



18 July 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. [Short-Rate Cancellations for Wawanesa Auto Policies \(NB and PE\)](#) – Effective July 12, 2018 for brokers in New Brunswick and Prince Edward Island who write business with Wawanesa, applicable personal lines and commercial auto policies cancelled at the Insured's request will be calculated by Short Rate.

1. Short-Rate Cancellations for Wawanesa Auto Policies (NB and PE)

Effective July 12, 2018 for brokers in New Brunswick and Prince Edward Island who write business with Wawanesa, applicable personal lines and commercial auto policies cancelled at the Insured's request will be calculated by Short Rate. This is applicable for Cancellation Requests for auto policies (including private passenger vehicle, ATV, motor home, trailer, commercial vehicle, and commercial trailer) created on or after July 12.

When you are creating a Cancellation Request, **Insureds Request** can be selected in the **Reason** drop-down menu in the Cancellation Request form (see Figure 1.1).

- Make applicable selections in the **Canc. Code/Method** menus, as well. *Please note, although Short Rate is not available for selection in the Method drop-down menu, the cancellation will automatically be calculated by Short Rate, as applicable.*

(Figure 1.1)

The screenshot shows a 'Cancellation Request' window. At the top, there's a title bar with a close button. Below it, the form is titled 'Request.' and has a section for 'multiple policy code' with a radio button for 'Multiple carriers or subscription'. The 'Branch' is set to '1 Branch - Four' and 'Department' to '1 Department One'. There are several dropdown menus: 'New Bus. Existing Cli', 'Tax Jurisdiction' (PE), 'Billing Type' (Agency Bill), 'Reason' (circled in red, showing 'Insureds Request'), and 'Canc. Code/Method' (Left Market Area, Pro Rata). A mouse cursor is pointing at the 'Reason' dropdown.

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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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