

13 September 2019

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

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1. [New Drivers Policy History Tab and Additional License Fields in Person Details](#) – Use the new Drivers Policy History tab in the Person Details Wizard to enter Auto policy history details for the driver. Also, two new fields (Current License Country and License Expiry Date) have been added to the Drivers License tab.

## 1. New Drivers Policy History Tab and Additional License Fields in Person Details

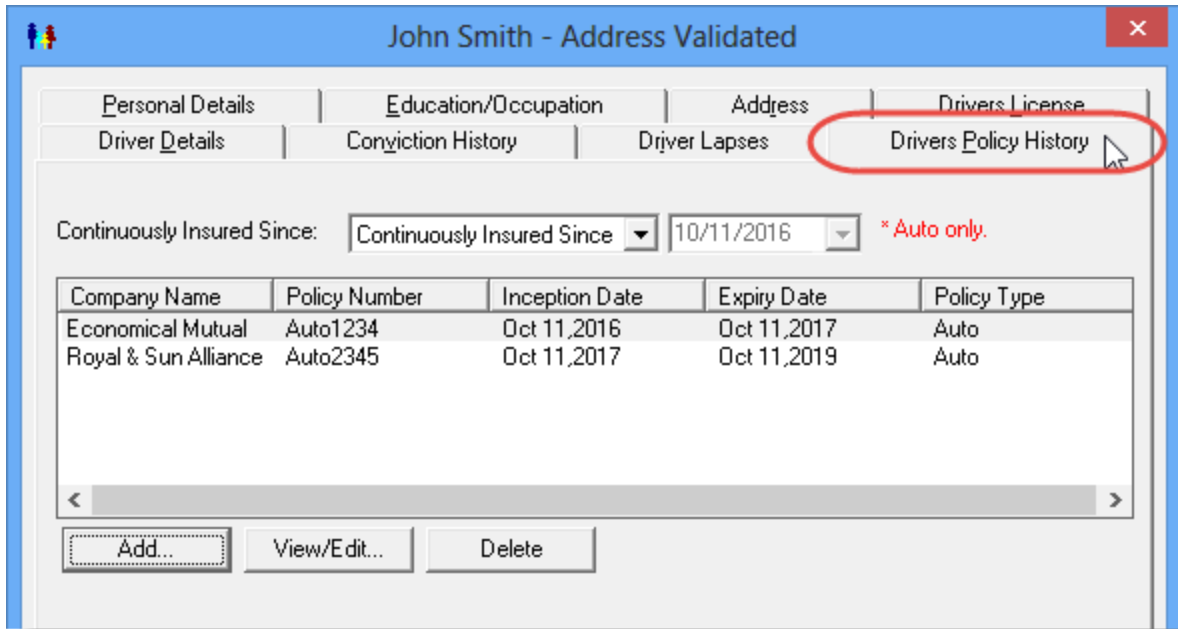
The Person Details Wizard has been enhanced with a new Drivers Policy History tab, as well as additional fields for Current License Country and License Expiry Date.

### Drivers Policy History Tab

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Use the **Drivers Policy History** tab/step to enter Auto policy history details for the driver. The Drivers Policy History step will display automatically during the workflow when you are adding a new person. For an existing person, select the Drivers Policy History tab in the Person Details window (see Figure 1.1). Any Auto policy information that has already been added for the driver will display, including details for Company Name, Policy Number, and more.

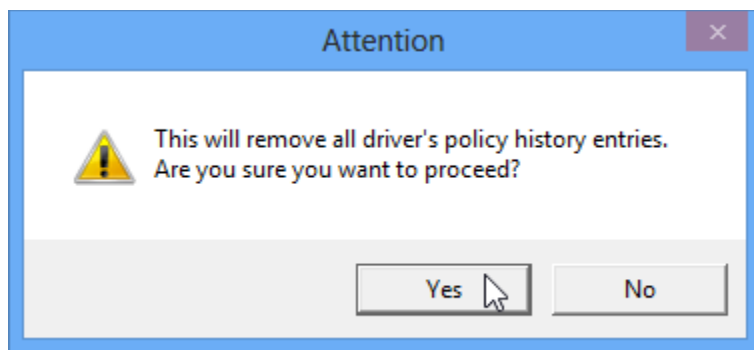
(Figure 1.1)



If no policy history has been entered, the **Continuously Insured Since** date field at the top of the tab will be editable. When policy history has been entered, this date field will update automatically, showing the oldest Inception Date in read-only format.

- If policy history details have been entered and you then change the Continuously Insured Since type to “No Previous Insurance,” a prompt will display, asking whether you would like to remove all of the driver’s policy history entries (see Figure 1.2). Click *Yes* to remove all entries, or click *No* to return to the tab without deleting the entries.

(Figure 1.2)



The buttons at the bottom of the tab can be used to add, view, modify, or remove Auto policy history items, as required. Note that these buttons are accessible only when “Continuously Insured Since” has been selected in the Continuously Insured Since type menu.

- Click the **Add** button to open the Policy History Details form and add new driver’s policy history details (see Figure 1.3).
  - For a policy renewed over multiple years, use a single entry for each policy number. For example, if the same policy number was renewed over 5 years, enter that policy once (with the appropriate Inception Date and Expiry Date), rather than creating an entry for each year.

(Figure 1.3)

- On the Drivers Policy History tab, double-click an existing policy history item or select the item and click **View/Edit** to open the Policy History Details form and view or modify item details.
- To delete a policy history item, simply select the item and click the **Delete** button.

### Current License Country and License Expiry Date Fields

Two new fields – **Current License Country** and **License Expiry Date** – have been added to the **Drivers License** tab in the Person Details Wizard (see Figure 1.4), providing the user with the option to enter an out-of-province license.

- When Canada is selected in the Current License Country field, the **Province/State** menu will display only Canadian provinces. Only U.S. states will display when United States is selected as the country.

- **Province/State, License Class, and Date License Class Obtained** fields will be greyed out/inaccessible when a country other than Canada/United States is selected in the Current License Country field.

(Figure 1.4)

In an existing IntelliQuote, if the province is currently set to a Canadian province or U.S. state, the Current License Country field will be set automatically in the Person Details Wizard. This selection can be changed as appropriate.

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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.



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