

The screen shown represents the **Broker Landing Page** which users will see once logged into SMART. Here users are able to access features utilizing the left side navigation panel.

The screen shown represents the **Data Entry Landing Page** where users can enter policy data and review submitted policies and endorsements.

BATCH	POLICY NO.	REF	TYPE	EFFECTIVE DATE	USER ID	TOTAL GROSS
3435	1234567890	1234567890	New	07/26/2017	SLTX TEST AGENCY	\$800.00
3436	1234567890	1234567890	Endorsement	07/26/2017	SLTX TEST AGENCY	\$1200.00
3433	1234567890	1234567890	New	07/26/2017	SLTX TEST AGENCY	\$620.00
3437	1234567890	1234567890	Endorsement	07/26/2017	SLTX TEST AGENCY	\$800.00
3438	1234567890	1234567890	New	07/26/2017	SLTX TEST AGENCY	\$900.00
3440	1234567890	1234567890	Endorsement	07/26/2017	SLTX TEST AGENCY	\$1200.00
3437	1234567890	1234567890	New	07/26/2017	SLTX TEST AGENCY	\$700.00
3490	1234567890	1234567890	Endorsement	07/26/2017	SLTX TEST AGENCY	\$800.00
3435	1234567890	1234567890	New	07/26/2017	SLTX TEST AGENCY	\$800.00

The screen shown represents the **Policy Entry Page** where users can enter policy data and/ or make corrections to an existing policy. SMART will also provide predictions for coverage/ class codes when entered into the Code & Description box.

SMART / Filing
 NOT A REAL AGENCY  
TDI License No. 123456 User Name

- HOME
- DASHBOARD
- SEARCH / EDIT
- FILING
- FILE UPLOAD
- DATA ENTRY
- POLICY AUDIT
- FILING REPORTS
- API
- USER PROFILE
- HELP
- EF5

Home / Filings / Data Entry / New Policy

### New Policy

**Basic Information**

Policy No.  Insured Name  Report Date 02/07/2020

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**Insured Type**

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

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**Dates**

Effective Date  Expiration Date  Continuous Until Cancelled  Yes  No  
 Issue Date

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**Coverage & Class**

**Coverage** Clear All

CODE & DESCRIPTION	PREMIUM	DELETE
<input type="text" value="Search by coverage code or description..."/>	<input type="text" value="\$"/>	<input type="text"/>
<b>Total:</b>		0.00%

**Limits** **Class**

Total Insurable Value  Please provide class by using the typeahead search below.

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**Primary Risk Location**

Insured Zip  County

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**Fees**

Total Premium  Total Policy Fee(s)  Tax  Stamping Fee  Total Gross

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**Insurers** Clear All

INSURER	TDI LICENSE NO.	NAIC NO.	PREMIUM %	DELETE
<input type="text" value="Search by Insurer, TDI License No. or NAIC No...."/>				<input type="text" value="%"/>
<b>Total:</b>				

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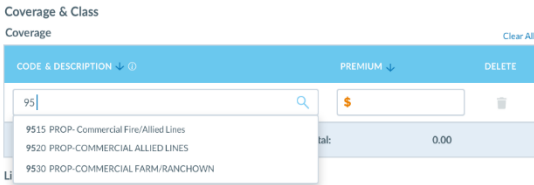
**Multi-State Transaction** Clear All

STATE & TERRITORY	AMOUNT	DELETE
<input type="text" value="Search by state and territory"/>	<input type="text" value="\$"/>	<input type="text"/>
<b>Summary Amount:</b>		<input type="text" value="\$"/>

**Exempt Amount**

**Correct Original ID**

Go back POST



As you type in a code, SMART will provide a preview of options relating to the provided input.

The screen shown represents the **Improved Corrections Workflow** where users can update and/or make corrections to existing policies. Policies can be viewed or edited by using the pencil icon or view option.

SMART / Filing

Home / Search/Edit Policies

### Policies

Search record with incorrect data or

Search by Policy No.  Search

Advanced Search

1 result found for: Policy No. PPI G24542907 003

POLICY NO.	INSURED	TYPE	EFFECTIVE DATE	ACTIONS
PPI G24542907 003	SLTX-TEST AGENCY	New Policy	01/24/2019	

Export Display

Click on Edit or Pencil Icon to make updates

SMART / Filing

Home / Search/Edit / Edit PPI G24542907 003

### Edit PPI G24542907 003

**Basic Information**

Policy No.  Insured Name  Type  Report Date

**Insured Type**

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

**Dates**

Effective Date  Expiration Date  Continuous Until Cancelled  Yes  No Issue Date

**Coverage & Class**

**Coverage**

CODE & DESCRIPTION	PREMIUM	DELETE
9515 - Prop - Commercial Fire/Allied Lines	\$ 12,500.00	
<input type="text" value="Search by coverage code or description..."/>	\$	
Total:		\$12,500.00

**Limits**

Total Insurable Value

**Class**

Please provide class by using the typeahead search below.

**Primary Risk Location**

Insured Zip  County  Excludes Wind Coverage  Yes  No Extended Coverage Territory

**Fees**

Total Premium	Total Policy Fee(s)	Tax	Stamping Fee	Total Gross
\$13,000.00	\$ 500.00	\$630.50	\$9.75	\$13,640.25

**Insurers**

INSURER	TDI LICENSE NO.	NAIC NO.	PREMIUM %	DELETE
TEST Insurance Company	000123	000	% 100.00	
<input type="text" value="Search by Insurer, TDI License No. or NAIC No...."/>			%	
Total:			100%	

**Multi-State Transaction**

STATE & TERRITORY	AMOUNT	DELETE
CA - California	\$ 600.00	
<input type="text" value="Search by state and territory"/>	\$	
Summary Amount:		\$ 600.00

**Exempt Amount**

**Correct Original ID**

Once info has been updated, click update

Go back **Update**