Introduction

This is a supplemental User Guide intended to describe the following SMART features, which will supplement the existing Monthly Detail (PDF) reports and replace the Individual Policy Transaction Report and downloadable Month-End or Year-End data features within EFS:
Search/Edit>Policies (Export Full)
Search/Edit>Policies (Export Basic)

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.
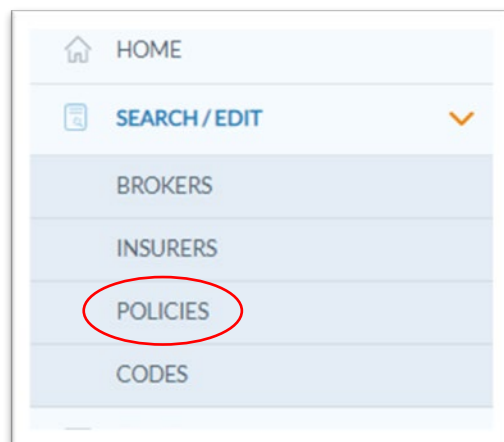
Supported Browsers
- Google Chrome
- Microsoft's Edge

NOTE: Internet Explorer (IE), regardless of the version, is not supported
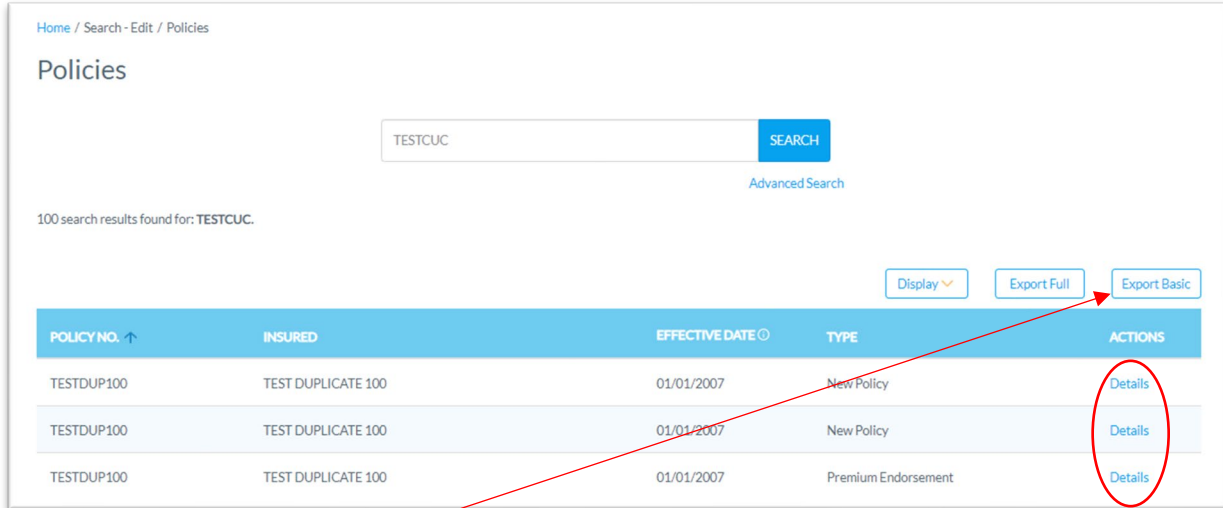
Primary Navigation
Step 1: Select the Search/ Edit menu and click Policies
*This will allow you to view information regarding policy level data of all filing methods by your agency.

Policy Search

Step 1: After performing Basic or Advanced Search, all records which match the search criteria will appear. To view individual details of the record, click Details.

Export Basic

Step 1: Click Export Basic on the Search Results page to export _basic_ data elements for all records matching the search criteria: Policy Number, Insured Name, Transaction Type, Total Premium, Tax, Stamping Fee, Total Gross, Effective Date, Report Date, Batch No., Broker Name, and TDI License No.

Step 2: Exported file will be displayed at the bottom of your browser window. To open document, double click on the CSV file.

Note: It may be necessary to format the CSV/Excel data to match your desired criteria.

Export Full

After completing STEP 1 from **Policy Search** section

Step 1: Click Export Full on the Search Results page to export all data points included and/or required to make a filing submission with SLTX. This also includes any data captured by SLTX or later records for the filed record. This involves, but is not limited to all data contained in the basic export, and: SLTX ID (Policy ID), Corrects Original ID, Issue Date, Filing User, Entry Method, Last Updated Date, Insurer, Coverage Code, Coverage Amount, Class Code, Policy Limit, and Reference / Custom ID.

Step 2: Exported file will be displayed at the bottom of your browser window. To open document, double click on the CSV file.

Disclaimer: The below represents the 46 data elements separated into 4 sections to demonstrate full details of the export file.

SLTX ID	Parent ID	Policy No.	Insured Name	Zip Code	Transaction Type	Total Premium	Tax	Stamping Fee	Sur Tax	Tax Override	Total Gross	Exempt Commercial Purchaser	Late Adjustment Applied	Corrects Original ID
21447851	21447851	TEST.2	TEST.2	78660	New Binder	4154	201.47	6.23	0		4361.7	N			21424079
21447852	21447852	TEST.3	TEST.3	78746	New Binder	100	4.85	0.15	0		105	N			21447847
21447853	21447853	TEST.4	TEST.4	77510	Renewal Binder (Replaced by Policy)	0	0	0	0		0	N			17766763
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0

	Industrial Insured	Inception Date	Effective Date	Issue Date	Expiration Date	Continuous Until Cancelled	Originated By	Originated Date	Updated By	Updated Date	Entry Method	Report Date	Batch No.	County
	N	1/5/2017 0:00	1/5/2017 0:00	01/01/0001 00:00:00	1/5/2018 0:00	N	TESTPOST	3/2/2018 0:00	TESTPOST	3/2/2018 15:40	E	4/1/2017 0:00	5372	Travis
	N	1/22/2017 0:00	1/22/2017 0:00	01/01/0001 00:00:00	1/5/2018 0:00	N	TESTPOST	3/2/2018 0:00	TESTPOST	3/2/2018 15:40	E	4/1/2017 0:00	5372	Travis
	N	2/1/2017 0:00	2/1/2017 0:00	01/01/0001 00:00:00	1/5/2018 0:00	N	TESTPOST	3/2/2018 0:00	TESTPOST	10/14/2021 11:54	E	4/1/2017 0:00	5372	Galveston
	N	10/1/2016 0:00	12/25/2016 0:00	01/01/0001 00:00:00	9/1/2017 0:00	N	TESTPOST	10/14/2021 12:02	TESTPOST	10/14/2021 12:07	E	12/31/2020 0:00	5958	Galveston
	N	10/1/2016 0:00	12/25/2016 0:00	01/01/0001 00:00:00	9/1/2017 0:00	N	TESTPOST	10/14/2021 12:02	TESTPOST	10/14/2021 12:07	E	12/31/2020 0:00	5958	Galveston
	N	10/1/2016 0:00	12/25/2016 0:00	01/01/0001 00:00:00	9/1/2017 0:00	N	TESTPOST	10/14/2021 12:02	TESTPOST	10/14/2021 12:07	E	12/31/2020 0:00	5958	Galveston
	N	10/1/2016 0:00	12/25/2016 0:00	01/01/0001 00:00:00	9/1/2017 0:00	N	TESTPOST	10/14/2021 12:02	TESTPOST	10/14/2021 12:07	E	12/31/2020 0:00	5958	Galveston

	Excludes Wind Coverage	Coastal Exposure	Broker Name	TDI License No.	TDI Broker ID	Insurer Name	TDI License No.	Insurer Eligible	Premium %	Class Code	Class
	N	N	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	CHUBB CUSTOM INSURANCE COMPA	80101034	Y	100.00%	99793	TRUCKERS
	N	N	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	ESSEX INSURANCE COMPANY	80101053	Y	100.00%	61215	BUILDINGS OR PREMISES-BANK,OFFICE,BAR
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	ASSICURAZIONI GENERALI S P A	90102033	Y	100.00%	306	INLAND MARINE - CONTRACTORS EQUIPME
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	TRAVELERS EXCESS & SURPLUS LINES C	80101086	Y	25.00%	306	INLAND MARINE - CONTRACTORS EQUIPME
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	LEXINGTON INSURANCE COMPANY	80101093	Y	25.00%	306	INLAND MARINE - CONTRACTORS EQUIPME
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	UNDERWRITERS AT LLOYD'S LONDON	90102091	Y	50.00%	306	INLAND MARINE - CONTRACTORS EQUIPME
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	TRAVELERS EXCESS & SURPLUS LINES C	80101086	Y	25.00%	306	INLAND MARINE - CONTRACTORS EQUIPME
	N	Y	NOT A REAL AGENCY - TESTING ONLY	XXXXX	111111111	LEXINGTON INSURANCE COMPANY	80101093	Y	25.00%	306	INLAND MARINE - CONTRACTORS EQUIPME

	Coverage Code	Coverage	Coverage Amount	Policy Limit	Reference	Custom Id
	9334	GEN LIAB - PREMISES LIAB(GL)	4154	785000		10.18.2020
	9015	PROPERTY - FIRE/ALLIED LINES	100	1000000		10.19.2020
	9090	INLAND MARINE	0	1500000		10.20.2020
	9334	GEN LIAB - PREMISES LIAB(GL)	275	0		
	9334	GEN LIAB - PREMISES LIAB(GL)	275	0		
	9334	GEN LIAB - PREMISES LIAB(GL)	550	0		
	9550	PROP-COMMERCIAL PKG(PROP+GL)	3750	0		
	9550	PROP-COMMERCIAL PKG(PROP+GL)	3750	0		

Note: It may be necessary to format the CSV/Excel data to match your desired criteria.

Special Note for Records with multiple coverage codes and/or insurers:
When a single record with more than one coverage and/or more than one insurer, data will be reflected as multiple rows in the export to demonstrate appropriate coverage and insurer amounts. However, the "Total Premium" in column G will not be separated. In this instance, you must calculate premium amounts from the "Coverage Amount" in column AQ.

You may easily identify this data scenario by observing the SLTX ID column – SLTX ID will be displayed more than once (one row for each coverage / insurer combination). Otherwise, there will be a single row per SLTX ID.

SLTX ID	Parent ID	Policy No.	Insured Name	Zip Code	Transaction Type	Total Premium	Tax	Stamping Fee	Sur Tax	Tax Override	Total Gross	Exempt Commercial Purchaser	Late Adjustment Applied	Corrects Original ID
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21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0
21535571	21535563	TEST.4	TEST.4	77510	Premium Endorsement	16199	785.65	24.3	0		17008.95	N			0