

Introduction

This is a supplemental User Guide intended to describe the following SMART features:

How to Delete a Transaction

Prerequisites

Prior to accessing SMART and/or utilizing the API, you are required to accept any licensing agreements: Privacy Policy, Terms of Use, SMART Connector and/or API User Licensing Agreement (when applicable).

Environments

The following URLs are used for SMART:

Test: <https://test.sltx.org/> **Production:** <https://smart.sltx.org/>

Supported Browsers

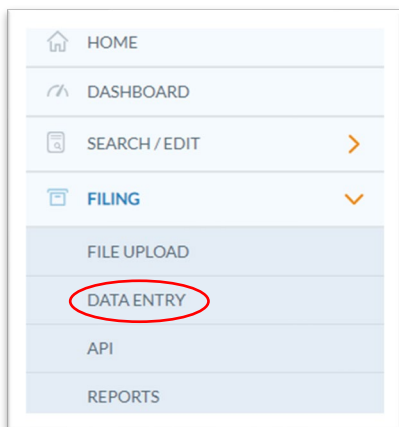
- Google Chrome
- Microsoft's Edge

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

Primary Navigation

Step 1: Select Filing menu and click Data Entry.

This allows for Manual Web-Entry or Data Entry Filings, and includes ability to Reverse, Update / Correct, or Delete previously filed transactions.



Data Entry landing page

Once you click Data Entry from Filing menu, you will see the Data Entry landing page.

Home / Filing / Data Entry

Data Entry

Get Started

What would you like to do today?

New Filing

Used to make a new filing with SLTX, such as a new or renewal policy / binder, audit, cancellation, premium endorsement, name change, etc.

[New Transaction](#)

Search / Edit

Used to search for and review the detail of any previously submitted transaction, and/or to make corrections to or edit a submitted transaction.

[Go to Search / Edit](#)

Recent Filings - Last 20 filings

BATCH	POLICY NO.	REFERENCE	TYPE	EFFECTIVE DATE	USER ID	TOTAL GROSS	SAVE AS
5995	TESTCANCELRX		New Policy Reversal	01/18/2021	TESTPOST	\$-1,468.95	PDF
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$0.00	PDF
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$1,468.95	PDF
5995	TESTCANCELRX		Cancellation Amendment	04/18/2021	TESTPOST	\$0.00	PDF
5995	TESTCANCELRX		Cancellation	04/18/2021	TESTPOST	\$-1,468.95	PDF

Features

[New Transaction](#) – allows navigation to [Data Entry Transaction page](#) to make filings with SLTX

[Recent filings](#) – allows access to last 20 transactions filed by your agency and includes transactions made by all filing methods (SLTX processed, SMART Data Entry, or SMART API). Click the Policy Number link to view transaction details.

[Save as PDF](#) – allows filing confirmation page to be printed in PDF format

[Go to Search / Edit](#) – allows navigation to Policies Search/Edit page

Data Entry (Manual Filing)

These steps may be used to create the following transactions: **Deletes (except Pending)**

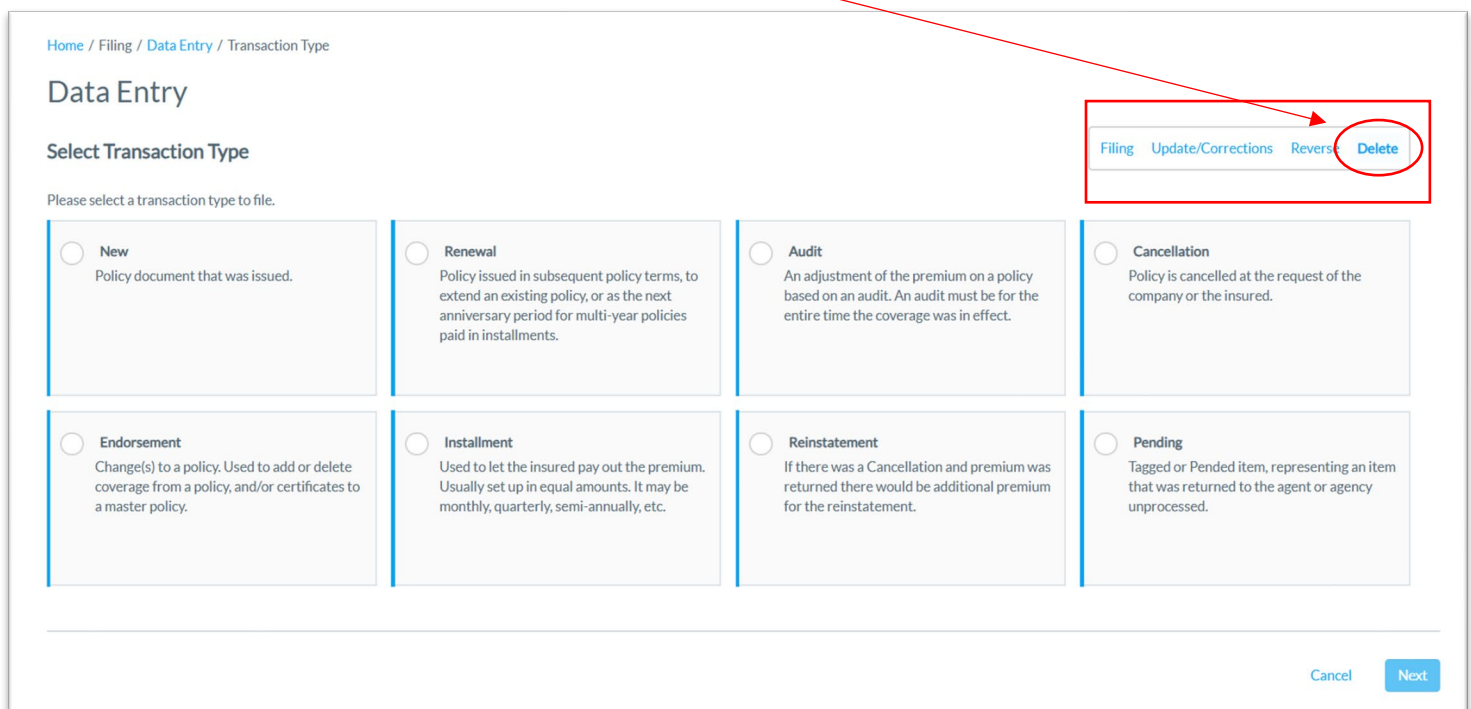
<Note> This allows the deletion of any type / sub-type, such new or renewal policy, binder, or policy replace binders, endorsement, audit, cancellation, etc. within the **current accounting month**. Any transaction from a prior month will need to be reversed or updated/corrected (as features are released). **<Feature>** For detailed instructions on how to delete or correct a pending (or errored) item, view the "Deleting Outstanding Errors (Tags)" or "Correcting Outstanding Errors (Tags)" user guides from the "Filing – Data Entry" section of the [SMART Training Videos and User Guides](#) page.

Step 1:

Click **New Transaction** from Data Entry landing page to create new filings with SLTX, such as new or renewal policy / binder, audit, cancellation, premium endorsement, name change, etc.

Step 2:

Select "Delete" from category section then select type of transaction by clicking on corresponding Transaction Type Tile. Click NEXT.



Home / Filing / Data Entry / Transaction Type

Data Entry

Select Transaction Type

Please select a transaction type to file.

<input type="radio"/> New Policy document that was issued.	<input type="radio"/> Renewal Policy issued in subsequent policy terms, to extend an existing policy, or as the next anniversary period for multi-year policies paid in installments.	<input type="radio"/> Audit An adjustment of the premium on a policy based on an audit. An audit must be for the entire time the coverage was in effect.	<input type="radio"/> Cancellation Policy is cancelled at the request of the company or the insured.
<input type="radio"/> Endorsement Change(s) to a policy. Used to add or delete coverage from a policy, and/or certificates to a master policy.	<input type="radio"/> Installment Used to let the insured pay out the premium. Usually set up in equal amounts. It may be monthly, quarterly, semi-annually, etc.	<input type="radio"/> Reinstatement If there was a Cancellation and premium was returned there would be additional premium for the reinstatement.	<input type="radio"/> Pending Tagged or Pended item, representing an item that was returned to the agent or agency unprocessed.

Cancel **Next**

Step 3:

Input policy number and effective date of your transaction (to be deleted) and click SEARCH to locate transaction. **<Note>** Transaction must be in the current accounting month. Any transaction from a prior month will need to be reversed or updated/corrected (as features are released).

Features

"Find a {transaction type}" provides identification of record to be deleted (by inputting policy number and effective date of record). This eliminates necessity to search for and/or input an "ID" or other pertinent criteria.

Home / Filing / Data Entry / Transaction Type / Find a Policy

Delete Transaction

Example: New Policy Delete

Transaction Type: New Report Date: 02/28/2025

Find a Policy/Binder

Input the policy number and effective date of this New Policy and then click Search.

Policy No. Effective Date

1 result found for: Policy No. ABC12345.

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	PREMIUM	TOTAL GROSS	ERRORS	HISTORY
<input checked="" type="radio"/>	ABC12345	New Policy	SLTX STORES, JOHN DOE DBA	06/01/2024	\$1,690.00	\$1,778.73	0	View

Home / Filing / Data Entry / Transaction Type / Find a Policy

Delete Transaction

Example: Endorsement Delete

Transaction Type: Endorsement Report Date: 02/28/2025

Find an Endorsement

Input the policy number and effective date of the Endorsement and then click Search to locate the Policy / Binder.

Policy No. Effective Date

1 result found for: Policy No. ABC12345.

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	PREMIUM	TOTAL GROSS	ERRORS	HISTORY
<input checked="" type="radio"/>	ABC12345	Premium Endorsement	SLTX STORES, JOHN DOE DBA	07/22/2024	\$645.00	\$678.86	0	View

Features

You may click [VIEW](#) to see a listing of policy/binder record(s) displayed, along with any child (or non-policy) transactions already in the system. To view Errors, click [ERRORS](#) column.

Step 4:

Select appropriate transaction, then click NEXT.

Find a Policy/Binder

Input the policy number and effective date of this New Policy and then click Search.

Policy No. Effective Date

1 result found for: Policy No. ABC12345.

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	PREMIUM	TOTAL GROSS	ERRORS	HISTORY
<input checked="" type="radio"/>	ABC12345	New Policy	SLTX STORES, JOHN DOE DBA	06/01/2024	\$1,690.00	\$1,778.73	0	View

Step 5:

Data, including named insured and policy number are copied from transaction being deleted into your Delete entry screen.

It is *not* necessary to input additional data from the insurance document.

[Home](#) / [Filing](#) / [Data Entry](#) / [Transaction Type](#) / [Find a Policy](#) / [Delete](#)

New Policy Delete

Basic Information

Policy No. ABC12345	Insured Name SLTX STORES, JOHN DOE DBA	Report Date 02/28/2025	Optional - Upload Transaction Valid file formats: .pdf <input type="button" value="Drag & Drop your files or Browse"/>
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Insured Type

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

Dates

Effective / Inception Date	Expiration Date	Continuous Until Cancelled	Issue Date
06/01/2024	06/01/2025	No	None

Coverage & Class

Coverage

CODE & DESCRIPTION	PREMIUM
9334 - GEN LIAB - PREMISES LIAB COMM	\$1,575.00
Total: \$1,575.00	

Limit

General Aggregate	Class
\$2,000,000	44100 - GOVERNMENT MUNICIPALITIES, FIRE DEPT

Primary Risk Location				
Insured Zip		County		
78746		Travis		
Fees				
Total Premium ⓘ	Total Policy Fee(s) ⓘ	Tax ⓘ	Stamping Fee ⓘ	Total Gross ⓘ
\$1,690.00	\$115.00	\$81.97	\$6.76	\$1,778.73
Insurers				
INSURER	TDI LICENSE NO.	NAIC NO.	PREMIUM %	
CHUBB CUSTOM INSURANCE COMPANY - 80101034			100.000000	
			Total: 100.000000%	
Multi-State Transaction				
STATE & TERRITORY ⓘ	AMOUNT			
	Summary Amount: \$0.00			
Exempt Premium ⓘ				
\$0.00				
References				
Reference ⓘ				

Features

Coach mark(s) are available for additional situational context. Click the ⓘ icon.

Step 6:

Click DELETE to submit or file transaction with SLTX.

Fees				
Total Premium [ⓘ]	Total Policy Fee(s) [ⓘ]	Tax [ⓘ]	Stamping Fee [ⓘ]	Total Gross [ⓘ]
\$1,690.00	\$115.00	\$81.97	\$6.76	\$1,778.73

Insurers				
INSURER	TDI LICENSE NO.	NAIC NO.	PREMIUM %	
CHUBB CUSTOM INSURANCE COMPANY - 80101034			100.000000	
			Total: 100.000000%	

Multi-State Transaction	
STATE & TERRITORY [ⓘ]	AMOUNT
	Summary Amount: \$0.00

Exempt Premium [ⓘ]
\$0.00

References
Reference [ⓘ]

[Go back](#) [DELETE](#)

Note: If any errors are detected, you will see a notification and the transaction will not post. Make necessary corrections and click DELETE to ensure filing is submitted.

Step 7:

Once transaction is complete and filing is accepted, a "Good Job" confirmation window will display (as demonstrated below).

Good Job!

[PDF Save as PDF [ⓘ]](#)

New for Policy No. ABC12345 has been deleted.
How do you want to proceed?

[Finish Filing](#) [Continue Filing Deletes](#) [File Another Type](#)

You may print a confirmation of the filing by clicking [Save as PDF](#). You may continue filing by clicking File Another Type or Continue Filing, or simply click Finish Filing to be returned to the Broker Landing page.

Recent Filings

Step 1:

After completing STEP 1 from [Primary Navigation](#), find the Recent Filings section on [Data Entry Landing page](#). This section allows access to last 20 transactions filed by your agency and will include transactions made by all filing methods (EFS manual or automated submissions, SLTX processed, SMART Data Entry, or SMART API).

To perform an in-depth search or locate a specific transaction, click "Go to Search / Edit".

The screenshot displays the 'Data Entry' interface. At the top, there is a breadcrumb trail: 'Home / Filing / Data Entry'. Below this, the title 'Data Entry' is followed by a 'Get Started' section with the prompt 'What would you like to do today?'. Two main action cards are visible: 'New Filing' (described as used for making new filings with SLTX) and 'Search / Edit' (described as used for searching and reviewing transactions). A red arrow points from the text above to the 'Go to Search / Edit' button in the 'Search / Edit' card. Below these cards is a section titled 'Recent Filings - Last 20 filings', which is highlighted with a red box. This section contains a table with columns for BATCH, POLICY NO., REFERENCE, TYPE, EFFECTIVE DATE, USER ID, TOTAL GROSS, and SAVE AS. A red arrow points from the text below to the 'POLICY NO.' link in the first row of the table.

BATCH	POLICY NO.	REFERENCE	TYPE	EFFECTIVE DATE	USER ID	TOTAL GROSS	SAVE AS
5995	TESTCANCELRX		New Policy Reversal	01/18/2021	TESTPOST	\$-1,468.95	
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$0.00	
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$1,468.95	
5995	TESTCANCELRX		Cancellation Amendment	04/18/2021	TESTPOST	\$0.00	
5995	TESTCANCELRX		Cancellation	04/18/2021	TESTPOST	\$-1,468.95	

Click Policy Number link to view details of a specific transaction.

Save as PDF

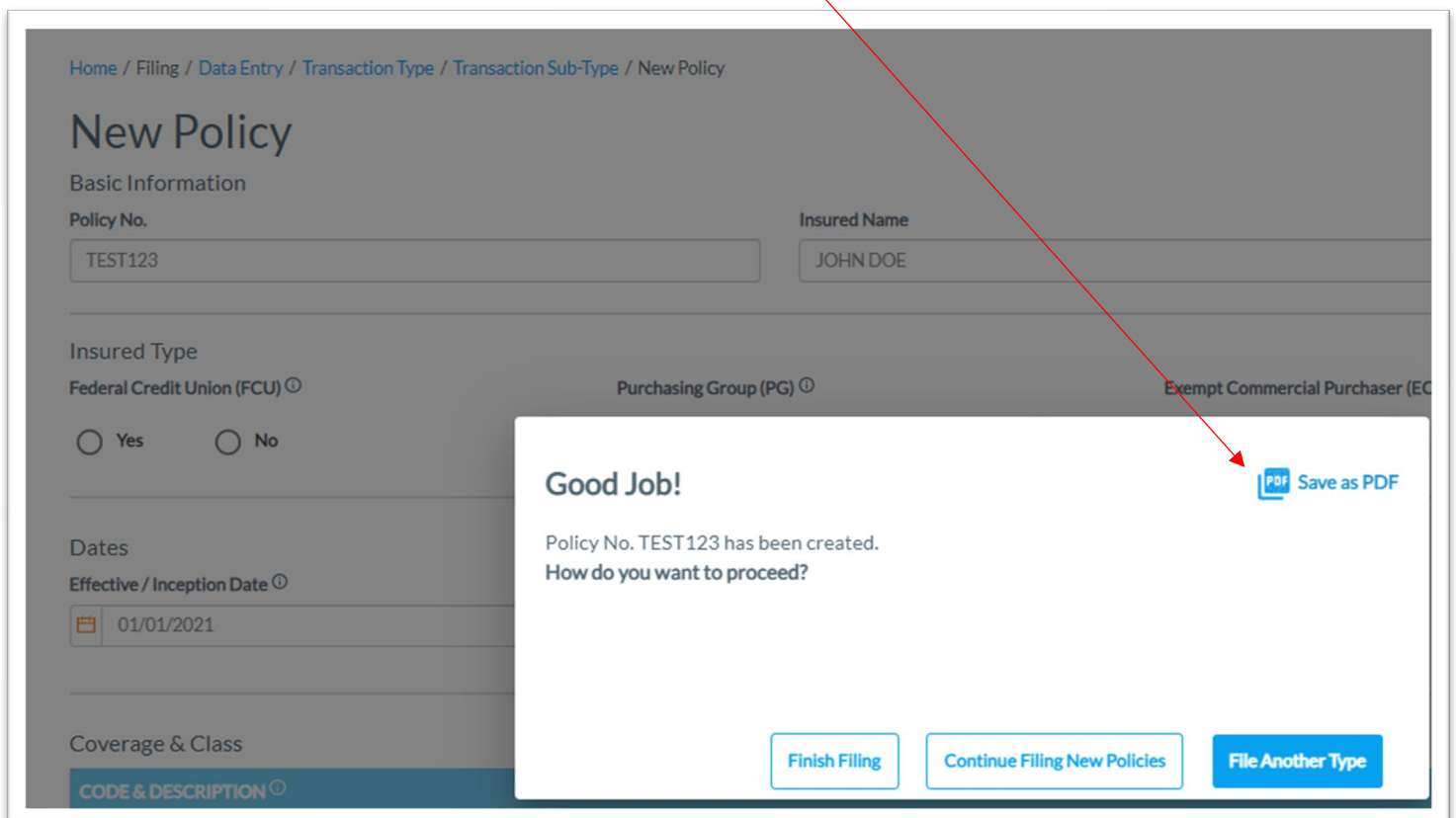
Step 1:

Click PDF icon from Recent Filings section on [Data Entry Landing page](#) to print a confirmation of individual filings. This confirmation page will include all data elements input on the transaction, including Report Date, Batch Number, and SLTX ID (Policy ID) assigned by SLTX. This will also serve as confirmation and acceptance of submission.

Recent Filings - Last 20 filings							
BATCH	POLICY NO.	REFERENCE	TYPE	EFFECTIVE DATE	USER ID	TOTAL GROSS	SAVE AS
5995	TESTCANCELRX		New Policy Reversal	01/18/2021	TESTPOST	\$-1,468.95	
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$0.00	
5995	TESTCANCELRX		Cancellation Reversal	04/18/2021	TESTPOST	\$1,468.95	
5995	TESTCANCELRX		Cancellation Amendment	04/18/2021	TESTPOST	\$0.00	
5995	TESTCANCELRX		Cancellation	04/18/2021	TESTPOST	\$-1,468.95	

Note: You may temporarily see an additional browser tab open displaying transaction details. This facilitates the PDF version and will be closed once document is complete. PDF file will be displayed at the top or bottom of your browser window (depending on browser settings). To open, double click on the PDF file.

Alternately, the "Save as PDF" feature is available following POST or submission of filing from the "Good Job!" confirmation window.



Home / Filing / Data Entry / Transaction Type / Transaction Sub-Type / New Policy

New Policy

Basic Information

Policy No. Insured Name

Insured Type
Federal Credit Union (FCU) Yes No


Purchasing Group (PG) Exempt Commercial Purchaser (EC)

Dates
Effective / Inception Date

Coverage & Class
[CODE & DESCRIPTION](#)

Good Job!

Policy No. TEST123 has been created.
How do you want to proceed?

 Save as PDF

[Finish Filing](#) [Continue Filing New Policies](#) [File Another Type](#)

View History

Step 1:

From "Find a Policy" results, you may click VIEW to see a listing of policy/binder record(s), along with any child (or non-policy) transactions already in the system.

Home / Filing / Data Entry / Transaction Type / Transaction Sub-Type

Data Entry

Transaction Type: Audit Report Date: 01/25/2022

Please select a transaction subtype:

Audit
An adjustment of the premium on a policy. For SLTX purposes, an Audit must be for the entire time that coverage was in effect.

Amendment
Amending an existing audit, most often to revise audit's premium and MUST have the same effective date.

Find a Policy

Input the policy number and effective date of the Audit and then click Search to locate the Policy / Binder.

Policy No. Effective Date

2 results found for: Policy No. TEST

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	ERRORS	HISTORY
<input type="radio"/>	TEST	New Policy	TEST	01/01/2021	0	View
<input type="radio"/>	TEST	New Policy	TEST	01/01/2021	0	View

Home / Filing / Data Entry / Transaction Type / Transaction Sub-Type

Data Entry

Transaction Type: Audit Report Date: 01/25/2022

Please select a transaction subtype:

Audit
An adjustment of the premium on a policy. For SLTX purposes, an Audit must be for the entire time that coverage was in effect.

Amendment
Amending an existing audit, most often to revise audit's premium and MUST have the same effective date.

Find a Policy

Input the policy number and effective date of the Audit and then click Search to locate the Policy / Binder.

Policy No. Effective Date

2 results found for: Policy No. TEST

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	ERRORS	HISTORY
<input type="radio"/>	TEST	New Policy	TEST	01/01/2021	0	View

History for Policy No. TEST

SLTX ID	NAMED INSURED	TRANSACTION TYPE	EFFECTIVE DATE	ORIGINATED BY	ORIGINATED DATE
11248410	TEST	New Policy	01/01/2021	CHEYENNE	12/10/2021
11253305	TEST	Premium Endorsement	01/01/2021	CHEYENNE	01/25/2022

Displaying records 1 - 2 of 2.

Click the **SLTX ID** link to view details of individual transactions.

View Errors

Step 1:

Under "Find a Policy" results, you may click the ERRORS column to a listing of any errors (or tags) applied to the policy/binder record displayed. NOTE: Based on current and former procedures, only manually paper filed transactions will reflect ERRORS on a *filed* transaction.

Home / Filing / Data Entry / Transaction Type / Transaction Sub-Type

Data Entry

Transaction Type: Audit Report Date: 01/25/2022

Please select a transaction subtype:

Audit
An adjustment of the premium on a policy. For SLTX purposes, an Audit must be for the entire time that coverage was in effect.

Amendment
Amending an existing audit, most often to revise audit's premium and MUST have the same effective date.

Find a Policy

Input the policy number and effective date of the Audit and then click Search to locate the Policy / Binder.

Policy No. Effective Date

1 result found for: Policy No. SLTX-1887

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	ERRORS	HISTORY
<input type="radio"/>	SLTX-1887	New Policy	SLTX-1887 (F5)	07/16/2020	2	View

Home / Filing / Data Entry / Transaction Type / Transaction Sub-Type

Data Entry

Transaction Type: Audit Report Date: 01/25/2022

Please select a transaction subtype:

Audit
An adjustment of the premium on a policy. For SLTX purposes, an Audit must be for the entire time that coverage was in effect.

Find a Policy

Input the policy number and effective date of the Audit and then click Search to locate the Policy / Binder.

Policy No. Effective Date

1 result found for: Policy No. SLTX-1887

SELECT	POLICY NO.	TYPE	INSURED	EFFECTIVE DATE	ERRORS	HISTORY
<input type="radio"/>	SLTX-1887	New Policy	SLTX-1887 (F5)	07/16/2020	2	View

Errors for Policy No. SLTX-1887

ERROR CODE	ERROR DESCRIPTION	ERROR REASON
&	NEW TAG Complaint Notice missing/altered	The Notice of Toll-Free Telephone Numbers and Information and Complaint Procedures was not found with the policy information submitted to our office or it was altered in some way. Please be sure this is attached to the insured's copy of the policy. NO RESPONSE IS REQUIRED ON THIS TAG.
X	Tax and Stamping Fee must be shown on Item	Both tax and stamping fee must be shown on each item submitted to this office. This tag is for your information only. No response is required.

Error Resolved	Date
No	07/16/2020