

# Introduction

This is a supplemental User Guide intended to describe the following SMART features, which will replace the Month-End (EOM) and Year-End (EOY) Reports within EFS:

**Search/Edit>Policies>Filing Reports**  
**Home>View Reports**

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 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.

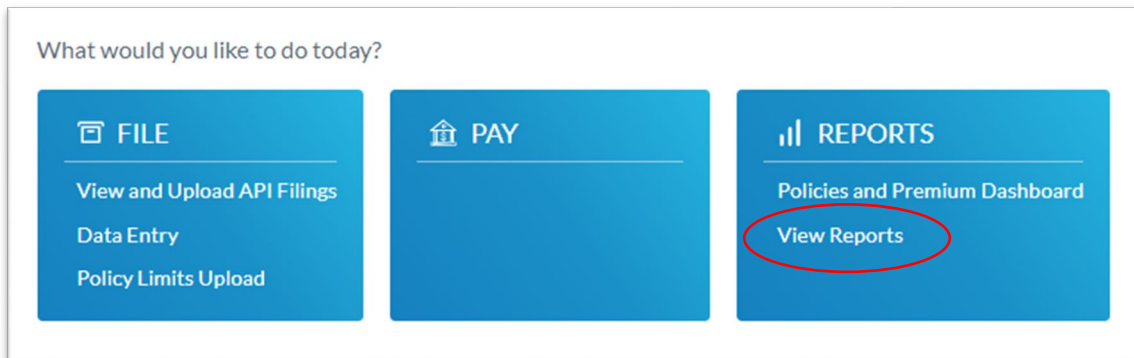
## Supported Browsers

- Google Chrome
- Microsoft's Edge

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

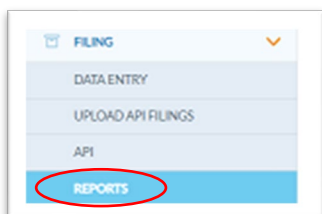
## Primary Navigation

**Step 1:** Click "View Reports" from the SMART Home page



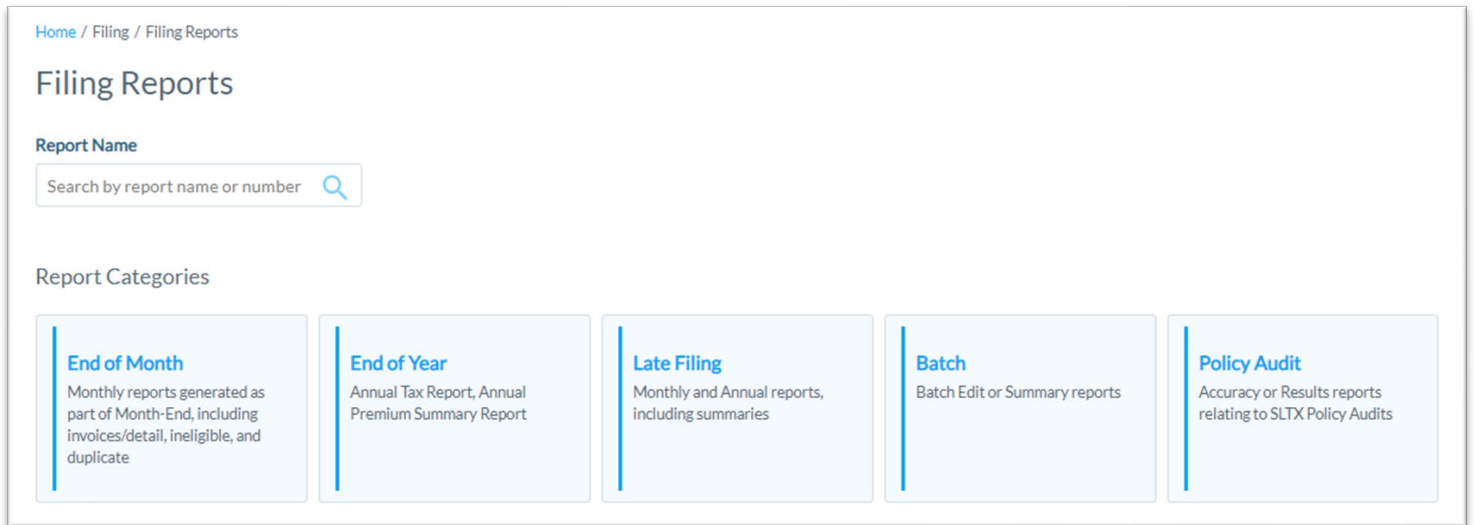
## Alternative Navigation

**Step 1:** Select Filing menu and click Reports.



## Filing Reports landing page

Once you click View Reports from SMART's Home page, you will see the Filing Reports landing page.



### Features

**Report Name Search** – allows search by report name or SLTX report number to locate specific report

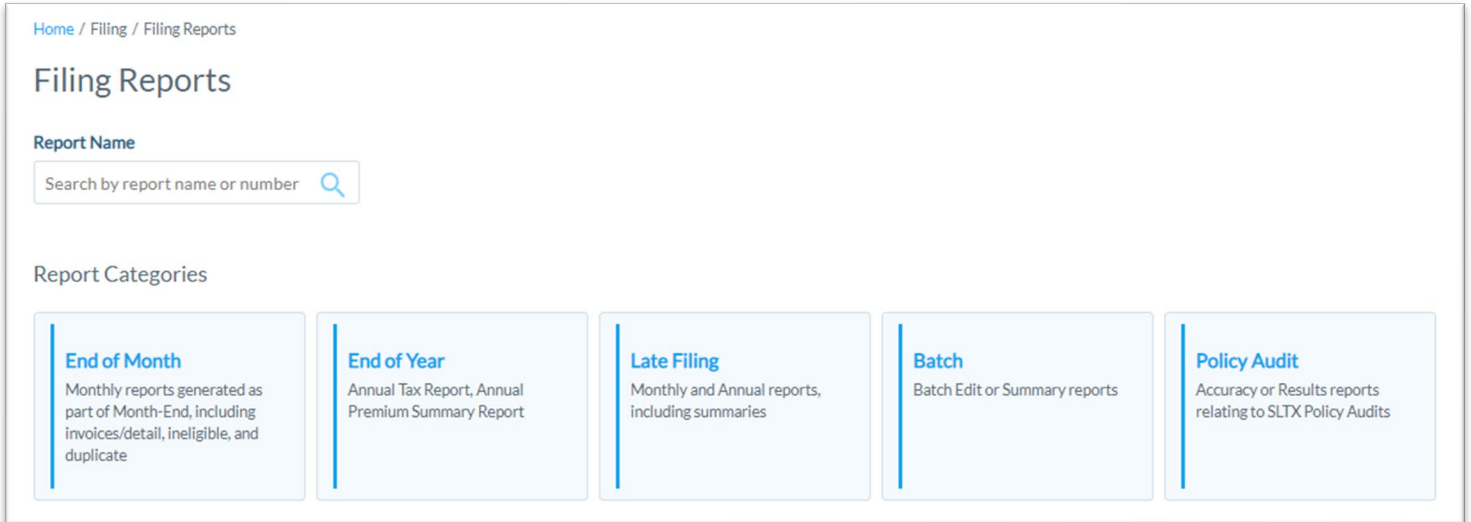
**Report Categories** –allows access to reports in each category or group; report contained within each category are listed on each Category tile

## Accessing Reports

These steps may be used to access any SLTX report in a PDF format.

### Step 1:


Click **specific category tile** from Filing Reports landing page.



Home / Filing / Filing Reports

## Filing Reports

Report Name

### **Categories (Available Reports)**

**End of Month** – Monthly Invoice, and corresponding Detail Policy Activity Report, Policy Transaction Activity Report; Duplicate Policy Report; and Outstanding Ineligible Report

**End of Year** – Annual Tax Report, Annual Premium Summary Report

**Late Filing** – Monthly and Annual reports

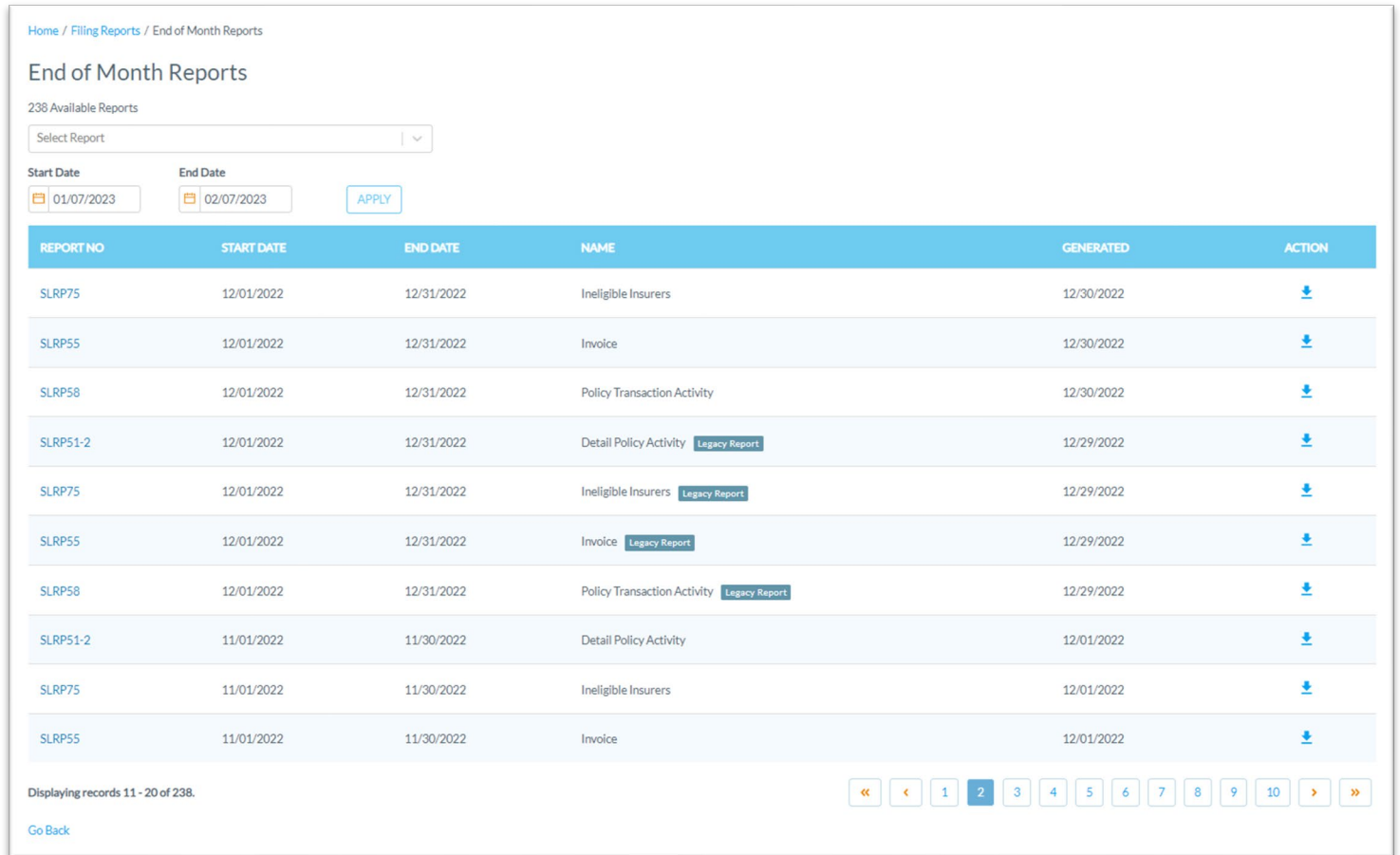
**Batch** – Batch Edit or Batch Summary Reports (for SMART API submissions and legacy batches)

**Policy Audit** – accuracy or results reports relating to SLTX's policy audit processes

## Step 2:

After performing [Step 1](#) (for any category), all reports within that category will be shown with the most recent reports at the top. To download individual reports as a PDF, click  icon.

**<Additional Feature>** You may download detailed data, by report date range, in a CSV format by utilizing the Advanced Policy Search and Full Export Feature(s). This may be used as a supplement to your monthly or annual PDF reports for various purposes, including regular reconciliation.













Home / Filing Reports / End of Month Reports

### End of Month Reports

238 Available Reports

Select Report

Start Date:  End Date:

REPORT NO	START DATE	END DATE	NAME	GENERATED	ACTION
SLRP75	12/01/2022	12/31/2022	Ineligible Insurers	12/30/2022	
SLRP55	12/01/2022	12/31/2022	Invoice	12/30/2022	
SLRP58	12/01/2022	12/31/2022	Policy Transaction Activity	12/30/2022	
SLRP51-2	12/01/2022	12/31/2022	Detail Policy Activity <span>Legacy Report</span>	12/29/2022	
SLRP75	12/01/2022	12/31/2022	Ineligible Insurers <span>Legacy Report</span>	12/29/2022	
SLRP55	12/01/2022	12/31/2022	Invoice <span>Legacy Report</span>	12/29/2022	
SLRP58	12/01/2022	12/31/2022	Policy Transaction Activity <span>Legacy Report</span>	12/29/2022	
SLRP51-2	11/01/2022	11/30/2022	Detail Policy Activity	12/01/2022	
SLRP75	11/01/2022	11/30/2022	Ineligible Insurers	12/01/2022	
SLRP55	11/01/2022	11/30/2022	Invoice	12/01/2022	

Displaying records 11 - 20 of 238.

Navigation:

### Features

**Report Search** – dropdown allows user to filter all reports to focus on a single report

**Date Range search** – date range allows user to filter all reports to focus on reports generated in that date range

**Paging** –allows user to navigate back to earlier reports

**Legacy Report (flag)** – indicates report was created by (legacy) EFS application