

Dear Valued Client:

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

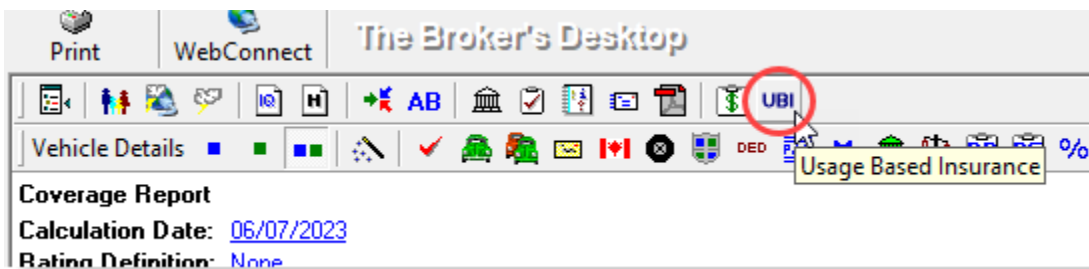
Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to The Broker's Workstation (TBW):

Facility Usage Based Insurance Program (Alberta)

Brokers in Alberta who write business with Facility now have access to their Usage Based Insurance (UBI) Program for commercial vehicles, effective May 1, 2023 for new business and renewals. This feature is applicable for interurban vehicles (classes 61, 62, 63, and 64) only.

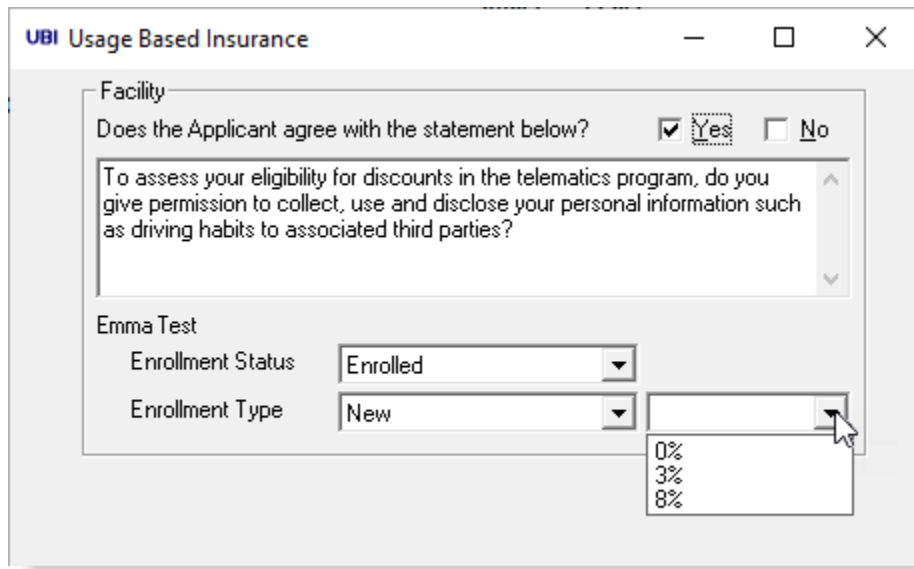
The UBI Program enables Facility to collect data on driving behavior using video telematics technology. Enrolling in the program may make the customer eligible for additional discounts.

When you are creating or editing a Facility Auto IntelliQuote, the **UBI** button will display on the IQ toolbar.



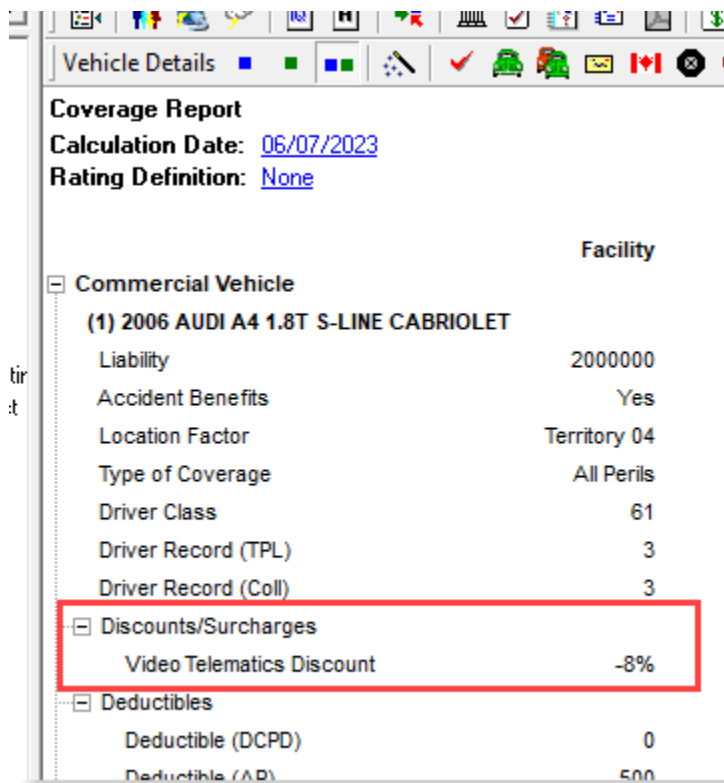
Click the UBI toolbar button to open the **Usage Based Insurance** form. Complete the form as follows:

1. Review the consent statement with your customer and select **Yes** or **No** based on the customer response.
2. Choose the applicable **Enrollment Status** for the driver.
 - Options include Enrolled, Not Interested, Cancelled by Company, Cancelled by Client, and No Consent From Client.
3. Select the **Enrollment Type** (New or Renewal).
4. Select the **Discount** (0%, 3%, or 8%).
 - The 0% option is provided in case the discount needs to be disabled for any reason. If 0% is selected, no discount will be applied.



5. Click OK.

If *Yes* is selected for the customer consent and the Enrollment Status is *Enrolled*, the discount will be applied to the premium. The discount, which is applicable to all coverages, will show as "Video Telematics Discount" for Facility in the Auto IQ.



If *Yes* is selected for the customer consent and the Enrollment Status is *Not Interested, Cancelled by Company, Cancelled by Client, or No Consent From Client*, the discount will not apply.

If *No* is selected for the customer consent, the discount will not apply (regardless of the selection in the Enrollment Status, Type, or Discount menu).

Please note the following with the Facility UBI feature:

- Only person(s) assigned as Primary Drivers in the IQ can be enrolled in the Facility UBI program. As such, only Primary Drivers (not Occasional Drivers) will show in the Usage Based Insurance form.
- The discount is applicable at New Business or Renewal.
- Click the UBI button on the IQ toolbar to update information for new or existing IntelliQuotes.
- The Facility UBI feature is currently applicable only for interurban vehicles in Alberta. The Usage Based Insurance form will not be available for Facility for other vehicle types or regions.

Once you have reviewed this document, please contact your Facility representative with any questions you have about the Usage Based Insurance Program.

Please share this information with the appropriate TBW users in your office(s). Please contact our Client Services Team at clientservices@cssionline.com or 1-888-291-3588 (toll-free telephone) for assistance or with any questions you may have.

Thank you for using The Broker's Workstation.

Yours sincerely,

Custom Software Solutions Inc.