



THE DAWNING OF SMART AND WHERE ITS HEADED: AN HISTORICAL PERSPECTIVE

→ Click each month to view its respective SMART Release article!

June 2020	••• SMART API (automated filing) and SMART Connector Introduced
August 2020	••••• "Delete transaction" feature for API and internal filing updates introduced
October 2020	••••• Reporting Module introduced
January 2021	••• Reporting Module features updated, new Month-End report format (includes Monthly invoice , Detail Policy Activity Report , Policy Transaction Activity Report , Outstanding Ineligible Report , and Duplicate Report)
March 2021	••••• Report Landing page available to all External Filers which allows users to directly obtain reports stated within Jan 2021 release. Invoice payments via CC or ACH can be conducted through SMART.
April 2021	••••• Focus Groups → Basic entries, refreshed correction process, broker landing page
May 2021	
September 2021	••• Broker Landing page, Basic and Advanced Policy Search , Insurers , Coverage and Class codes , and Broker (only) search components available. View September 2021 User Guide here .
October 2021	••• Export capability for Advanced Policy Search available to users in CSV/EXCEL format; for reconciliation, research, confirmation or analysis.
November 2021	••• First Manual (or Data Entry) transaction available: New Policy or New Binder , Broker Search/ Edit , change/update Password feature available through SMART.
December 2021	••••• Renewal Policy and Renewal Binder transactions available. Coverage and Class code "helper tool" (intended to assist in selecting coverage and class codes within SLTX processes and code section rules) available. Month End and Year End reports available in SMART .
January 2022	••••• Premium Endorsement , Installment , and Audits transactions available. Users may now perform policy search(es) by inputting any value(s) into the reference field.
February 2022	••••• Cancellation transaction available. Coverage and Class code relationships visible, Advanced Policy relationships visible, and API updates available.
March 2022	••••• Reinstatement transaction available. Policy-level search(es) by Federal Credit Union (FCU) or Purchasing Group selections may be conducted. Warning feature implemented to notify users of policy term (1 day or unusually long) or duplication.
April 2022	••••• Name Change Endorsements and Policy Number Change Endorsements available. Users may search or view Insurer's NAIC Number directly from Data Entry screens. Primary/ Secondary (online filing) contact info may be updated within Broker Security. API improvements also introduced.
May 2022	••••• Expiration Date Change Endorsements available. Additional context provided for Password creation in SMART. Improvements conducted for Cancellation and Reinstatement entry processes, Policy warning notifications for duplicates, password reset workflow, and policy results export features.
June 2022	••••• Insurer/ Company Change Endorsements and Renewal Policy Replacing Binder available. Improvements conducted for API transactions, Broker status with warning language, "Invite New User" language, "Sent Invitations" context, Insurer search exports, API batch status context, and "in progress" notification language.
July 2022	••••• New Policy Replacing Binder and Non-Premium Endorsement available. Improvements conducted for SMART logo, "Get more help" feature, TDI License data sync, Password reset email link, Reinstatement language, invalid or prohibited page language, and API parsing failures context.
August 2022	••••• New and Renewal Reversal features available. Monthly totals, Late filings, and Policy Audit within Broker Search (Updated Guide here), API filing, SMART Connector (Policy Limits), and Batch and Month-End now available within Broker Search report delivery methods (paper filers).
September 2022	••••• Non-Policy Reversals and Agent/Broker of Record updates available. Improvements conducted for Policy Search Results screens (NPN), Password reset page, Usernames with special characters, email addresses longer than 35 characters, adding transactions effective prior to existing cancellation/ reinstatement pair, deleted record within advanced search results, "Entry Method" within Policies Search, and SMART Connector (Windstorm Exclusion)
October 2022	••••• Additional features for API filers to request batch or transition-level details for previous submitted XML batch filings available in SMART. Improvements conducted for API Updates (Federal Credit Unions (FCU)), Agent/ Broker of Record changes, Data Entry or API batch links within Data Entry Landing page, Month-End scheduled tasks, Broker security and Manual Data Entry pages, Coverage and Class Code(s) search results page, Help page, Filing Menu and menu option labels, and "Save as PDF" feature within SMART.
November 2022	••••• Inception Date Change Endorsement (manual filing) , API filers ability to correct errors (tags) through SMART user interface, and Monthly/ Annual late filing reports available in SMART. <i>Additional features TBD.</i>
December 2022	
May 1, 2023	••••• EFS End of Life → SMART will be primary Filing System moving forward.

Spot a feature that fits into your workflow?
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