

Arizona Filing Migration:

What Industry Users Need to Know Before October 19

Version 2.0 | September 2026

WHAT MIGRATES

Most Arizona electronic filing history and active work will move to SERFF Modernization.

- ✓ Historical and submitted filings
- ✓ In-progress filings
- ✓ Filing correspondence and filing history

MIGRATION EXCEPTIONS

These items will not migrate on October 19:

- ✗ Draft filings and draft content
- ✗ Paper filings
- ✗ Plan Management Binders
- ✗ Filings with TOIs beginning with H, HOrg, or NA

DRAFT MATERIALS

NO DRAFT MATERIALS WILL MIGRATE

Draft filings and draft content will remain available in SERFF Legacy for reference, but will not transfer to SERFF Modernization.

If draft work is still needed after launch, it must be recreated in SERFF Modernization.

Beginning October 19

The guidance below applies to migrated Arizona filings. Paper filings, Plan Management Binders, and filings with TOIs beginning with H, HOrg, or NA will remain in SERFF Legacy.

SERFF LEGACY: READ-ONLY

For Arizona filings that migrated:

- Legacy copies will be read-only and available for reference.
- Arizona filing data in Legacy can no longer be updated and will quickly become outdated.
- Legacy copies may be used for migration verification and historical reference.

WORK IN THE NEW PLATFORM

Use SERFF Modernization for:

- ✓ New filings
- ✓ Migrated in-progress filings
- ✓ Reopened filings
- ✓ Ongoing review and correspondence

SERFF Modernization is the system of record and source of truth for migrated Arizona filings beginning October 19

COMING SEPARATELY

User setup, training, support resources, and preparation information.

QUESTIONS: serffmodernizationquestions@naic.org