



24 July 2015

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. [CASL Email Consent Form and Report](#) – The new Email Consent Form and Email Consent Report can assist TBW/TUW users in staying compliant with the CRTC Anti-Spam Law.
2. [Additional Fields in IntelliQuote Details Dialog](#) – Two new Supporting Personal Auto Policy fields have been added to the IntelliQuote Details dialog.
3. [DCPD Coverage and New CSIO Auto Application for Brokers in PEI](#) – Effective October 1, 2015, Insurance Companies in PEI will be introducing DCPD coverage. The new PEI Application for Automobile Insurance form will also be available for applications with a Calculation Date on or after October 1, 2015.

1. CASL Email Consent Form and Report

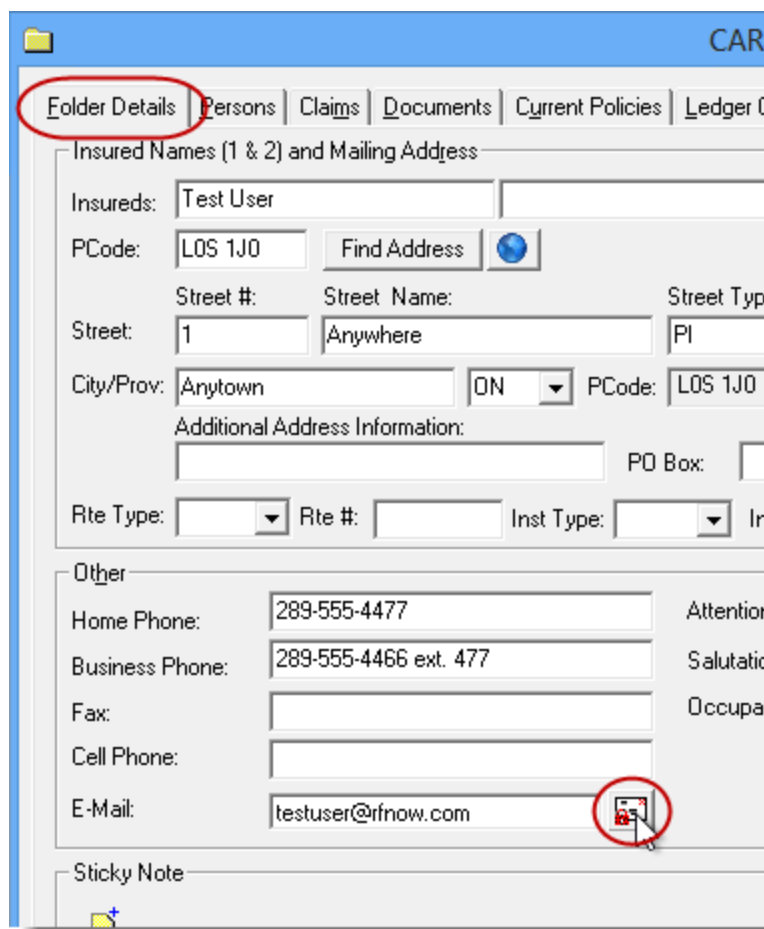
Canada's anti-spam legislation (CASL) came into effect July 1, 2014, and was put in place to protect Canadians while ensuring that businesses can continue to promote their organizations, products, and services to customers, prospects, and other audiences.

The new Email Consent Form and Email Consent Report in TBW/TUW can assist users in staying compliant with CASL. The **Email Consent Form** can be used to record details regarding the types of email communications a client or another individual has consented or declined to receive from your organization. The **Email Consent Report** allows you to view a list of all or particular email consent information in TBW/TUW, and print or export the list to Microsoft Excel for additional use or analysis, as required.

The **Email Consent Form** can be accessed wherever an email address can be entered in TBW/TUW, such as TBW/TUW Lists, User Manager, and the Folder Details and Persons tabs in the Client folder. To access the form, click the **Email Consent Form**  button (see Figure 1.1).

- If no email address has been entered, the Email Consent Form button will be greyed out and inaccessible.

(Figure 1.1)



The screenshot shows a software window titled 'CAR' with several tabs: 'Folder Details', 'Persons', 'Claims', 'Documents', 'Current Policies', and 'Ledger'. The 'Folder Details' tab is highlighted with a red circle. Below the tabs, there are several input fields and buttons. The 'Insured Names (1 & 2) and Mailing Address' section includes fields for 'Insureds' (Test User), 'PCode' (LOS 1J0), 'Street #' (1), 'Street Name' (Anywhere), 'Street Type' (PI), 'City/Prov' (Anytown), and 'PO Box'. There is also a 'Find Address' button. The 'Other' section includes fields for 'Home Phone' (289-555-4477), 'Business Phone' (289-555-4466 ext. 477), 'Fax', 'Cell Phone', and 'E-Mail' (testuser@rnow.com). A red circle highlights the 'Add New' button icon next to the E-Mail field. At the bottom, there is a 'Sticky Note' field.

In the **CASL Consent Form** dialog, click the **Add New** button to add information about a new consent. Then, enter details in the **Consent Details** area of the form as follows:

- Select one or more items in the **Consent Types** list.
- Select the **Consent Method** from the drop-down menu.
- Enter the name of the person who gave the consent in the **Obtained From** box.
- Select the name of the person who obtained the consent in the **Obtained By** menu.

- e. In the **Consent Given** menu, select **Yes** if the individual has agreed to receive the selected Consent Type(s), or click **No** if the client has declined to receive the selected item(s).
- f. Select or enter the **Date** the consent information was provided.
- g. Click **Save** to save this consent (see Figure 1.2).

(Figure 1.2)

Repeat this process as required to add one or more additional consents for this email address. Details about existing consents will display in the **Consents Given For** area of the form (see Figure 1.3).

- To delete one of the consents, select the item and click the **Delete** button.

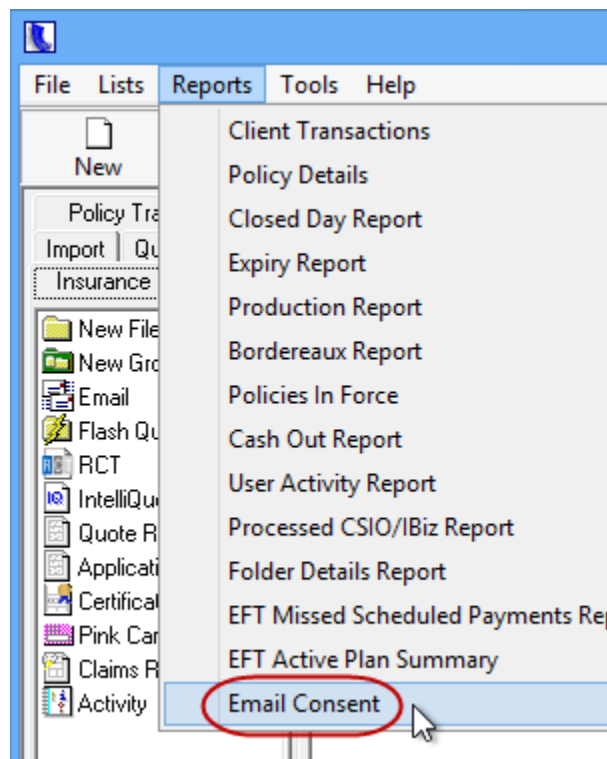
(Figure 1.3)

Date	Type	Method	Name	Consent Given	Obtained By
5/11/2015	Newsletters	Verbal	Test User	<input checked="" type="checkbox"/>	Lainey Russell
5/11/2015	Insurance Correspondence	Verbal	Test User	<input checked="" type="checkbox"/>	Lainey Russell
5/11/2015	Seasons Greetings	Verbal	Test User	<input checked="" type="checkbox"/>	Lainey Russell
5/11/2015	Promotions	Verbal	Test User	<input checked="" type="checkbox"/>	Lainey Russell
5/11/2015	Other	Verbal	Test User	<input type="checkbox"/>	Lainey Russell

Once all consent information has been entered, click **OK** to close the form.

The **Email Consent Report** can be used to view a list of all or particular email consent information in TBW/TUW. To create an Email Consent Report, click **Reports, Email Consent** (see Figure 1.4).

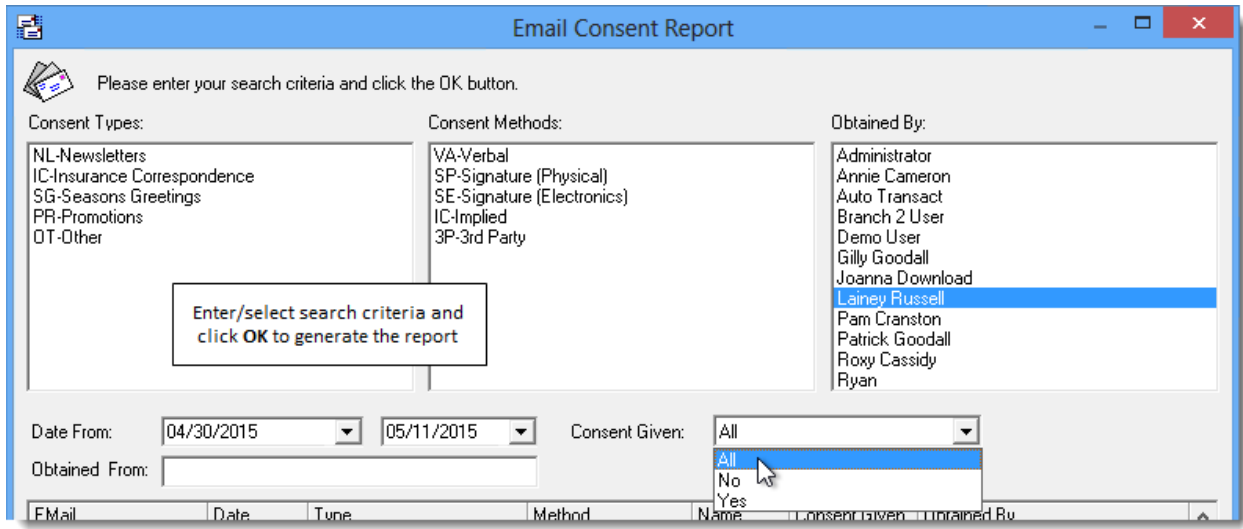
(Figure 1.4)



In the **Email Consent Report** dialog, enter or select search criteria (see Figure 1.5). Click **OK** to generate the report.

- Use **Shift+click** to select multiple consecutive items in one section (e.g. to select all Consent Types); use **Ctrl+click** to select multiple non-consecutive items in one section.

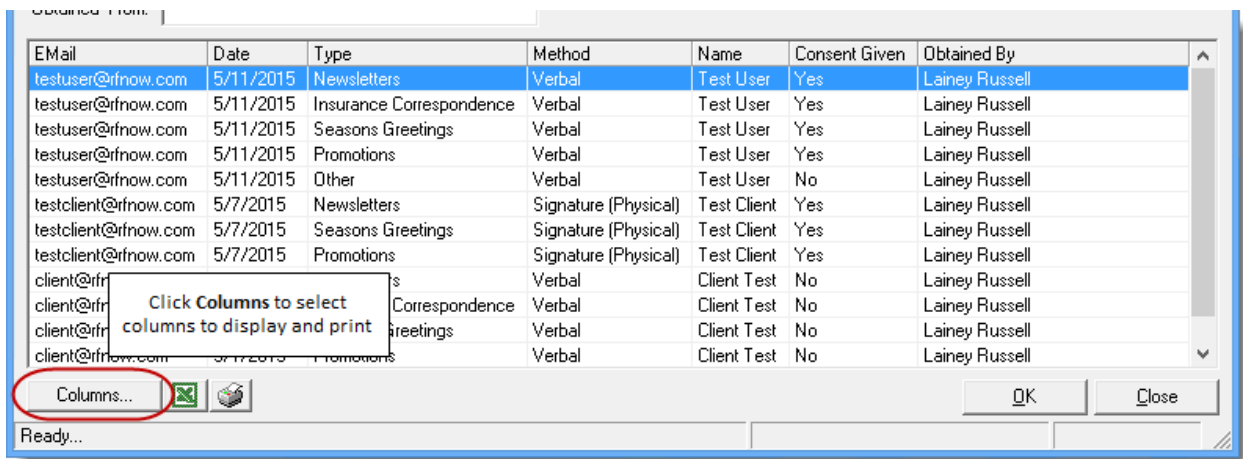
(Figure 1.5)



Consent items matching the selected parameters will display in the report results at the bottom of the form (see Figure 1.6).

- Click a column heading to sort the report by that category. Click the column heading again to sort the report in reverse order.
- Click the **Columns** button to open the **Column Selection** dialog and select which columns to display in the report and which columns to print when report results are printed.

(Figure 1.6)

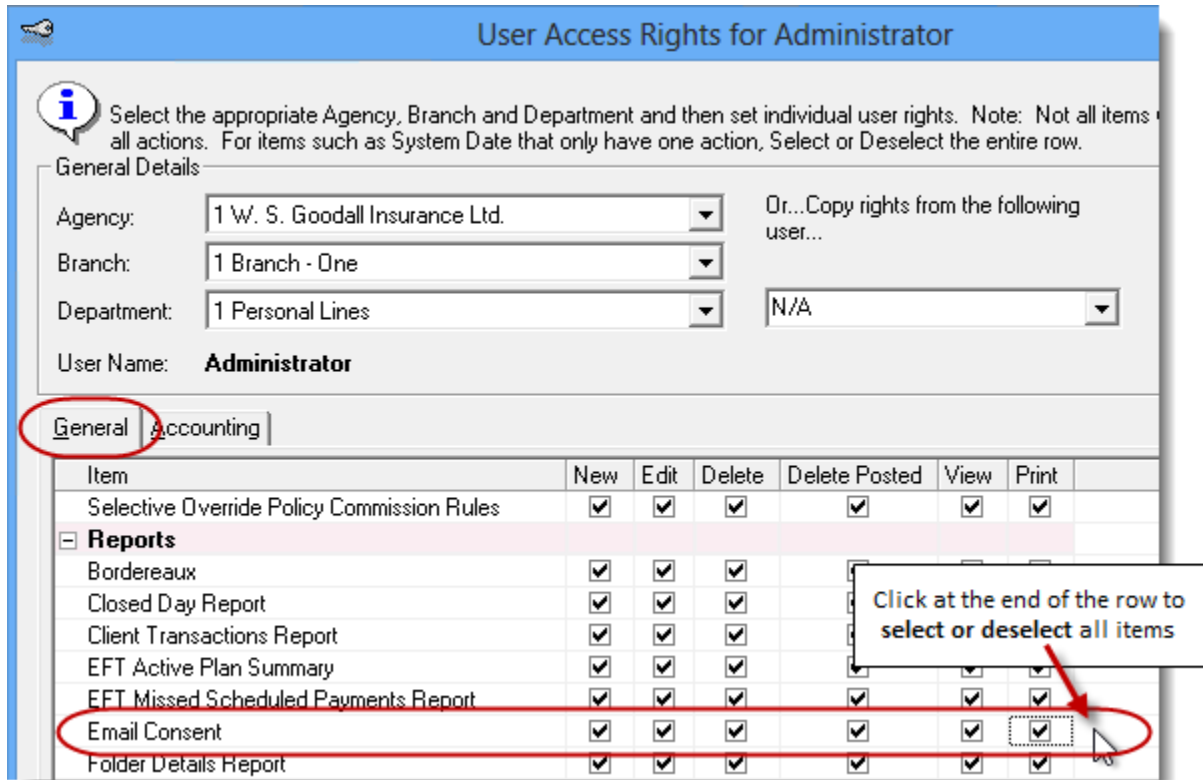


Report results can be printed or exported to Microsoft Excel, if required. To print the report, click the **Print** button (see Figure 1.6). Click the **Export to Excel** button to export report results to Microsoft Excel for additional analysis or use (e.g. promotional and other mass emailing).

To create another report, simply select new criteria and click **OK** again.

Please note that the Email Consent Report is controlled by **User Rights** (*Tools, Administrative, User Manager, Rights*). The Email Consent Report User Right is found on the **General** tab in the **Reports** section (see Figure 1.7).

(Figure 1.7)



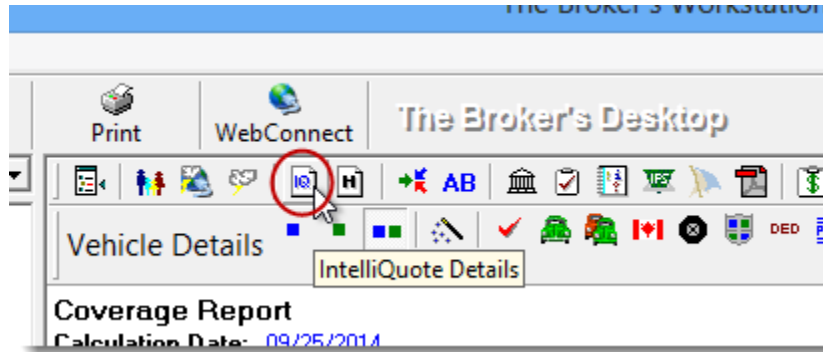
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2. Additional Fields in IntelliQuote Details Dialog

The IntelliQuote Details dialog has been updated with two additional Supporting Personal Auto Policy fields: **Liability** and **Coverage Type**. These fields, which will track the liability and coverage type if the client has a supporting auto policy, can affect rating and are used for determining discounts, such as the Multi-Vehicle Discount. **Please note these fields will impact IQ rating effective October 1, 2015 for Ontario, New Brunswick, Nova Scotia, and PEI, and November 1, 2015 for Alberta.**

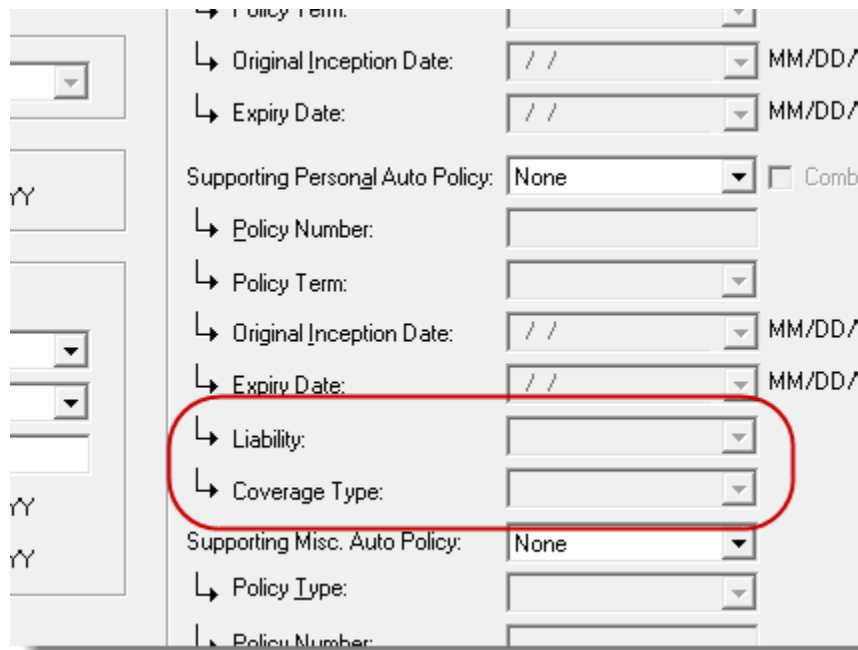
The new fields will display in the IntelliQuote Details dialog during the workflow when a new IQ is being created, and can also be viewed for an existing IQ by clicking the **IntelliQuote Details** button on the **IQ Toolbar** (see Figure 2.1).

(Figure 2.1)



The new fields are available in the **Supporting Personal Auto Policy** area of the **IntelliQuote Details** dialog (see Figure 2.2). Please fill in these details to get an accurate rate.

(Figure 2.2)



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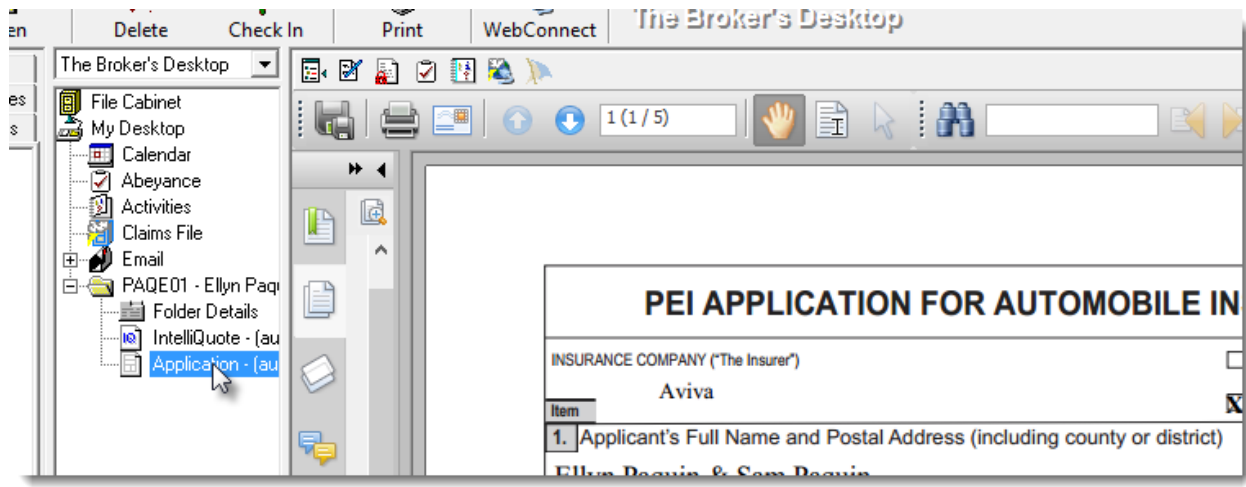
3. DCPD Coverage and New CSIO Auto Application for Brokers in PEI

Effective October 1, 2015, Insurance Companies in PEI will be introducing DCPD coverage. The new PEI Application for Automobile Insurance form will also be available for applications with a Calculation Date on or after October 1, 2015.

To create an Auto Application, drag and drop the **Application** icon from the **Insurance Tray** onto the completed 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 also display in the Document Window (see Figure 3.1).

(Figure 3.1)



As well as the inclusion of DCPD details, a number of other minor changes have been made to the PEI Application for Automobile Insurance, including the addition of a *Registered Identification Number (RIN)* field for Commercial Rated Vehicles and various modifications to format and wording.

Note that applications with a Calculation Date prior to October 1, 2015 will continue to use the previous version of the application form.

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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 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.