31 March 2017

To: Users of The Broker's Workstation and/or The Underwriter's Workstation

Dear Valued Client:

Re: The Broker's Workstation and The Underwriter's Workstation – Important Releases and Changes

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and newest features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. SGI CANADA Credit Score Feature – Brokers in Saskatchewan who write business with SGI CANADA now have access to the SGI Credit Score feature for Tenant and Condo policies effective May 15, 2017 for new business and renewals.

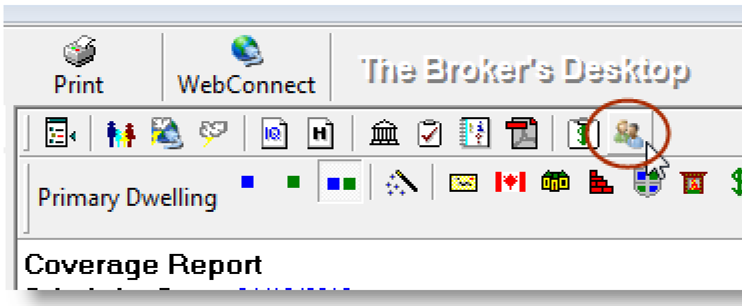
1. SGI CANADA Credit Score Feature

Brokers in Saskatchewan who write business with SGI CANADA now have access to the SGI Credit Score feature for Tenant and Condo policies effective May 15, 2017 for new business and renewals. With the Credit Score feature, the broker can submit client consent for the Company to obtain additional information required to make an informed decision about the risk. Submitting this consent may make the client eligible for additional discounts.

SGI Credit Score information will be sent through SGI's Rate Bridge Web Service as one request.

No setup is required for this feature. Once the TBW Update Utility has been run, the **Credit Score form** will appear automatically as part of the workflow when you are creating a new SGI CANADA Personal Lines Property IntelliQuote. For existing IntelliQuotes, you can access the Credit Score form by clicking the **Credit Score** button on the IntelliQuote toolbar (see Figure 1.1).

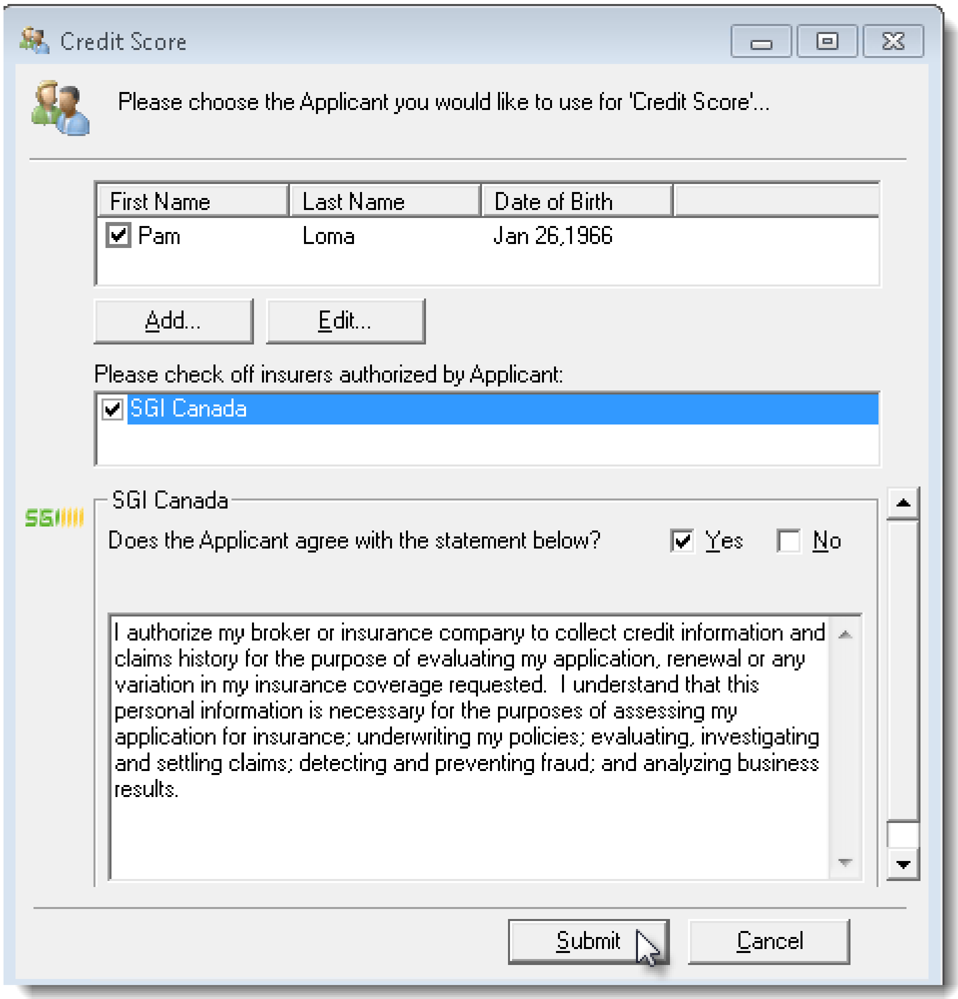
(Figure 1.1)



To complete the Credit Score form,

1. Select one **Applicant** for the Credit Score.
   - Click the **Add** button to add and select a different applicant for the Credit Score. Enter the requested information in the Personal Details Wizard.
2. Select the insurer authorized by the Applicant.
3. If the client agrees with the given statement, select the '**Yes**' checkbox.
4. Click the **Submit** button to send the consent information to SGI CANADA (see Figure 1.2).

(Figure 1.2)



Any applicable **discount** will be included on the **Summary Report** tab of the IntelliQuote and will be applied to the premium**.**

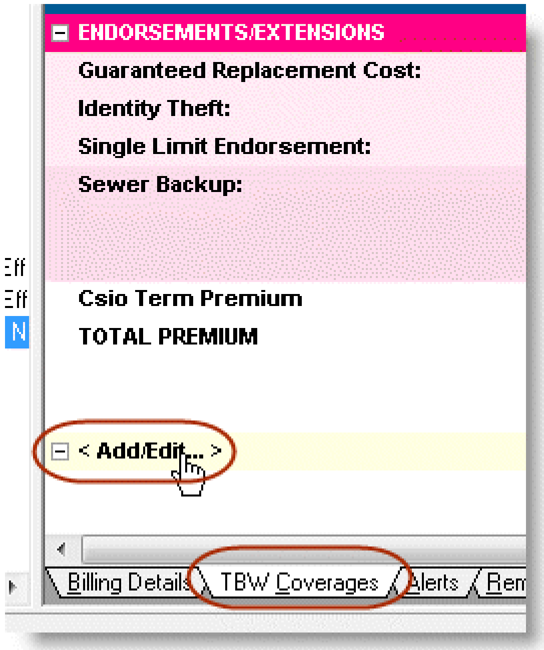
Please note the following when working with the Credit Score feature:

- Be sure to inform the client that he/she is giving consent for the Company to obtain additional information required to make an informed decision as to whether or not to accept the risk.
- A prompt will display if additional client details are required after clicking the **Submit** button. Select the **Applicant** and click the **Edit** button to modify or add details.
- If you click **Cancel** in the Credit Score window, the information will not be sent through the Rate Bridge Web Service. Based on submitted information, SGI CANADA will determine whether the client qualifies for a discount. If yes, the discount will be applied to the quote.
- Click the **Credit Score** button on the IQ toolbar to update information for pre-existing or new IntelliQuotes.

The Credit Score form is also accessible from qualifying policy documents. Complete the Credit Score for applicable policies to ensure relevant discounts are applied and to assist in premium matching of

TBW Coverages. To access the Credit Score form in a new or existing policy, click **<Add/Edit...>** on the **TBW Coverages** tab in the policy document (see Figure 1.3).

(Figure 1.3)



Move through the pop-up forms, making adjustments as required. If the policy qualifies, the Credit Score form will display after the **List of Claims** form. Complete the form in the usual manner.

Once you have reviewed this document, please contact your SGI CANADA Personal Lines representative with any questions you have about the SGI CANADA Credit Score feature.

Return to Contents

Please share this information with the appropriate TBW and TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding these features or need further assistance in their usage, please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.

Microsoft Partner
Gold Independent Software Vendor (ISV)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.