



Important Notice

National Securities Clearing Corporation

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Date:	AUGUST 12 TH 2026
To:	DTCC INSURANCE CLIENTS
Category:	INSURANCE AND RETIREMENT SERVICES
From:	DTCC INSURANCE PRODUCT MANAGEMENT
Attention:	MANAGER INSURANCE OPERATIONS, MANAGER DATA PROCESSING, MANAGER CASHIERS, MANAGER P&S DEPARTMENT
Subject:	DTCC I&RS DOCUMENT PROCESSING API IMPLEMENTATION TIMELINE – REVISED IMPLEMENTATION DATES

Overview

As shared in a previous Important Notice [A9684](#) issued on November 24, 2024, Insurance & Retirement Solutions (I&RS) is replacing the legacy SOAP/XML attachment system with a REST/JSON API. This initiative is part of DTCC's broader digital transformation and modernization strategy.

To allow additional time for development, client readiness and implementation activities, DTCC has revised the rollout schedule related to the PSE and production dates and will supersede the implementation dates previously communicated.

Updated Timeline

- **Participant Test Environment (PSE): March 25th 2027**
- **Production Environment: April 15th 2027**

Currently, there are no plans to modify or extend the current decommission date of **November 17, 2027**. We will continue to monitor progress of our clients against the revised schedule and will communicate any changes should circumstances require adjustment to the decommission date.

Client Preparation

Clients are encouraged to begin planning for migration to the Document Processing API and to review the available documentation and onboarding materials. Supporting implementation documents, specifications, and related resources are available through [DTCC Learning](#).

Questions

Please reach out to your assigned Relationship Manager for assistance.

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