

7 December 2018

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)**:

Contents

1. [New CSIO Habitational and Farm Insurance Applications](#) – New CSIO Habitational and Farm Insurance Applications have been implemented in TBW/TUW and are applicable for new applications, effective October 1, 2018. The applications have been updated to address the collection of data related to the cultivation and use of cannabis.

1. New CSIO Habitational and Farm Insurance Applications

New CSIO Habitational and Farm Insurance Applications have been implemented in TBW/TUW and are applicable for new applications, effective October 1, 2018. The applications have been updated to address the collection of data related to the cultivation and use of cannabis.

To create an application, drag and drop the Application icon from the Insurance Tray onto the completed Client 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 will display in the Document Window.

- Note that applicable details regarding “Number of Cannabis Plants Grown on Premises” will display in the **Liability Exposures** section of the application (see Figure 1.1).

(Figure 1.1)

The screenshot shows a web-based form titled "The Broker's Desktop" with a "WebConnect" button. The form is divided into two main sections: "FOR THIS LOCATION" and "IF OCCUPANCY IS LESS THAN 3 YEARS, PROVIDE PREVIOUS ADDRESS BELOW". The "FOR THIS LOCATION" section contains a table with columns for NO., ADDRESS, CITY, PROV., POSTAL CODE, DATE MOVED IN (YYYY/MM/DD), and DATE MOVED OUT (YYYY/MM/DD). Below this table is section "13. LIABILITY EXPOSURES", which is circled in red. A note states: "All YES answers may require liability extension coverage or remarks explaining coverage declined." The questionnaire includes 18 numbered questions with Yes/No checkboxes. Question 17, "NUMBER OF CANNABIS PLANTS GROWN ON PREMISES?", is circled in red and has the number "3" entered in the answer field. Other questions include inquiries about multiple locations, rental properties, day care operations, trampolines, garden tractors, golf carts, saddle-draft animals, unlicensed recreational vehicles, renewable energy, and watercrafts.

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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)

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