Introduction

This is a supplemental User Guide intended to describe the following SMART features, which will replace the Transaction Inquiry AND the Individual Policy Transaction Report features within EFS:
Search/Edit>Policies

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.
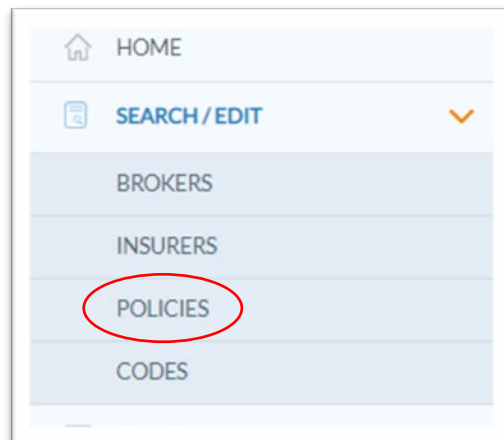
Supported Browsers
- Google Chrome
- Microsoft's Edge

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

Primary Navigation
Step 1: Select the Search/ Edit menu and click Policies
*This will allow you to view information regarding policy level data of all filing methods by your agency.

BASIC Policy Search

Step 1: Once you click Policies from the Search/ Edit menu, the option to search policies utilizing the Policy Number will become available.

Step 2: Input the Policy Number and click search to reveal all records which match the Policy Number SLTX has on file. To further view details of the record, click Details.

ADVANCED Policy Search

Step 1: Click Advanced Search on the Basic Search page to search by virtually any data element reported or stored by SLTX.

Note: Coach marks are available to the right of field names for additional context or information regarding the searched field.

Step 2: Select one, more, or all of the Additional Filters to expand search options to include information regarding policy, coverage, risk location, batch, insurer, exemptions, errors, and/or users.

Coverage

Premium Amount
$ [   ]

Premium Amount Range
Min $ [   ]   Max $ [   ]

Type
○ Personal
○ Commercial

Limit Amount
$ [   ]

Limit Amount Range
Min $ [   ]   Max $ [   ]

Coverage Codes
[Select]

Selected Coverage Codes
None

Class Codes
[Select]

Selected Class Codes
None

Exempt Premium Amount
$ [   ]

Exempt Premium Amount Range
Min $ [   ]   Max $ [   ]

Non-Texas Premium Amount ⓘ
$ [   ]

Non-Texas Premium Amount Range ⓘ
Min $ [   ]   Max $ [   ]

Primary Risk Location

Zip
[   ]

County
[   ]

Windstorm Exclusion
○ Yes   ○ No

Batch

<NOTE> User may use the Report Date Range to view (or download in a CSV format) all submissions made during a specific period.

Batch No.
[   ]

Report Date ⓘ
📅 [   ]

Report Date Range
📅 [   ] to 📅 [   ]

Insurer

Insurer
[Enter Name or TDI License No.]

Exemptions

Late Adjustment Applied
○ Yes   ○ No

Insured Type

Federal Credit Union ⓘ
○ Yes   ○ No

Purchasing Group ⓘ
○ Yes   ○ No

Exempt Commercial Purchaser (ECP) ⓘ
○ Yes   ○ No

Industrial Insured ⓘ
○ Yes   ○ No

Error ⓘ

○ No Tags   ○ Unresolved Tags   ○ Resolved Tags

Error Categories

[Enter Category Text]

Selected Error Categories

None

Error Reasons

[Enter Reason Text]

Selected Error Reasons

None

User

Originated By

[   ]

Updated By

[   ]

Step 3: If looking for deleted records, click on Search for Deleted Records.

Home / Search - Edit / Policies

Policies

« Back to Regular Search

Advanced Search

Search for Deleted Records ⓘ ☐

It is only necessary to input data in to the fields that are relevant to your search.

Expected Results 73,291

Additional Filters
- ☑ Coverage
- ☑ Primary Risk Location
- ☑ Batch
- ☑ Insurer
- ☑ Exemptions
- ☑ Error
- ☑ User

Policy

Policy No.

[   ]

Insured Name

[   ]

SLTX ID ⓘ

[   ]

Effective Date ⓘ

[📅 |]

Expiration Date

[📅 |]

In Force as of Date ⓘ

[📅 |]

Transaction Types

[Select... |∨]

Action Codes ⓘ

[Select... |∨]

○ Polices Only   ◉ All Transactions

Reference No.

[   ]

Policies Detail View

Step 1: After completing STEP 2 from the **BASIC Policy Search** section, you will find details relating to the record initially searched.

*Details include Broker and Basic Information, Coverage & Class code information, Primary Risk Location, Insurers, Errors, and Multi-State or Exempt Premium.

Policy No. SLTX-1887

Originated By	Updated By	Validated By
CHERRERA	CHERRERA	SJACKSON
07/16/2020 00:00	04/25/2023 14:08	08/13/2020

DETAILS   HISTORY

Change Validation

Broker

Broker Name	TDI License No.	TDI Broker ID	National Producer No.
SLTX TEST AGENCY	99999	666666666	

Basic Information

Transaction Type	Entry Method	SLTX ID ⓘ	Parent ID ⓘ	Report Date ⓘ	Batch No.
New Policy	SMART Data Entry (Internal)	11197250	11197250	07/16/2020	17

Policy No	Insured Name
SLTX-1887	SLTX PLUMBING INC

Insured Type

Federal Credit Union (FCU) ⓘ	Purchasing Group (PG) ⓘ	Exempt Commercial Purchaser (ECP) ⓘ	Industrial Insured ⓘ
No	No	No	No

Dates

Effective Date ⓘ	Expiration Date ⓘ	Continuous Until Cancelled ⓘ	Issue Date ⓘ
07/16/2020	07/16/2021	No	01/01/2019

Coverage & Class

COVERAGE CODE ⓘ ↑	PREMIUM
9334 - GEN LIAB - PREMISES LIAB COMM	$100.00
9515 - PROP-COMMERCL FIRE/ALLIED LINE	$150.00
Total:	$250.00

General Aggregate	Class
$150,000	99938 - WAREHOUSES AND STORAGE FACILITIES

Primary Risk Location

Zip Code	County	Excludes Wind Coverage	Extended Territory Code
78746	Travis	No	Remainder of State

Fees

Total Premium ⓘ	Total Policy Fee(s) ⓘ	Tax ⓘ	Stamping Fee ⓘ	Total Gross ⓘ
$265.00	$15.00	$12.85	$0.40	**$278.25**

Insurers

⚠ Ineligible Insurer ⓘ

INSURER NAME ↑	TDI LICENSE NO.	NAIC NUMBER	PREMIUM %
UNDERWRITERS AT LLOYD'S LONDON	90102091	AA1122000	100.000000%
⚠ 332 - LLOYD'S OF LONDON SYNDICATE	101133		
		Total:	100.000000%

Error

Errors (Tags)

ERROR CODE	ERROR DESCRIPTION	ERROR REASON
&	NEW TAG Complaint Notice missing/altered	The Notice of Toll-Free Telephone Numbers and Information and Complaint Procedures was not found with the policy information submitted to our office or it was altered in some way. Please be sure this is attached to the insured's copy of the policy. NO RESPONSE IS REQUIRED ON THIS TAG.
X	Tax and Stamping Fee must be shown on item	Both tax and stamping fee must be shown on each item submitted to this office. This tag is for your information only. No response is required.

Error Resolved	Date
No	07/16/2020

Late Adjustment Applied	Corrects Original Id
No	Not Applicable

Multi-State Transaction

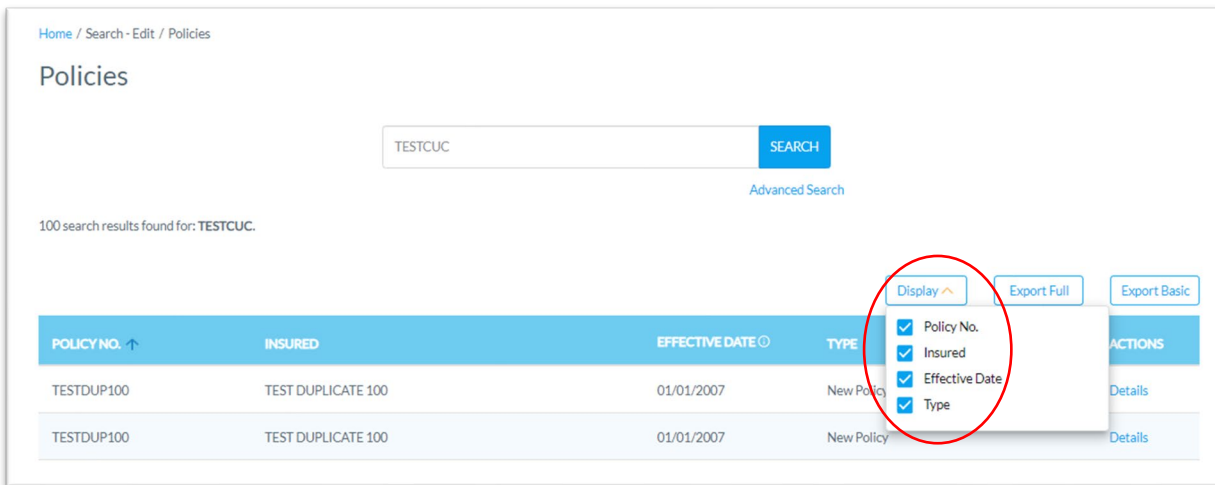| STATE & TERRITORY	AMOUNT
PA - Pennsylvania	$150.00
	Summary Amount: $150.00

Exempt Premium

$299.42

References

Reference No. ⓘ

None

Display Option for Policies Table

Step 1: After completing STEP 2 from the BASIC Policy Search section, you may also control which basic information is displayed within the Policies Result(s) table.

Note: Once this is selected, SMART will remember your selection.