 things at once. E.g., if you open a second response letter, it should keep both open rather than switching from one to the other.

N/A

Would like the system to automatically calculate the filing fee based on what forms were uploaded to the Form Filing Tab. and the ability to change what was uploaded.

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Form Schedule Tab Changes

Mentimeter

bulk uploading

No suggestions

Allow drag and drop to re-order forms.

Allow a drag and drop to attach forms

automatically populate form name, edition date, and form number

ability to have SERFF create PDF from word doc after upload

Links to prior filing/etc should open in new tab, not in a pop-up window.

No suggestion.

To be able to load more than one form at a time. If you have 400 forms it takes quite some time to load them.

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Form Schedule Tab Changes

Mentimeter

works fine as is - no suggested changes

extract form name and number

Enough space to show the complete form name

no suggestions

no suggested changes

If the form schedule is not completed, there should be a block so that they cannot proceed onto the next step.

prepopulate name and edition date also allow drag and drop of forms into template

Can't remember if attachment criteria is on the forms schedule but if not then would like to see that included.

Must be enterered EXACTLY as it was approved, Must identify the difference between policies.

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Form Schedule Tab Changes

Mentimeter

no suggestions

Drag & Drop forms, auto population of form name, auto population of prious filing information for that form number in that state if not new, readability engine to determine score inline with the statutory requirements in that state.

make prior serff numbers required if that is a state requirement with a red asterisk

Ability to approve all the forms at once.

make all states uniform (OR currently requires edition date in form # field)

drag and drop to move order of forms on the FS

allow for the reordering of forms via dragging versus moving up/down one at a time

I know you can move a form up or down, but that could take a long time if you have a large number of forms. it would be nice to be able to click on a line and move it- similar to drag and drop.

Number of pages not just form count

30

Form Schedule Tab Changes

Mentimeter

the ability to drag and drop on the template or form schedule (without hitting attach - i know the drag/drop is avail there) and for the info to auto populate

none

ability to populate the State Tracking Number and not the SERFF Tracking Number in the action specific data field.

New Form, Revised Form, Withdrawn Form, etc.....

Extract form name and number.

easier way to edit form order

pull SERFF ID if there was a prior filing number for revisions

Automatic state versioning to accommodate states that have specific requirements on how the form number and edition date are displayed.

Form number in form number field must match what is on the attachment. Same with edition date for P&C filings

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Form Schedule Tab Changes

Mentimeter

perhaps a forms lookup if replacing an edition and it auto fills and you update the info

Maybe grab the form number from the bottom left corner and paste into the form number field

auto redline creation when replacement form is added.

clearer view when updating forms

drag and drop

Ability to search on form type but need ability to have filer or state correct when wrong

pull prior SERFF IDs if revision

Have a designation for replaced and revised forms. A replaced form being completely replaced as opposed to a revised form with simple edits.

pull information automatically for prior filing if you enter the SERFF ID (last rate change/filing method/etc)

30

Form Schedule Tab Changes

Mentimeter

Automatically populate the State Tracking Number and not the SERFF Tracking into the Previous State Tracking Number field or (load both of these numbers).

Ability to attach native file format, i.e. Word. As part of the submission process the forms convert to pdf.

none

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Rate/Rule Schedule Tab Changes

Mentimeter

No suggestions

Allow drag and drop to attach rate/rule pages

To be able to upload more than one document at a time

rate info to be added a CW level and modified a state level if needed

nothing to note here

Drag and drop

Allow "N/a" for rate indication if that is truly the case.

Please require edition date. It is imperative for us.

ability to upload multiple documents at the same time

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Rate/Rule Schedule Tab Changes

Mentimeter

no suggestions

Rate changes by specific coverages ie PD, BI, UM, UIM etc

None

No suggestions, but I want to run this past our re-rating area, they use it more and may have ideas.

same drag and drop and auto populate info as forms

Have a designation for replaced and revised forms. A replaced Rate/Rule being completely replaced as opposed to a revised manual page with simple edits.

Auto-fill Written Premium Change based on Rate Impact and Written Premium fields.

Documents should open in PDF, not some pop-up window with the web browser.

Compare the indicated and overall change to the information provided by the company in their exhibits and identify if there are discrepancies.

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Rate/Rule Schedule Tab Changes

Mentimeter

Rates need to be identified if they apply. Rule schedule tabs need to have the info on why these rates have changed

Ability for filer to indicate this is complete manual and/or ability to quickly compile complete manual

To have an added action of Withdrawn From Filing rather than just Withdrawn to avoid confusion when documents have to be pulled from the filing. This would be a good feature for the Form Schedule as well.

Reorganization of the rate data portion to make more readable. Same options as the form tab to link to prior and associated filings.

a way to identify if rate capping is being used and the capping % amount might be helpful

No change.

no comment

is prior filing type (file/use, prior appro) really needed on the rate information section

Is there the possibility of an auto PDF tool for larger Excel spreadsheets that do not convert well formatting wise? Thinking of longer, more detail manuals.

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Rate/Rule Schedule Tab Changes

Mentimeter

If Med Supp need to divide by plan/or LTC plans

Add a link to the form filings affected instead of having to list the forms.

Associated filings - Add Project name and Project Number

Open pdfs in pdf reader.

Overall Percentage Rate Indicated For This Filing and Overall Percentage Rate Impact For This Filing (Have the system total these fields).

Have the total premium, total impact, and total indicated change figures populated from the information the company submits in the fields above. Have the total information for the filing exportable.

Allow the state to select sub-categories by TOI for companies to enter the indicated and selected change. Example Auto: By Coverage, Home: By Form, etc.

Permissible Loss Ratio, ROI

load the previous TDI File Number (and SERFF Tracking Number) in the previous state filing number field.

33

Rate/Rule Schedule Tab Changes

Mentimeter

need search by rule number or text capability

drag drop to add documents

Allow for larger document sizes. We are regularly having to break documents up into several pieces to attach.

When a company submits a rate change, the upper part of the rate information should be required to fill out. i.e. the filing method, rate change type, effect date of last filing, etc... Sometimes rate filings some over without that top part completed

SERFF Tracking Number of Last Filing (Provide at least 3 prior filings).

Prepopulate the filing method based on the states requirements. Example: Auto should always be prior approval, forms should always be prior approval, etc.

Is there a way to remove Add Rate Data? for states that do not require nor want this Data.

Ability to attach native file format, i.e. Word or Excel. As part of the submission process the rates/rules automatically convert to pdf.

Require redlines when form is revision

33

Rate/Rule Schedule Tab Changes

Mentimeter

Logic to ensure required attachments are present, drag & drop

NA

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Supporting Documentation Tab Changes

Mentimeter

No suggestions

Increase cap to 15MB's on attachments

drag drop to add documents

Open pdfs in pdf reader software. Not in web browser.

to work faster - it is slow to open, satisfy and then attach

Review each category to see if it is still applicable

Drag and drop to add documents to the supporting documentation

We attach what is required and link each document to our website.

No suggestions

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Supporting Documentation Tab Changes

Mentimeter

Permit attachment of XLS files when it makes sense to do so.

no suggestions

No suggestions.

make them consistent so you can better use a template, some have LOA header,others don't. Name them consistently if they are asking for the same information

no suggestions

drag & drop documents

no suggestions

Auto-fill "Not applicable" if By-Pass is chosen, but allow change if desired.

Keep the bypassing and satisfying at a multi-state option!!! :)

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Supporting Documentation Tab Changes

Mentimeter

Because many states have different requirements, such as attach redlines to Forms Schedule or attach to Supporting Documentation Tab - I suggest a field that the state has to specify how they would like the redlines attached.

Allow attachment of Word Documents.

It would be helpful for states to list the items that are required based on the TOI/sub-TOI selected instead of including items that are not applicable. Also, many items like certifications don't appear and need to be manually added.

When you click "expand all", it should actually expand all, not leave everything except updated documents shown.

Increase size for attachments.

Require a filing memo, not a reference to the general information tab

there are sometimes components that need to be "satisfied" even when it in no way is related to the TOI the filing is coded as.

Figure a way that attached excel docs can be part of PDF pipeline.

Add a check box for acknowledging items

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Supporting Documentation Tab Changes

To prevent filers from loading documents under General Requirements Instructions.Require filers list documents with a Title/Category name.

Can the requirements be consistent? Most states require an EM, supporting docs etc. Can we list these in the same order? And if its an EM being requested, call it that.

When "updated" documents are attached, change default to for that schedule item to be expanded.

Need ability to select/deselect confidential status at individual attachment level.

Nothing comes to mind.

A way to make attached excel docs part of pdf pipeline.

no suggestions

Making the individual requirements not "Bypass-able" - requiring a note about how the item has been satisfied, either inside or outside of the filing.

Ability to indicate just changed documents instead of replacing all attached documents.

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Supporting Documentation Tab Changes

Mentimeter

Have a separate Submission Requirement tab instead of having it under supporting documentation.

make xls files part of a pdf

add last updated date for all checklists/forms etc so you can easily see if they've been updated between the time you created the draft and the time you submit the filings

Restrict certain documents/requirements from being bypassed by industry

Line up the requirements in a specific order by line of insurance and filing type

By state - perhaps warnings or notices that more requirements need to be satisfied as summarized in the state's general instructions.

When states include a field for redlines, it makes it difficult because we then can't import a template for the redlines. Understandably, the state would want consistency, so maybe they can include that information in the field that provides a naming

I second the submission requirement tab suggestion!

con'td..naming convention so that companies can name the filed that the state would like.

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Supporting Documentation Tab Changes

Mentimeter

NA

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Statement of Intent Tab Changes

Mentimeter

N/A	n/a	N/A
N/A	N/A	not applicable
n/a	N/a	N/A

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Statement of Intent Tab Changes

Mentimeter

N/A

N/A

N/A

n/a

No suggestions at this time, but may have later.

N/A

n'/a

n/a

Nothing to suggest.

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Statement of Intent Tab Changes

Mentimeter

Don't submit Compact filings currently.

no suggestions

Allow the company to add or delete a company after submission.

Need to know if it is bein used with other endorsements and what those files are.

haven't used much, but recall it seemed cumbersome to complete. Any simplicity would be appreciated.

no changes

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No Changes

System calculation based on state requirement.

24

Statement of Intent Tab Changes

Mentimeter

Contact information for reviewers.

24

Companies and Contact Tab Changes

Mentimeter

No changes.

No suggestions

ability to change after creation

No suggestions

A way to update after submission.

to be able to add / remove companies after submission

no recommendations here

no suggestions

Number for the filer. Not just the generic company number.

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Companies and Contact Tab Changes

Mentimeter

The reviewer's contact info be listed

Update after submission

Allow a company to be added/deleted after filing submission.

pull address based on NAIC

No suggestions.

prefer to have at least two company contacts

If the filer is a 3rd party, include field for name of 3rd party.

No suggestions

Reviewer's contact information included.

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Companies and Contact Tab Changes

Mentimeter

Connect Company creation to NAIC database to confirm appropriate NAIC, Group Number, FEIN, etc....

Would prefer 2 company and contacts along with the names of the companies.

Ability to edit the companies filed for prior to submission.

info to be populated by NAIC vs company so it has standard information

No suggestions.

Ability to update companies after submission

No changes

Making a space for the contact info of the person actually "working" the filing.

Add a field or tab showing the state examiner's contact information, similar to the present "Companies and Contact"

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Companies and Contact Tab Changes

Mentimeter

ability to change contact information after a filing is submitted.

Who they represent ie Actuarial, Product Management, Admin, Filing Analyst vs, just a name without a title

Ability to change information via Post Submission UpdateAbility to add multiple contacts

Add other authors contact information onto tab, in case the lead is out of the office.

Allow Producers to file materials. Allow producers to select all applicable insurers when the material is applicable to multiple insurers.

ability to additional filing contacts as a cc to filing correspondence

Contact person that actually is submitting the filing, not the corporate compliance person.

Have this tab updated periodically to ensure contact with the correct person.

Add more than one contact name in case someone is out of the office

37

Companies and Contact Tab Changes

Mentimeter

ability to add a secondary contact (not additional serff author)

For Compact filings, all the included states are listed here. this seems odd. Also would like included states "unbundled" if you will so that APIs can call the rate and form information per state, not per filing

Rename this tab to Contact and include the Company Contact and another section for State Contact. The state should provide the contact's email address and telephone number. Sometimes it's like looking for a needle in a haystack.

Create checkbox to connect to EFT account.

Add multiple points of contact (filer, actuarial, etc.)

Make the Group Code and Group Name mandatory to prevent filings from being rejected in certain states.

Second company contact.

If 3rd party files also a space for a company contact for future contact (post approval)

Field for group name

37

Companies and Contact Tab Changes

Mentimeter

Allow option for company to provide contact info for more than 1 person on a filing and to update filing contact info if it changes during the review period

Nothing to report.

No suggestions.

N/A

Place how to calculate fees on this tab.

Include tables into objections.

auto calculate

Display the domiciliary state filing fee

Take out created date field - don't see use of this field.

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Filing Fees Tab Changes

Mentimeter

N/A

n/a

auto calculate fees

No suggestions

No suggestions

No suggestions.

N/A

automatically calculate filing fees based on filing type

N/A retalitory state

31

Filing Fees Tab Changes

Mentimeter

system to know if it is retaliatory

Consistently list the required fee/calculation above the payment box.

No suggestions

automatically calculate fees based.

filing fee calculator incorporated

just remove ha ha

State requirements should be listed here.

n/a

Auto calculate state filing fees

31

Filing Fees Tab Changes

Mentimeter

Automatic calculation of fees, or a link to a reference chart devoted only to filing fees for all states.

to know when a fee has to be allocated for multi companies or if it can just be lumped into one company

filing fees calculated for you

Warning if fee being paid is higher than X to prevent mistakes

Add state filing fee requirements

checkbox if retaliatory so you don't have to keep entering the same domicile calculation

automatically calculate fees based on number of Forms, etc.

Remove requirement for calculation explanation

filing fees calculated

31

Filing Fees Tab Changes

Mentimeter

Allow for multiple state filings with the filing fees depicted in the screen with a calculated total.

In the event of overpayment of fees, feature to request refund.

Allow the tab to be edited so filing fee information can be updated after the filing is sent for review.

No comments

allow a fee limit per filer not access level

display the state domiciliary filing fee

When same fee applies to multiple companies in one filing have the ability to include that fee for each by selecting "applies to all" or similar button.

auto calculate

not allow bypass fees if they've calculated what fee is required

31

Filing Fees Tab Changes

Mentimeter

not sure what improvements could be made - would need to check with our billing division

general instructions for fees to be displayed vs inside GI

MA relies on that tab to account for all filing fees.

Seems like a lot of redundant information on this tab. Some states are quite picky about what's listed here. When they have specific requirements, they should have to list it here. There are states that do this and that really helps.

Make it clear when filing fees are not required.

nothing at this time

Have a way to bypass fees for Joint Underwriting Associations who only file once in three years.

Some states have quite specific requirements and you have to go to another sheet to look at what they want rather than providing an example in this tab .

ability to amend / delete objections after issuing

31

Filing Fees Tab Changes

Mentimeter

Add a subject line please to help identify objections. Add additional text formatting ability - e.g., bold, etc.

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Filing Correspondence Tab Changes

Mentimeter

Ability to delete objections.	Nothing to add.	Notification that a message has been read?
easier way to respond vs sections (intro, body, conclusion)	No suggestions	contact information for reviewers
Email alert when new correspondence is received.	no suggestions	checkbox for request extension or reopen filing

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Filing Correspondence Tab Changes

Objection letters and responses shouldn't open in new pop-up window. Have them open in the same webpage.

Automatically send remember when objection is due

seems to work fine - no suggestions

Insert tables into objections.

Require states to use Objections as designed, not list all objection items in the Introduction.

ability to add cc to correspondence without having to add as an author

nothing at this time

Contact information of Reviewers

ability to delete an objection if sent in error or incomplete

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Filing Correspondence Tab Changes

Mentimeter

automatically add contact info for reviewer

Allow formatting of text (bold, italics, etc)

Ability to copy objection letters

objections are searchable outside of Filing. Search specific keywords. Some objections received on same subject within multiple TOI's.

generate auto reminders about due dates on open objections

I hate all the pop-up windows for everything (objection letters, responses, amendments, notes, etc.)

pop up explanation of type of correspondence and when to submit, what it is used for, etc.

Allow an edit or cancellation to a Post Submission Update that has yet to be processed.

Provide auto-generated email notifications when statuses change, objections are made, notes are provided, etc.

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Filing Correspondence Tab Changes

Mentimeter

What is the value of having the "created on" columns? Just use the date submitted. Seems like extra real estate

allow text formatting

Ability to delete objection letters sent without objections

checkbox for extension, with a place to put what date you need to reply.

notification if objection response due date is approaching *without setting up the alert

Email notifications of additions to the tab.

ability to add post submission updates in all states

Easier way to ask for extension and approval like post submission update function on the objections.

Fix the date of disposition to reflect date submitted not the draft date

42

Filing Correspondence Tab Changes

Mentimeter

Due date feature with automated email alerts/reminders.

Allow users to set up email alerts so that when a company responds to an objections, submits a post submission update, sends a note to reviewer, an email alert can be sent. For those users that are in in SERFF every day.

Send communication outside of SERFF to notify of correspondence received. - Push to email

I personally find it very helpful when creating objections and submitting them individually. bolding would be nice.

How about the due date also appear on the Objection Letters screen.

Have the respond by date show on the main screen

Ability to add a Note letting Industry know when out of the office for an extended period of time

State contact information

Bigger Font and larger box to write disapproval points. Ability to change a disapproval letter once submitted. Easier way to search for quick text.

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Filing Correspondence Tab Changes

Mentimeter

Can remain as is.

show objection due date

Due date message to come as SERFF message.

Why does each objection have to be submitted separately? And why are they each a separate pop-up window? It's a waste of time to fill them out.

Save messages received.

Reviewer's contact info

Reviewers contact info

Allow users to set up email alerts so that when a company responds to an objections, submits a post submission update, sends a note to reviewer, etc and the user is out of the office, a bounce back message is sent to the sender.

With producers filing materials (with insurer authorization) provide notification of activity to all applicable parties (email to filer, email to DOI representative and email to applicable insurer contact) when a new material has been filed.

42

Filing Correspondence Tab Changes

Mentimeter

Formatting should be allowed for responses.

Show all reminders set on filings as a sort of diary to monitor what is due.

Is an introduction necessary?

include an objection due date

With producers filing materials (with insurer authorization) provide notification of activity to all applicable parties (email to filer, email to DOI representative and email to applicable insurer contact) when a change/objection has been made.

Text copied from microsoft word seems to remove quotation marks in the pdf pipeline

ability to maintain formatting in a response. such as uploading tables

Allow subsequent Objections to be correlated to the original Objections there is a follow-up Objection to an Objection response vs. continuing numbering

Can the Filing Notes heading be separate instead of side by side. Create Reviewer Notes, Create Note to Filer. They are to close together.

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Filing Correspondence Tab Changes

Mentimeter

Upload tables and charts, format objections with indents and special characters.

show that a company responded to one of two objection letters - possibly create a new type of SERFF status for it.

There is no reason why two filing notes can't be opened at the same time, but your site doesn't allow it.

I more prominent display of the approved effective dates than those shown in the disposition. Objections shown in more of chat format to capture questions and replies, rethink the reminders, Ability to set an internal filing expiration date

Take out created date of objection and response.

Update it so a responder cannot bypass an objection within the Objections Letter.

A way to copy previous objections that have not been responded to.

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