ELANY Electronic Filing System
User's Quick Guide – Electronic Document Submission

This tutorial instructs you in using the ELANY Electronic Filing System (EFS) to attach and submit documents to ELANY.

These procedures assume that you have completed an affidavit batch through the Affidavit Part A section of the EFS, and that you have scanned all the necessary documents you intend to submit with the batch.

Electronic Filing System Login

Attaching Files to a Batch

1. Login to EFS with your user ID and password, if you are not already logged in.

2. In the top menu, click on the AFFIDAVITS tab to display the affidavit menu on the left side of the EFS screen.

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Batch Manager

3. From the affidavit menu, under the *Affidavit Part A* heading, click BATCH LISTING OR AFFIDAVIT TAB. The BATCH MANAGER window displays.

SELECT opens the Batch Listing for the selected batch.

PRINT allows you to view the full image range for the selected batch, including the BFR, Part A attachments, and any additional attachments. From this view, you can send the file to a physical printer or save the file to disk.

Batch Rpt Date: The date that the batch was created.

Items: The number of individual transactions contained in this batch.

Total Premium: The total gross premium of all items contained within this batch.

Contact: The name of the user who created this batch.

Status: **O** (open) or **P** (printed) before submission. You can submit batches with either status. *Note:* Once you have selected the PRINT option for a specific batch, the status of that batch will change to **P** afterwards.

E	P**E**nding	batch received by ELANY, pending ELANY's approval
I *	**I**n Process	batch submission is still in process
J *	Re**J**ected	validation error encountered during the submission process
O	**O**pen	batch is open
P	**P**rinted	batch has printed
R	**R**eturned	ELANY review is complete; batch returned to the User
S	**S**ubmitted	no validation errors encountered
W	**W**aiting	ELANY is waiting for additional information from the User

SUBMIT processes the batch for submission to ELANY. If there are errors with the selected batch, these errors will be displayed at this time (see *Submitting a Batch to ELANY* on page 5).

*if the error persists, please contact the ELANY helpdesk at 646 805-1200

Locate the batch you want to attach documents to and click the SELECT button for that batch. The BATCH (AFFIDAVIT) LISTING window displays for the selected batch.

Batch (Affidavit) Listing

The Reference field is for your use to help you track your submission internally. You can use your insured name, affidavit number/range, or some other tracking number or name. Use a reference that will help you find the specific documents later when retrieving stamped documents.

4. In the BATCH (AFFIDAVIT) LISTING window, click ATTACH for the selected batch. The TRANSACTION ATTACHMENT window displays.

Transaction Attachment

5. In the DOCUMENT CODE field, click the down arrow (⏷) and select the type of attachment you need to attach to the item. For example, attach the documents in this order for a Binder submission:

- Binder
- Notice of Excess Lines Placement
- Part C

6. Click BROWSE… to navigate and find the image file you want to attach to the batch. The filename will display in the IMAGE FILE field.

Note: At this time, the EFS will accept image files that meet the following criteria:

- There are five acceptable formats: (**.tiff/.pdf** recommended) ***.tif**, ***.tiff**, ***.jpg**, ***.jpeg**, or ***.pdf**. The filesize limit, per attached image (page) is currently 1 Mb (megabyte).
- The image resolution must be minimum 200 dpi (dots-per-inch) *if* the attachment is *.tif/*.tiff.
- Do not password protect scanned documents
- ***All documents must be in black and white. No color.***

7. Click ATTACH to attach the file to the batch.

Note: If the image format of the submitted file is not recognized by the EFS, an error message similar to the following displays:

```
Attachment 'affidavit_1013.png' is not a recognized file format, or the
                internal contents do not match the file type.
```

8. Repeat Steps 6 through 8 to attach additional image files to the batch. Similarly, add attachments to the new items in the batch (if applicable).

Files accepted by the EFS for attachment are displayed in the TRANSACTION ATTACHMENT window as shown in the following example:

Transaction Attachment

Policy Number | Affidavit Number
POL1012 | AFD1012

Document Code: Binder Confirmation ▼

Image File: [   ] Browse...

Attach

Back

	Name	Type	View
Delete	C_affidavit_1013.jpg	B	📝
Delete	C_affidavit_1014.jpg	B	📝
Delete	A_affidavit_1016.jpg	D	📝
Delete	A_affidavit_1021.pdf	D	📝
Delete	policy_dec_PL2816732.jpg	C	📝
Delete	policy_dec_PL2826321.jpg	D	📝
Delete	endorse_355897.pdf	E	📝
Delete	endorse_355898.pdf	E	📝

**Files Attached to a Specific Transaction (Example)**

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Submitting a Batch to ELANY

1. Login to EFS with your user ID and password, if you are not already logged in.

2. In the top menu, click on the AFFIDAVITS tab to display the affidavit menu on the left side of the EFS screen.

3. From the affidavit menu, under the *Affidavit Part A* heading, click BATCH LISTING. The BATCH MANAGER window displays.

4. Locate the batch you want to submit for electronic processing and click the SUBMIT button for that batch.

   Note: When you click the SUBMIT button for a batch you will be prompted for a PIN number, the ELANY EFS validates the submitted batch. The Status for the batch changes to **I** (**I**n process) indicating that the batch submission is still in process.

   During the submission process, it is important that you do not close the window until the process has been completed.
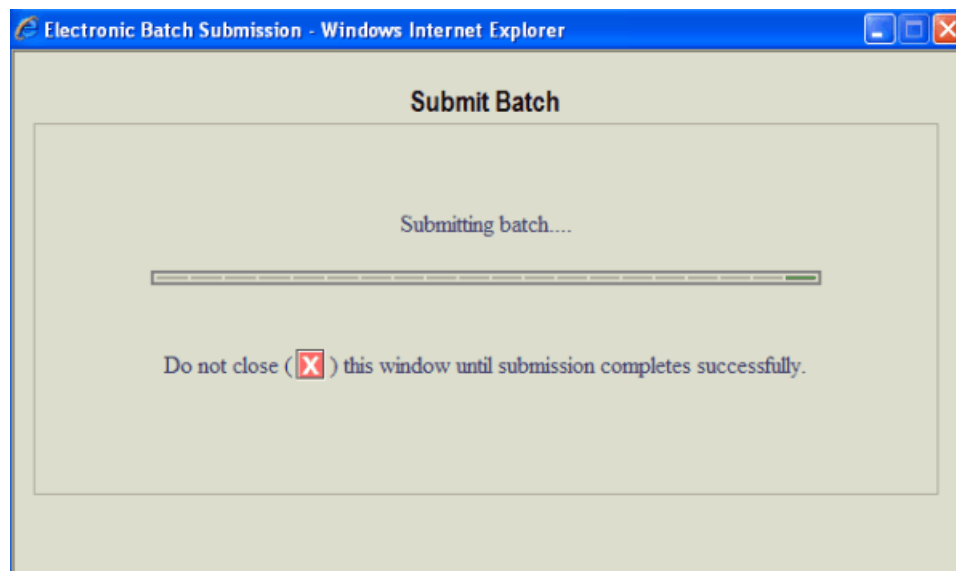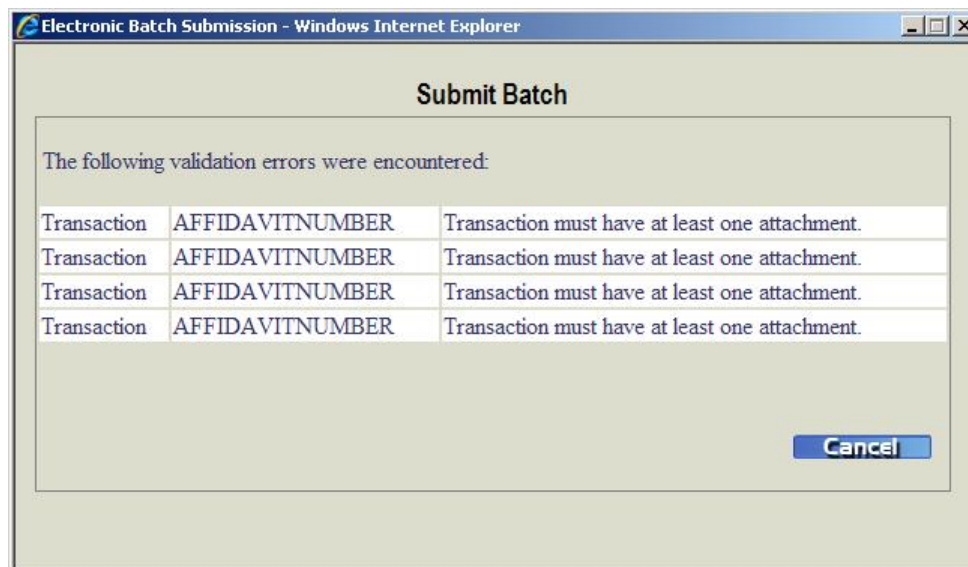

Warning not to Close Window until Submission is Complete
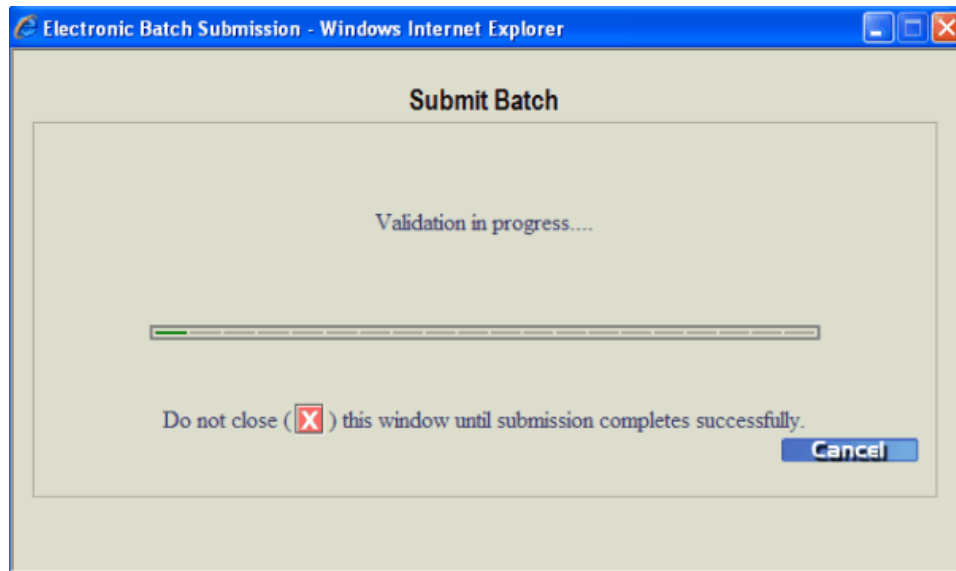
Validation in Progress

If the system detects errors, they will be displayed to you in an error message window as shown in the following example:

Validation Errors Encountered During Batch Submission (Example)

Correct any errors before resubmitting the batch.

5. If the EFS system did not detect any errors, you will be prompted for your PIN number.

   Note: Remember that the PIN is the equivalent of your electronic signature. When you enter your PIN, you are verifying that the batch and all attached documents are valid to the best of your knowledge. If the batch contains items from more than one sublicensee, the system will prompt you to enter a PIN for each sublicensee contained in the batch. A PIN is only required for Part A/revised part A Affidavit transactions. Endorsements/X-items don't require a PIN number.

6. Enter your PIN and click CONTINUE. A validation message is displayed if an error is encountered during the validation of the PIN as shown in the example below.

PIN Code: Validation Error During Batch Submission (Example)

7. In the Batch Manager window, the status of each submitted batch changes according to how that particular batch is handled. The status of the batch changes to **S** (**S**ubmitted) if no validation errors were encountered during the submission process. Once a validation error is encountered during the submission process, the Batch Status changes to **J** (Re**j**ected).

   The batch status changes to **E** (P**e**nding) once the batch has been received and is ready to be processed by ELANY. The status changes to **W** (**W**aiting) if ELANY has contacted you and is waiting for additional information to process the batch.

   The batch has a status of **R** (**R**eturned) if ELANY has successfully processed the batch and returned them back to you.

8. Once a batch has the status **R**, the stamped documents for this batch can then be retrieved from the 'Catalog Listing' under the 'Reporting' menu.