

# The Insider Newsletter

## JIRA Service Desk: what is it?

If you have contacted the Marketing Team recently, then you will have seen something new in our reply. The subject of the email response now includes a ticket number. In early March we went live with phase 1 of JIRA Service Desk, a ticketing system that enables us to more efficiently track your request and respond to you.

Phase 2 of JIRA will be available later this year, and will add new functionality for you. You will have access to login to JIRA with your existing application ID to create a ticket, see the status of your existing ticket, communicate directly with us, and search our knowledge base for more information.

We look forward to making this new functionality available, so that we can better communicate and serve you.

## SERFF Plan Management

*Plan Year 2019*

SERFF Plan Management is now live in SERFF and ready for Issuers to create and submit their binders. The Product Specialists have worked directly with the states to coordinate and prepare submission requirements on a state by state basis to encourage Go Live on 5/7/2018. Be sure to watch for SERFF Alerts for notifications on which states are currently live.

### Changes for Plan Year 2019:

The Accreditation template is no longer required by CMS and has been removed from SERFF. Please be sure your NCQA and URAC IDs are entered under your company's information in SERFF. *Only users with the Industry Configuration Manager can perform this task.*

SERFF now allows functionality for a staggered submission on the Rate Data template. Please see your states filing deadlines on SERFF.com under Plan Management on [http://www.serff.com/documents/plan\\_year\\_2019\\_state\\_deadlines.pdf](http://www.serff.com/documents/plan_year_2019_state_deadlines.pdf)

### Training:

Recorded training sessions for both industry and regulators are posted on [www.serff.com](http://www.serff.com) under the Plan Management Link

If you have any questions, please feel free to contact our help desk at:  
SERFF Plan Management Support  
816-783-8990  
[SERFFPlanMgmt@naic.org](mailto:SERFFPlanMgmt@naic.org)

## Want to connect with SERFF?

We may have a booth near you – stop by and say hi!

AICP New England E-Day  
June 6, 2018  
Sturbridge, MA

NAIC Insurance Summit  
June 18 – 22, 2018  
Kansas City, MO



*Providing flexibility, promoting uniformity*

# SERFF Pricing Restructure Complete

SERFF is wrapping up its pricing restructure that began in December 2017 when pricing and policy changes were adopted with the approval of the NAIC's 2018 Budget. These changes were effective January 4, 2018, and were designed to streamline the pricing structure, alleviate manual effort involved with the prepaid block process; and significantly reduce the NAIC's financial liability. The Pay As You Go rate was reduced to from \$15.00 a transaction to \$13.50, and the volume discount for Pay As You Go transactions was removed.

The prepaid-block tiers were streamlined to three with pricing as follows:

**\$9.50 per transaction for a block of 500 transactions**  
**\$8.00 per transaction for a block of 1,000 transactions**  
**\$6.50 per transaction for a block of 1,500 transactions**

*With the restructure, prepaid blocks also expire 24 months after the date posted in SERFF.*

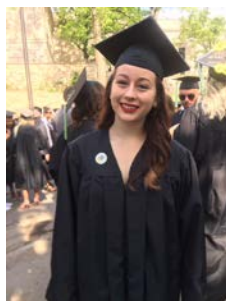
A lot of communication went out in the first quarter of 2018 in regards to the changes. Communication was done via email, SERFF alerts, a special edition newsletter, and a SERFF Pricing Restructure page on serff.com to keep customers up to date. The marketing and implementation team was busy with not only the communication piece but also assisting customers with questions, purchasing new blocks, gathering refund addresses, and preparing for the block purchased in 2017 or prior to be zeroed out.

Blocks purchased on the 2017 and prior pricing structure were closed out at midnight on March 1, 2018. The SERFF team then worked to get refund checks processed and sent out. Checks were mailed out at the end of March to either the SERFF billing address on file or if you completed the SERFF Refund Processing Form, mailed to that address.

If you have questions regarding the new pricing or policies, you are welcome to contact the SERFF Marketing team at [serffbilling@naic.org](mailto:serffbilling@naic.org) or 816-783-8787.

## Meet the New Staff!

### Product Specialists Add to the Team



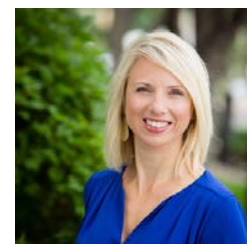
#### Tatiana Smith – Product Specialist I

Tatiana is the newest member of our team, starting as an intern in March and accepting a full-time position in May! She recently graduated from the University of Kansas (KU for any Jayhawk fans!) with a Bachelor's degree in Psychology and a minor in Business.

Tatiana loves to travel – she's been to over 10 countries and has even hiked Mt. Olympus. In her free time, Tatiana enjoys a good book and cup of coffee, and she also loves spending time with her three-year-old niece.

#### Maree Quetschenbach – Product Specialist II

Maree joined the team in February 2018 after moving to Kansas City from Lakeville, Minnesota. Maree has a solid background in the insurance world, working in QA, business analysis, business management, investment products, and marketing.



When Maree isn't working with SERFFers, you can find her spending time with her family, exercising, reading, traveling, and eating really good food.

#### Laurie Schee – Product Specialist III



Laurie has been with the NAIC since September of 1997, and is coming up on her 21-year anniversary! She began her NAIC journey in the Publications department, eventually moving on to AVS / Structured Securities / Vision, and is a recent addition to the OPTins team.

Laurie has four grandchildren and loves spending time spoiling them as much as possible. She also enjoys photography and vacationing in Jamaica.