



24 June 2020

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. [Gore Mutual Online Quoting and Credit Score Feature for Condo Policies \(BC\)](#) – Brokers who write business in British Columbia with Gore Mutual Insurance can access Gore Mutual's Online Quoting and Credit Score feature for Condo policies, effective July 1, 2020 for new business and September 1, 2020 for renewals.

1. Gore Mutual Online Quoting and Credit Score Feature for Condo Policies (BC)

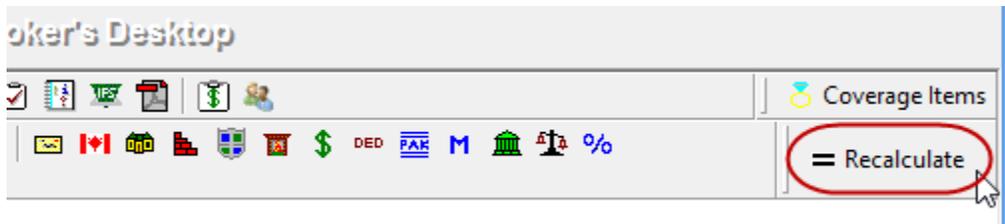
Brokers who write business in British Columbia with Gore Mutual Insurance can access Gore Mutual's Online Quoting and Credit Score feature directly from TBW and IntelliQuote for Condo policies (including Primary Condo and Additional Residence Condo). These new features are effective July 1, 2020 for new business and September 1, 2020 for renewals.

Online Quoting for Condo Policies

With Online Quoting, Gore Mutual rates for Condo policies will always be up-to-date and available to you Realtime, because the rates will come directly and immediately from Gore's system through a web call. This streamlined quoting process, with improved rating accuracy and rate updates in Realtime, will enhance the customer experience and enable you to do business more efficiently and responsively.

No setup is required for the Online Quoting feature. Gore's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) for a Gore Condo IQ with a Calculation Date on or after July 1 for new business/on or after September 1 for renewals.

(Figure 1.1)

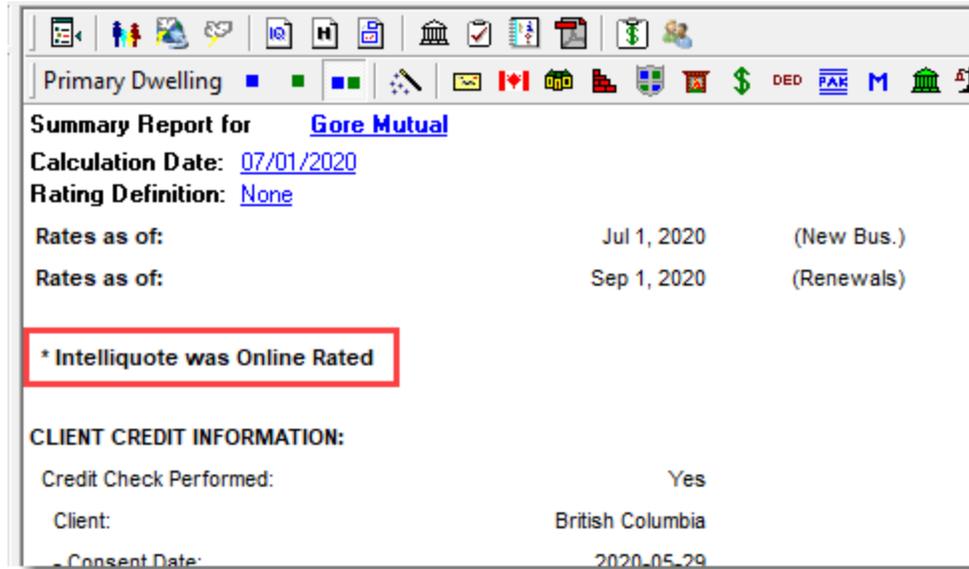


The results of the web service call will be displayed immediately on the Summary Report tab in the IQ, and any alerts that have been returned from the web service will be displayed on the Alerts tab.

Please note the following when using the Gore Mutual Online Quoting feature:

- **Online Quoting can be used for current (today's date) rating and forward rating, but it will not provide quotes on a backdated effective or calculation date.** As such, for online quoting, please ensure the effective date or calculation date is always set to the current or a future date, rather than a past date.
- Online rating will be for Condo risks (Primary Condo and Additional Residence Condo).
 - As released previously, online rating is also available for Primary Home policies. Other policy types will continue to use TBW's local rating engine for quoting.
- When a pre-existing Gore Condo IQ is opened, it will continue to use TBW's local rating engine for quoting unless the Calculation Date is changed.
- With online rating, the text "IntelliQuote was Online Rated" will display on the Summary Report tab in the IQ (see Figure 1.2).

(Figure 1.2)

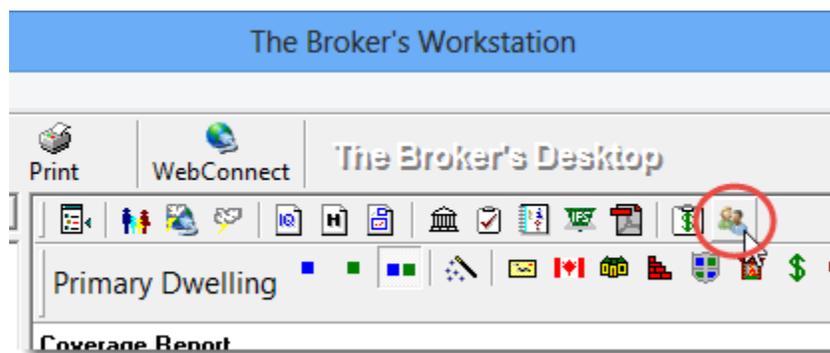


Credit Score Feature for Condo Policies

With the Credit Score feature, the broker can submit client consent for the Company to obtain additional information required to make an informed decision about the risk. Submitting this consent may make the client eligible for additional discounts.

The **Credit Score form** will appear automatically as part of the workflow when you are creating a new Gore Mutual Condo IntelliQuote. For existing IntelliQuotes, you can access the Credit Score form by clicking the **Applicant Declaration**  button on the IQ toolbar (see Figure 1.3).

(Figure 1.3)



To complete the Credit Score form,

1. Select the **Insurer(s)** authorized by the Applicant.

2. Select the **Applicant** for the Credit Score.
 - Click the **Add/Edit Person** button if you would like to add and select a different applicant for the Credit Score form, and then enter the requested information in the Personal Details Wizard.
3. Review the given **Consent Statement** with your customer and select *Yes* or *No* based on the customer response (see Figure 1.4).

(Figure 1.4)

4. Click the **Submit** button to send the Credit Score information to Gore Mutual.

The **Summary Report** tab in the IntelliQuote will indicate whether a credit check was performed and provide information regarding which Named Insured was used in rating, as well as date of birth and address details. Any applicable discount will be included in the Summary Report and applied to the premium.

Please note the following when using the Gore Mutual Credit Score feature:

- Ensure you inform the client that he/she is giving consent for the Company to obtain additional information required to make an informed decision about the risk.
- A prompt will display if additional client details are required after clicking the **Submit** button. Select the **Applicant** and click the **Add/Edit Person** button to modify or add details.
- If you click **Cancel** in the Credit Score form, no Credit Score call will be made. Based on submitted information, Gore Mutual will determine whether the client qualifies for a discount. If yes, the discount will be applied to the quote.
- Click the **Applicant Declaration** button on the IQ toolbar to update information for pre-existing or new IntelliQuotes.

If you have any questions about Gore Mutual Online Quoting or the Gore Mutual Credit Score feature, please contact your Gore Mutual 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)

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