



Electronic Filing & Reporting System

EFS User Manual



Surplus Line Association of Illinois

ELECTRONIC FILING & REPORTING SYSTEM

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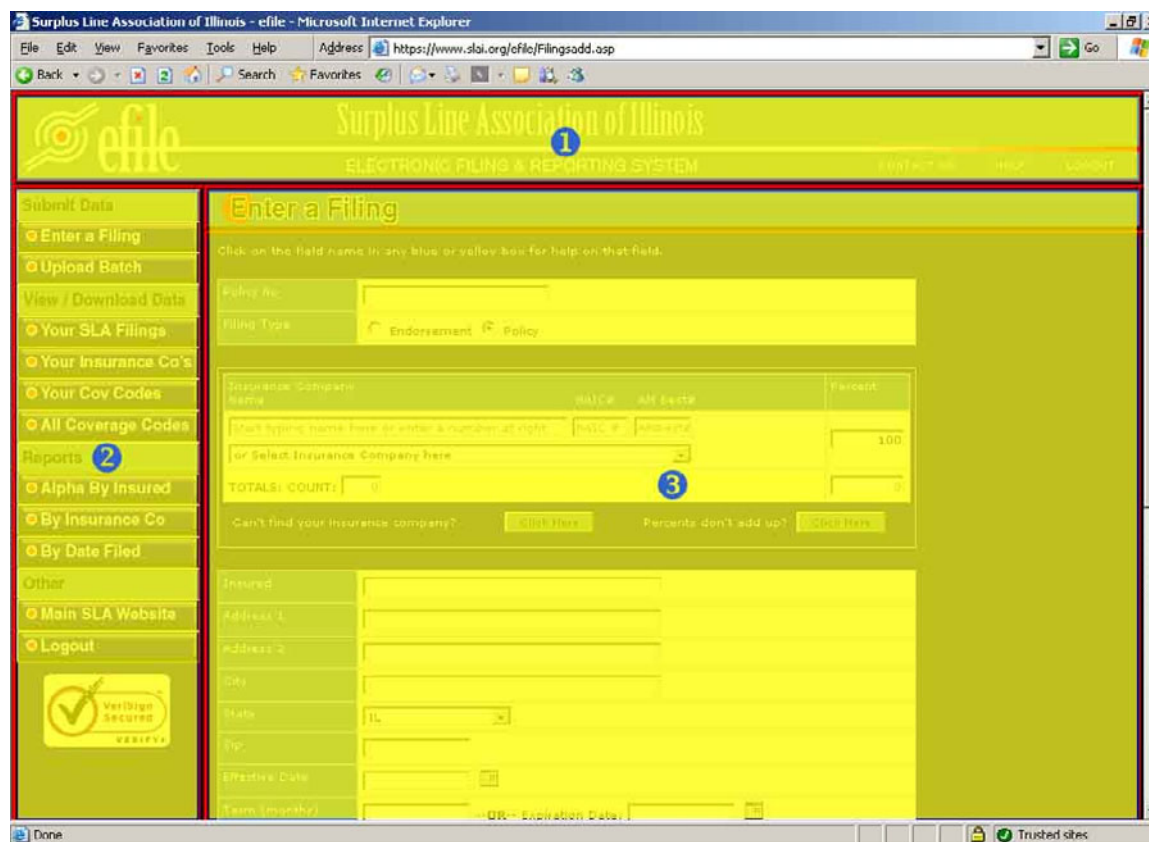
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Screen Overview

The Electronic Filing System screen is divided into three basic sections:



1. **Title Bar.** Contains three important links at the far right:

Contact Us. Click here to send an email to our EFS Help Desk.

Help. Each task in the system has its own custom Help screen. Click here to see the Help screen for task you are working on.

Logout. Click here to log out of the EFS.

The EFS is optimized for Microsoft Internet Explorer, version 6 or later. Some graphics in the Title Bar might not display or align properly in other browsers. If you are not using MS Internet Explorer and the Title Bar graphics look wildly out of whack, try refreshing your screen (F5 in most browsers).

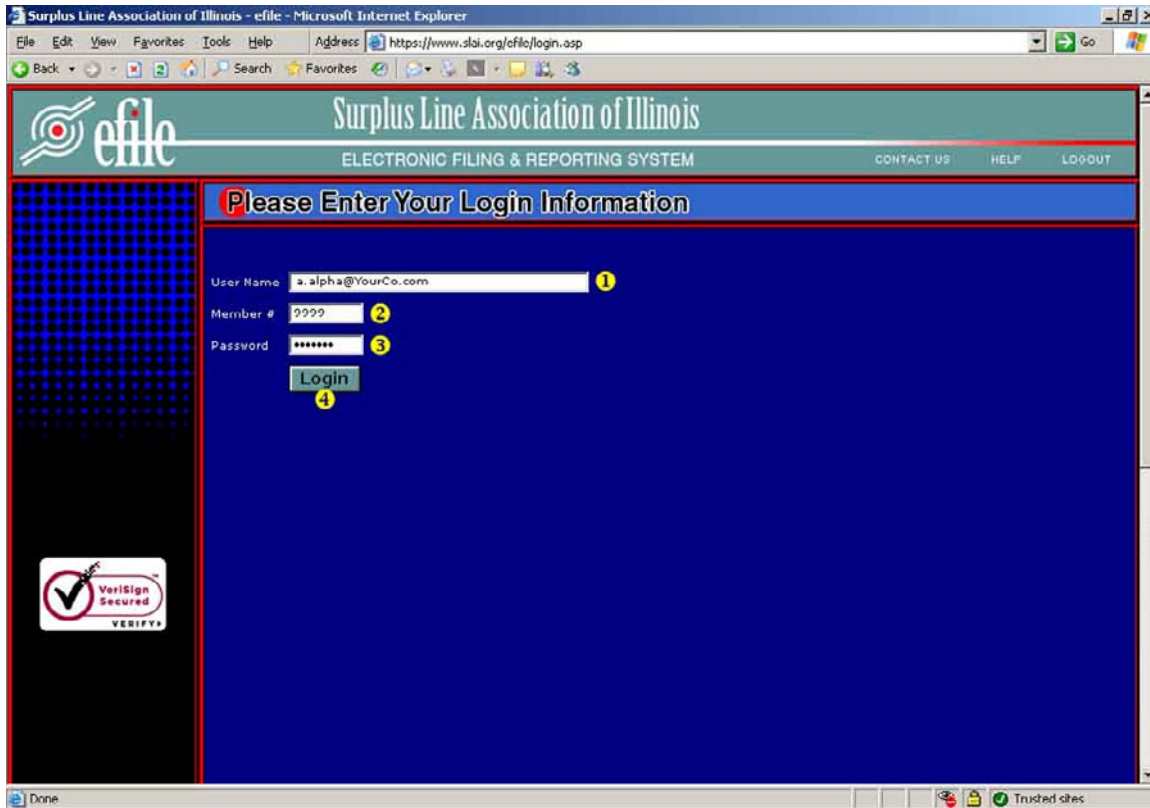
Screen Overview (continued)

2. **Navigation Bar**. Use this section to navigate the site and choose the task you want to perform. The ***Navigation Bar*** is divided into five sections (*not all of the sections/buttons may display for you depending on the permissions your EFS Account Administrator assigned to you*):

 - Submit Data***. Links for submitting data.
 - View/Download Data***. Links for viewing and downloading data. Administrators can also edit some data on these screens.
 - Reports***. Links to pre-defined PDF reports
 - Other***. Other links.
 - Verisign Certificate***. Confirms that you are *really* connected to the SLA and that your connection is secure. Click on the graphic for confirmation and more information.
3. **Work Area**. This is the area where you will view and enter data.

Log In

The Log In Screen is the first screen you'll see each time you connect to the EFS. It also will reappear if your session times out due to inactivity.



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 assigned to you by the EFS Account Administrator in your office.
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.

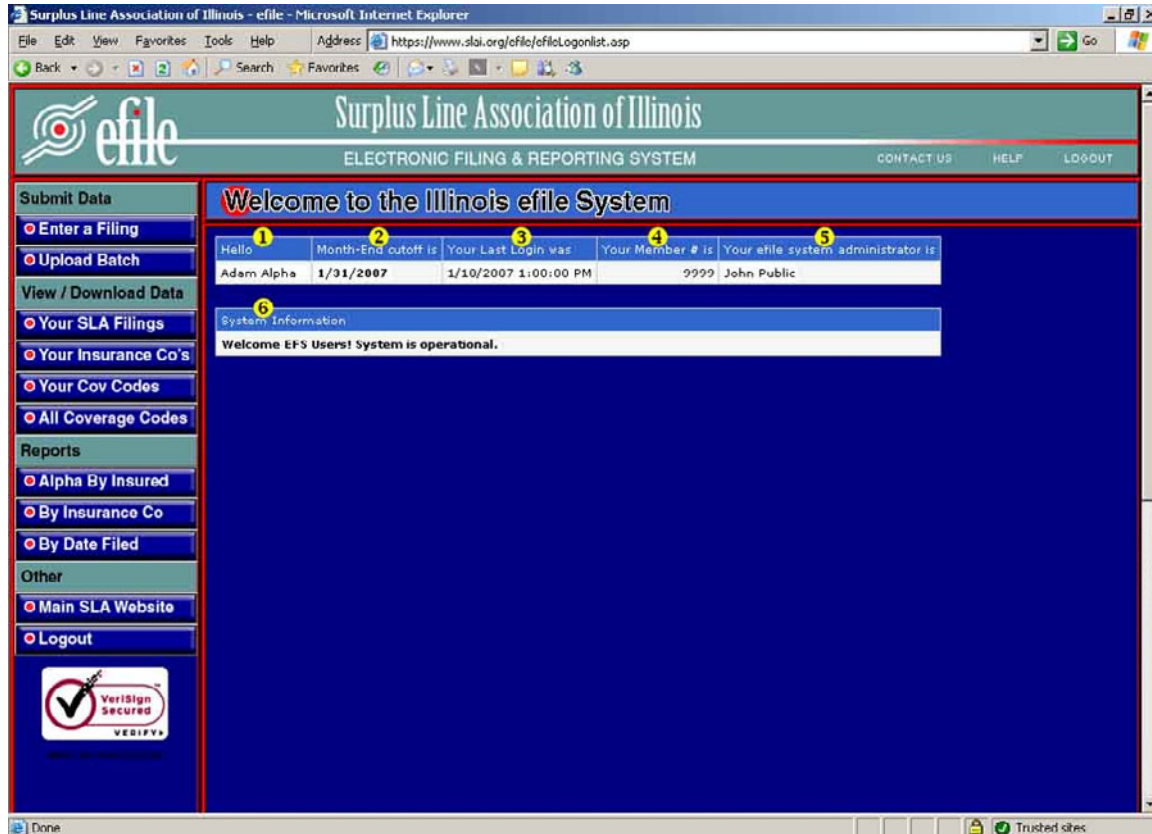
Passwords / Forgotten Passwords

If you forget your password, contact your EFS Account Administrator to reassign your password. In general, you should try to avoid short, simple passwords, or passwords that others can readily guess.

Log In

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. Typically, Month-End cutoff will occur at 4:30pm, central time, on the date shown – which is generally the last calendar day of the month. Occasionally, however, it may be a different day – 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**. Your SLA member number.
5. **Your System Administrator**. This is the EFS Account Administrator at your company. Contact this person to change/reset your password, assign you different permissions on the EFS, bring you your morning muffin, schedule your daily chair massage or to get the keys to your company Lexus. They also maintain your custom insurance companies list (***Your Insurance Co's***) and custom coverage codes list (***Your Cov Codes***).

Log In

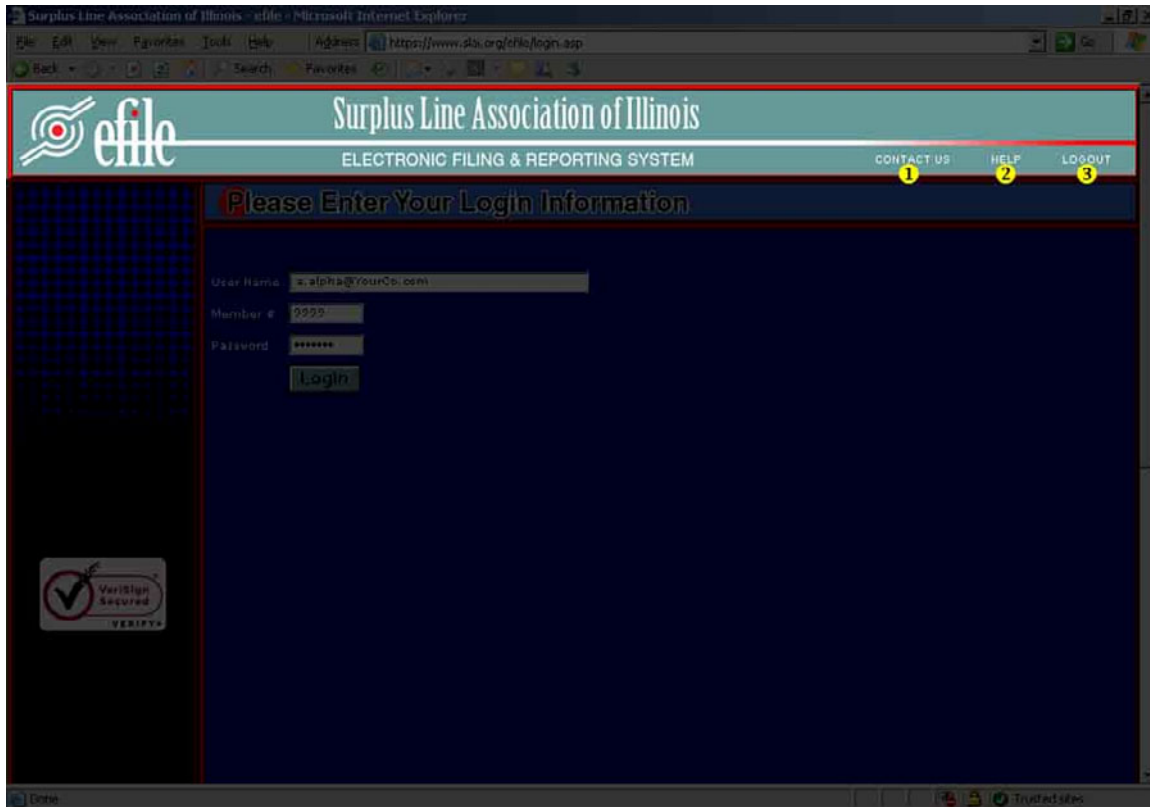
Welcome Screen (continued)

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*” or “*Help...we’ve run out of coffee*”).

Navigate the EFS

Title Bar

The **Title Bar** displays at the top of every screen.



It contains three important links at the far right:

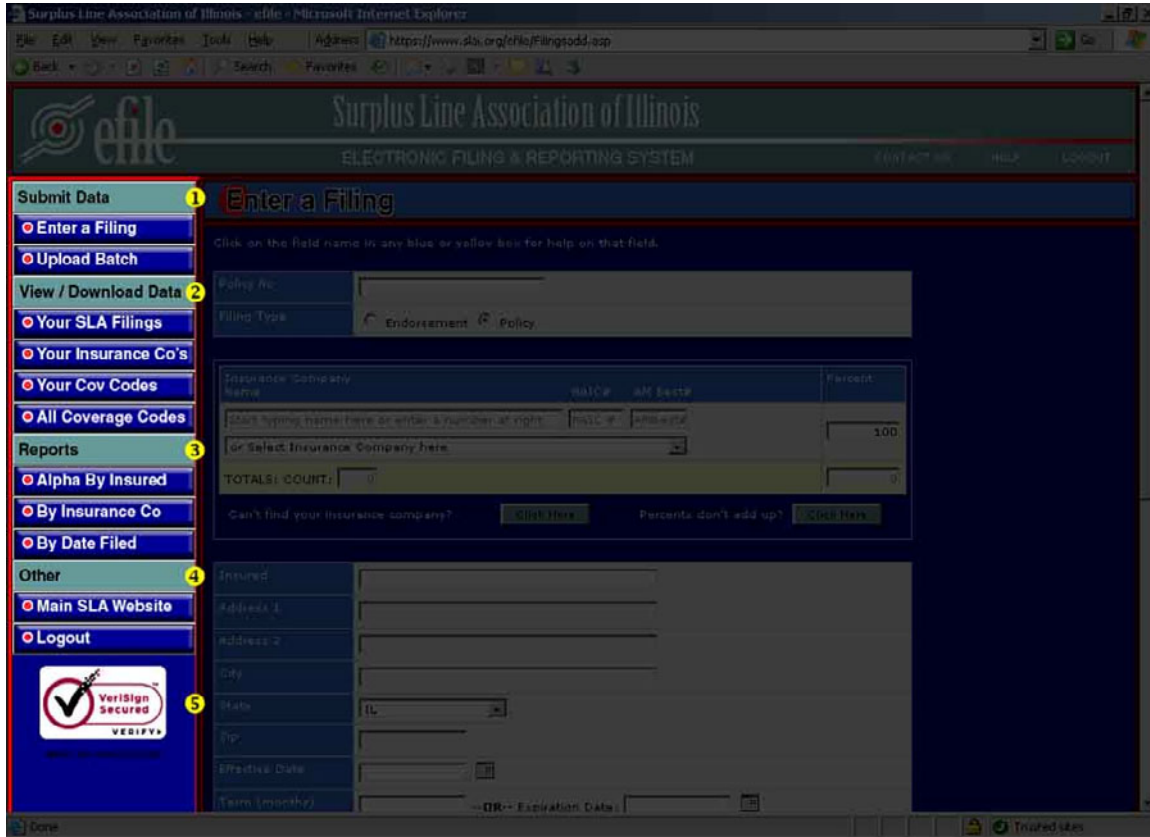
1. **Contact Us**. Click here to send an email to our EFS Help Desk.
2. **Help**. Each task in the system has its own custom Help screen. Click here to see the Help screen for task you are working on.
3. **Logout**. Click here to log out of the EFS.

The EFS is optimized for Microsoft Internet Explorer, version 6 or later. Some graphics in the Title Bar might not display or align properly in other browsers. If you are not using MS Internet Explorer and the **Title Bar** graphics look wildly out of whack, try refreshing your screen (F5 in most browsers).

Navigate the EFS

Navigation Bar

The **Navigation Bar** displays at the left side of every screen. Use it to navigate the site and choose the task you want to perform. The **Navigation Bar** is divided into five sections (*not all of the sections/buttons may display for you depending on the permissions your EFS Account Administrator assigned to you*):



1. **Submit Data**. Links for submitting data.

Enter a Filing. Click here to navigate to the screen that lets you input a new filing into the EFS.

Upload Batch. Click here to navigate to the screen that lets you make filings by uploading a batch of data that has been extracted from your computer system.

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 will be available to users Q3 or Q4 of 2007.

Navigate the EFS

Navigation Bar (continued)

2. **View/Download Data**. Links for viewing and downloading data.

Your SLA Filings. Displays filings made with the SLA (whether electronically or on paper) for the current year and the prior two years. The list is searchable, sortable and downloadable in several formats. From this list you can perform the ***Auto-Renew*** and ***Auto-Endorse*** functions that drastically cut down on data entry when renewing or endorsing a policy.

Your Insurance Co's. Displays your custom list of insurers that are available to users making a filing. Your EFS Account Administrator can create and edit this list. If no list has been created, you will see a message that says "No Records Found."

Your Cov Codes. Displays your custom list of coverage codes that are available to users making a filing. Your EFS Account Administrator can create and edit this list. If no list has been created, you will see a message that says "No Records Found."

All Coverage Codes. Displays the complete list of SLA coverage codes for your reference. Not all of these codes may be available to you when making a filing if your EFS Account Administrator has created a custom ***Your Cov Codes*** list.

3. **Reports**. Links to pre-defined PDF reports

Alpha by Insured. Prints a PDF report of filings for a selected period. The report is sorted alphabetically by insured name.

By Insurance Co. Prints a PDF report of filings for a selected period. The report is grouped and sorted alphabetically by insurance company with subtotals for each insurer.

By Date Filed. Prints a PDF report of filings for a selected period. The report is grouped and sorted by filing month with subtotals for each period. These subtotals should tie out to your Monthly Activity Report and to the numbers reported on your licensee's semi-annual tax reports.

4. **Other**. Other links.

Main SLA Website. Takes you to the main SLA website.

Logout. Log out of the EFS.

5. **Verisign Certificate**. Confirms that you are *really* connected to the SLA and that your connection is secure. Click on the graphic for confirmation and more information.

Submit Data

If you are entering a completely new policy, you should start directly with the ***Enter a Filing*** screen. This screen allows you to input all of the data necessary to make an electronic filing with the Association. If you are renewing or endorsing an existing policy, be sure to check out the time saving ***Auto-Renew*** and ***Auto-Endorse*** features which are available from the ***Your SLA Filings*** screen. These functions will populate the ***Enter a Filing*** screen with most of the data you need, based on previous filings for the selected policy, requiring you to fill in just a few fields.

Submit Data

Enter a Filing

The *Enter a Filing* screen is shown below:

Surplus Line Association of Illinois - efile - Microsoft Internet Explorer
Address: <https://www.slai.org/etest/Filesadd.asp>

efile Surplus Line Association of Illinois
ELECTRONIC FILING & REPORTING SYSTEM CONTACT US HELP LOGOUT

Submit Data

- Enter a Filing
- Upload Batch
- View / Download Data
- Your SLA Filings
- Your Insurance Co's
- Your Cov Codes
- All Coverage Codes

Reports

- Alpha By Insured
- By Insurance Co
- By Date Filed

Other

- Main SLA Website
- Logout

VeriSign Secured
VERIFY

Enter a Filing

Click on the field name in any blue or yellow box for help on that field.

Policy No. **1**

Filing Type **2** Endorsement Policy

Insurance Company Name	NAIC#	AM Best#	Percent
<input type="text" value="Start typing name here or enter a number at right"/> NAIC # <input type="text" value="AMBest#"/>			<input type="text" value="100"/>
or Select Insurance Company here			
TOTALS: COUNT: <input type="text" value="0"/>			<input type="text" value="0"/>

Can't find your insurance company? [Click Here](#) **4** Percents don't add up? [Click Here](#) **5**

Insured **6**

Address 1 **7**

Address 2 **8**

City **9**

State **10**

Zip **11**

Effective Date **12**

Term (months) **13** --OR-- Expiration Date:

Amount of Cover **14**

Coverage Code (CC)	Premium	Fire Mar
CC # Coverage Code Category		shal Tax
<input type="text" value="CC #"/> or Select Coverage Category here	<input type="text"/>	<input type="text"/>
then Select Coverage here		
TOTALS: COUNT: <input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

surplus Line Tax: **16**

Stamping Fee **17**

User Field 1

User Field 2

User Field 3 **18**

User Field 4

SUBMIT **19**

Done Trusted sites

Submit Data

Enter a Filing (continued)

Use the **[TAB]** key to navigate between fields on the **Enter a Filing** screen. If you hit the **[ENTER]** key, it is the same as clicking on the **SUBMIT** button! You can click on any field name to get Help information for that field. If you want to clear the screen and start over, just click on the **Enter a Filing** button on the **Navigation Bar** and the screen will be reloaded with all of the fields blank. The various fields on the screen are described below:

1. **Policy No.** Enter the complete policy number as it appears on the declarations page. You can leave out any space, punctuation and/or symbols. The system will automatically remove any spaces, punctuation and/or symbols you enter and convert all characters to upper case. Be sure to include any prefixes or policy codes. ***It is important to enter the policy number correctly and consistently!*** When you try to enter a return premium endorsement for a policy, the system searches for previous filings under that policy number to ensure that you are not *returning* more premium than you've *filed*.
2. **Filing Type.** Check the button as appropriate. You can only select one. You must make a separate filing for each endorsement not included as part of the policy when issued. For endorsements extending the policy period and renewal certificates, check the "Policy" button and treat it as a new policy.
3. **Insurance Company.**

General Info

It is important that you enter the proper insurance company. Since many names can be similar, be certain the name you pick matches the policy **exactly** (ABC Insurance, Inc. can be a different company than ABC Insurance, Ltd.).

Your system administrator may have limited the list of available insurance companies to only those that your firm uses. This should make your searches much easier.

If you are unable to find your insurance company using one of the methods below, click on the ***Can't find your insurance company? Click Here*** button.

Each time you enter an insurance company, the screen adds a new blank insurance company line, in case you have more than one insurer participating on the risk.

Submit Data

Enter a Filing (continued)

3. Insurance Company (continued).

Name

Start typing the name in the first box and the system will try to “guess” the company you are entering (*The SLA EFS is optimized for Microsoft Internet Explorer version 6 or later. If you are using an alternate browser, this "guessing" feature may not work*). If it is a match, just hit **[TAB]** or click into the next desired field. The system will fill in the NAIC and AM Best numbers for you. Alternatively, you can select the company from the drop down box (just below the type-in field). To open the drop-down box, click on the gray box that has the black, downward-pointing triangle. Companies are listed alphabetically.

NAIC#

If you know the NAIC# of the insurance company listed in the policy, you can enter it here, rather than looking it up alphabetically.

AM Best#

If you know the AM Best# of the insurance company listed in the policy, you can enter it here, rather than looking it up alphabetically.

Percent

Enter the percentage of the risk covered by the insurance company you have selected. If there is only one insurance company on the policy, enter “100”. If the risk is insured by more than one insurance company you must list all insurance companies participating in the policy and the percentage of risk they insure. The total percentage must add up to 100%.

If the percentages in the policy do not add up to 100% (perhaps the risk is not 100% subscribed or an admitted insurance company participated) then click on the ***Percents don't add up? Click Here*** button. The EFS requires that you provide the percentage of participation as it relates to the document you are filing (not as it relates to the entire risk). This button opens a screen that will automatically recalculate your percentages (based on what you've entered) so they show the insurer's percentage of risk for *this filing*. When you click the ***UPDATE*** button on this screen, the recalculated percentages will be dropped into the ***Enter a Filing*** screen.

Submit Data

Enter a Filing (continued)

4. **Can't Find Your Insurance Company? Click Here**. This window lists all insurance companies alphabetically, their NAIC and AM Best numbers and their "status" in our system. From this window you can select the insurance company by clicking **Select** in the column on the right side.

If the company is an active Illinois surplus line company it will be added to the data entry screen. Remember, however, that if your EFS Account Administrator has created a custom **Your Insurance Companies** list, *only the insurance companies on that list* can be selected for data entry. If there is a company that needs to be added to your custom list, contact the EFS Account Administrator at your company.

If the insurance company's status does not allow activity, a message will pop up informing you of the status of the company and why you cannot use it at this time. In some cases, it may be that the insurer has simply never been used in Illinois before. If you believe this to be the case, contact the Help Desk for assistance.

5. **Percents Don't Add Up? Click Here**. The efile system requires that the insurance company percentages add up to 100%. However, in some cases, the percentages in the policy do not add up to 100% (perhaps the risk is not 100% subscribed or an admitted insurance company participated). The EFS requires that you provide the percentage of participation as it relates to the *document you are filing* (not as it relates to the *entire risk*). This button opens a screen that will automatically recalculate your percentages (based on what you've entered) so they show the insurer's percentage of risk for **this filing**. When you click the **UPDATE** button on this screen, the recalculated percentages will be dropped into the **Enter a Filing** screen.
6. **Insured**. Enter the full insured name as listed on declarations page. Include the "Doing Business As" (d/b/a) information, if applicable. Maximum length of this field is 50 characters including spaces.
7. **Address 1**. Insured's address as listed on declarations page including any suite numbers or post office box numbers. Maximum length of this field is 50 characters including spaces. If address does not fit entirely in this field, you can use Address 2 field for any overflow. Report only the address that is listed on the declarations page. It is not necessary to enter the property locations as reported in the schedule of locations, if any.
8. **Address 2**. Field to include any insured's address information contained on the declarations page that does not fit into the Address1 field. Maximum length of this field is 50 characters including spaces.

Submit Data

Enter a Filing (continued)

9. **City.** Insured's city as listed on the declarations page. Maximum length of this field is 50 characters including spaces. As you begin typing, the system will try to "guess" the city name you are entering (*The SLA EFS is optimized for Microsoft Internet Explorer version 6 or later. If you are using an alternate browser, this "guessing" feature may not work*). If the proper name comes up, you can stop typing and hit the **[TAB]** key or click into the next field.
10. **State.** Enter state as listed on the declarations page. The system defaults to Illinois but any state can be selected from the drop down box.
11. **Zip.** Insured's zip code as listed on the declarations page. Zip code can be reported as standard 5 digit or expanded 9 digit code. The system will accept both formats.
12. **Effective Date.** Inception or start date of the policy. You may enter the date in **mmddyyyy** format (without typing slashes or dashes), or you can use the **m/d/yy** or the **m-d-yy** format (typing the slashes or dashes). Alternatively, you can select the date by clicking on the calendar icon to the right of the field.
13. **Term (months) – or – Expiration Date.** Length of the policy period in months. Enter only a one-digit or two-digit number in this field. For example, if the effective date of a policy is 03/01/07 and the term is one year, then enter 12 in this field. If the term of the policy is less than one month, then enter 1 in this field.

Alternatively, you can enter the Expiration Date of the policy in the **Expiration Date** field to the right or select the date by clicking on the calendar icon. The system will then calculate the term and place the calculated value in the **Term (months) Box** (*The SLA EFS is optimized for Microsoft Internet Explorer version 6 or later. If you are using an alternate browser, this calculation feature may not work*).
14. **Amount of Coverage.** Enter the total, aggregate coverage limits of the policy. The coverage limits should be added up for all lines of business that the policy covers and reported as one number in this field (not to exceed the policy aggregate limit). When completing this field, do not enter a dollar sign, use only numbers and commas, if preferred. For example, if a policy has coverage limits for property and liability, then both these limits should be added together and the total reported in this field (not to exceed the policy aggregate limit). The maximum acceptable value for this field is \$2,147,483,647.

Submit Data

Enter a Filing (continued)

15. Coverage Code, Premium / Fire Marshal Tax.

Coverage Code. The coverage code is a unique four digit number that identifies the type of policy coverage. Reporting the correct coverage code for the policy is critical, as it determines the correct amount of fire marshal tax.

There are two different ways to enter the coverage code:

- a. Enter the four digit coverage code in the **CC #** field, if known.
- b. If the code is not known then, from the **Select Coverage Category here** drop down box, select a coverage category. Once the category has been selected, choose a specific coverage from the **then Select Coverage here** drop down box. At this point, the four digit coverage code will appear in the **CC #** field. For example, if you select “Liability General” in the first box, and “Excess” in the second, 5003 will appear in the **CC #** field.

Your system administrator may have limited the list of available coverage codes to only those that your firm uses. This should make your searches much easier. If the list has been limited by your system administrator, you can still review all available coverage codes by clicking on the **All Coverage Codes** button located on the left-hand side of the screen.

Premium. Enter the gross premium in this field, rounded to the nearest whole dollar. **Do not include** in the premium the surplus line tax, stamping fee, fire marshal tax or any other fees such as filing fee, policy fee, broker fee or inspection fee.

Fire Marshal Tax. The efile system automatically calculates the fire marshal tax based on coverage code selected and the premium entered. In most circumstances, the system will not permit the fire marshal tax to be overwritten.

For mutli-peril policies, you can enter the information in one of two ways:

- a. You can select a mutli-peril coverage code which will calculate the 1% fire marshal tax on 40% of the premium entered on that line.
- b. You can enter the coverage code and premium for each line of coverage on the policy. For example, when a policy has both inland marine coverage and general liability coverage, you would enter coverage code 3001 for the inland marine coverage along with the related premium, and then on the next line you would enter coverage code 5001 for the general liability and its related premium. The fire marshal tax would only be calculated on the inland marine premium.

For more information on this topic, see the Fire Marshal Tax Section in the SLA Procedures Manual.

Submit Data

Enter a Filing (continued)

16. **Surplus Line Tax**. The efile system automatically calculates the surplus line tax (the current rate is 3.5% of total gross premium) based on the total premium entered into the system. In most circumstances, the system will not permit the surplus line tax to be overwritten.
17. **Stamping Fee**. The efile system automatically calculates the stamping fee based on the effective date of the policy. The rate is currently 0.1% (one-tenth of one percent) for policies with an effective date of 07/01/06 or later. Other rates apply for policies effective prior to 07/01/06 (and endorsements to these policies). See the Stamping Fee Schedule in the SLA Procedures Manual. In most circumstances, the system will not permit the stamping fee to be overwritten.
18. **User Fields 1 - 4**. These fields are for member's use. The member making the filing can use these fields for any internal information that they want the efile system to capture. The efile system will store this data along with the filing information. When accessing your filing data, these User Fields can be searched, sorted, exported and printed out as needed.
19. **SUBMIT**. Click on this button when you are done entering the required information. If any of the required information is missing or invalid, the system will let you know immediately. Pressing the **[ENTER]** key on the keyboard is the same as clicking on this button.

Upload Batch

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 will be available to users Q3 or Q4 of 2007.

View / Download Data

This section of the EFS contains screens that allow you to allow you to view and download data. There are powerful search capabilities and helpful Auto-Renew and Auto-Endorse functions.

View / Download Data

Your SLA Filings

The **Your SLA Filings** screen lists all filings made with the Association (whether by paper or electronically) from the **current year** and the **prior two years**. It is a powerful search and retrieval tool that not only lets you view and download data but also gives you access to the handy **Auto-Renew** and **Auto-Endorse** features which save time and improve accuracy by automatically filling in most of the **Enter a Filing** screen when you are renewing or endorsing a policy. The **Search Box**, which searches all fields whose column headings have an asterisk (*) as well as some others you can't even see, lets you quickly search for insured names, policy numbers or SLA batch numbers. Once the desired record is located, you can view the detailed record, reprint the stamping confirmation page or use the **Renew** or **Endorse** links to easily make renewal or endorsement filings with minimal data entry required. The **Advanced Search** button gives you access to more complex searches.

View / Download Data

Your SLA Filings (continued)

The *Your SLA Filings* screen is shown below:

Surplus Line Association of Illinois - efile - Microsoft Internet Explorer
 Address: https://www.slai.org/efile/Filingslist.asp?cmd=resetall

efile ELECTRONIC FILING & REPORTING SYSTEM

Your SLA Filings

Export to Excel | Export to XML | Export to CSV

Search (*) | Show all | Advanced Search

Exact phrase | All words | Any word

Add New Filing

Click on any column heading to sort by that field. Ctrl-click on additional columns to subsort by that field.

Policy Id (*)	Batch (*)	Item	Filing Type	Policy Number (*)	Insured (*)	Effective Date	Premium			
IL20070000999			Policy	ABC000999	BETA CO	3/8/2007	11,000	View/Print	Renew	Endorse
IL20070000998			Policy	ABC000998	CHARLIE CO	3/7/2007	12,000	View/Print	Renew	Endorse
IL20070000997			Policy	ABC000997	DELTA CO	3/6/2007	13,000	View/Print	Renew	Endorse
IL20070000996			Policy	ABC000996	ECHO CO	3/5/2007	14,000	View/Print	Renew	Endorse
IL20070000995			Policy	ABC000995	FOXTROT CO	3/4/2007	15,000	View/Print	Renew	Endorse
IL20070000994			Policy	ABC000994	GOLF CO	3/3/2007	16,000	View/Print	Renew	Endorse
IL20070000993			Policy	ABC000993	HOTEL CO	3/2/2007	17,000	View/Print	Renew	Endorse
IL20070000992			Policy	ABC000992	INDIA CO	3/1/2007	18,000	View/Print	Renew	Endorse
IL20070000991			Policy	ABC000991	JULIET CO	2/9/2007	19,000	View/Print	Renew	Endorse
IL20070000990			Policy	ABC000990	KILO CO	2/8/2007	20,000	View/Print	Renew	Endorse
IL20070000989			Policy	ABC000989	LIMA CO	2/7/2007	21,000	View/Print	Renew	Endorse
IL20070000988			Policy	ABC000988	MIKE CO	2/6/2007	22,000	View/Print	Renew	Endorse
IL20070000987			Policy	ABC000987	NOVEMBER CO	2/5/2007	23,000	View/Print	Renew	Endorse
IL20070000986			Policy	ABC000986	OSCAR CO	2/4/2007	24,000	View/Print	Renew	Endorse
IL20070000985			Policy	ABC000985	PAPA CO	2/3/2007	25,000	View/Print	Renew	Endorse
IL20070000984			Policy	ABC000984	QUEBEC CO	2/2/2007	26,000	View/Print	Renew	Endorse
IL20070000983			Policy	ABC000983	ROMEO CO	2/1/2007	27,000	View/Print	Renew	Endorse
IL20070000982			Policy	ABC000982	SIERRA CO	1/9/2007	28,000	View/Print	Renew	Endorse
IL20070000981			Policy	ABC000981	TANGO CO	1/8/2007	29,000	View/Print	Renew	Endorse
IL20070000980			Policy	ABC000980	UNIFORM CO	1/7/2007	30,000	View/Print	Renew	Endorse
IL20070000979			Policy	ABC000979	VICTOR CO	1/6/2007	31,000	View/Print	Renew	Endorse
IL20070000978			Policy	ABC000978	WHISKEY CO	1/5/2007	32,000	View/Print	Renew	Endorse
IL20070000977			Policy	ABC000977	X RAY CO	1/4/2007	33,000	View/Print	Renew	Endorse
IL20070000976			Policy	ABC000976	YANKEE CO	1/3/2007	34,000	View/Print	Renew	Endorse
							TOTAL :	550,000		

COUNT: 25

Page 1 of 33 | Records Per Page 25

Records 1 to 25 of 804

View / Download Data

Your SLA Filings (continued)

The various fields on the **Your SLA Filings** screen are described below:

1. **Policy Id.** This is the unique number that identifies each filing. It is also the “SLA Countersignature #.” A document submitted through the EFS is considered “stamped” once this number is affixed to the declarations page and labeled as the “SLA Countersignature #” (or when the countersignature confirmation page is printed and attached to the policy).
2. **Batch / Item.** These are the SLA-assigned batch numbers and item numbers for filings that have been made on paper.
3. **Filing Type.** Shows whether the filing was a *Policy* or an *Endorsement*.
4. **Policy Number.** Shows the policy number for this filing.
5. **Insured.** Shows the insured’s name for this filing.
6. **Effective Date.** Shows the effective date of the policy or endorsement.
7. **Premium.** Shows the premium for this filing.
8. **View/Print.** You'll notice, as you move your mouse over the list of filings, the line over which your mouse is hovering turns a stunning shade of orange (or is that peach?). In technical parlance, this is called "unnecessary (but pretty cool) stuff that web pages can do." If you click on the **View/Print** link near the right end of the record – or anywhere on the highlighted record (except the **Renew** or **Endorse** links), you will be able to view all the detail for that record. The detail is shown in the same format as the confirmation page you saw when you first entered the filing, so if you've lost your confirmation page, you can then reprint it.
9. **Renew (“Auto-Renew” Function).** Click on the **Endorse** link for the highlighted record to enter an endorsement filing for that policy. The **Enter a Filing** screen will come up, pre-loaded with all of the information you need except the Effective Date and Premium. If any of the pre-loaded data is incorrect or has changed, you can over-type the pre-loaded data.

*If the insurance company or coverage code records do not automatically load into the Enter a Filing screen after clicking this link, it is likely because your EFS Account Administrator has limited the insurance companies or coverage codes available to you by creating a custom list. Click on the **Your Insurance Co's** or **Your Coverage Codes** button on the Navigation Bar to check the list and contact your EFS Account Administrator with questions.*

View / Download Data

Your SLA Filings (continued)

10. **Endorse (“Auto-Endorse” Function)**. Click on the **Renew** link for the highlighted record to enter a renewal filing for that policy. The **Enter a Filing** screen will come up, pre-loaded with all of the information you need except the Policy Number, Effective Date and Premium. If any of the pre-loaded data is incorrect or has changed, you can over-type the pre-loaded data.

*If the insurance company or coverage code records do not automatically load into the Enter a Filing screen after clicking this link, it is likely because your EFS Account Administrator has limited the insurance companies or coverage codes available to you by creating a custom list. Click on the **Your Insurance Co’s** or **Your Coverage Codes** button on the Navigation Bar to check the list and contact your EFS Account Administrator with questions.*

11. **Export**. See the **Using the Export Controls** section of this manual on page 39.
12. **Search**. See the **Using the Search Controls** section of this manual on page 33.
12. **Add New Filing**. This button gives you a quick link back to the **Enter a Filing** screen.
13. **Sorting**. See the **Sorting Displayed Records** section of this manual on page 32.
14. **Pages of Records / Records Per Page**. See the **Pages of Records** section of this manual on page 40.

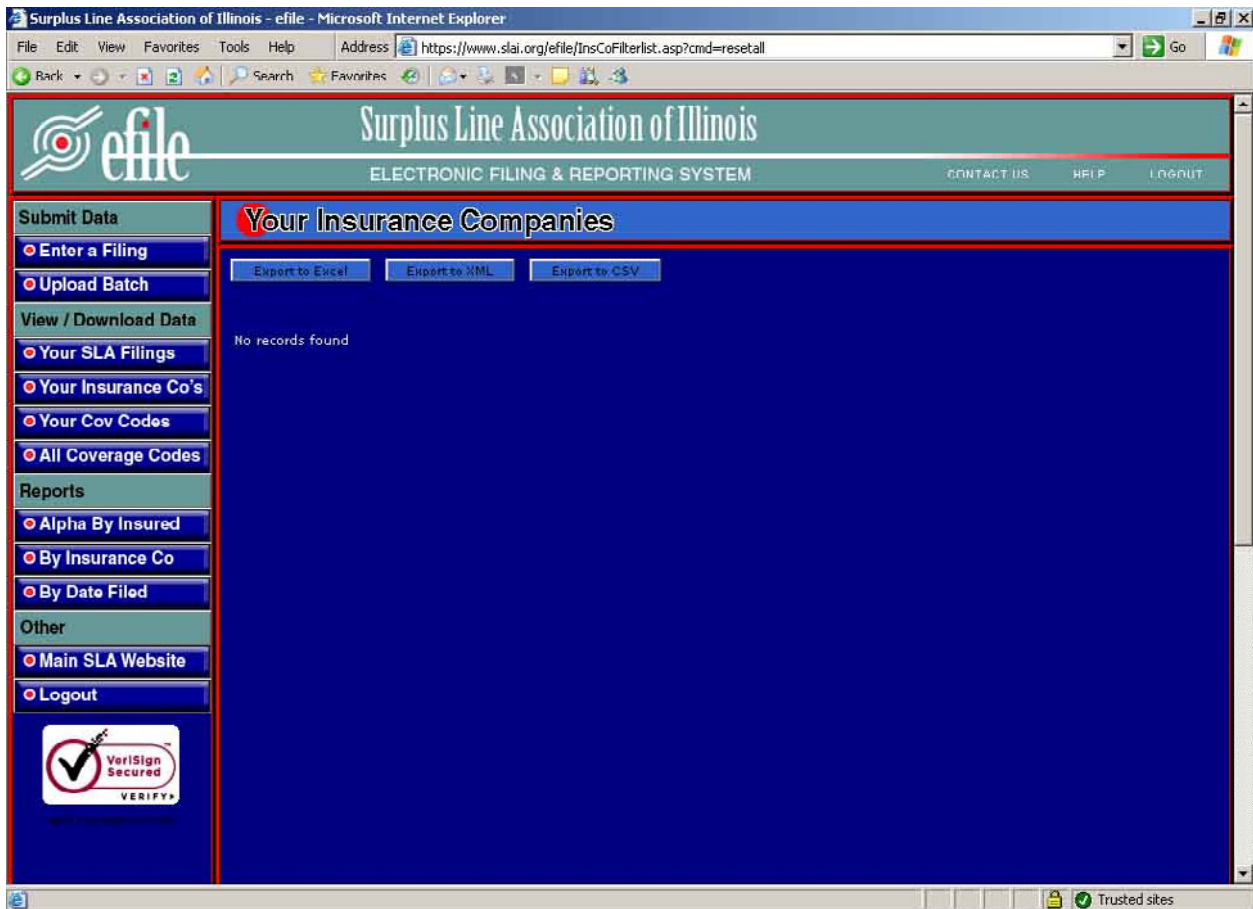
View / Download Data

Your Insurance Companies

The **Your Insurance Co's** screen displays the custom list of insurers that was created by your EFS Account Administrator. If no list has been created, the screen says "No records found." This custom list is used by the **Enter a Filing** screen so that a person entering a filing can only choose an insurer from this list. If the custom list does not exist, the **Enter a Filing** screen displays a large, and somewhat unwieldy, list of insurers that is more difficult for users to scroll through.

*If you have tried to make a filing and the **Enter a Filing** screen will not display or accept the insurer you tried to enter, chances are it is because the insurer is not on the custom **Your Insurance Co's** list. Contact your EFS Account Administrator for assistance in adding the insurer, if appropriate, to your list.*

If there is no custom list, the screen will look like this:



View / Download Data

Your Insurance Companies (continued)

If your efile System Administrator has created a list, it will look like this:

The screenshot shows the 'Your Insurance Companies' page in the efile system. The page has a blue header with the 'efile' logo and 'Surplus Line Association of Illinois ELECTRONIC FILING & REPORTING SYSTEM'. The main content area is titled 'Your Insurance Companies' and features a table with the following data:

Insurance Companies	Last Update	Last Update By
Admiral Insurance Co	1/10/2007 1:00:00 PM	j.public@YourCo.com
American International Specialty Lines Insurance Co	1/10/2007 1:00:00 PM	j.public@YourCo.com
Essex Insurance Co	1/10/2007 1:00:00 PM	j.public@YourCo.com
Lexington Insurance Co	1/10/2007 1:00:00 PM	j.public@YourCo.com
Mt Hawley Insurance Company	1/10/2007 1:00:00 PM	j.public@YourCo.com
Scottsdale Insurance Co	1/10/2007 1:00:00 PM	j.public@YourCo.com
COUNT: 6		

The page also includes a sidebar with navigation options like 'Submit Data', 'View / Download Data', and 'Reports'. The main content area has a table with columns for 'Insurance Companies', 'Last Update', and 'Last Update By'. The table is sorted by 'Last Update' in descending order. The page also includes navigation buttons for 'Export to Excel', 'Export to XML', and 'Export to CSV', and a pagination control showing 'Page 1 of 1' and 'Records Per Page 25'.

1. **Insurance Companies.** These are the insurance companies that your EFS Account Administrator has selected to be available to you when using the **Enter a Filing** screen.
2. **Last Update.** Date and time this record was added to your custom insurance companies list.
3. **Last Update By.** Person who added this record to your custom insurance companies list. This should be your EFS Account Administrator.
4. **Export.** See the **Using the Export Controls** section of this manual on page 39.
5. **Sorting.** See the **Sorting Displayed Records** section of this manual on page 32.
6. **Pages of Records / Records Per Page.** See the **Pages of Records** section of this manual on page 40.

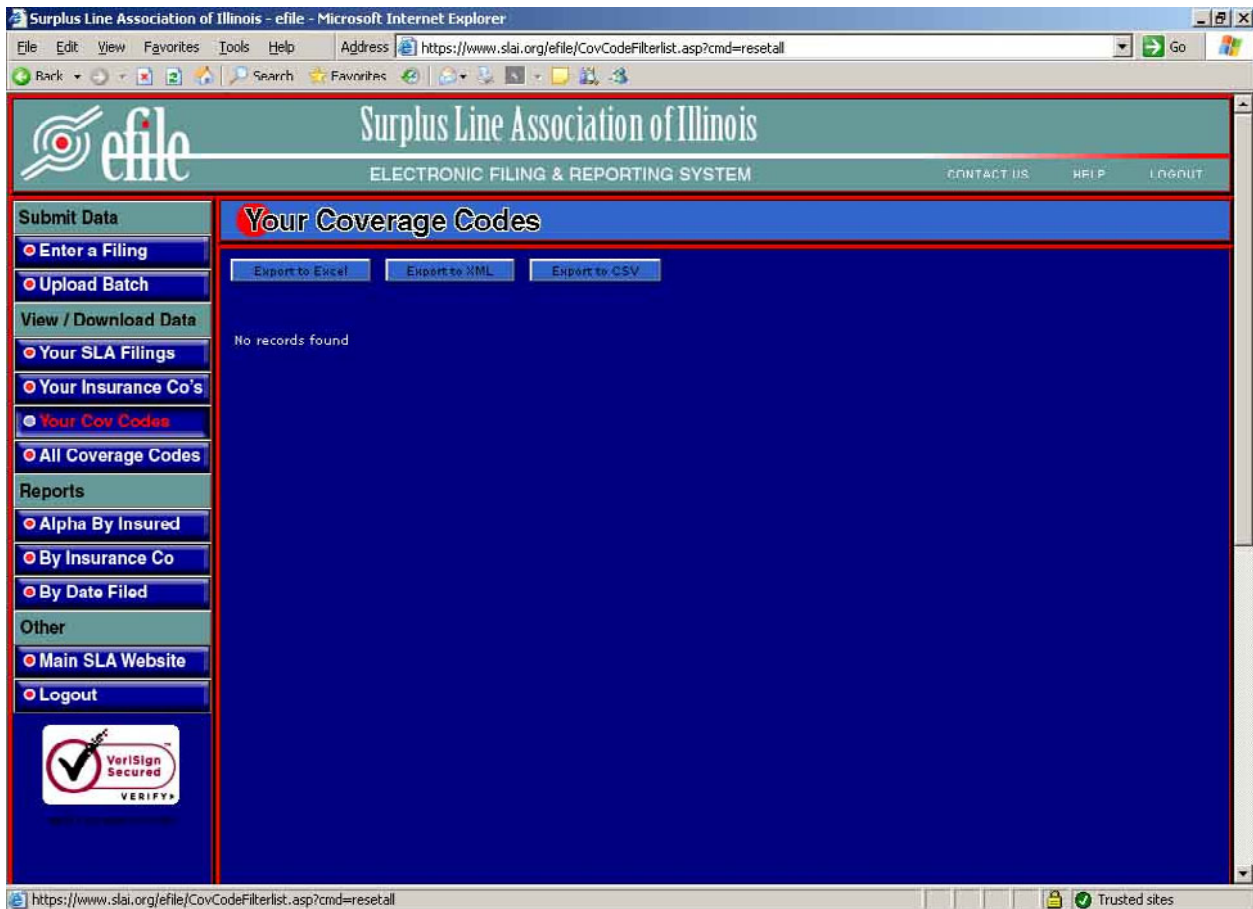
View / Download Data

Your Coverage Codes

The **Your Coverage Codes** screen displays the custom list of coverage codes that was created by your EFS Account Administrator. If no list has been created, the screen says "No records found." This custom list is used by the **Enter a Filing** screen so that a person entering a filing can only choose a coverage code from this list. If the custom list does not exist, the **Enter a Filing** screen displays a large, and somewhat unwieldy, list of coverages that is more difficult for users to scroll through.

*If you have tried to make a filing and the **Enter a Filing** screen will not display or accept the coverage you tried to enter, chances are it is because the insurer is not on the custom **Your Insurance Co's** list. Contact your EFS Account Administrator for assistance in adding the insurer, if appropriate, to your list.*

If there is no custom list, the screen will look like this:



View / Download Data

Your Coverage Codes (continued)

If your efile System Administrator has created a list, it will look like this:

The screenshot shows the 'Your Coverage Codes' page in the efile system. The page has a blue header with the 'efile' logo and 'Surplus Line Association of Illinois ELECTRONIC FILING & REPORTING SYSTEM'. A left sidebar contains navigation options like 'Submit Data', 'View / Download Data', and 'Reports'. The main content area displays a table of coverage codes with columns for 'Coverage Codes', 'Last Update', and 'Last Update By'. Below the table is a 'COUNT: 9' and a pagination section showing 'Page 1 of 1' and 'Records Per Page 25'. A VeriSign Secured logo is visible at the bottom left.

Coverage Codes	Last Update	Last Update By
Property (including excess) Fire	1/10/2007 1:00:00 PM	j.public@YourCo.com
Multiple Peril Commercial (SMP)	1/10/2007 1:00:00 PM	j.public@YourCo.com
All Risk All	1/10/2007 1:00:00 PM	j.public@YourCo.com
Inland Marine Jewelers & Furriers Block; All Floaters	1/10/2007 1:00:00 PM	j.public@YourCo.com
Professional Errors & Omissions D & O	1/10/2007 1:00:00 PM	j.public@YourCo.com
Liability General (BI & PD) CGL	1/10/2007 1:00:00 PM	j.public@YourCo.com
Liability General (BI & PD) Excess Liability	1/10/2007 1:00:00 PM	j.public@YourCo.com
Umbrella All (including excess)	1/10/2007 1:00:00 PM	j.public@YourCo.com
Miscellaneous Miscellaneous	1/10/2007 1:00:00 PM	j.public@YourCo.com

1. **Coverage Codes**. These are the coverages that your EFS Account Administrator has selected to be available to you when using the **Enter a Filing** screen.
2. **Last Update**. Date and time this record was added to your custom coverage code list.
3. **Last Update By**. Person who added this record to your custom coverage code list. This should be your EFS Account Administrator.
4. **Export**. See the **Using the Export Controls** section of this manual on page 39.
5. **Sorting**. See the **Sorting Displayed Records** section of this manual on page 32.
6. **Pages of Records / Records Per Page**. See the **Pages of Records** section of this manual on page 40.

View / Download Data

All Coverage Codes

The *All Coverage Codes* screen is shown below:

Surplus Line Association of Illinois - efile - Microsoft Internet Explorer
 Address: <https://www.slai.org/efile/CovCodeDisplaylist.asp?cmd=resetall>

efile Surplus Line Association of Illinois
 ELECTRONIC FILING & REPORTING SYSTEM CONTACT US HELP LOGOUT

Submit Data
 Enter a Filing
 Upload Batch

View / Download Data
 Your SLA Filings
 Your Insurance Co's
 Your Cov Codes
All Coverage Codes

Reports
 Alpha By Insured
 By Insurance Co
 By Date Filed

Other
 Main SLA Website
 Logout

All Coverage Codes
 Export to Excel Export to XML Export to CSV
 Search (*) Show all
 Exact phrase All words Any word
 Click on any column heading to sort by that field. Ctrl-click on additional columns to subsort by that field.

Coverage Code	Category (*)	Description (*)	Notes (*)
1001	Property (including excess)	Fire	Straight Fire Policies (Includes Basic Coverage)
1002	Property (including excess)	Allied Lines	When Allied Lines are shown as a separate and distinct premium, they can be broken out into this Coverage Code and assessed FM Tax at 25% of the premium.
1003	Property (including excess)	Excess of Loss	
1004	Property (including excess)	Earthquake	
1500	Crop Hail	All	
1700	Difference In Conditions	All	
2001	Multiple Peril	Farm Owners	
2002	Multiple Peril	Home Owners	
2003	Multiple Peril	Commercial (SMP)	
2004	Multiple Peril	Multiple Line	
2200	All Risk	All	All Risk Real Property (Buildings)
3001	Inland Marine	Jewelers & Furriers Block; All Floaters	Includes Builders Risk, Motor Truck Cargo & Securities Risk
3002	Inland Marine	All Others	
3003	Inland Marine	Watercraft	
3200	Aviation	All	Physical Damage
3500	Glass	All	
4001	Professional Errors & Omissions	D & O	
4002	Professional Errors & Omissions	All Others	Includes Professional Liability, Wrongful Acts
4003	Professional Errors & Omissions	Attorney Malpractice	
4004	Professional Errors & Omissions	Architects & Engineers	
4500	Personal Accident	All	
4600	Medical (including excess)	All types	
5001	Liability General (BI & PD)	CGI	Includes Manufacturers & Contractors; Owners, Landlords & Tenants; Third Party Property Damage; Legal Liability; Aviation Liability; Contingent Liability; Garagekeepers Legal Liability; Auto Service Warranties & Contracts; Mechanical Breakdown, Personal Catastrophe
5002	Liability General (BI & PD)	Products (including excess)	
5003	Liability General (BI & PD)	Excess Liability	

Page 1 of 3 Records Per Page 25
 Records 1 to 25 of 62

Trusted sites

View / Download Data

All Coverage Codes (continued)

The various fields on the **All Coverage Codes** screen are described below:

1. **Coverage Code**. This is the internal SLA numeric code for the coverage. You don't have to know this code since the **Enter a Filing** screen lets you find the coverage by using "drop-down" boxes. But if you pay attention to the codes, especially for your most common coverages, you will be able to speed up your data entry by just entering the code number.
2. **Category**. Coverage codes in the efile system are broken up into broad categories to help you search for them more quickly. This is the category for the coverage shown on this record.
3. **Description**. This is the description of the coverage.
4. **Notes**. These are some additional notes regarding this coverage that may help you in deciding which SLA coverage code to use.
5. **Export**. See the **Using the Export Controls** section of this manual on page 39.
6. **Search**. See the **Using the Search Controls** section of this manual on page 33.
7. **Sorting**. See the **Sorting Displayed Records** section of this manual on page 32.
8. **Pages of Records / Records Per Page**. See the **Pages of Records** section of this manual on page 40.

Reports

Alpha By Insured

The **Alpha By Insured** screen will generate a PDF report based on the data range you specify. It is sorted alphabetically by insured name. The report will be displayed on your screen and, from there, can be printed or saved to your computer, as desired. The report generation screen is shown below:

The screenshot shows the 'Reports: Alpha by Insured' screen in a Microsoft Internet Explorer browser. The browser's address bar shows the URL: <https://www.slai.org/efile/ReportPeriod.asp?ReportName=ByInsured>. The page header includes the 'efile' logo and the text 'Surplus Line Association of Illinois ELECTRONIC FILING & REPORTING SYSTEM'. The left sidebar contains a 'Reports' section with the 'Alpha By Insured' option selected. The main content area features a form with the following elements:

- Report Period:** A group of radio buttons with options: Today, Yesterday, This Month, Last Month, This Year, Last Year, and Two Years Ago. A yellow callout '1' points to the 'Last Month' option.
- Report From:** A text input field.
- Report Thru:** A text input field. A yellow callout '2' points to this field.
- SUBMIT:** A green button with a yellow callout '3' pointing to it.

1. **Report Period.** Choose the period for which you wish to generate a report.
2. **Report From / Thru.** After selecting the **Report Period**, these fields will show the dates covered by the report. You cannot enter data in these fields.
3. **Submit.** After choosing the **Report Period**, click this button to generate the report.

To print the report, choose **F**ile, **P**rint from your browser toolbar menu or click on the Print icon. To save the report to your computer, choose **F**ile, **S**ave from your browser toolbar menu or click on the Save icon.

Reports

By Insurance Co

The **By Insurance Co** screen will generate a PDF report based on the data range you specify. It is sorted alphabetically by insurance company name with subtotals for each insurance company. The report will be displayed on your screen and, from there, can be printed or saved to your computer, as desired. The report generation screen is shown below:

The screenshot shows the 'Reports: By Insurance Company' page in the efile system. The page has a blue header with the efile logo and 'ELECTRONIC FILING & REPORTING SYSTEM'. A left sidebar contains navigation links like 'Submit Data', 'View / Download Data', and 'Reports'. The main content area is titled 'Reports: By Insurance Company' and contains a form with radio buttons for 'Report Period' (Today, Yesterday, This Month, Last Month, This Year, Last Year, Two Years Ago), input fields for 'Report From' and 'Report Thru', and a 'SUBMIT' button. Yellow callout numbers 1, 2, and 3 point to the 'Report Period' radio buttons, the 'Report From' and 'Report Thru' fields, and the 'SUBMIT' button respectively.

1. **Report Period.** Choose the period for which you wish to generate a report.
2. **Report From / Thru.** After selecting the **Report Period**, these fields will show the dates covered by the report. You cannot enter data in these fields.
3. **Submit.** After choosing the **Report Period**, click this button to generate the report.

To print the report, choose File, Print from your browser toolbar menu or click on the Print icon. To save the report to your computer, choose File, Save from your browser toolbar menu or click on the Save icon.

Reports

By Date Filed

The **By Date Filed** screen will generate a PDF report based on the data range you specify. It is sorted by month filed with subtotals for each month. The report will be displayed on your screen and, from there, can be printed or saved to your computer, as desired. The report generation screen is shown below:

The screenshot shows the 'Surplus Line Association of Illinois - efile' web application. The main content area is titled 'Reports: By Date Filed'. It features a 'Report Period' section with radio buttons for 'Today', 'Yesterday', 'This Month', 'Last Month', 'This Year', 'Last Year', and 'Two Years Ago'. Below this are 'Report From' and 'Report Thru' text input fields. A 'SUBMIT' button is located at the bottom of the form. Yellow callout numbers 1, 2, and 3 are placed next to the 'Report Period' radio buttons, the 'Report Thru' field, and the 'SUBMIT' button respectively.

4. **Report Period.** Choose the period for which you wish to generate a report.
5. **Report From / Thru.** After selecting the **Report Period**, these fields will show the dates covered by the report. You cannot enter data in these fields.
6. **Submit.** After choosing the **Report Period**, click this button to generate the report.

To print the report, choose File, Print from your browser toolbar menu or click on the Print icon. To save the report to your computer, choose File, Save from your browser toolbar menu or click on the Save icon.

Sorting Displayed Records

Any table of displayed records (in a column/row format) can be sorted by clicking on the column title. You can sort by a single column or by multiple columns. You can also sort in ascending or descending order.

Single-Column Sort (Asc or Desc)

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 (see below) next to the title text. A second click on the column title will change the sort to descending order and a **Descending Sort** icon (see below) will display next to the title text.



Ascending Sort icon



Descending Sort icon

Multiple-Column Sort (Asc or Desc)

You can sort by more than one column by clicking on the title of the first column you want to sort by (click it twice if you want it in descending order), then holding down the CTRL key on your keyboard and clicking on additional column titles (CTRL-click them twice for descending order). The screen may go completely blank for a moment while the system re-sorts the records. This is completely normal (it's not a bug – it's a *feature*!!).

Using the Search Controls

Simple Search

To do a Simple Search, use the **Search Box** near the top of the screen. The **Search Button** is labeled with the word "Search", plus an asterisk (*). This is to remind you that a simple search will search the columns in the table where the column title text is also followed by an asterisk (it also searches the Address, City, State and Zip fields – even though you don't see them on this screen). Multiple words typed into the Search Box should be separated by spaces (**do not** use commas, quotations or any other punctuation). You **cannot** use the greater-than (>), less-than (<) or equal-to (=) operators.

All simple searches are LIKE-type searches. In other words, if you are searching for a Policy Number, you do not need to type in the ENTIRE Policy Number. If you enter **GL123**, the system will return records where the Policy Number is **GL123456**, **CGL123XYZ11**, **ABC444GL123**, etc.

Simple Search Options

Just below the **Search Box** are the three **Simple Search Options**.

Exact Phrase. This is the default search type. The system will return records where the characters you typed in the Search Box are found, in the exact order you typed them, ANYWHERE within the searchable fields.

All Words. This is an AND-type search. Use this option when there is more than one word that you are searching for within the records. Multiple words typed into the Search Box should only be separated by spaces (do not use commas or other punctuation). For example, if you want to see records where the Policy Number begins with "GL" AND the insured is located in "Chicago", type **GL Chicago** in the **Search Box** (do not type quotation marks!).

Any Words. This is an OR-type search. Use this option when you want to search for records that contain one set of characters OR another set of characters. For example, if you want to see records where the insured name has "Smith" within it, **OR** the Policy Number has the characters "CMP" in it, **OR** the insured's address is on "Clybourne" street, you would select this option and type **Smith CMP Clybourne** in the **Search Box** (do not type quotation marks!).

Show All Button

If you have previously limited the number of records displayed by using the Search function and now want to see all of your filings again, click on the **Show All** button.

Using the Search Controls

Advanced Search

The ***Advanced Search*** button will bring up a new screen that allows you to do complex searches. The Advanced Search screen is shown on the next page:



Surplus Line Association of Illinois

ELECTRONIC FILING & REPORTING SYSTEM

[CONTACT US](#) [HELP](#) [LOGOUT](#)

Submit Data

[Enter a Filing](#)

[Upload Batch](#)

View / Download Data

[Your SLA Filings](#)

[Your Insurance Co's](#)

[Your Cov Codes](#)

[Your efile Users](#)

[All Coverage Codes](#)

Reports

[Alpha By Insured](#)

[By Insurance Co](#)

[By Date Filed](#)

Other

[Main SLA Website](#)

[Logout](#)



Your SLA Filings

Search

[Back to List](#)

Policy Id	=	IL	<input type="text"/>
Batch	=		<input type="text"/>
	AND		
Filing Month (YYYYMM)	=		<input type="text"/>
	AND		<input type="text"/>
Filing Type	=	<input type="radio"/> Endorsement <input type="radio"/> Policy	
Insurance Company	=	Please Select	
Policy Number	LIKE	<input type="text"/>	
Insured	LIKE	<input type="text"/>	
Address 1	LIKE	<input type="text"/>	
Address 2	LIKE	<input type="text"/>	
City	LIKE	<input type="text"/>	
State	LIKE	<input type="text"/>	
Zip	LIKE	<input type="text"/>	
Effective Date	=	<input type="text"/>	
	AND	<input type="text"/>	
Term (months)	=	<input type="text"/>	
	AND	<input type="text"/>	
Amount	=	<input type="text"/>	
	AND	<input type="text"/>	
Coverage Code	=	Please Select	
Premium	=	<input type="text"/>	
	AND	<input type="text"/>	
Fire Marshal Tax	=	<input type="text"/>	
	AND	<input type="text"/>	
Surplus Line Tax	=	<input type="text"/>	
	AND	<input type="text"/>	
Stamping Fee	=	<input type="text"/>	
	AND	<input type="text"/>	
User Field 1	LIKE	<input type="text"/>	
User Field 2	LIKE	<input type="text"/>	
User Field 3	LIKE	<input type="text"/>	
User Field 4	LIKE	<input type="text"/>	
Last Update	=	<input type="text"/>	
	AND	<input type="text"/>	
Last Update By	LIKE	<input type="text"/>	

Search

Using the Search Controls

Advanced Search (continued)

General

The Advanced Search screen lets you perform complex searches across multiple fields. For most fields, it allows you to choose the type of search using comparison operators (< = >) so you can choose whether you are looking for records whose field values are less than, equal to, more than or not equal to the values you specify.

Entering Search Criteria

There is a label and search criteria box for each field in the record. Enter criteria is as many, or as few, boxes as you wish. In general, numeric searches allow you to choose a comparison operator. Text fields are automatically "like" searches. Enter criteria and choose comparison operators in any order you want. The search is not performed until you click on the Search Button. All of the criteria and comparisons must be true for a given record in order for the system to return that record when it performs the search.

Using Comparison Operators

There are six different comparison operators.

Equal to =

Records will only be returned if the field in the record matches exactly the criteria you have entered in the search criteria box for that field.

Not equal to <>

Records will only be returned if the field in the record does not exactly match the criteria you have entered in the search criteria box for that field.

Less than <

Records will be returned if the record's field is less than the amount typed in the search criteria box.

Less than or equal to <=

Records will be returned if the record's field is less than, or equal to, the amount typed in the search criteria box.

Greater than >

Records will be returned if the record's field is greater than the amount typed in the search criteria box.

Using the Search Controls

Advanced Search (continued)

Greater than or equal to >=

Records will be returned if the record's field is greater than, or equal to, the amount typed in the search criteria box.

"Like" Searches

Alphanumeric or text fields are automatically searched using the "LIKE" comparison operator. This means that the system will return records when it finds the characters you typed in any part (beginning, middle, end) of corresponding field in the record. For example, if you enter **GL123** in the Policy Number search field, the system will return records where the Policy Number is **GL123456**, **CGL123XYZ11**, **ABC444GL123**, etc.

Filing Type Search

The Filing Type field does not have a search criteria box, but rather, two buttons you can choose. If you only want policies in the returned recordset, click the Policy button. If you only want endorsements, click the Endorsemt button. If you want the system to return policy and endorsement records, do not click on either button.

Insurance Co Search

The Insurance Company field is not a regular search criteria box, but rather a "drop-down" box. There are a couple of ways to make choices in this box.

When the screen's focus is in the Insurance Company drop-down box, quickly type the first few letters of the insurer's name. The box will scroll to the record (if any) that matches the characters you are typing. If you pause too long between typing the characters, the system will think you are starting over and begin a new search for the characters you are typing.

You can also click on the light blue box with the downward-pointing arrow at the right side of the drop-down box. This will "open" the box and show you part of the list of insurance companies. There is a vertical scroll bar at the right side of the list. Navigate through the list using the up and down arrows on your keyboard, the PageUp and PageDn keys on your keyboard, or the vertical scroll bar. When you find the insurer you want to choose, click on it.

Using the Search Controls

Advanced Search (continued)

Coverage Code Search

The Coverage Code field is not a regular search criteria box, but rather a "drop-down" box. There are a couple of ways to make choices in this box.

When the screen's focus is in the Coverage Code drop-down box, quickly type the first few letters of the coverage code name. The box will scroll to the record (if any) that matches the characters you are typing. If you pause too long between typing the characters, the system will think you are starting over and begin a new search for the characters you are typing.

You can also click on the light blue box with the downward-pointing arrow at the right side of the drop-down box. This will "open" the box and show you part of the list of coverage codes. There is a vertical scroll bar at the right side of the list. Navigate through the list using the up and down arrows on your keyboard, the PageUp and PageDn keys on your keyboard, or the vertical scroll bar. When you find the coverage code you want to choose, click on it

Search Button

When you have finished entering search criteria, click on the Search Button and the system will begin the search.

Using the Export Controls

The Export Buttons are located at the top of the dark blue section of the screen, just below the "Your SLA Filings" title. When you choose to export records, the system will export all records, on all pages in the recordset (i.e. even if only 25 records are shown on the screen, if the bottom of the screen says there are 2000 records, the system will export all 2000 records). If you have filtered the record set by doing a Simple or Advanced Search, the system will only export the records that match your search criteria. The system will prompt you to save the file on your local computer and allows you to export data in one of three ways.

There *is* a limit to the number of records the system will export (this is especially true for Excel files). If your export does not work, try limiting the number of records you are exporting by using the **Search** or **Advanced Search** functions. For instance, if you are trying to export to Excel and you have not limited your records by using a **Search** function, you are attempting to export all of your current year data, plus all of your prior year data, plus all data from the year before *that!* That can be a whole heck of a lot of data! Try just doing one year at a time.

Excel. The system will save the exported records to a Microsoft Excel file on your computer.

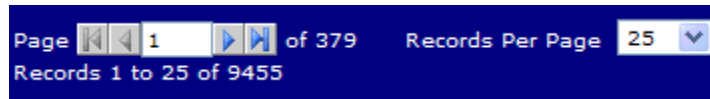
XML. The system will save the exported records to an XML (eXtended Markup Language) file on your computer.

CSV. The system will save the exported records to a CSV (Comma Separated Values) file on your computer.

Pages of Records

Pages of Records

For convenience and speed, the system shows you records in pages of 25, 50 or 100 records at a time. At the bottom of the screen there are controls that let you page through the records and choose how many records will display on each page. The controls look like this:



Click on the FirstPage icon (see below) to display the first page of records. Click on the PrevPage icon (see below) to display the previous page of records. Click on the NextPage icon (see below) to display the next page of records. Click on the LastPage icon (see below) to display the last page of records.



FirstPage icon



PrevPage icon



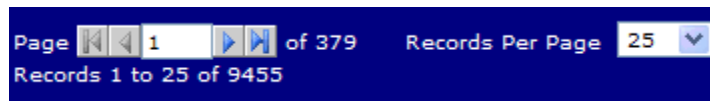
NextPage icon



LastPage icon

Records Per Page

For convenience and speed, the system shows you records in pages of 25, 50 or 100 records at a time. At the bottom of the screen there are controls that let you page through the records and choose how many records will display on each page. The controls look like this:



To choose the number of records that will be displayed on each page, click on the downward-pointing arrow on the right side of the Records Per Page box and select either 25, 50 or 100. There will normally be a brief pause before the system refreshes your screen to display the number of desired records.