What is SERFF?

SERFF is a portal utilized by states for form submittal, document management and review. You can access the portal by going to SERFF.com

SERFF is the most cost-effective and efficient way to submit rate and form filings to the states and jurisdictions. Outside of training or the tutorial and the possibility of using a you will only need an Internet Browser and Adobe Acrobat or a PDF producer to submit filings with SERFF. If you have any questions, feel free to contact SERFF Implementation & Marketing at (816) 783-8787 or **serffmktg@naic.org**.

I'm having difficulties with using the SERFF portal, who can I contact?

Product Assistance
SERFF Help Desk
(816) 783-8500 - option 2
serffhelp@naic.org

Are there any tutorials or trainings offered by the NAIC?

Yes, you can access the trainings and tutorials page here: https://www.serff.com/serff_tutorials.htm

How to get a SERFF ID and password

Each company has someone designated as the "Configuration Manager" who can add or edit you into the system as a contact.

You need to know what role you are needing prior to sending a request to your Configuration Manager. The SERFF roles are located in the chart below.

Roles	Description
Configuration Manager	Can Create/Edit Instance Preferences & Settings, including: • Company Statuses • Companies • Contacts
Filer	Can create/submit new filings as well as view or modify filings on which the user is listed as an author.
Filing Manager	Can create/submit new filings as well as modify **any** filing in the instance.
EFT User	Has the ability to submit filings with EFT payments
User Admin	Request/Updates or Deactivates user roles.

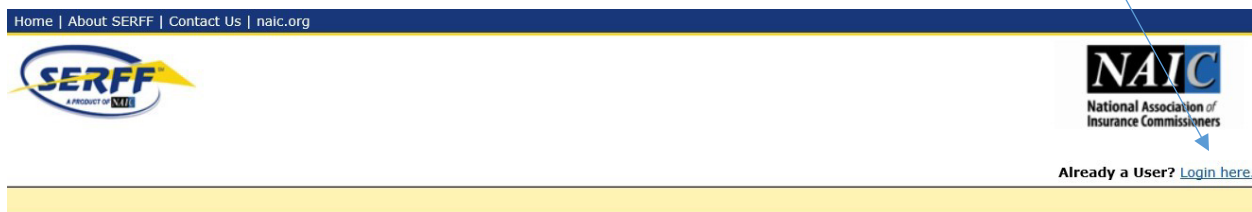# How do I find my company's "Configuration Manager"?

Your company's product filing team may know who your "Configuration Manager" is. If you are unsuccessful with finding your "Configuration Manager" please reach out to the SERFF help desk via the contact information noted above and send a request that includes your company's name, NAIC number and request for the "SERFF Configuration Manager".

How to log into SERFF

Use Google Chrome (for now) and go to: https://www.login.serff.com/

Once you get the email with your SERFF ID & temporary password. Sign in with user ID and you will be prompted to change the password.

To log in click the link in the upper right corner that says: Already a User? Login Here

Password Requirements
Passwords must be a minimum of 12 characters, but no more than 30. No spaces allowed. At least one character must be non-alphabetic. Passwords cannot be reused.

Billing questions will need to be addressed depending on usage. This is talking about SERFF filing as there are no filing fees for Oregon.

Technical support is available for the SERFF application from 8:00 am to 6:30 pm (CT)
Monday through Friday. The SERFF Help Desk can be contacted by calling (816) 783-8990 or e-mailing serffhelp@naic.org. Additional resources for users are available at www.serff.com and within the SERFF application's Online Help database.