

Introduction

This is a supplemental User Guide intended to describe the following SMART features, which replaces the Security Administration>User Profile Maintenance feature from EFS:

Search/Edit>Broker

This guide is a sub section of the SMART User Guide. You may contact our Tech Support team via [email](#) to obtain a complete version of the Smart User guide.

Note: Development of this application is in progress; this guide may be updated as new releases are in place.

Prerequisites

You must have an authorized account with active credentials to SLTX's Online Filing System or SMART application. SMART utilizes the user credentials from the existing Electronic Filing System (EFS); therefore, separate credentialing is not necessary.

Environments

The following URLs are used for SMART:

Test: <https://test.sltx.org/> **Production:** <https://smart.sltx.org/>

Site Navigation

To navigate back one or more pages, you may use your browser's back button, the clickable breadcrumbs at the top of each page, or the left navigation panel.

Supported Browsers

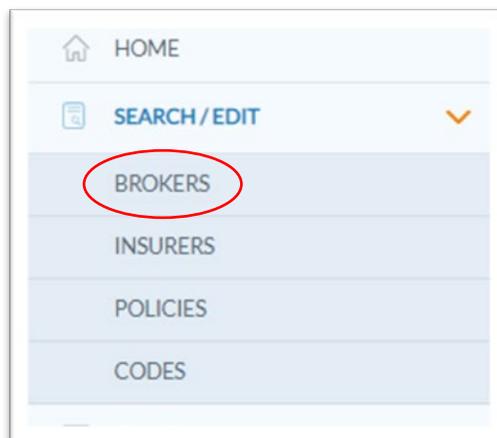
- Google Chrome
- Microsoft's Edge

NOTE: Internet Explorer (IE), regardless of the version, is not supported

Primary Navigation

Step 1: Select the Search/ Edit menu and click Brokers

*This will allow you to view information SLTX maintains about your agency and maintain/create Online filing users' profiles or reset passwords for existing profiles.



BASIC Policy Search

Step 1: Once you click Broker from the Search/ Edit menu, you will be able to view license and contact info by selecting License/Contact tab. You will only be able to view info for agent or agency for which you have an authorized credential.

Note: SLTX obtains licensing info directly from the Texas Department of Insurance (TDI), while contact info is obtained from you, the user, or other external sources.

[Home](#) / [Search - Edit](#) / [Brokers](#) / 99999

SLTX TEST AGENCY

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT SECURITY

License Information

Broker Type	License Status	License Effective	License Expiration
Corporate	Active	12/31/2003	12/31/2022

Contact

Contact Name	YOUR NAME			Email	NAME@EMAIL.COM	
Phone	Extension	Alternative Phone	Extension			
(512) 531-1880		(800) 681-5848				
Alternative Email	Broker Principal Email [ⓘ]		Website			
NAME@EMAIL.COM	SOME OTHER NAME		WWW.SLTX.ORG			
TSLA Member	No					

Alternative Contacts

NAME	EMAIL	PHONE	EXTENSION
YOUR NAME 3	NAME@EMAIL.COM	(512) 555-1212	1234
YOUR NAME 4	NAME@EMAIL.COM	(512) 555-1212	456

Address

MAILING OFFICIAL HOME OFFICE THIRD PARTY FILER

Line 1
805 LAS CIMAS PARKWAY STE 300

Line 2 ADDR LINE 2 **Line 3** ADDRESS LINE 3

City **State** **Zip**
DALLAS PA 78665

DBA/AKA

Step 1: To View DBAs on file with SLTX, click the down arrow to the right of "DBA/AKA".

DBA/AKA

DBA/AKA

- 1 - SLTX HAS A DBA
- 2 - SLTX BUSINESS NAME
- 3 - SOME OTHER NAME

Broker Security Tab

Step 1: Once you complete Step 1 from the **Primary Navigation** section, you can view Online Filing Users by selecting the Security tab. You will only see users which are associated with your agency.

Note: This table includes details for each User ID, including user type, status, the number of invalid log-in attempts, and when the password is set to expire. It will also let you know the status of each user's acceptance of any necessary SMART End User Licensing Agreements (EULA), Terms of Service (TOS), and/or Privacy Policies (PP).

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SLTX TEST AGENCY

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT SECURITY

Security

Profile

Name	Phone	Primary Email	Secondary Email
SLST TEST AGENCY	512-555-1212	NAME@EMAIL.COM	NAME@EMAIL.COM
Max Login Attempts	Password Expire Days		
10	90		

Users Add

USER ID	DOCUMENTS PP TOS ABILA	NAME ↓	EMAIL	ADMINISTRATIVE	STATUS	APPROVED BY	LOGIN ATTEMPTS	PASSWORD EXPIRES	ACTION
NONADMIN	✓ ✓ ✗	YOUR USER NAME 1	NAME@EMAIL.COM	User	Active		0	12/15/2021	
TESTADD	✓ ✓ ✓	USER NAME 2	NAME@EMAIL.COM	Administrative	Active		0	07/14/2021	

Edit Existing Users

Step 1: Click the pencil icon from the ACTION column to EDIT existing user profiles. Functions include updating User's Name, Email, Authority, [Password](#), and/or inactivating or deleting a profile.

Note: Once created, [User ID](#) cannot be changed.

Step 2: Once necessary changes have been made, click SAVE. If you click CANCEL, you will be returned to the Security Tab without saving your changes.

Edit User ✕

<p>Name</p> <input type="text" value="YOUR USER NAME 1"/>	<p>Status</p> <p><input checked="" type="radio"/> Active <input type="radio"/> Inactive</p>
<p>User ID</p> <input type="text" value="NONADMIN"/>	<p>Password</p> <input type="password"/>
<p>Email</p> <input type="text" value="NAME@EMAIL.COM"/>	<p>Authority</p> <p><input type="checkbox"/> Administrative</p>
<p>Approved By ⊕</p>	

DELETE
Cancel
SAVE

*Clicking CANCEL will not save your changes!

Step 3: To DELETE a user's profile, click DELETE.

Note: You will be prompted to confirm the delete since it cannot be undone once confirmed.

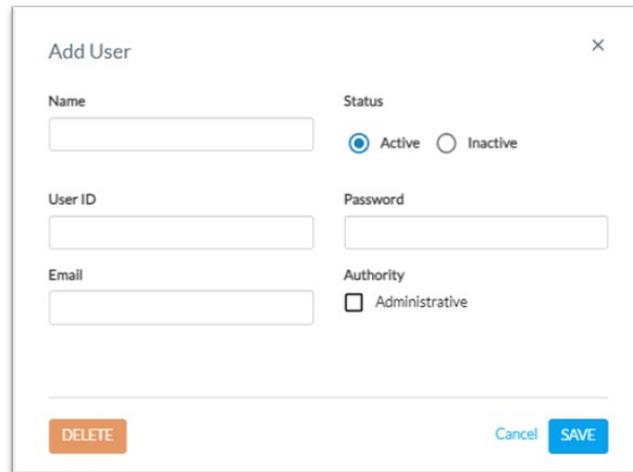
test.sltx.org says

This action cannot be undone. Delete User NONADMIN?

OK
Cancel

Add New Users

Step 1: Click the ADD button to create or add a new user profile

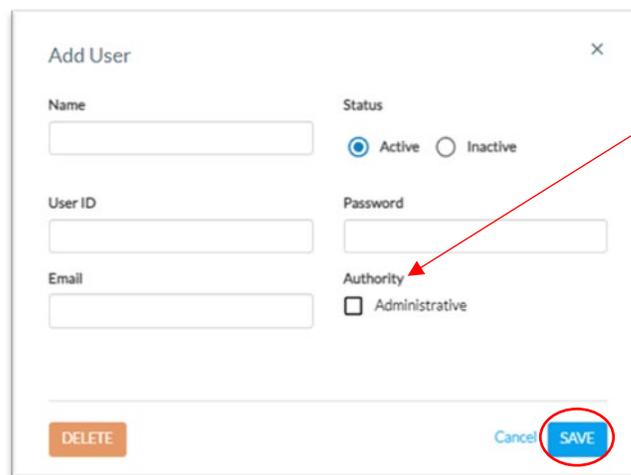


The screenshot shows a modal window titled "Add User" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field.
- User ID:** A text input field.
- Email:** A text input field.
- Password:** A text input field.
- Status:** Radio buttons for "Active" (selected) and "Inactive".
- Authority:** A checkbox for "Administrative".

At the bottom of the form, there are three buttons: a blue "DELETE" button on the left, a grey "Cancel" button in the center, and a red "SAVE" button on the right.

Step 2: Input User's Name, [User ID](#), Email, and [Password](#). Once you select the appropriate authority for the user, click SAVE.



This screenshot is identical to the one above, but with a red arrow pointing from the "Authority" checkbox to the "SAVE" button. The "SAVE" button is circled in red.

*Clicking CANCEL will not save your changes!

Note: Administrative Authority allows a user to create new and/or maintain user profiles.

Password Requirements

Must be a combination of alphanumeric characters, containing at least 1 special character, and be between 8 and 20 characters long. **A password may not contain the user's name(s) or User ID.**

User ID Requirements

Must be between 3 and 10 characters long and must be unique. You will be prompted to select another User ID if it is already in use. Once created, a User ID cannot be changed

Approved By

Name of SLTX employee that approved this agency's user's test transactions, or the license number of the broker or agency where this user previously tested.