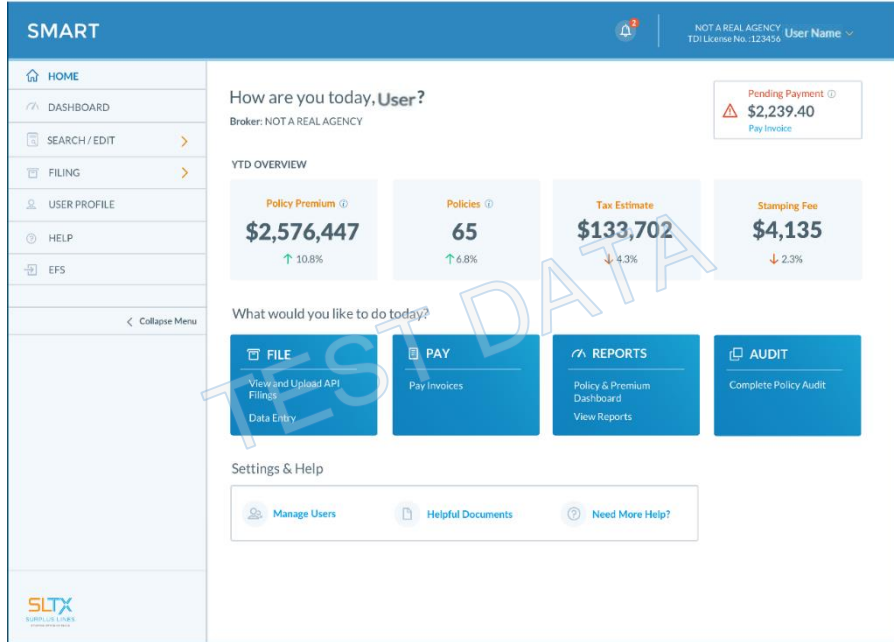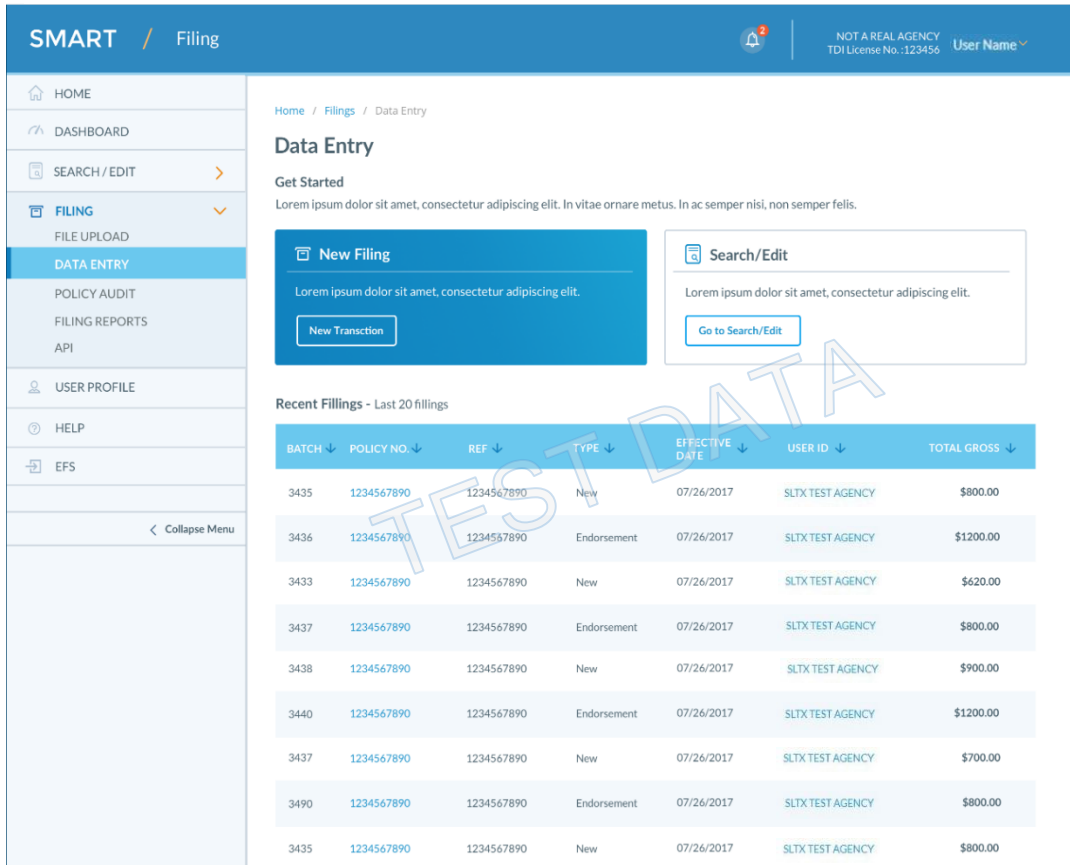The screen shown represents the **Broker Landing Page** which users will see once logged into SMART. Here users are able to access features utilizing the left side navigation panel.

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

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
EFS

‹ Collapse Menu

Home / Filings / Data Entry / New Policy

New Policy

Basic Information

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

Insured Type

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

Dates

Effective Date   Expiration Date   Continuous Until Cancelled   Issue Date
📅   📅   ○ Yes ● No   📅

Coverage & Class

Coverage   Clear All

CODE & DESCRIPTION ↓ ⓘ		PREMIUM ↓	DELETE
Search by coverage code or descrption... 🔍		$	🗑
	Total:	0.00%	

Limits   Class
Total Insurable Value   Please provide class by using the typeahead search below.
$ Search by class code or descrption... 🔍

Primary Risk Location

Insured Zip   County

Fees

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

Insurers

Clear All

INSURER ↓ ⓘ	TDI LICENSE NO.	NAIC NO.	PREMIUM % ↓	DELETE
Search by Insurer, TDI License No. or NAIC No. ... 🔍			%	🗑
			Total:	

Multi-State Transaction

Clear All

STATE & TERRITORY ↓ ⓘ		AMOUNT ↓	DELETE
Search by state and territory 🔍		$	🗑
	Summary Amount:	$	

Exempt Amount ⓘ
$

Correct Original ID ⓘ
Search by policy no. 🔍

Go back   POST

TEST DATA (watermark)

Coverage & Class
Coverage   Clear All

CODE & DESCRIPTION ↓ ⓘ		PREMIUM ↓	DELETE
95 🔍		$	🗑

9515 PROP- Commercial Fire/Allied Lines
9520 PROP-COMMERCIAL ALLIED LINES
9530 PROP-COMMERCIAL FARM/RANCHOWN

Total: 0.00
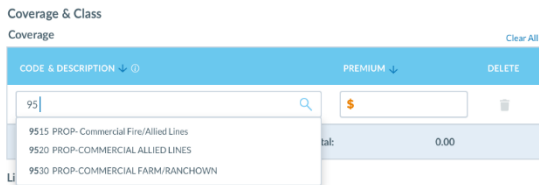
As you type in a code, SMART will provide a preview of options relating to the provided input.

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.

Search record with incorrect data or

Click on Edit or Pencil Icon to make updates

Once info has been updated, click update