



7 October 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 enhancements and newest features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [New Dynamic CSIO Habitational Application](#) – The CSIO Habitational Insurance Application form has been updated to reflect the most recent version published by CSIO.
2. [Resolution for Recent Issue with HITS Lookup](#) – The recent issue with HITS Lookup has been resolved, and applicable data will now prepopulate correctly during a HITS lookup.

1. New Dynamic CSIO Habitational Application

The CSIO Habitational Insurance Application form has been updated to reflect the recent version published by CSIO.

To create a Habitational Application, drag and drop the **Application** icon from the Insurance Tray onto the completed Client IntelliQuote in the Desktop Tree. Enter application details as requested with the help of the Application Wizard. The completed application will appear in the Client folder in the Desktop Tree and display in the Document Window.

Please note the following with the updated Application form:

- **Certain fields in the updated Application form will not contain data** (e.g. *Preferred Language (Other)* in Section 1 and details for attachments in Section 11).
- **The updated application is dynamic**, which means that various sections of the application will automatically expand to allow for additional items. For example, Section 5 – Loss History will expand as required to allow for additional claims (see Figure 1.1) and Section 10 – Mortgagee/Loss Payee will expand to include all Loss Payees listed in the IQ.

(Figure 1.1)

OCCUPATION architect YEARS CONTINUOUSLY EMPLOYED

DATE OF BIRTH YYYYMMDD 1986/09/09

5. LOSS HISTORY CLAIMS HISTORY REPORT DATE YYYYMMDD

HAVE THERE BEEN ANY LOSSES OR CLAIMS BY THE APPLICANT IN THE PAST 5 YEARS?

DATE OF LOSS YYYY/MM/DD	LOC.NO.	CAUSE OF LOSS	STAT
2013/07/04	Principal		CLOS
2012/10/10	Seasonal		CLOS
2011/11/11	Principal		CLOS
2014/06/06	Seasonal Dwelling		CLOS
2012/08/08	Seasonal Dwelling	Burglary	CLOS

Updated Application is dynamic and will expand as required to allow for additional items

DOES THE APPLICANT HAVE ANY KNOWLEDGE OR INFORMATION OF ANY FACT, CIRCUMST WHICH COULD REASONABLY GIVE RISE TO A CLAIM WHICH WOULD FALL WITHIN THE SCOP

6. POLICY HISTORY CONTINUOUSLY INSURED SINCE YYYYMMDD 2001/09/09

INSURANCE COMPANY	POLICY NUMBER	EFFECTIVE DATE YYY
AAA Insurance Company	XP335	

IN THE PAST FIVE YEARS, HAS ANY INSURANCE COMPANY DECLINED, CANCELLED, REFUSE

- **Previous persisted applications will display in the previous version/format of the Habitational Application.** If an existing Application is modified with the help of the Application Wizard, the modified Application will generate using the new updated version of the Application.
- The updated CSIO application is applicable for new Habitational IQs, including **Home, Mobile Home, Tenant, Condo, and Seasonal**, as applicable.

[Return to Contents](#)

2. Resolution for Recent Issue with HITS Lookup

It has come to our attention that, with the recent updates to the CGI portal, login details and location information have not been prepopulating correctly in the portal during a HITS lookup from TBW, and the TBW user was required to enter this information manually before requesting the report.

Please note that this issue has been resolved, and applicable data will now prepopulate correctly during a HITS lookup.

[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.