



3 September 2014

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 enhancement to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [SGI Online Quoting \(AB\)](#) – Effective September 1, 2014, brokers who write business in Alberta with SGI CANADA can access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for homeowners' and farm homeowners' policies.

1. SGI Online Quoting (AB)

Effective September 1, 2014, brokers who write business in Alberta with SGI CANADA can access SGI CANADA's Online Quoting directly from TBW and IntelliQuote for homeowners' and farm homeowners' policies. This integration of IntelliQuote with SGI CANADA's web service allows the broker to view web-service-based premium calculations for homeowners' and farm homeowners' policies in IntelliQuote.

Please note the following when using the Quoting Tool for habitational and farm policies:

- **If your organization writes business with SGI Canada in Alberta *and* in Saskatchewan,** Client Services will be contacting you to assist you with the necessary setup for the SGI Online Quoting feature.

- If you have Windows Server 2003 SP2, you are required to run a Hotfix before you can use the SGI Online Rating feature. You can learn more about the required Hotfix and download it on the Microsoft website here: <http://support.microsoft.com/kb/938397>
- Brokers can quote up to 45 days in advance with the Quoting Tool.
- Online rating for farm homeowners' policies will be for Primary Dwelling Home and Endorsements ONLY. Other dwelling types will still be rated through TBW's rating engine.
- Online rating for habitational policies will be for Primary Homeowners and Endorsements. Misc. Property (including additional residences) and Liability Extensions will still be rated through TBW's rating engine.
- When a dwelling built between 1950 and 1959 is quoted, in order to get the Select rating, complete updates (100%) must have been completed since 1960 for heating, plumbing, electrical, and roof (see Figure 1.1).

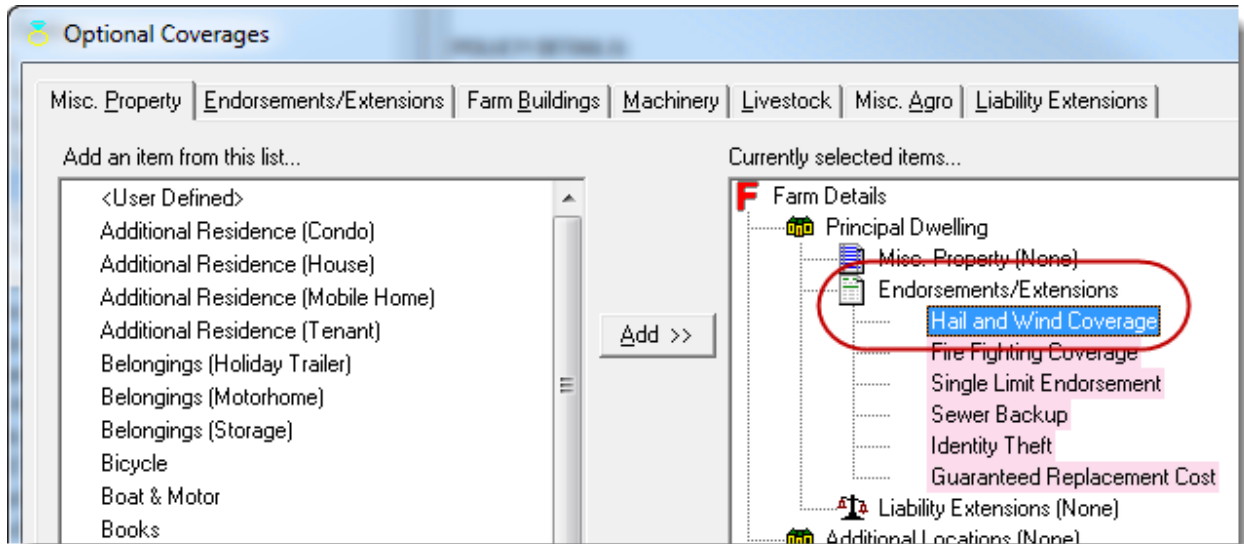
(Figure 1.1)

The screenshot shows the 'Coverage Item Properties' window. The 'Construction Details' tab is selected and circled in red. Below the tabs, there is a section for 'Updating and Renovating' which is highlighted with a red box. This section contains the following fields:

Updating and Renovating		
Year electrical system last updated	2000	■ ■
Year plumbing system last updated	2000	■ ■
Year roof last updated	2000	■ ■
Year heating system last updated	2000	■ ■
Updated Electrical (%)	100	■ ■
Updated Plumbing (%)	100	■ ■
Updated Roof (%)	100	■ ■
Updated Heating (%)	100	■ ■

- The Wind and Hail Coverage Item is available in the Endorsement section (see Figure 1.2). This coverage item is available for Home Pack policies only and is mandatory. Insureds have the option to reduce their deductible.

(Figure 1.2)



- The classification override will be removed and no longer supported for Primary Homeowners. SGI CANADA will be looking at supporting this in the web service in the future.
- Please ensure the Agency, Branch, and Department match what was set up for the Broker Number for SGI CANADA under Insurance Companies in TBW Lists.
- Please use the policy number for all renewals to ensure the correct loyalty and claims free discounts are applied.
- If items in the quote are changed (e.g. year built or postal code), this may cause rate capping to drop and new rates to apply. If the rate cap is lost due to a correction of previously inaccurate information, an underwriter may be able to reinstate the cap. Please contact the underwriting department at 306-775-6616.
- For more information, please refer to the Rate Manual cover letter of September 1, 2014.

Before using the SGI Canada Insurance Services Ltd. feature, please ensure your main Broker Number is set as default if you have more than one Broker Number set up for SGI Canada Insurance Services Ltd. in TBW Lists.

- If you are a multi-branch office, please ensure that the applicable default Broker Number is set for each multi-level (Agency/Branch or Department).
- If you are a multi-region quoting office, please contact Client Services for setup assistance and to ensure that appropriate CSIO Carriers are set up for different regions.
- ***If your office does CSIO download of policies, please do NOT add a new number as default.*** As all numbers are already set up in your system, you will only need to pick the default number to be used per Agency/Branch/Department, if applicable.

- **For Alberta online quoting only:** The **CSIO Carrier** for the Insurance Company must be set to **SGI Canada Insurance Services Ltd.** in TBW Lists (see Figure 1.3).

(Figure 1.3)

Insurance Company - SGI Canada Insurance Services

General Details
Please enter the General Details for this company.

Company Details

Company Name: SGI Canada Insurance Services

Accounting Code: SGIC

I-Biz:

CSIO:

Policy Number Manager:

Rating Engines (Obsolete)

Rating Engine: SGI Canada

Servicing Carrier:

CSIO Carrier: SGI CANADA Insurance Services Ltd.

Commercial Rating Engine:

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To designate a Broker Number as default,

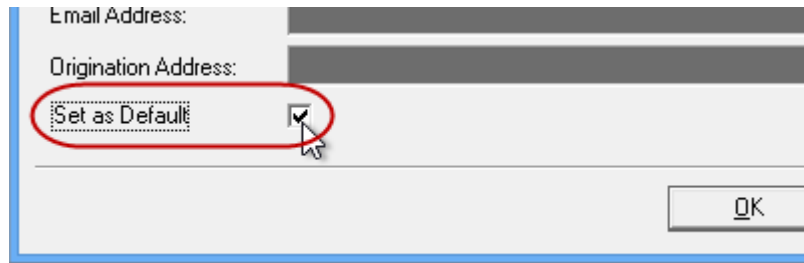
- In the TBW window, click **Lists, Insurance Companies**.
- In the Lists dialog, find and double-click **SGI CANADA**.
- On the **Company Branch Details** tab in the SGI CANADA dialog, double-click the applicable **Company Branch** in the **Broker Numbers** section (see Figure 1.4).

(Figure 1.4)

Company Bra...	Agency	A
Head Office	W. S. Goodall I...	M
Head Office	W. S. Goodall I...	V

- d. In the **Broker Number Details** dialog, click to select the **Set as Default** checkbox (see Figure 1.5), and then click **OK**.

(Figure 1.5)



- e. Click **OK** in the SGI CANADA dialog, and then click **OK** in the Lists dialog.

After reviewing this document, please contact our Client Services Team at 1-888-291-3588 (toll-free telephone) or clientservices@cssionline.com (email) with any questions you have about designating a default Broker Number. For questions regarding the feature itself, please contact your SGI CANADA Personal Lines representative for assistance.

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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 this feature or need further assistance in its 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)