



# **Electronic Filing & Reporting System**

## **EFS Account Administrator Manual**



Surplus Line Association of Illinois

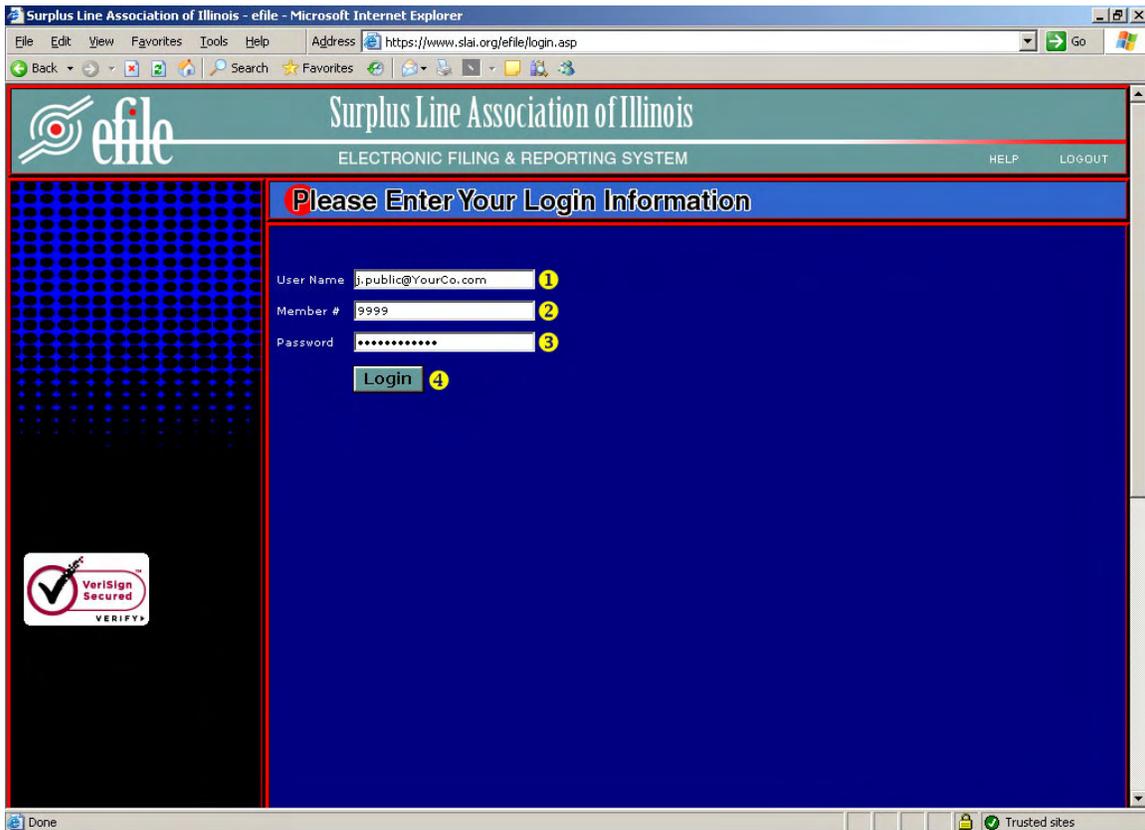
ELECTRONIC FILING & REPORTING SYSTEM

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# Administrator Login



1. **User Name.** Your User Name is your company email address.
2. **Member #.** Your member number is your SLA-assigned member number.
3. **Password.** Your password has been emailed to you by the SLA.
4. **Login.** Complete the three required fields on the Login Screen with the appropriate information, then click on the **Login** button in order to log in.

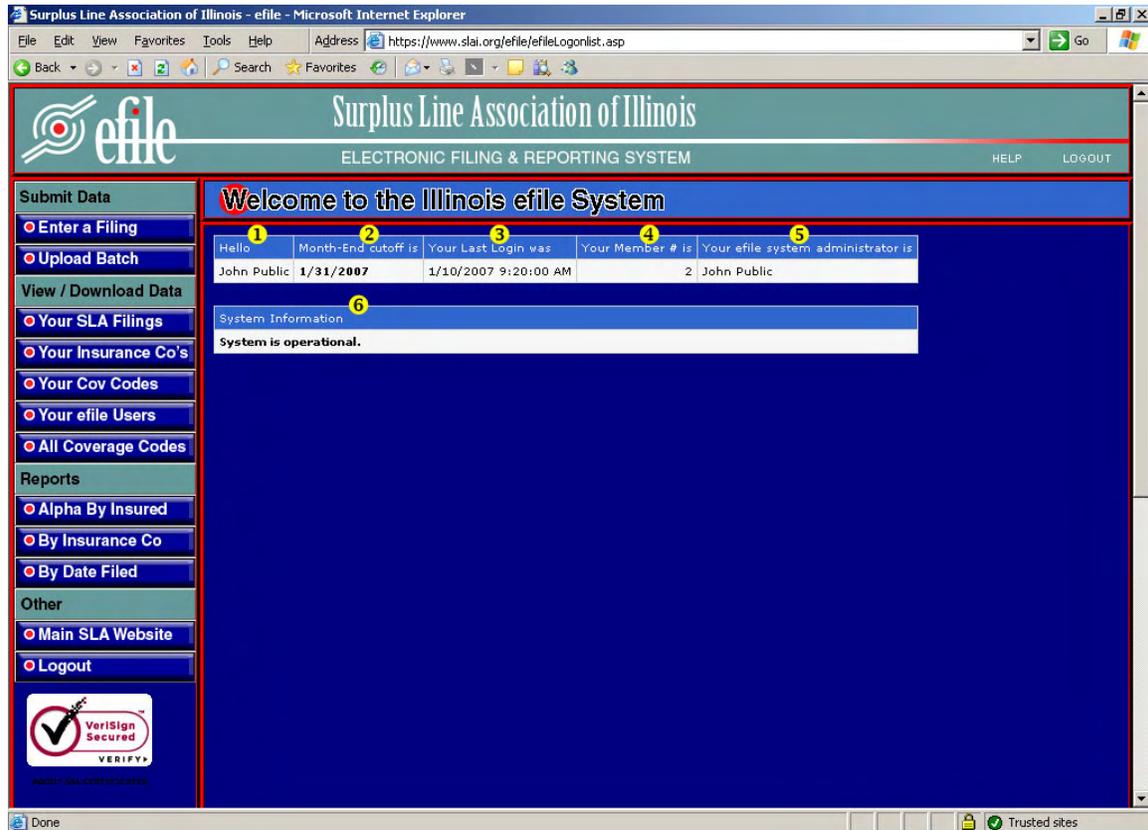
## Passwords / Forgotten Passwords

Once you complete your initial log in, it is recommended that you edit your own record and change your password to something you can remember. As Administrator you can make changes any time to the user accounts for your membership. If another user forgets their password, it is the Administrator's responsibility to edit their record and assign them a new one. If you forget your Administrator password, you must contact the SLA Help Desk to have your password reset. In general, you should try to avoid short, simple passwords, or passwords that others can readily guess.

# Administrator Login

## Welcome Screen

After your successful login, you will see the Welcome Screen:



1. **Your Name**. In case you've already forgotten...
2. **Month-End Cutoff**. This is the last day you will be able to enter filings and still have them show on that month's Activity Report. Generally, it will be the last calendar day of the month but, occasionally, it may be different – especially near the end of the tax periods (end of June & end of December).
3. **Your Last Login**. This shows the last time you logged in under this user information. It is helpful to detect unauthorized access to your account.
4. **Your Member Number**.
5. **Your System Administrator**. Since you are the Administrator, this will be your name. Other users that you set up for your account will see your name here, too. That way they know who to bug when they forget their password.
6. **System Message**. If the SLA wants to communicate system information to you and other users, it will show here (for example, "The system will be down for scheduled maintenance from 3/15/07 09:00:00 PM until 3/16/07 02:30:00 AM")

## Your efile Users

As EFS Administrator, you are responsible for setting up and maintaining all User Accounts for your membership. In the **Your efile Users** section, you can view, edit, add and delete accounts. To enter the **Your efile Users** section, click on the **Your efile Users** button in the Navigation Bar on the left side of the screen. Initially, you will see a list of your users (initially, this will probably just be you!).

The screenshot shows the 'Your efile Users' page in the Surplus Line Association of Illinois efile system. The page features a navigation menu on the left with options like 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a table of users with the following columns: Login (\*), First Name (\*), Last Name (\*), Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. The table contains two users: j.public@YourCo.com and k.adams@YourCo.com. The page also includes a search bar, a 'Add a New Record' button, and a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'.

1	2	3	4	5	6	7	8	9	10	11	12
Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/23/2007 6:09:00 PM	View	Edit	Delete
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete

1. **Login**. This column shows each user's login email.
2. **First Name**.
3. **Last Name**.
4. **Account Maintenance**. You are the only one that has this permission. You cannot change it for yourself or any other user. To change the EFS Account Administrator, contact the SLA Help Desk.
5. **Data Entry**. Shows whether the user has permission to enter new filings into the EFS system.
6. **Bulk Entry**. Shows whether the user has permission to upload bulk filings to the EFS system.

## Your efile Users

7. **Reporting**. Shows whether the user has permission to generate predefined PDF reports that are available in the Reports section.
8. **User Locked Out**. Shows whether this user has been locked out from logging into the system.
9. **Last Login**. Shows the last time this user logged in.
10. **View**. Click here to see a detailed view of the corresponding record.
11. **Edit**. Click here to make changes to the corresponding record.
12. **Delete**. Click here to remove this user from your account (you cannot *undo* a delete).
13. **Add a New Record**. Click here to add a new user to your account.
14. **Search Controls**. Use the search controls to search for specific users. This can be helpful if your user list is extensive. The fields whose columns are marked with an asterisk are searched in a simple search. For more information, see the ***Using the Search Controls*** section of this manual.
15. **Export Controls**. These controls let you export your user list to a file on your own computer. For more information, see the ***Using the Export Controls*** section of this manual.

# Your efile Users

## Viewing User Detail

To view a complete user record, click on the word View in the row of the user whose detail you want to see. This is helpful if the user login or name is too long to see on the summary screen. You will see the complete user record as shown below:

The screenshot shows a web browser window displaying the 'Your efile Users' page. The page has a blue header with the 'efile' logo and the text 'Surplus Line Association of Illinois ELECTRONIC FILING & REPORTING SYSTEM'. On the left is a navigation menu with categories: 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area is titled 'Your efile Users' and contains a table of user details for a user with login 'k.adams@YourCo.com'. Above the table are three numbered links: 1. Back to List, 2. Edit, and 3. Delete. The table lists various user attributes and their values.

Your efile Users	
1	Back to List
2	Edit
3	Delete
Login	k.adams@YourCo.com
First Name	Kathy
Last Name	Adams
Account Maintenance	No
Data Entry	Yes
Bulk Entry	No
Reporting	No
User Locked Out	No
Last Login	
Last Update	4/23/2007 6:54:00 PM
Last Update By	docasek@slai.org

1. **Back to List.** Clicking here will return you to the full list of users.
2. **Edit.** Click here to make changes to this user's record. Then follow the instructions under the ***Editing User Information*** section of this manual.
3. **Delete.** Click here to delete this user. Then follow the instructions under the ***Deleting a User*** section of this manual.

# Your efile Users

## Adding a User

To add a new user, click **Your efile Users** in the Navigation Bar on the left side of the screen, then on **Add a New Record**:

The screenshot shows the 'Your efile Users' page in the Surplus Line Association of Illinois efile system. The page title is 'Your efile Users'. Below the title, there are options to 'Export to Excel', 'Export to XML', and 'Export to CSV'. A search bar is present with a 'Search (\*)' button and a 'Show all' link. Below the search bar, there are radio buttons for 'Exact phrase', 'All words', and 'Any word'. A blue button labeled 'Add a New Record' is highlighted with a mouse cursor. Below this button is a table with columns: 'Login (\*)', 'First Name (\*)', 'Last Name (\*)', 'Account Maintenance', 'Data Entry', 'Bulk Entry', 'Reporting', 'User Locked Out', and 'Last Login'. The table contains two rows of user data. At the bottom of the table, it says 'COUNT: 2'. Below the table, there are pagination controls: 'Page 1 of 1 of 1' and 'Records Per Page 25'. The left navigation bar has several sections: 'Submit Data' (with 'Enter a Filing' and 'Upload Batch'), 'View / Download / Edit Data' (with 'Your SLA Filings', 'Your Insurance Companies', 'Your Coverage Codes', 'Your efile Users', and 'All Coverage Codes'), 'Reports' (with 'Alpha By Insured', 'By Insurance Company', and 'By Date Filed'), and 'Other' (with 'Main SLA Website' and 'Logout'). A VeriSign Secured logo is visible at the bottom left of the page.

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/23/2007 6:49:00 PM	View	Edit	Delete
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete

## Your efile Users

### Adding a User (continued)

After clicking **Add a New Record**, you will see the screen below. Fill in the fields according to the instructions below.

The screenshot shows a web browser window titled "Surplus Line Association of Illinois - efile - Windows Internet Explorer". The address bar shows "https://www.slai.org/efile/WebUseradd.asp". The page header includes the "efile" logo, "Surplus Line Association of Illinois", and "ELECTRONIC FILING & REPORTING SYSTEM". A navigation menu on the left lists options like "Submit Data", "View / Download / Edit Data", "Reports", and "Other". The main content area is titled "Your efile Users" and contains a form with the following fields:

Login	c.delta@YourCo.com	1
Password	****	2
First Name	Charlie	3
Last Name	Delta	4
Data Entry	<input checked="" type="radio"/> Yes <input type="radio"/> No	5
Bulk Entry	<input type="radio"/> Yes <input checked="" type="radio"/> No	6
Reporting	<input checked="" type="radio"/> Yes <input type="radio"/> No	7

Below the form is a "SUBMIT" button labeled 8. A "Back to List" link with a question mark icon is also present.

1. **Login**. You must enter the user's current and valid company email address for their login. At times, the Association may communicate with users via email, so the login **must** be a valid email address.
2. **Password**. Assign the user a password.
3. **First Name**.
4. **Last Name**.
5. **Data Entry**. Select "Yes" if you want the user to be able to enter filings on the **Enter a Filing** screen. Select "No" if you don't.
6. **Bulk Entry**. Select "Yes" if you want the user to be able upload filings on a bulk basis of data extracted from your system. Select "No" if you don't.

*The Bulk Entry section of the system will allow users who can extract data from their system and format it according to an SLA specification, to upload that data on a bulk basis to the SLA system. The Bulk Entry section is expected to be operational Q3 or Q4 of 2007.*

# Your efile Users

## Adding a User (continued)

7. **Reporting.** Select “Yes” if you want the user to be able to generate the predefined PDF reports in the Reports section of the system. Select “No” if you don’t.
8. **SUBMIT.** Once you have completed entering data in all the fields as described above, click the **SUBMIT** button to create the new user.
9. **Back to List.** Click here to return to the user list without adding a new user.

After clicking the SUBMIT button, you will automatically return to the user list. You will see your new user in the list and message saying “**Add New Record Successful.**”

Surplus Line Association of Illinois - efile - Windows Internet Explorer

https://www.slai.org/efile/WebUserlist.asp

Surplus Line Association of Illinois - efile

efile  
Surplus Line Association of Illinois  
ELECTRONIC FILING & REPORTING SYSTEM

Submit Data

- Enter a Filing
- Upload Batch

View / Download / Edit Data

- Your SLA Filings
- Your Insurance Companies
- Your Coverage Codes
- Your efile Users
- All Coverage Codes

Reports

- Alpha By Insured
- By Insurance Company
- By Date Filed

Other

- Main SLA Website
- Logout

VeriSign Secured

### Your efile Users

Export to Excel Export to XML Export to CSV

Search (\*) Show all

Exact phrase Any word

Add a New Record

**Add New Record Successful**

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login				
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No			View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	Yes	No			View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/24/2007 5:14:00 PM		View	Edit	Delete

COUNT: 3

Page 1 of 1 of 1 Records Per Page 25

Records 1 to 3 of 3

# Your efile Users

## Editing User Information

To edit information for an existing user, click **Your efile Users** in the Navigation Bar on the left side of the screen, then on the **Edit** field on the row corresponding to the user whose information you wish to change:

The screenshot shows the 'Your efile Users' page in the Surplus Line Association of Illinois efile system. The page includes a navigation bar on the left with options like 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a table of users with the following columns: Login (\*), First Name (\*), Last Name (\*), Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. The table contains three rows of user data. The 'Edit' link for the user 'j.public@YourCo.com' is highlighted with a blue box.

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login	View	Edit	Delete
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	Yes	No		View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 9:50:00 AM	View	Edit	Delete

Page 1 of 1. Records Per Page 25. Records 1 to 3 of 3.

## Your efile Users

### Editing User Information (continued)

After clicking **Edit**, you will see the screen below. Fill in the fields according to the instructions below.

Surplus Line Association of Illinois - efile - Microsoft Internet Explorer  
Address: https://www.slai.org/efile/WebUseredit.asp?key=c%2Edelta%40YourCo%2Ecom

efile  
ELECTRONIC FILING & REPORTING SYSTEM

Submit Data  
• Enter a Filing  
• Upload Batch

View / Download / Edit Data  
• Your SLA Filings  
• Your Insurance Companies  
• Your Coverage Codes  
• Your efile Users  
• All Coverage Codes

Reports  
• Alpha By Insured  
• By Insurance Company  
• By Date Filed

Other  
• Main SLA Website  
• Logout

VeriSign Secured  
VERIFY

### Your efile Users

Back to List 10

Login	c.delta@YourCo.com	1
Password	*****	2
First Name	Charles	3
Last Name	Delta	4
Data Entry	<input checked="" type="radio"/> Yes <input type="radio"/> No	5
Bulk Entry	<input type="radio"/> Yes <input checked="" type="radio"/> No	6
Reporting	<input type="radio"/> Yes <input checked="" type="radio"/> No	7
User Locked Out	<input type="radio"/> Yes <input checked="" type="radio"/> No	8

UPDATE 9

1. **Login**. This should always be the user's current and valid company email address. If the user's email has changed or was incorrect when originally entered, make changes here.
2. **Password**. If a user has forgotten their password – which I'm sure will *never* happen – you can change it here. Additionally, you may wish to institute a system where user passwords are changed on a regular basis to increase security.
3. **First Name**.
4. **Last Name**.
5. **Data Entry**. Select "Yes" if you want the user to be able to enter filings on the **Enter a Filing** screen. Select "No" if you don't.

## Your efile Users

### Editing User Information (continued)

6. **Bulk Entry**. Select “Yes” if you want the user to be able upload filings on a bulk basis of data extracted from your system. Select “No” if you don’t.

*The Bulk Entry section of the system will allow users who can extract data from their system and format it according to an SLA specification, to upload that data on a bulk basis to the SLA system. The Bulk Entry section is expected to be operational Q3 or Q4 of 2007.*

7. **Reporting**. Select “Yes” if you want the user to be able to generate the predefined PDF reports in the Reports section of the system. Select “No” if you don’t.
8. **User Locked Out**. Select “Yes” if you want to lock this user out from accessing the system at all. They will be unable to log in. Select “No” to reinstate their access after a lockout.
9. **UPDATE**. Once you have completed editing data as necessary, click the **UPDATE** button to save the changes.
10. **Back to List**. Click here to return to the user list without making any changes.

# Your efile Users

## Editing User Information (continued)

After clicking the **UPDATE** button, you will automatically return to the user list. You will see your updated user data reflected in the list and message saying **“Update Record Successful for Key = [user@email.com].”**

The screenshot shows the 'Your efile Users' page in a Microsoft Internet Explorer browser. The page title is 'Your efile Users' and the URL is 'https://www.slai.org/efile/WebUserlist.asp'. The page features a navigation menu on the left with sections for 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a search bar, a message box, and a table of users.

**Message:** Update Record Successful for Key = c.delta@YourCo.com

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No				View Edit Delete
c.delta@YourCo.com	Charles	Delta	No	Yes	No	No	No				View Edit Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 9:57:00 AM			View Edit Delete

Page 1 of 1 Records Per Page 25  
Records 1 to 3 of 3

# Your efile Users

## Deleting a User

You can delete a user permanently from the system if, for instance, they've left the company or been reassigned to an area where they will no longer need system access. To delete a user, click **Your efile Users** in the Navigation Bar on the left side of the screen, then on the **Delete** field on the row corresponding to the user you wish to delete:

The screenshot shows the 'Your efile Users' page in the Surplus Line Association of Illinois efile system. The page includes a navigation bar on the left with options like 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a table of users with columns for Login, First Name, Last Name, Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. A mouse cursor is pointing at the 'Delete' button for the user 'j.public@YourCo.com'.

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	Yes	No		View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 9:50:00 AM	View	Edit	Delete

COUNT: 3

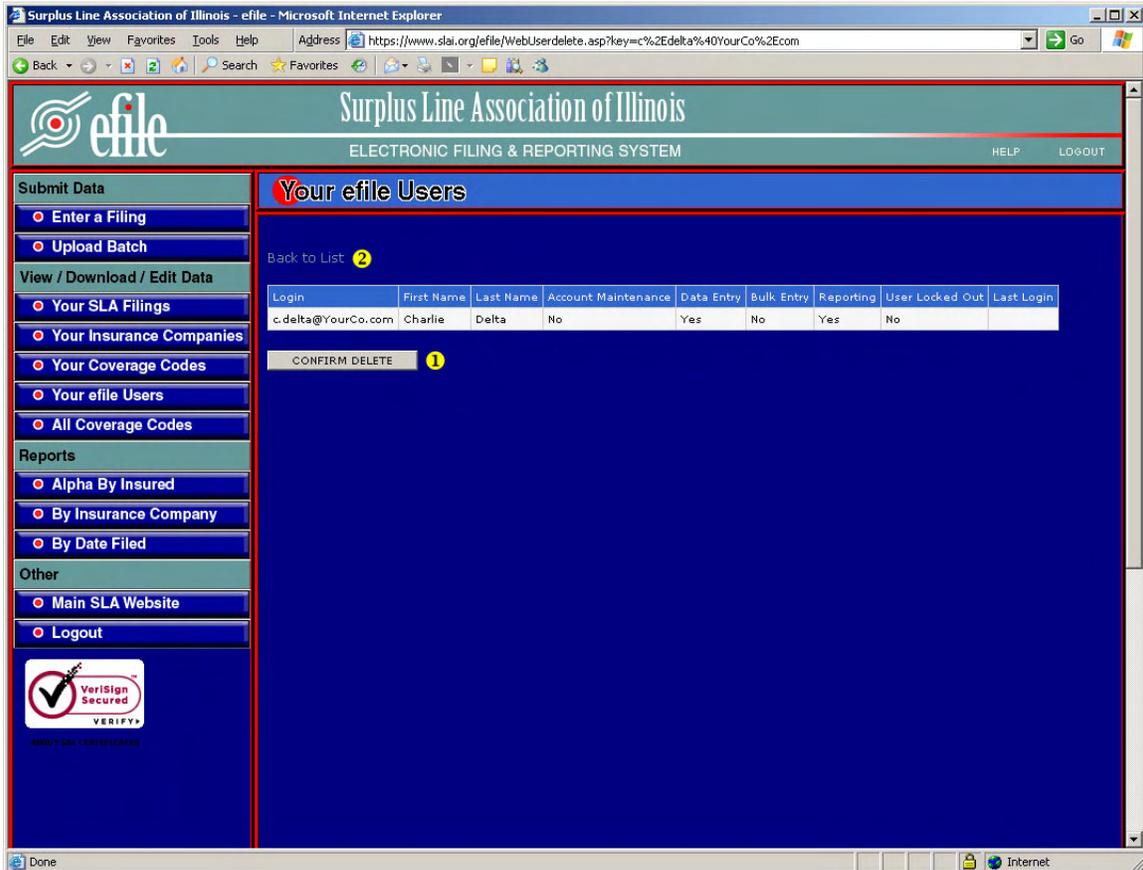
Page 1 of 1 of 1 Records Per Page 25

Records 1 to 3 of 3

# Your efile Users

## Deleting a User (continued)

After clicking **Delete**, you will see the screen below:

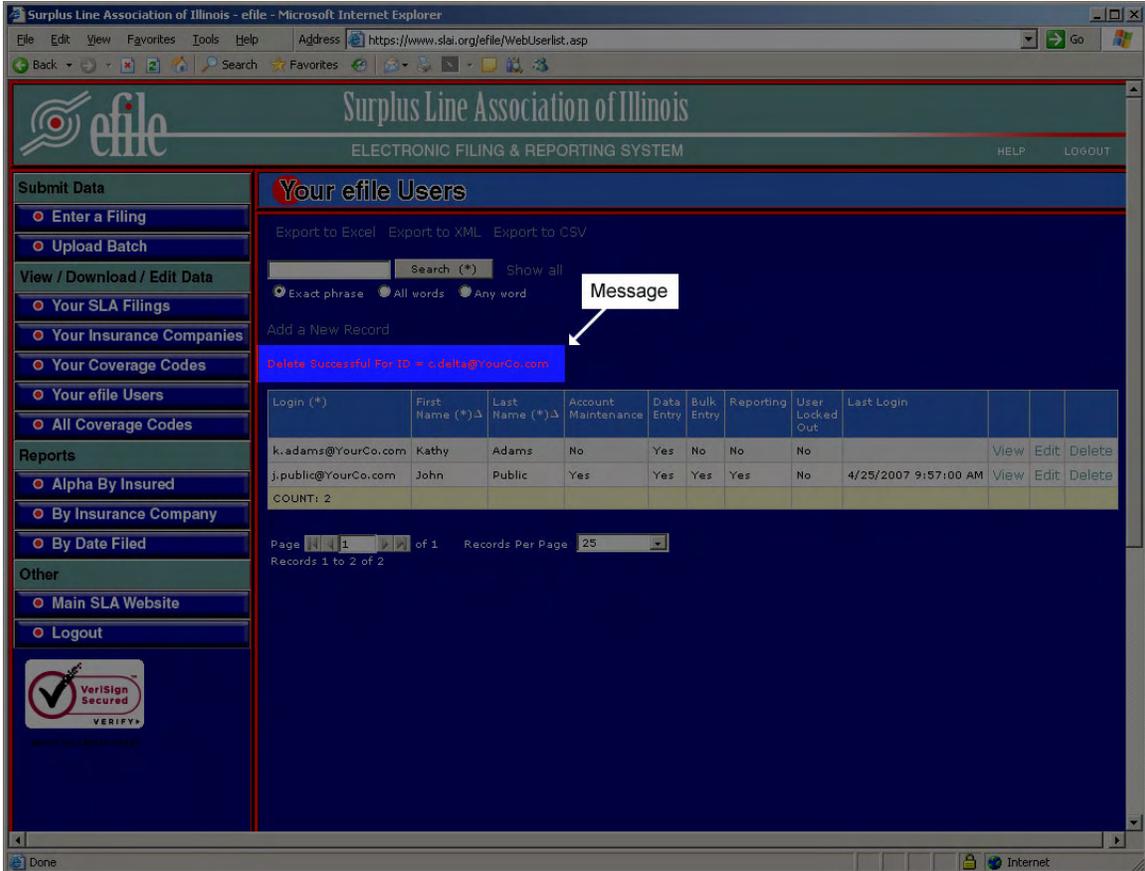


1. **Confirm Delete**. Click here to confirm that you want to delete this user. **YOU CANNOT “UNDO” THE DELETE PROCESS.**
2. **Back to List**. Click here to return to the user list without deleting the user.

# Your efile Users

## Deleting a User (continued)

After clicking the **CONFIRM DELETE** button, you will automatically return to the user list. You will see that the user you deleted is no longer reflected in the list. You will also see a message saying “**Delete Successful for Key = [user@email.com].**”



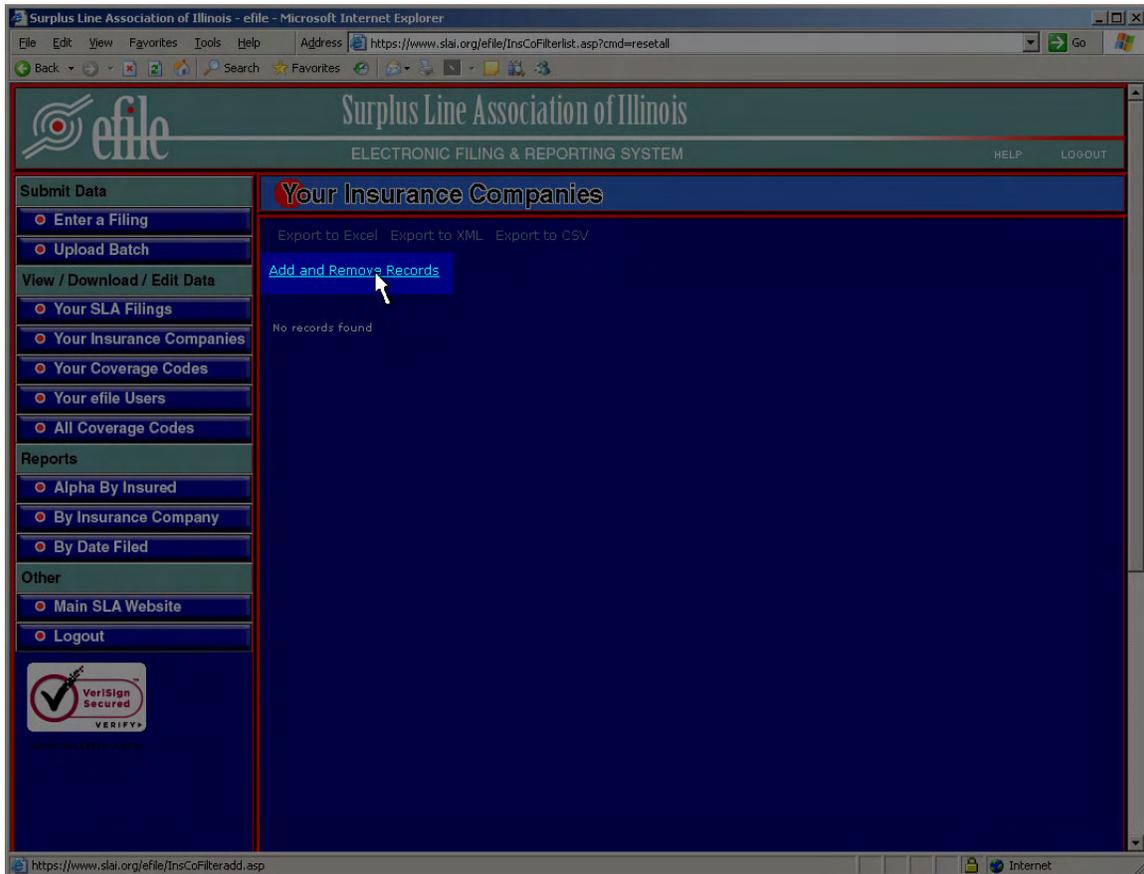
## Your Insurance Companies

The **Your Insurance Companies** screen is a great tool to use that will increase the speed and accuracy for your users that enter filings into the system. By default, when a user is entering a filing, a large list of possible insurers is loaded into the box from which they choose the insurer. The complete list can be cumbersome for your users to scroll through. By creating a custom list of the insurers that your company uses, you will decrease the load time for the screen and make it easier for your users to choose the **proper** insurer each time they enter a filing.

Note: You cannot add Lloyd's of London to your custom list. Lloyd's policies cannot be submitted directly to the SLA via the EFS. Lloyd's policies are submitted to Lloyd's Illinois, Inc. which determines surplus line or admitted status and, in turn, submits the surplus line policies to the SLA.

### Creating Your List

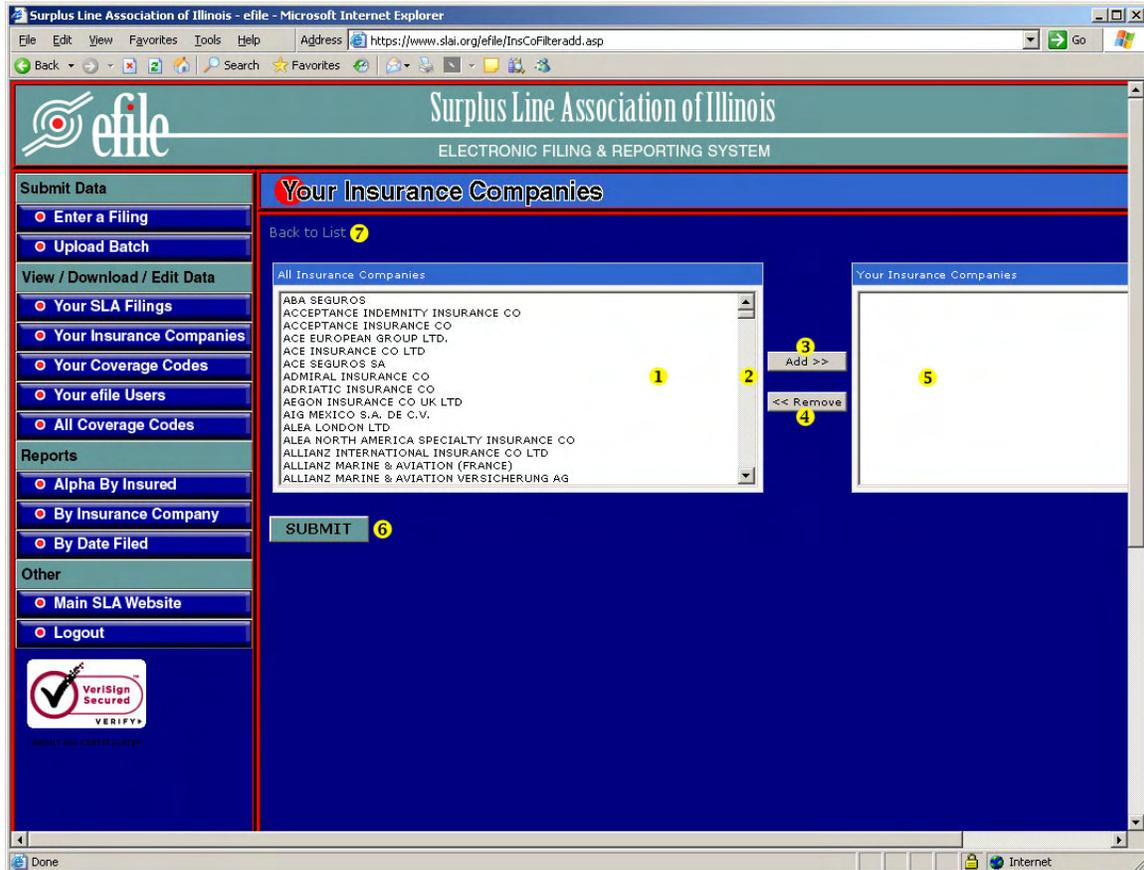
To create your custom list of insurers, click on **Your Insurance Companies** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:



# Your Insurance Companies

## Creating Your List (continued)

After clicking **Add and Remove Records**, you will see the screen below:



1. **All Insurance Companies.** Select the insurance company or companies that you wish to add to your custom list. You can select a company by clicking on it. Once selected, the name will be highlighted in blue. Select multiple companies with CTRL-Click (holding down the Ctrl key on your keyboard while clicking on additional companies).
2. **Vertical Scroll Bar.** Use this bar to scroll through the list of insurers. Alternatively, you can click on any name in the **All Insurance Companies** box and then type the first letter of the name of the insurer you are searching for. The box will then scroll to the first insurer that begins with that letter, and you can scroll down from there to the insurer you want.
3. **Add Button.** Once you have selected the insurance company or companies from the **All Insurance Companies** box that you want to add to your custom list, click here to add the names to the **Your Insurance Companies** box.

## Your Insurance Companies

### Creating Your List (continued)

4. **Remove Button**. Once you have selected the insurance company or companies from the ***Your Insurance Companies*** box that you want to remove from your custom list, click here to remove the names.
5. **Your Insurance Companies**. This box shows your progress as you add companies to (or remove companies from) your list. The changes to your list will not be saved until you click on the ***SUBMIT*** button.
6. **SUBMIT Button**. Click here when you are done creating your list to save your changes.
7. **Back to List**. Click here to exit without making any changes.

# Your Insurance Companies

## Adding/Removing Insurers from Your List

To add or remove insurers from your custom list, click on **Your Insurance Companies** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:

The screenshot shows the 'Your Insurance Companies' page in the efile system. The page title is 'Your Insurance Companies' and it includes options to 'Export to Excel', 'Export to XML', and 'Export to CSV'. A blue button labeled 'Add and Remove Records' is highlighted with a mouse cursor. Below this button is a table with the following data:

Insurance Companies	Last Update	Last Update By
AMERICAN INTERNATIONAL SPECIALTY LINES INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
BURLINGTON INSURANCE COMPANY	4/25/2007 1:31:00 PM	j.public@YourCo.com
LEXINGTON INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
SCOTTSDALE INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
LLOYD'S OF LONDON	4/25/2007 12:00:00 PM	j.public@YourCo.com
COUNT: 5		

Below the table, there is a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'. The status bar at the bottom indicates 'Trusted sites' and '100%' zoom.

# Your Insurance Companies

## Adding/Removing Insurers from Your List (continued)

After clicking **Add and Remove Records**, you will see the screen below:

The screenshot shows a web browser window displaying the Surplus Line Association of Illinois efile system. The page title is "Your Insurance Companies". The interface is divided into several sections:

- Submit Data:** Includes links for "Enter a Filing" and "Upload Batch".
- View / Download / Edit Data:** Includes links for "Your SLA Filings", "Your Insurance Companies", "Your Coverage Codes", "Your efile Users", and "All Coverage Codes".
- Reports:** Includes links for "Alpha By Insured", "By Insurance Company", and "By Date Filed".
- Other:** Includes links for "Main SLA Website" and "Logout".

The main content area is titled "Your Insurance Companies" and features a "Back to List" link. It contains two lists of insurance companies:

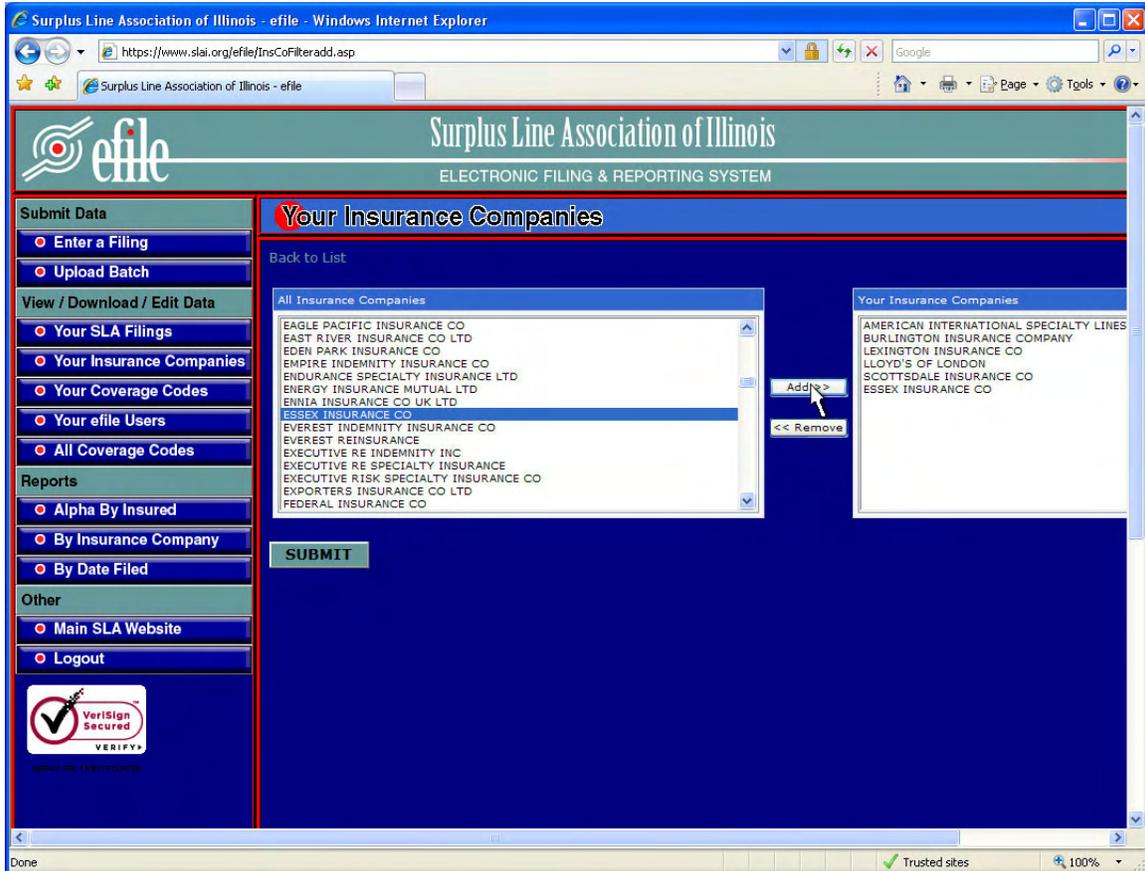
- All Insurance Companies:** A scrollable list containing the following companies: ABA SEGUROS, ACCEPTANCE INDEMNITY INSURANCE CO, ACCEPTANCE INSURANCE CO, ACE EUROPEAN GROUP LTD., ACE INSURANCE CO LTD, ACE SEGUROS SA, ADMIRAL INSURANCE CO, ADRIATIC INSURANCE CO, AEGON INSURANCE CO UK LTD, AIG MEXICO S.A. DE C.V., ALEA LONDON LTD, ALEA NORTH AMERICA SPECIALTY INSURANCE CO, ALLIANZ INTERNATIONAL INSURANCE CO LTD, ALLIANZ MARINE & AVIATION (FRANCE), and ALLIANZ MARINE & AVIATION VERSICHERUNG AG.
- Your Insurance Companies:** A scrollable list containing the following companies: AMERICAN INTERNATIONAL SPECIALTY LINES, BURLINGTON INSURANCE COMPANY, LEXINGTON INSURANCE CO, LLOYD'S OF LONDON, and SCOTTSDALE INSURANCE CO.

Between the two lists are buttons for "Add >>" and "<< Remove". A "SUBMIT" button is located below the "All Insurance Companies" list. The browser's address bar shows the URL "https://www.slai.org/efile/InsCoFilteradd.asp". The status bar at the bottom indicates "Done" and "Trusted sites".

# Your Insurance Companies

## Adding/Removing Insurers from Your List (continued)

To add an insurer to your list, scroll through the **All Insurance Companies** box to the insurer you want to add. Click on that insurer to select it (selected insurers will be highlighted in blue) and then click the **Add** button.

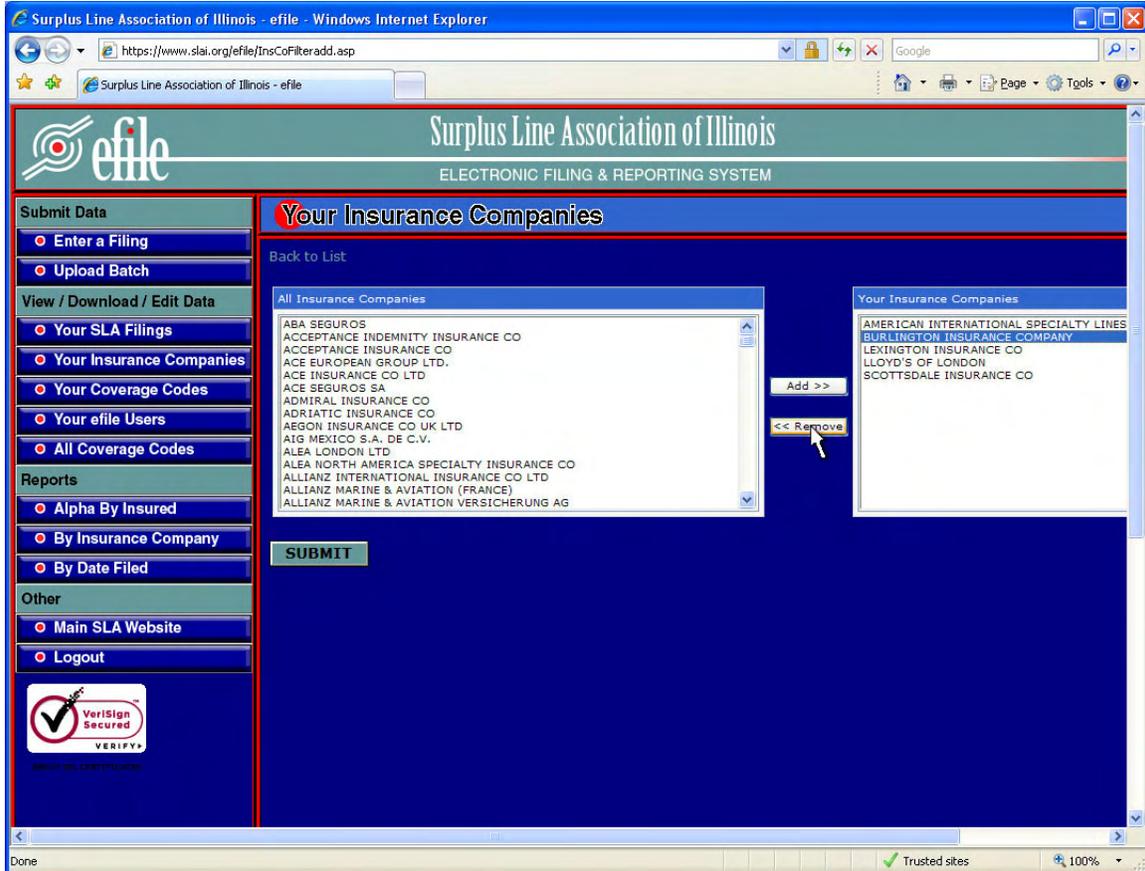


After clicking **Add**, click the **SUBMIT** button and your change will be saved.

# Your Insurance Companies

## Adding/Removing Insurers from Your List (continued)

To remove an insurer from your list, scroll through the **Your Insurance Companies** box to the insurer you want to remove. Click on that insurer name to select it (selected insurers will be highlighted in blue) and then click the **Remove** button.



After clicking **Remove**, click the **SUBMIT** button and your change will be saved.

# Your Insurance Companies

## Completely Removing Your List

To completely remove your custom list from the system, click on **Your Insurance Companies** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:

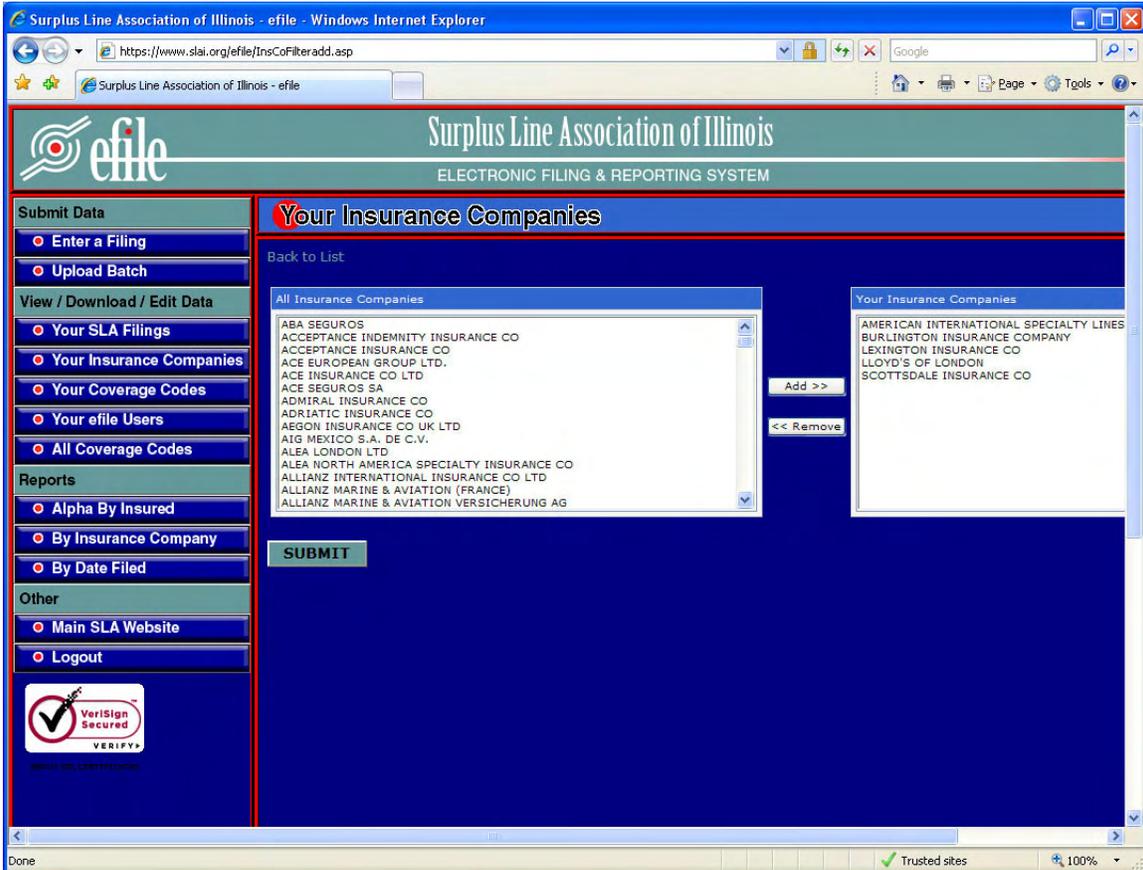
The screenshot shows the 'Your Insurance Companies' page in the efile system. The left navigation bar includes sections for 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The 'Your Insurance Companies' link is selected in the 'View / Download / Edit Data' section. The main content area shows a table of insurance companies with columns for 'Insurance Companies', 'Last Update', and 'Last Update By'. A blue button labeled 'Add and Remove Records' is positioned above the table. Below the table, there is a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'. A VeriSign Secured logo is visible in the bottom left corner of the page.

Insurance Companies	Last Update	Last Update By
AMERICAN INTERNATIONAL SPECIALTY LINES INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
BURLINGTON INSURANCE COMPANY	4/25/2007 1:31:00 PM	j.public@YourCo.com
LEXINGTON INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
SCOTTSDALE INSURANCE CO	4/25/2007 12:00:00 PM	j.public@YourCo.com
LLOYD'S OF LONDON	4/25/2007 12:00:00 PM	j.public@YourCo.com
COUNT: 5		

# Your Insurance Companies

## Completely Removing Your List (continued)

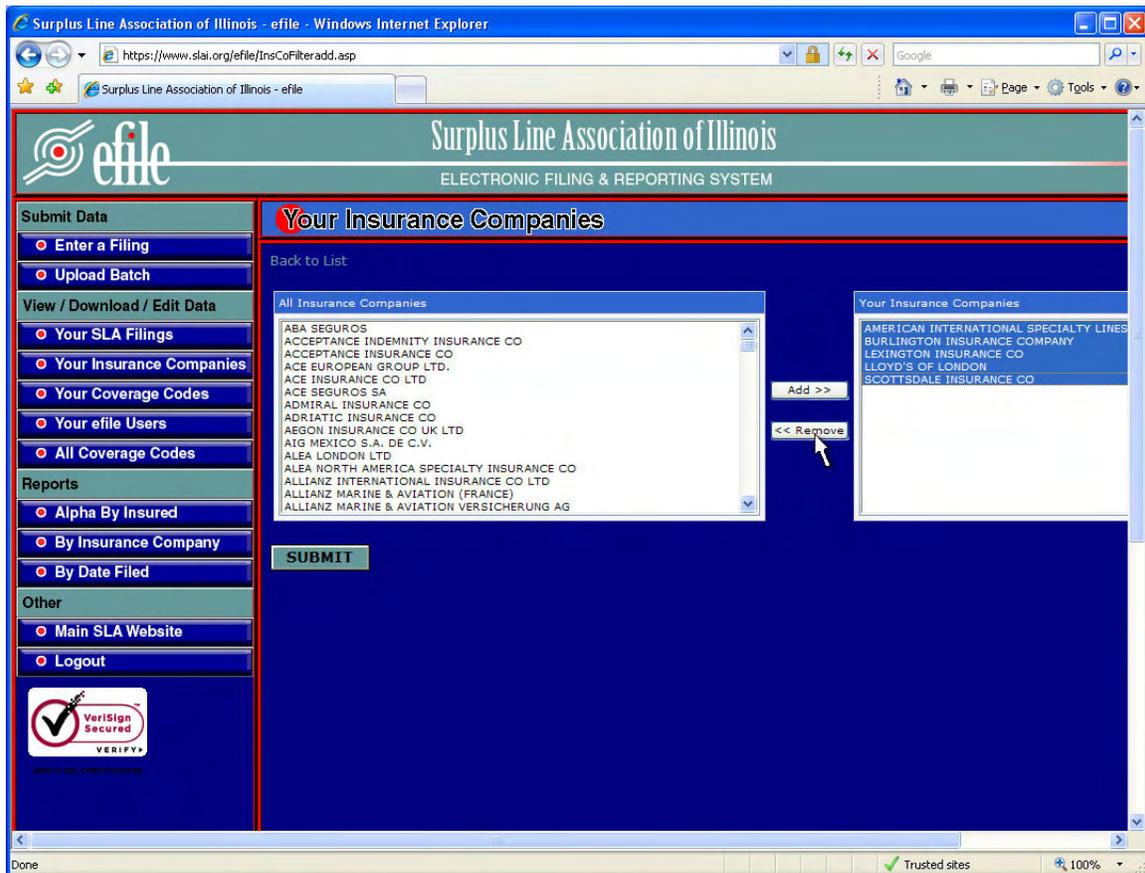
After clicking **Add and Remove Records**, you will see the screen below:



# Your Insurance Companies

## Completely Removing Your List (continued)

To select all of the insurers on your custom list, first click on the first insurance company name in the **Your Insurance Companies** box. Then, hold down the SHIFT key on your keyboard and click on the last insurer in the box or, with the SHIFT key held down, repeatedly press the down-arrow key until all insurers are selected (highlighted in blue). Then click the **Remove** button to remove the insurers from your list.



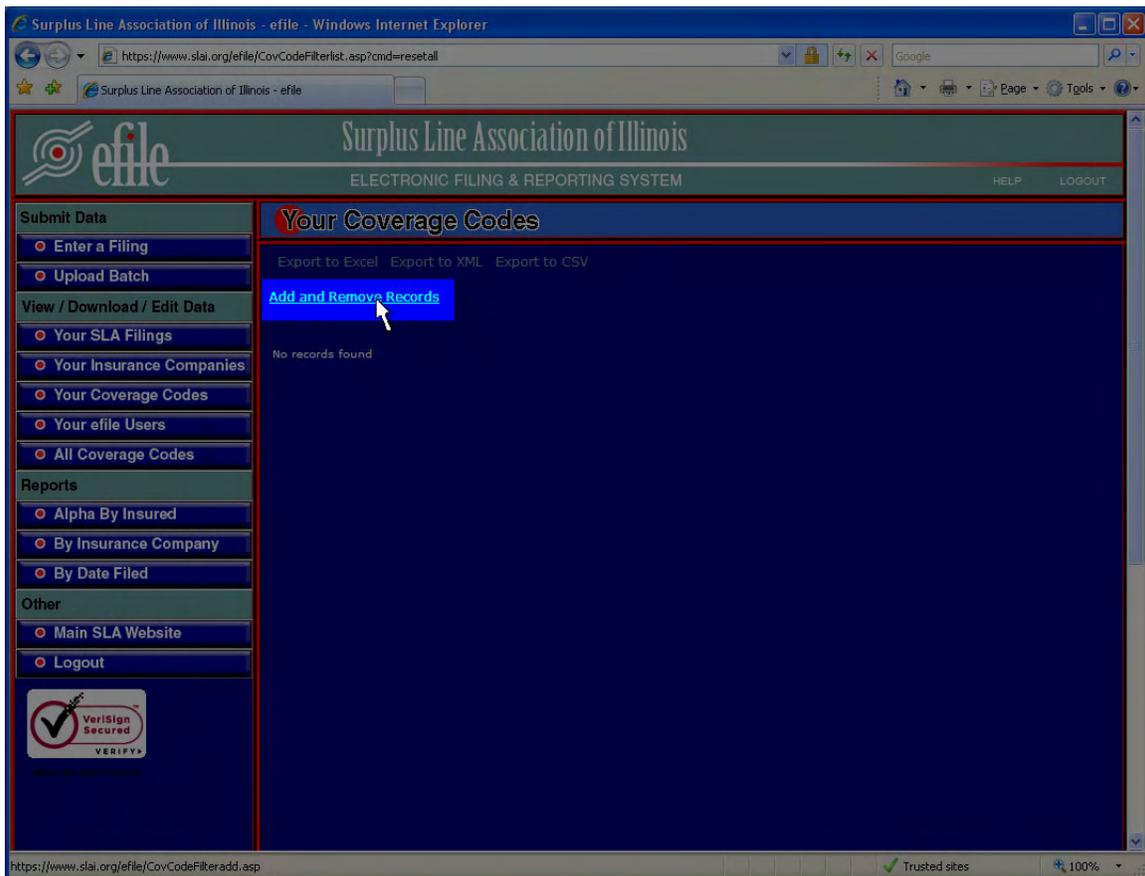
After clicking **Remove**, click the **SUBMIT** button and your custom list will be gone.

## Your Coverage Codes

The **Your Coverage Codes** screen is a great tool to use that will increase the speed and accuracy for your users that enter filings into the system. By default, when a user is entering a filing, a large list of possible coverage codes is loaded into the box from which they choose the coverage. The complete list can be cumbersome for your users to scroll through. By creating a custom list of the coverages that your company uses, you will decrease the load time for the screen and make it easier for your users to choose the **proper** coverage each time they enter a filing.

### Creating Your List

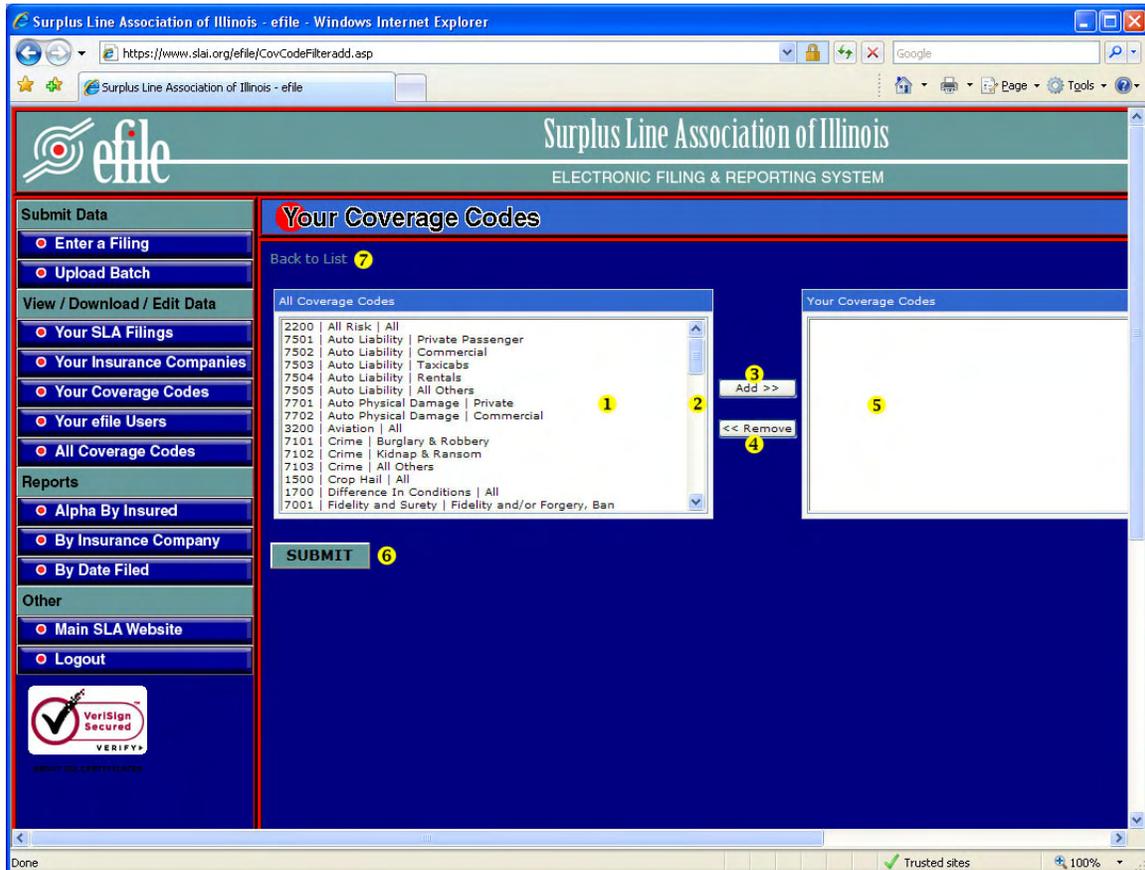
To create your custom list of coverage codes, click on **Your Coverage Codes** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:



# Your Coverage Codes

## Creating Your List (continued)

After clicking **Add and Remove Records**, you will see the screen below:



1. **All Coverage Codes**. Select the coverage or coverages that you wish to add to your custom list. You can select a coverage by clicking on it. Once selected, the coverage will be highlighted in blue. Select multiple coverages with CTRL-Click (holding down the Ctrl key on your keyboard while clicking on additional coverages).
2. **Vertical Scroll Bar**. Use this bar to scroll through the list of coverages.
3. **Add Button**. Once you have selected the coverage or coverages from the **All Coverage Codes** box that you want to add to your custom list, click here to add the coverages to the **Your Coverage Codes** box.
4. **Remove Button**. Once you have selected the coverage or coverages from the **Your Coverage Codes** box that you want to remove from your custom list, click here to remove the coverages.

## Your Coverage Codes

### Creating Your List (continued)

5. **Your Coverage Codes**. This box shows your progress as you add coverages to (or remove coverages from) your list. The changes to your list will not be saved until you click on the ***SUBMIT*** button.
6. **SUBMIT Button**. Click here when you are done creating your list to save your changes.
7. **Back to List**. Click here to exit without making any changes.

# Your Coverage Codes

## Adding/Removing Coverages from Your List

To add or remove coverage codes from your custom list, click on **Your Coverage Codes** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:

The screenshot shows the 'Your Coverage Codes' page in the efile system. The page title is 'Your Coverage Codes' and it includes links for 'Export to Excel', 'Export to XML', and 'Export to CSV'. A blue button labeled 'Add and Remove Records' is highlighted with a mouse cursor. Below this is a table with the following data:

Coverage Codes	Last Update	Last Update By
Property (including excess)   Fire	4/25/2007 2:49:00 PM	j.public@YourCo.com
Difference In Conditions   All	4/25/2007 2:48:00 PM	j.public@YourCo.com
Multiple Peril   Commercial (SMP)	4/25/2007 2:49:00 PM	j.public@YourCo.com
Multiple Peril   Multiple Line	4/25/2007 2:49:00 PM	j.public@YourCo.com
All Risk   All	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   Jewelers & Furriers Block; All Floaters	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   All Others	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   Watercraft	4/25/2007 2:48:00 PM	j.public@YourCo.com
Professional Errors & Omissions   D & O	4/25/2007 2:49:00 PM	j.public@YourCo.com
Liability General (BI & PD)   CGL	4/25/2007 2:48:00 PM	j.public@YourCo.com
Liability General (BI & PD)   Excess Liability	4/25/2007 2:48:00 PM	j.public@YourCo.com
Liability General (BI & PD)   Miscellaneous Liability	4/25/2007 2:48:00 PM	j.public@YourCo.com

At the bottom of the table, it says 'COUNT: 12'. Below the table is a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'. The page also features a 'VeriSign Secured' logo and a 'Logout' link in the navigation menu.

# Your Coverage Codes

## Adding/Removing Coverages from Your List (continued)

After clicking **Add and Remove Records**, you will see the screen below:

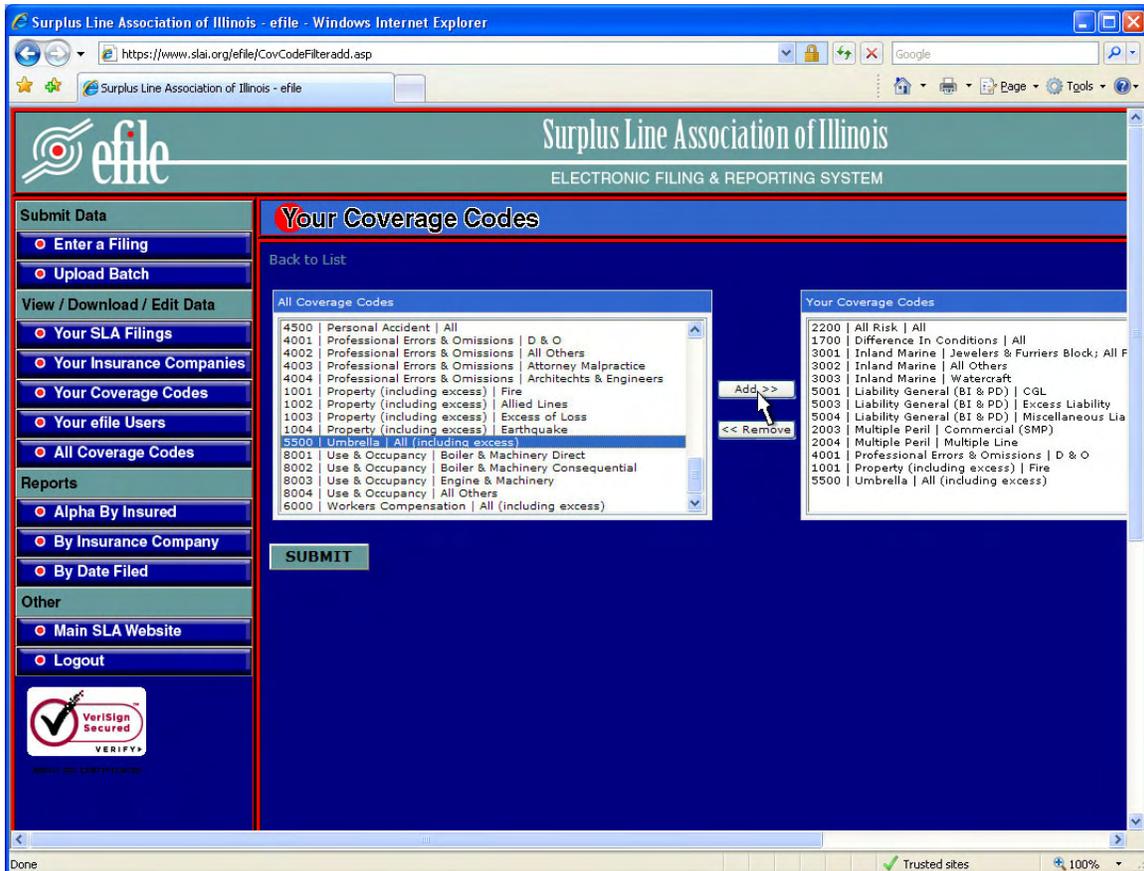
The screenshot displays the 'Your Coverage Codes' page in the efile system. The page is divided into several sections:

- Navigation Menu (Left):** Includes options for 'Submit Data' (Enter a Filing, Upload Batch), 'View / Download / Edit Data' (Your SLA Filings, Your Insurance Companies, Your Coverage Codes, Your efile Users, All Coverage Codes), 'Reports' (Alpha By Insured, By Insurance Company, By Date Filed), and 'Other' (Main SLA Website, Logout).
- Header:** 'Surplus Line Association of Illinois' and 'ELECTRONIC FILING & REPORTING SYSTEM'.
- Main Content:**
  - Back to List:** A link to return to the main list.
  - All Coverage Codes:** A list of codes and descriptions, including: 2200 All Risk | All; 7501 Auto Liability | Private Passenger; 7502 Auto Liability | Commercial; 7503 Auto Liability | Taxicabs; 7504 Auto Liability | Rentals; 7505 Auto Liability | All Others; 7701 Auto Physical Damage | Private; 7702 Auto Physical Damage | Commercial; 3200 Aviation | All; 7101 Crime | Burglary & Robbery; 7102 Crime | Kidnap & Ransom; 7103 Crime | All Others; 1500 Crop Hail | All; 1700 Difference In Conditions | All; 7001 Fidelity and Surety | Fidelity and/or Forgery, Ban.
  - Your Coverage Codes:** A list of codes and descriptions, including: 2200 All Risk | All; 1700 Difference In Conditions | All; 3001 Inland Marine | Jewelers & Furriers Block; All F; 3002 Inland Marine | All Others; 3003 Inland Marine | Watercraft; 5001 Liability General (BI & PD) | CGL; 5003 Liability General (BI & PD) | Excess Liability; 5004 Liability General (BI & PD) | Miscellaneous Lia; 2003 Multiple Peril | Commercial (SMP); 2004 Multiple Peril | Multiple Line; 4001 Professional Errors & Omissions | D & O; 1001 Property (including excess) | Fire.
  - Buttons:** 'Add >>' and '<< Remove' buttons are positioned between the two lists. A 'SUBMIT' button is located below the 'All Coverage Codes' list.

# Your Coverage Codes

## Adding/Removing Coverages from Your List (continued)

To add a coverage to your list, scroll through the **All Coverage Codes** box to the coverage you want to add. Click on that coverage (selected coverages will be highlighted in blue) and then click the **Add** button.

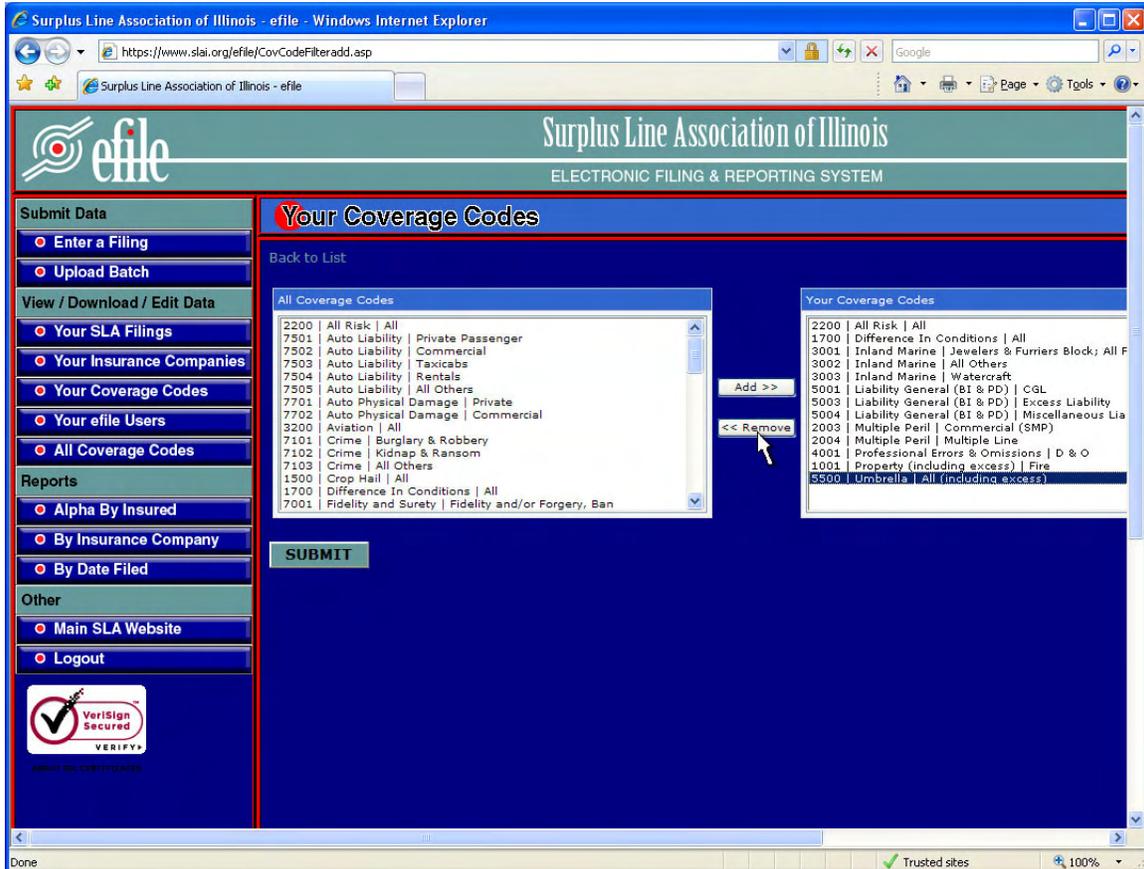


After clicking **Add**, click the **SUBMIT** button and your change will be saved.

# Your Coverage Codes

## Adding/Removing Coverages from Your List (continued)

To remove a coverage from your list, scroll through the **Your Coverage Codes** box to the coverage you want to remove. Click on that coverage (selected coverages will be highlighted in blue) and then click the **Remove** button.



After clicking **Remove**, click the **SUBMIT** button and your change will be saved.

# Your Coverage Codes

## Completely Removing Your List

To completely remove your custom list from the system, click on **Your Insurance Companies** in the Navigation Bar on the left side of the screen, then on the **Add and Remove Records** link on the screen:

The screenshot shows the 'Your Coverage Codes' page in the efile system. The left navigation bar includes sections for 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The 'View / Download / Edit Data' section has 'Your Insurance Companies' selected. The main content area shows a table of coverage codes with columns for 'Coverage Codes', 'Last Update', and 'Last Update By'. A blue button labeled 'Add and Remove Records' is positioned above the table. Below the table, there is a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'.

Coverage Codes	Last Update	Last Update By
Property (including excess)   Fire	4/25/2007 2:49:00 PM	j.public@YourCo.com
Difference In Conditions   All	4/25/2007 2:48:00 PM	j.public@YourCo.com
Multiple Peril   Commercial (SMP)	4/25/2007 2:49:00 PM	j.public@YourCo.com
Multiple Peril   Multiple Line	4/25/2007 2:49:00 PM	j.public@YourCo.com
All Risk   All	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   Jewelers & Furriers Block; All Floaters	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   All Others	4/25/2007 2:48:00 PM	j.public@YourCo.com
Inland Marine   Watercraft	4/25/2007 2:48:00 PM	j.public@YourCo.com
Professional Errors & Omissions   D & O	4/25/2007 2:49:00 PM	j.public@YourCo.com
Liability General (BI & PD)   CGL	4/25/2007 2:48:00 PM	j.public@YourCo.com
Liability General (BI & PD)   Excess Liability	4/25/2007 2:48:00 PM	j.public@YourCo.com
Liability General (BI & PD)   Miscellaneous Liability	4/25/2007 2:48:00 PM	j.public@YourCo.com

COUNT: 12

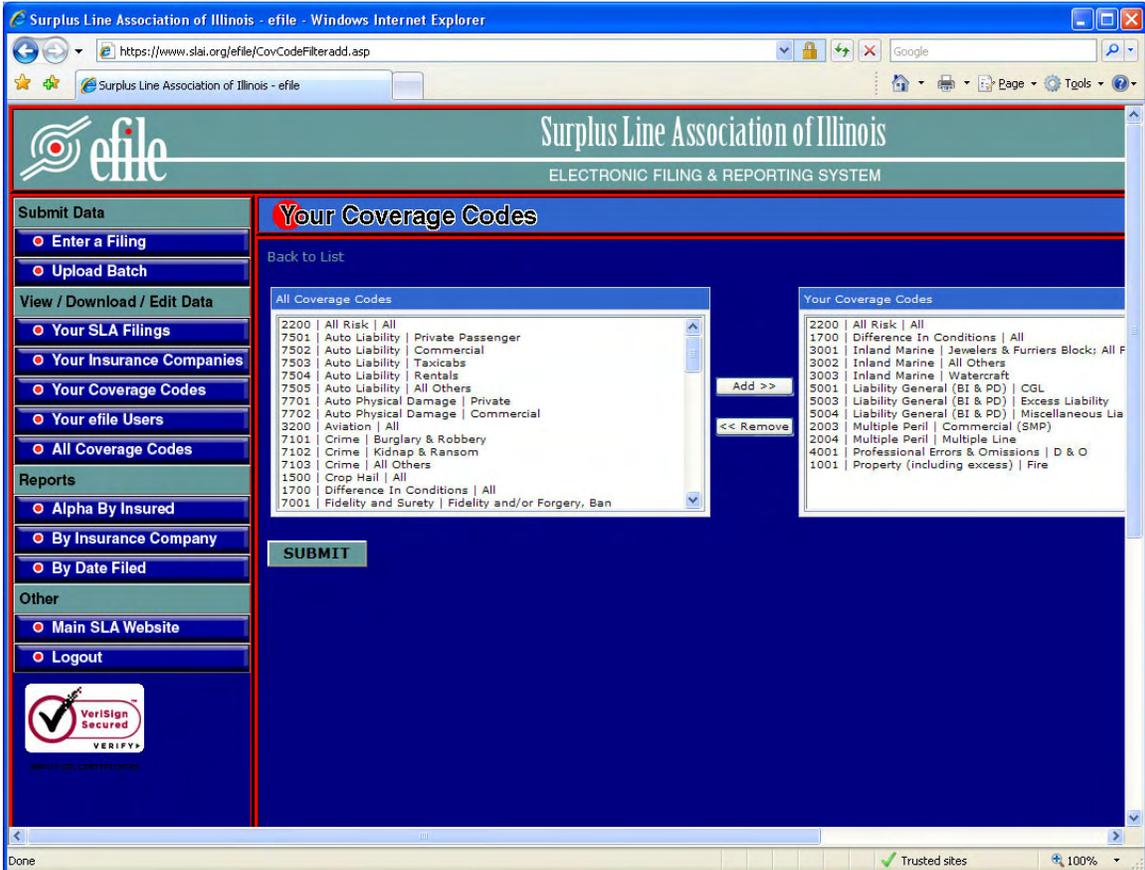
Page 1 of 1 Records Per Page 25

Records 1 to 12 of 12

# Your Coverage Codes

## Completely Removing Your List (continued)

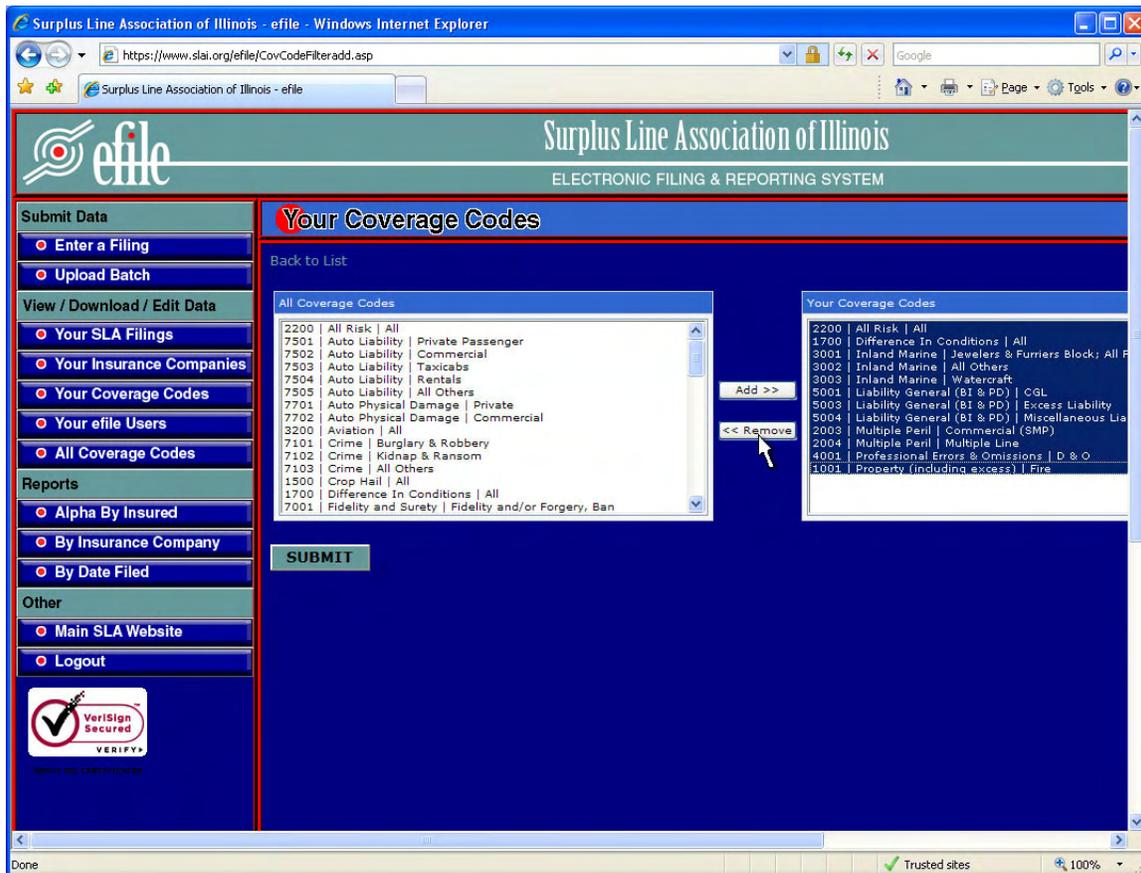
After clicking **Add and Remove Records**, you will see the screen below:



# Your Coverage Codes

## Completely Removing Your List (continued)

To select all of the coverages on your custom list, first click on the first coverage in the **Your Coverage Codes** box. Then, hold down the SHIFT key on your keyboard and click on the last coverage in the box or, with the SHIFT key held down, repeatedly press the down-arrow key until all coverages are selected (highlighted in blue). Then click the **Remove** button to remove the coverages from your list.



After clicking **Remove**, click the **SUBMIT** button and your custom list will be gone.

## Sorting Displayed Records

Any table of displayed records (in a column/row format) can be sorted by clicking on the column title. You cannot change the sorting of drop down boxes or lists.

Initially clicking on the column title will sort the records in ascending order by the values in that column. The column title will show an Ascending Sort icon (▲) next to the title text. A second click on the column title will change the sort to descending order and a Descending Sort icon (▼) will display next to the title text.

*Example.* Clicking once on the **Last Name** column title will sort the records on the **Your efile Users** screen by Last Name:

The screenshot shows the 'Your efile Users' screen in a web browser. The page title is 'Surplus Line Association of Illinois - efile'. The URL is 'https://www.slai.org/efile/WebUserlist.asp?order=LName'. The page features a navigation menu on the left with options like 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a table of users with the following columns: Login (\*), First Name (\*), Last Name (\*), Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. The 'Last Name' column is sorted in ascending order, as indicated by the upward-pointing triangle icon next to the column header. The table contains 6 records, with the last record being John Public, who logged in on 4/25/2007 at 3:58:00 PM. The interface includes a search bar, navigation menus, and a footer with a VeriSign Secured logo.

Login (*)	First Name (*)	Last Name (*)▲	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
b.adams@YourCo.com	Bill	Adams	No	Yes	No	Yes	No		View	Edit	Delete
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	No	No		View	Edit	Delete
e.echo@YourCo.com	Edward	Echo	No	Yes	No	No	No		View	Edit	Delete
f.foxtrot@YourCo.com	Francine	Foxtrot	No	No	No	Yes	No		View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 3:58:00 PM	View	Edit	Delete

COUNT: 6

Page 1 of 1 Records Per Page 25

Records 1 to 6 of 6

## Sorting Displayed Records

You can sort by more than one column by clicking on the title of the first column you want to sort by, then holding down the CTRL key on your keyboard and clicking on additional column titles. The screen may go completely blank for a moment while the system resorts the records. This is completely normal.

*Example:* Clicking initially on the **Last Name** column title will sort the records by Last Name. Then, holding down the CTRL key and clicking on the **Reporting** column title redisplay the records sorted first by Last Name, then by Reporting permission. Since **No** sorts before **Yes**, Kathy Adams is now shown before Bill Adams. Note that the Ascending Sort icon (▲) is now shown next to the title text in both column titles.

The screenshot shows the 'Your efile Users' page in a web browser. The page title is 'Surplus Line Association of Illinois - efile - Windows Internet Explorer'. The URL is 'https://www.slai.org/efile/WebUserlist.asp?order=Reporting&ctrl=1'. The page features a navigation menu on the left with options like 'Submit Data', 'View / Download / Edit Data', 'Reports', and 'Other'. The main content area displays a table of users with columns for Login, First Name, Last Name, Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. The table is sorted by Last Name and Reporting permission. Below the table, there is a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'.

Login (*)	First Name (*)	Last Name (*)▲	Account Maintenance	Data Entry	Bulk Entry	Reporting▲	User Locked Out	Last Login			
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete
b.adams@YourCo.com	Bill	Adams	No	Yes	No	Yes	No		View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	No	No		View	Edit	Delete
e.echo@YourCo.com	Edward	Echo	No	Yes	No	No	No		View	Edit	Delete
f.foxtrot@YourCo.com	Francine	Foxtrot	No	No	No	Yes	No		View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 3:58:00 PM	View	Edit	Delete
COUNT: 6											

Page 1 of 1 Records Per Page 25  
Records 1 to 6 of 6

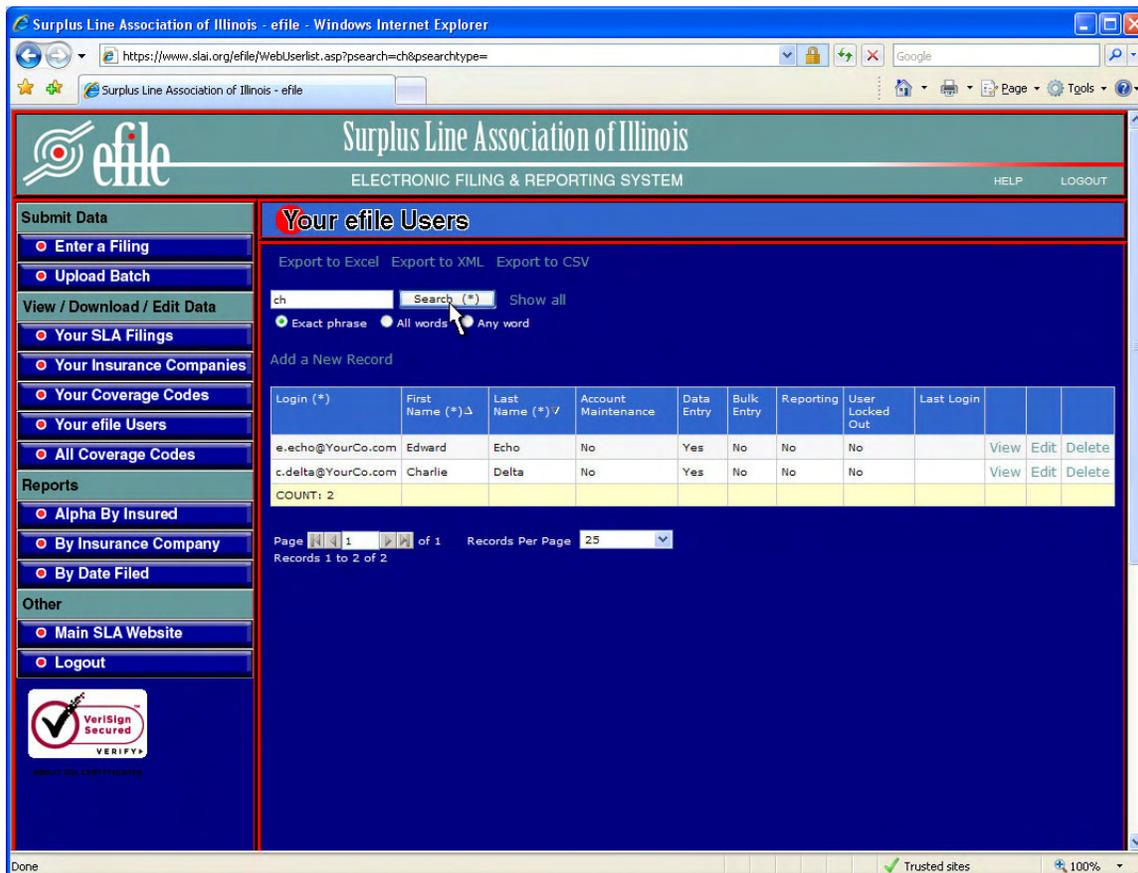
## Using the Search Controls

Most screens that display a table of records (in column/row format) also have a **Search** box and button at the top. When you see a **Search** box and button at the top of the screen, you will be able to enter criteria to search for, and the system will return the records that match the criteria you entered. There are two types of searches – Simple and Advanced.

### Simple Search

To do a Simple Search, use the Search Box at the top of any screen that displays it. The **Search** button is labeled with the word **Search**, plus an asterisk (\*). This is to remind you that a simple search will search only the columns in the table where the column title text is also followed by an asterisk. Multiple words typed into the Search Box should be separated by spaces (do not use commas or other punctuation).

*Example:* Because only the **Login(\*)**, **First Name(\*)** and **Last Name(\*)** column titles have asterisks next to their column title texts, when doing a simple search on the **Your efile Users** screen, the system will look through those three fields for the characters you enter in the Search Box. In this example, we've entered the characters "ch" in the Search Box. The system returns the two records shown below because there is a "ch" in *Echo* and a "ch" in *Charlie*.



The screenshot shows the 'Your efile Users' screen in a web browser. The search box contains 'ch' and the search button is labeled 'Search (\*)'. The search results table is as follows:

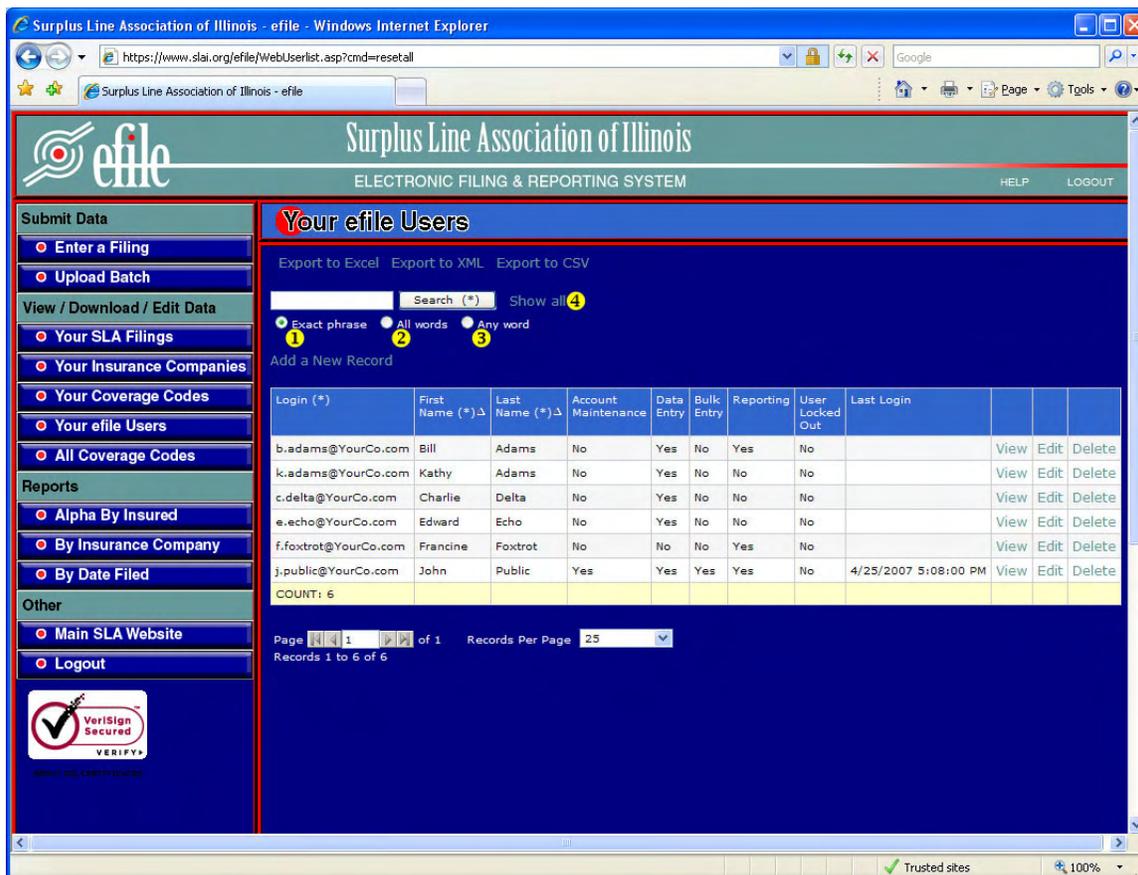
Login (*)	First Name (*)	Last Name (*) /	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login				
e.echo@YourCo.com	Edward	Echo	No	Yes	No	No	No			View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	No	No			View	Edit	Delete

Below the table, it says 'COUNT: 2'. The page navigation shows 'Page 1 of 1' and 'Records Per Page 25'. The status bar at the bottom indicates 'Trusted sites' and '100%' zoom.

## Using the Search Controls

### Simple Search Options

Beneath the Search Box and Search Button are three search choices. Also, there is a *Show All* link to the right of the Search Button.



The screenshot shows the 'Your efile Users' page in the efile system. The search controls include a search box, a 'Search (\*)' button, and a 'Show all 4' link. Below the search box are three radio buttons: 'Exact phrase' (labeled 1), 'All words' (labeled 2), and 'Any word' (labeled 3). The table below shows the results of a search, with columns for Login, First Name, Last Name, Account Maintenance, Data Entry, Bulk Entry, Reporting, User Locked Out, and Last Login. The table contains 6 records, and the 'COUNT: 6' is displayed below the table. The page also includes a navigation menu on the left and a VeriSign Secured logo at the bottom.

Login (*)	First Name (*)	Last Name (*)	Account Maintenance	Data Entry	Bulk Entry	Reporting	User Locked Out	Last Login			
b.adams@YourCo.com	Bill	Adams	No	Yes	No	Yes	No		View	Edit	Delete
k.adams@YourCo.com	Kathy	Adams	No	Yes	No	No	No		View	Edit	Delete
c.delta@YourCo.com	Charlie	Delta	No	Yes	No	No	No		View	Edit	Delete
e.echo@YourCo.com	Edward	Echo	No	Yes	No	No	No		View	Edit	Delete
f.foxtrot@YourCo.com	Francine	Foxtrot	No	No	No	Yes	No		View	Edit	Delete
j.public@YourCo.com	John	Public	Yes	Yes	Yes	Yes	No	4/25/2007 5:08:00 PM	View	Edit	Delete

1. **Exact phrase.** This choice is the default. The system will try to find matches for the exact phrase you typed into the Search Box in any of the searchable fields of the table (those fields marked with an asterisk).
2. **All words.** The system will only return records that contain all of the words typed in the Search Box. Remember, multiple words typed in the Search Box should be separated by spaces (do not use commas or other punctuation).
3. **Any word.** The system will return every record that contains any of the words typed in the Search Box. Remember, multiple words typed in the Search Box should be separated by spaces (do not use commas or other punctuation).
4. **Show All.** Clicking *Show All* will remove any filter that was applied to the table (by doing a search) and revert to showing all the records again.

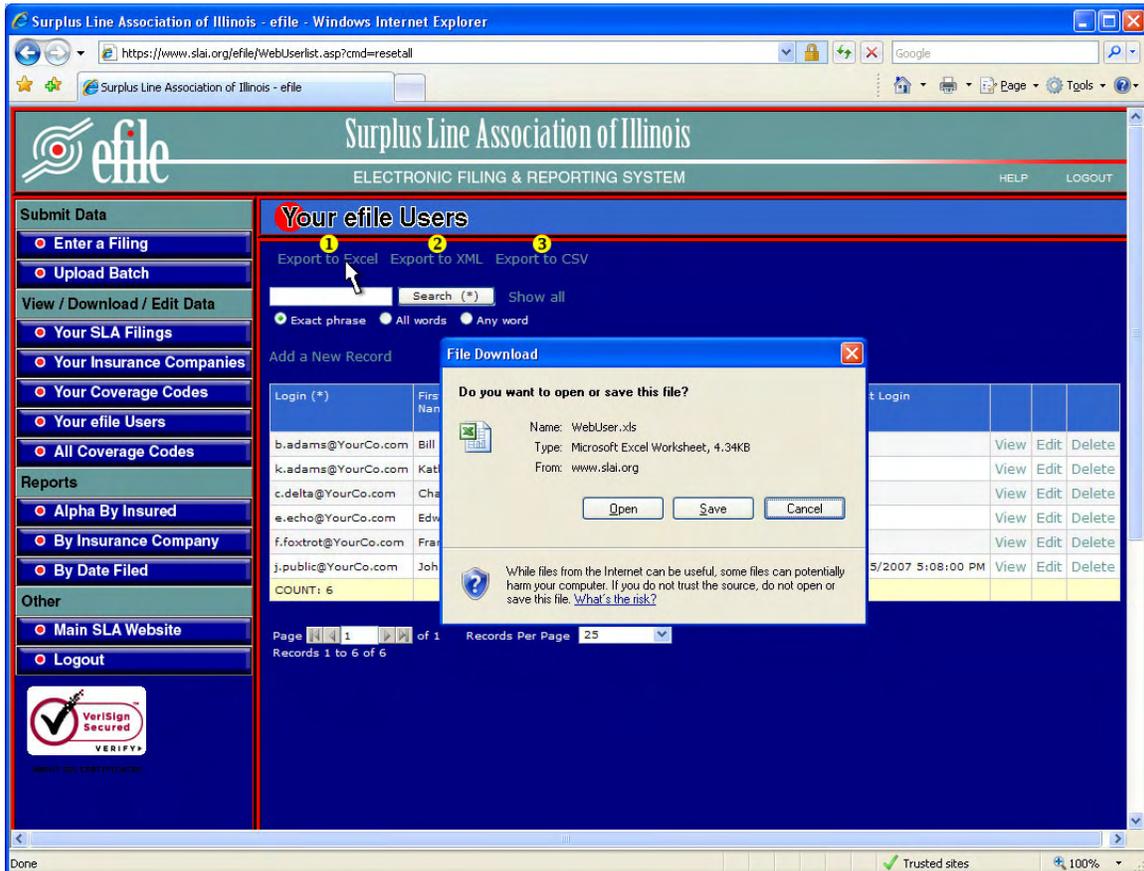
## Using the Search Controls

### Advanced Search

There are no advanced search capabilities on the administrator screens (only on the ***Your SLA Filings*** screen). For an explanation of the advanced search capabilities of the ***Your SLA Filings*** screen, see the regular **EFS User Manual**.

## Using the Export Controls

Most screens that display a table of records (in column/row format) also have Export Links at the top. When you see Export Links at the top of the screen, you will be able to export the records from that table and save them in a file on your local computer as described below.



1. **Export to Excel.** Click on this link to export the records in a Microsoft Excel file-format. You will be given the option to either open or save the exported file.
2. **Export to XML.** Click on this link to export the records in an XML (eXtended Markup Language) file-format. You will be given the option to either open or save the exported file.
3. **Export to CSV.** Click on this link to export the records in a CSV (Comma Separated Values) file-format. You will be given the option to either open or save the exported file.