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.
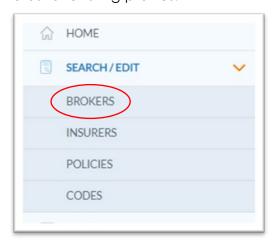
Supported Browsers
- Google Chrome
- Microsoft's Edge

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

Primary Navigation
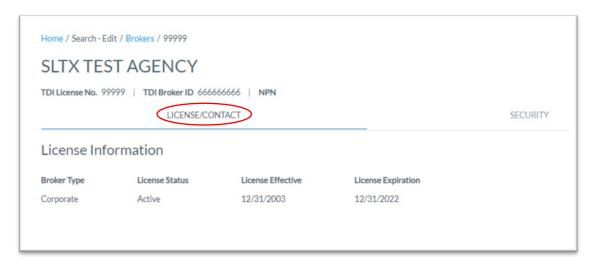**Step 1:** Select the Search/ Edit menu and click Brokers
*This will allow you to view information SLTX maintains about your agency and maintain/create Online filing users' profiles or reset passwords for existing profiles.

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.
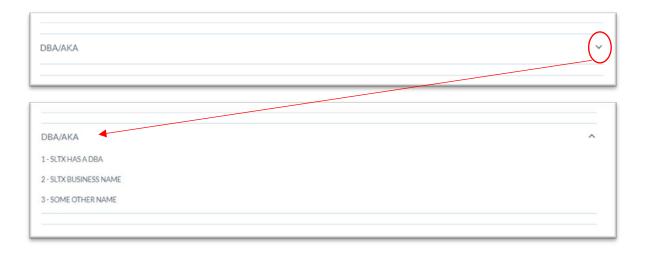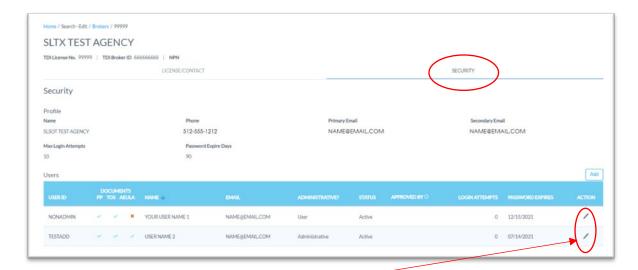
Home / Search - Edit / Brokers / 99999

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	Email
YOUR NAME	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

DBA/AKA

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

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).
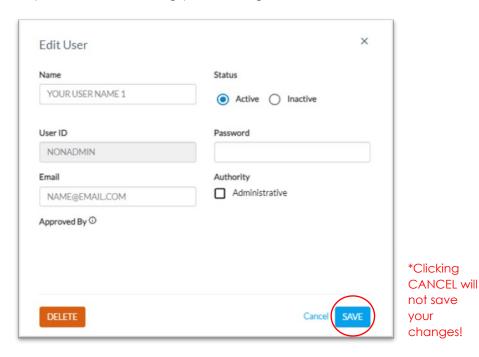
Edit Existing Users

Step 1: Click the pencil icon form the ACTION column to EDIT existing user profiles. Functions include updating User's Name, Email, Authority, Password, and/or inactivating or deleting a profile.
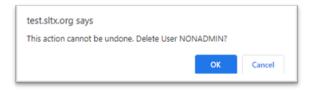
Note: Once created, User ID cannot be changed.

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.
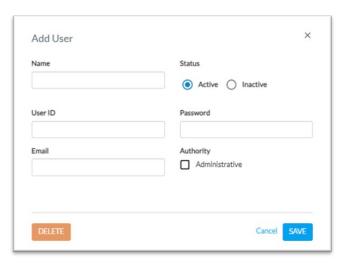

*Clicking CANCEL will not save your changes!

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

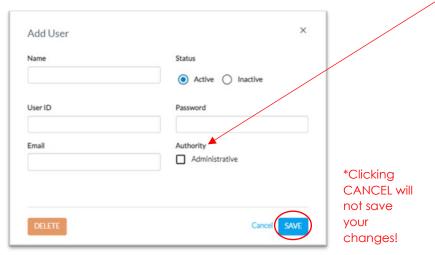Note: You will be prompted to confirm the delete since it cannot be undone once confirmed.

Add New Users

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

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

*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.