



10 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*

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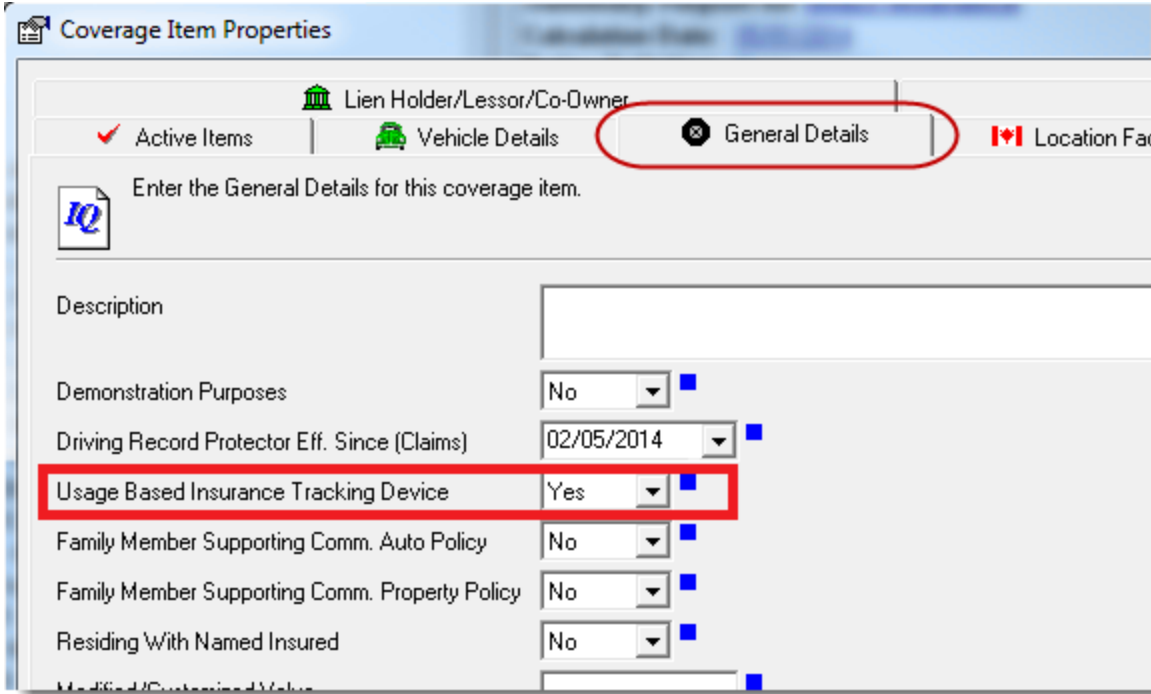
1. [Intact and Novex Usage Based Insurance \(Alberta\)](#) – Brokers in Alberta who write business with Intact or Novex now have access to the Usage Based Insurance Program (my Driving Enrollment Discount) for auto policies effective March 6, 2017 for new business and renewals.

### 1. Intact and Novex Usage Based Insurance (Alberta)

Brokers in Alberta who write business with Intact or Novex now have access to the **Usage Based Insurance Program (my Driving Enrollment Discount)** for private passenger vehicles effective March 6, 2017 for new business and renewals. The Usage Based Insurance (UBI) Program will provide the capability for Intact to collect data on driving behavior using telematics technology. The variables that will be tracked are kilometers driven, quick acceleration, sudden hard breaking, and time of day the vehicle is used.

When you are creating a new or updating an existing Intact or Novex Auto IntelliQuote, indicate which vehicle has the **Usage Based Insurance Tracking Device** on the **General Details** screen (see Figure 1.1).

(Figure 1.1)



For Intact or Novex Auto IntelliQuotes, the **UBI button** will display on the IQ toolbar (see Figure 1.2).

(Figure 1.2)



Click the UBI toolbar button, and the **Usage Based Insurance** dialog will display. Complete the form in the following manner.

1. If the client agrees with the given statement, select the **'Yes'** checkbox.
2. Provide **Enrollment Status** and **Enrollment Type** details for each driver on the IQ.
3. Click **OK** (see Figure 1.3).

(Figure 1.3)

**Usage Based Insurance**

Intact Insurance & Novex

Does the Applicant agree with the statement below?  Yes  No

To assess your eligibility for discounts in the telematics program, do you give permission to collect, use and disclose your personal information such as driving habits to associated third parties?

Principal Driver

Enrollment Status:

Enrollment Type:

Occasional Driver

Enrollment Status:

Enrollment Type:

Based on the details given and the rules, any applicable discount will be included on the **Summary Report** tab of the IntelliQuote (see Figure 1.4) and will be applied to the premium.

(Figure 1.4)

**Summary Report for [Intact Insurance](#)**

Calculation Date: [2017/03/06](#)

Rating Definition: [None](#)

Rates as of: Mar 6, 2017 (New Bus.)

Rates as of: Mar 6, 2017 (Renewals)

Vehicle Use	Pleasure	
AB Rate Group	9	
Coll Rate Group	27	
Comp Rate Group	23	
CVI Level	5	
<b>Third Party Liability</b>		
TPL Limit	\$1,000,000	\$360.78
- Loyalty Discount	(5%)	(\$18.04)
- New Business Discount		
- my Driving Enrollment Discount	(5%)	(\$17.14)
- Convictions Surcharge		
- TPL Total		\$326
- 06 TPL Premium	Drv Rec. 0	\$340.32
- 06 my Driving Enrollment Discount	(5%)	(\$17.02)
- 06 Convictions Surcharge		

Please note the following when working with the UBI 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 the client's eligibility for discounts in the telematics program.
- If you click **Cancel** in the **Usage Based Insurance** window, changes will not be saved.
- Click the **UBI** button on the IQ toolbar to update information for pre-existing or new IntelliQuotes.
- On renewal, please contact Intact for the applicable discount percentage for drivers who are enrolled in the program.

Once you have reviewed this document, please contact our Client Services Team at [clientservices@cssionline.com](mailto:clientservices@cssionline.com) (email) or 1-888-291-3588 (toll-free telephone) with any questions you may have about the setup. For questions regarding the feature itself, please contact your Intact or Novex Insurance 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 these features or need further assistance in their usage, please contact our Client Services Team at [clientservices@cssionline.com](mailto: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)

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