



30 June 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. [Intact Usage Based Insurance \(Nova Scotia\)](#) – Brokers in Nova Scotia who write business with Intact now have access to the Usage Based Insurance Program (my Driving Discount) for auto policies effective July 7, 2015 for new business and renewals.

1. Intact Usage Based Insurance (Nova Scotia)

Brokers in Nova Scotia who write business with Intact now have access to the **Usage Based Insurance Program (my Driving Discount)** for auto policies effective July 7, 2015 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.

The Intact UBI feature will be available to TBW users on July 7, 2015.

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

(Figure 1.1)

The screenshot shows the 'Coverage Item Properties' dialog box with the 'General Details' tab selected. The 'Usage Based Insurance Tracking Device' field is highlighted with a red box and set to 'Yes'. Other fields include 'Description', 'Demonstration Purposes' (No), 'Driving Record Protector Eff. Since (Claims)' (02/05/2014), 'Family Member Supporting Comm. Auto Policy' (No), 'Family Member Supporting Comm. Property Policy' (No), and 'Residing With Named Insured' (No).

For Intact 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)

UBI 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 car location and driving habits to associated third parties as outlined in the terms of the program?

Male Auto Case 15

Enrollment Status: Enrolled

Enrollment Type: New

Squat Right

Enrollment Status: Enrolled

Enrollment Type: New

OK Cancel

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

(Figure 1.4)

Comp Rate Group		
Third Party Liability		
No Fault BI	\$1,000,000	\$361
- Multi-Vehicle Discount		
- Multi Policy Discount		
- Driver Experience Discount	(16%)	\$303
- Conviction Free Discount	(10%)	\$273
- Conviction Surcharge		
- My Home & Auto Discount		
- Low Mileage Discount		
- Hybrid Discount		
- Occupation Discount		
- Web Discount		
- my Driving Enrollment Discount	(5%)	(\$14)
- TPL BI Total		\$259
No Fault PD	\$1,000,000	Incl.
- my Driving Enrollment Discount	(5%)	
- TPL PD Total		Incl.
<small>TPL Total</small> <small>6250</small> <small>6250</small>		
<small>Coverage Report</small> Summary Report(s) <small>Outline View(s)</small> <small>Alerts</small> <small>Comparison Report</small> <small>Update Rep</small>		

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. Based on submitted information, CSSI will determine whether the client qualifies for a discount. If so, the discount will be applied to the quote.
- 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 (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 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 (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.