The Broker's Workstation INTEGRATED MANAGEMENT SYSTEM

The Underwriter's Workstation INTEGRATED MANAGEMENT SYSTEM

16 March 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

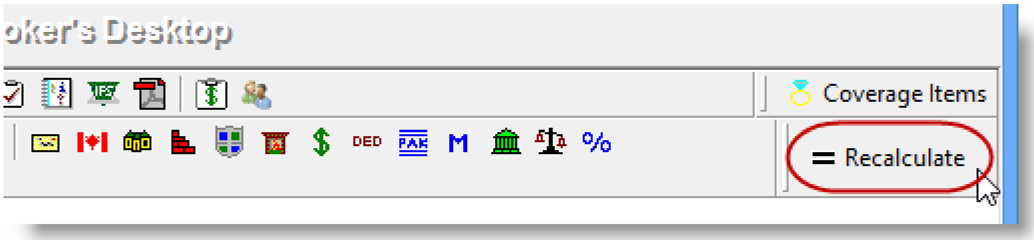
1. Wawanesa Online Quoting and Realtime Upload (AB Property)

Brokers in Alberta who write business with Wawanesa Insurance can access Online Quoting and Realtime Upload directly from TBW and IntelliQuote for new business Personal Lines Property policies.

What this will mean for you, the broker, is that Wawanesa rates for personal property policies will always be up-to-date and available to you Realtime, because the rates will come directly and immediately from Wawanesa's system through a web call. If the new business application that has been uploaded is accepted, the new policy document will be sent back in near Realtime.

Once the one-time setup for this feature (see below) has been completed, proceed to create a new or modify an existing Wawanesa Habitational IntelliQuote in the usual way. Wawanesa's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) for a Wawanesa personal property IQ.

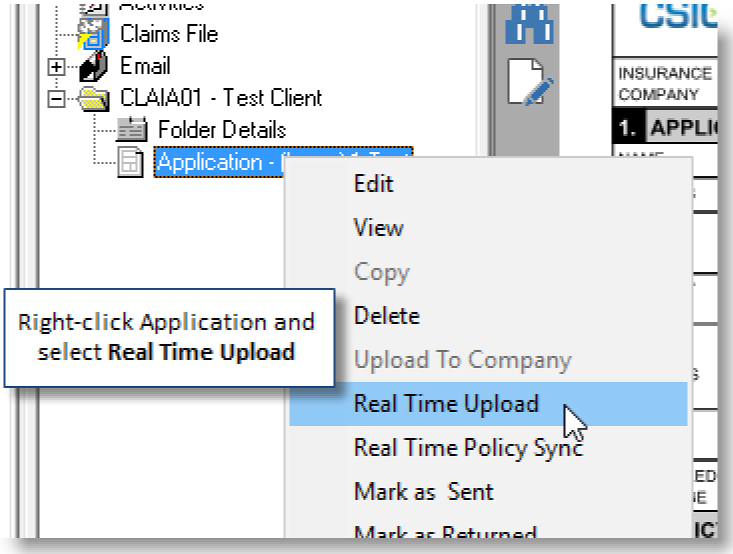
(Figure 1.1)



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

In addition, the "Realtime Upload" option will be available for new business applications. Once you have completed a new business personal property application for Wawanesa, right-click the application document in the Desktop Tree, and select **Realtime Upload** (see Figure 1.2).

(Figure 1.2)



A response will be returned from Wawanesa, with details provided in the upload message box.

- **Note**: ***If the upload message box says "Compliance," the upload will go straight through.***
- If the application upload has been successful, but an Underwriter review is required, you will be notified in the upload message box and on the Alerts tab.

If the new business application has been accepted, Wawanesa will issue the policy from the information provided, and the policy will be sent back to you. The policy will appear in the Client folder in the Desktop Tree, and will open to the **TBW Coverages** tab in the Document Window.

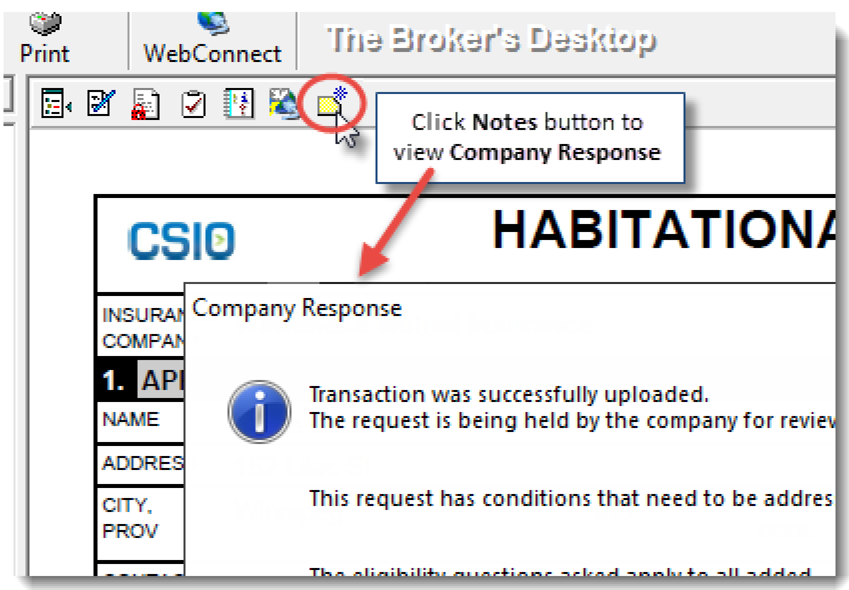
- An **Abeyance** with the Subject “Document uploaded… awaiting reply” will automatically be created when the Application is uploaded. If the Application is accepted and a new policy is returned via Realtime download, this Abeyance will automatically be marked as “Done.”
- Following the usual TBW workflow, a new Abeyance will automatically be generated for the new downloaded policy.
  - If a different user is to transact the new downloaded policy, the user who created the new policy must open this Abeyance and assign it to the applicable person.
  - Once the policy has been transacted, this Abeyance will be marked as completed, and the transacting user will have the opportunity to create any new Abeyances needed for your organization.
- Once a Direct Bill or Agency Bill policy has been returned, a URL will be provided in the message box and on the Alerts tab, allowing you to perform a policy lookup and apply a credit card payment to the policy. Copy the link and paste it in your web browser to view policy details and make a payment on the company website.

If the new business application has not been successful, you will be informed in the upload message box.

Once the new business application has been uploaded, click the **Notes** button on the Application toolbar (see Figure 1.3) to open the Company Response window and review the message sent by the company on upload, if needed. (This option may be useful, for example, if you did not receive a Realtime return policy and cannot remember the company message received after the upload.)

- This toolbar button will only be available after the Realtime upload. Note that you may need to refresh the application to view the button.

(Figure 1.3)



Important Points – Wawanesa Online Quoting and Realtime Upload

Here are a few important points to keep in mind when you are using Wawanesa Online Quoting and Realtime Upload.

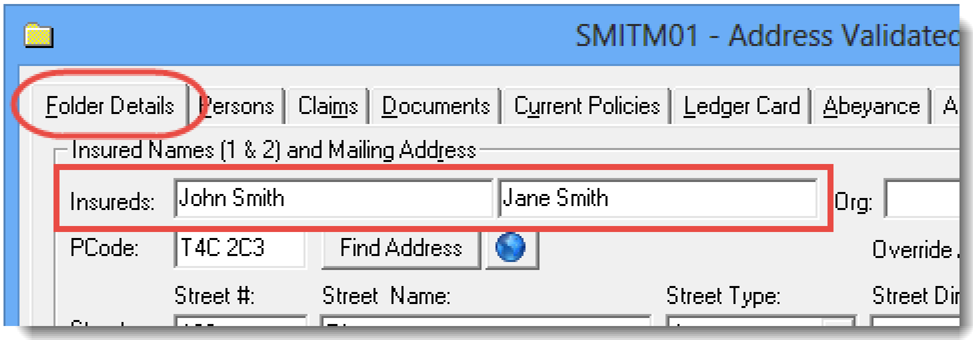
- **Online Quoting can be used for current (today's date) rating and forward rating, but it will not provide quotes on a backdated effective or calculation date.** As such, for Online Quoting, please ensure the effective date or calculation date is always set to the current or a future date, rather than a past date.
- **An application that was uploaded successfully cannot be deleted in TBW**. If an uploaded application is held for review and declined by the Underwriter, you will be notified by the company. In this situation, you can right-click the application on the Documents tab in Folder Details, and select "Mark as Declined" in the right-click menu.
- **A return policy cannot be deleted in TBW**. Please note, on the Documents tab in Folder Details, "ICompany – Realtime" will display in the Created By column for a return policy.
    - If the company ever contacts you to request that you remove an automated Realtime policy, please contact CSSI Client Services for assistance.
- Batch Transact and Auto Transact are not affected by Realtime download. Realtime downloads from Wawanesa, which are automatically returned through a web connection, will not Auto Transact or be available in Batch Transact. For Realtime downloads, the user can either transact the Realtime download at the time, or reassign the download Abeyance to the appropriate person for transacting.
- **Do not delete a Wawanesa policy that has been downloaded in Realtime unless Wawanesa advises you to do so.** Note that Realtime downloads will not display in the processing screen, and so cannot be deleted and reprocessed.
- When a pre-existing IQ is opened, it will continue to use TBW's local rating engine for quoting unless the calculation date is changed to the current or a future date.
- At this time, online quoting and Realtime upload are not supported for Endorsement Requests for Wawanesa. Instead, please use Wawanesa's BluePass Broker portal for policy change.

Data Entry/IQ Tips for Wawanesa Online Quoting and Realtime Upload

When you are creating or updating a Wawanesa Property IQ, please note the following.

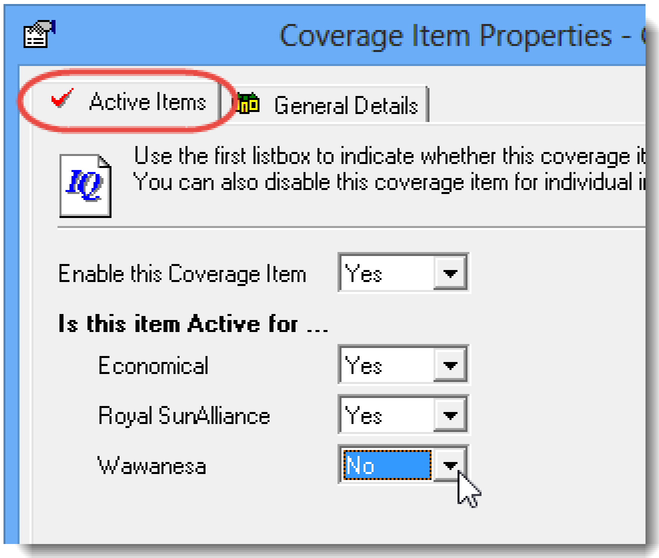
- In the Client folder, only one client name is to be entered in each **Insureds** field in the Client folder (see Figure 1.4).
    - Also, **no characters** (such as an ampersand – '&') can be entered in either Insureds field. If a character exists in either the first or second Insureds field, you will be informed that the Named Insured does not match the Person. In this case, remove the character from the Client folder, check the folder in and out, and recalculate the IntelliQuote before proceeding.

(Figure 1.4)



- The name in the **Insureds** field and the name on the **Persons** tab <u>must exactly match</u> (for example, if the Insureds field includes the person's middle name, the middle name must also be included on the Persons tab). In addition, the name in each of these fields must be in proper case style, and cannot be entered in all capital letters.
- For **Account Types**:
  - **Individual** – Enter individual names in the Insureds fields. If the individuals have a business using a registered trading name only (not a legal entity), that trading name can be entered in the Organization field. This field has no impact on rating or the actual named Insured on the return policy.
  - **Corporation** – This account type is used for business accounts where company names are actual legal entities (i.e. Inc. or Ltd.). The corporate name is entered in the Name field. A registered trading name can be added, if desired, but this information will not display on the return policy.
- Overrides are not enabled for Wawanesa Online Quoting.
- To get preferred rating for a home, Guaranteed Replacement Cost <u>and</u> Single Limit Endorsement must be added.
- Credit Score consent details can be entered in the usual way while a Wawanesa IQ is being created or modified. However, the IQ Summary Report will not indicate whether a credit score was performed, and credit score status details will not be included in the returned policy. If the insured qualifies for a credit score discount, the premium will be adjusted accordingly.
- When performing multi-company rating and additional items are added, alerts may display for Wawanesa stating certain coverage items are not supported. As not-rated coverage items will stop application creation, follow these steps if this occurs:
  - For each not-rated coverage item, open Coverage Item Properties for the item and, on the **Active Items** tab, disable the coverage item for Wawanesa (see Figure 1.5). Then, recalculate the IQ.

(Figure 1.5)



- The following will be held for Underwriter review:
  - Standard-rated homes
  - Mobile homes
  - Primary FEC and/or additional rented dwellings
  - Corporate folders
  - Dwellings under Construction

Setup for Wawanesa Online Quoting and Realtime Upload

The following one-time setup for Wawanesa Online Quoting and Realtime Upload must be completed in TBW before the functionality can be used.

Please note, users may already have completed some of the following setup steps (e.g. for User Rights and WebConnect). In this situation, these steps will only need to be completed for new users or if your office has never used any Wawanesa WebConnect functions. Broker number setup is also required (but this, along with I-Biz Defaults and I-Biz Folder Defaults for each number, should already have been set up).

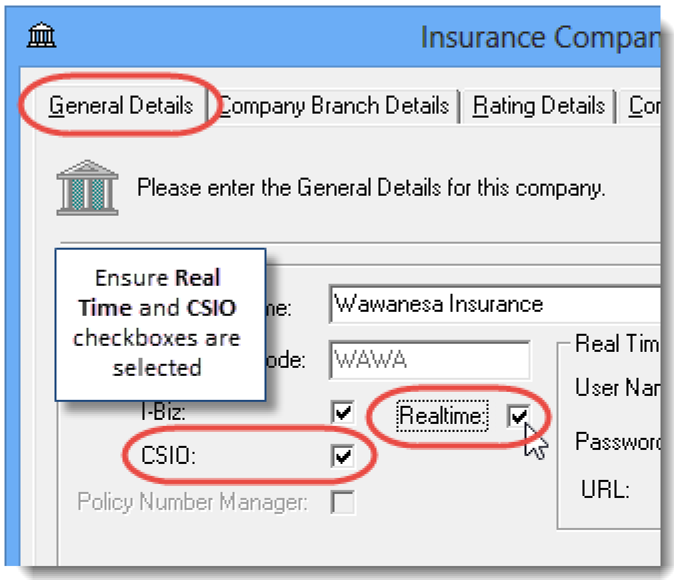
Important: Before you begin, please ensure you have the required broker numbers from Wawanesa (these are required for broker number setup, as described below). Please also ensure you have the required User ID/Password for WebConnect setup as described below. Please contact your Wawanesa Personal Lines representative for assistance if you do not have the required broker numbers or username/password.

Follow these steps to complete setup for Wawanesa Online Quoting and Realtime Upload.

1. Ensure there is only one instance of Wawanesa in the Insurance Company List using the Wawanesa Rating Engine.

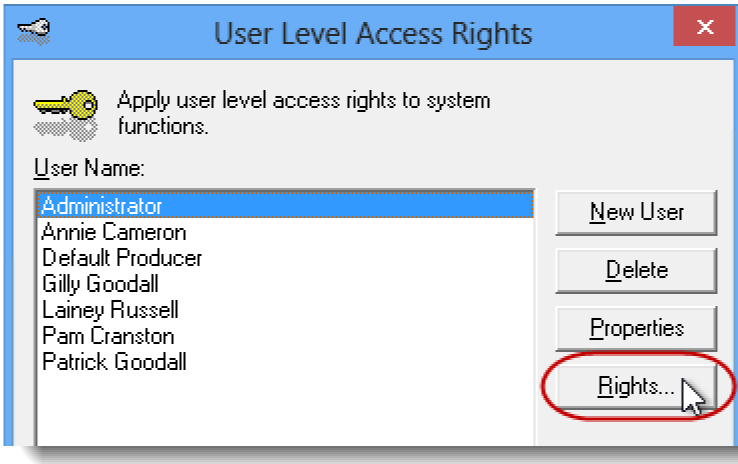
2. Ensure the Realtime and CSIO options are selected in TBW Lists as follows:
    a. In the TBW window, click **Lists**, **Insurance Companies**.
    b. In the **Lists** window, double-click **Wawanesa**.
    c. On the **General Details** tab in the Wawanesa dialog, ensure the **Realtime and CSIO checkboxes** are selected (see Figure 1.6).

(Figure 1.6)



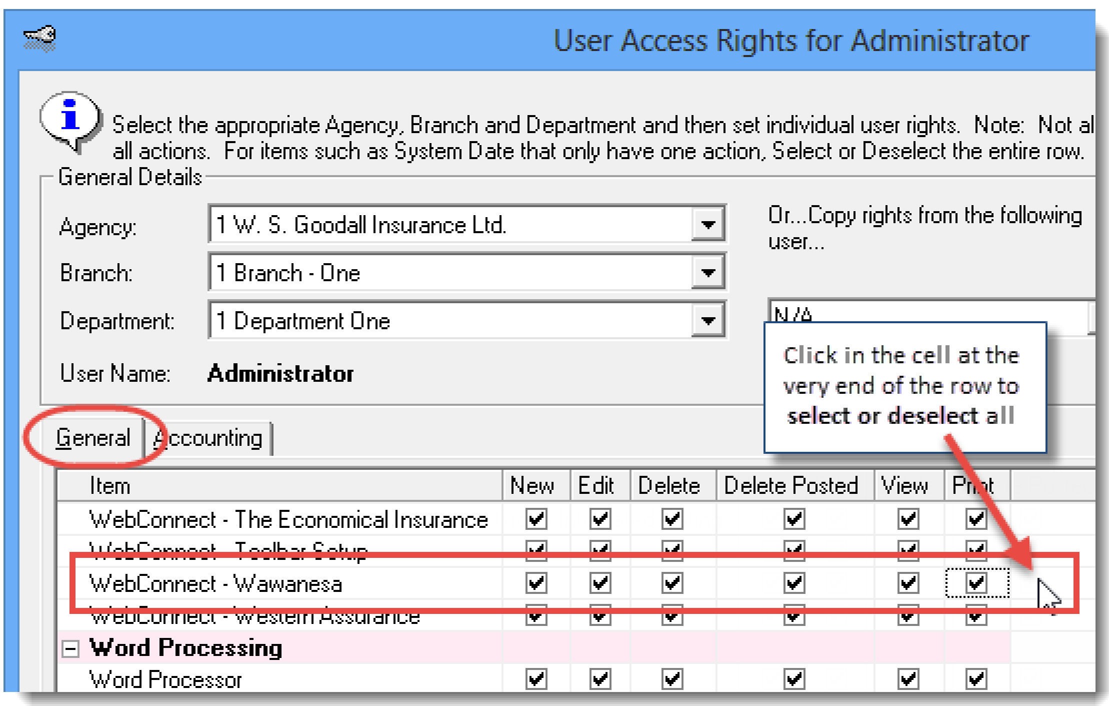
3. Still in the Wawanesa dialog, select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
    - The applicable 7-digit and 10-digit broker numbers display for each ABD in your organization.
        - Note that broker numbers for Guidewire (Online Quoting/Realtime Upload) are 7-digit numbers, while broker numbers for CSIO are 10-digit numbers. *Both types of broker numbers are required for proper setup.*
    - The 7-digit Guidewire number must be set as default for use on applications.
    - If you are setting up additional broker numbers in TBW Lists, please ensure there is no trailing whitespace if you copy/paste the broker number into TBW.
4. Click **OK** in the Wawanesa dialog, and click **OK** in the Lists dialog.
5. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows:
    a. Click **Tools**, **Administrative**, **User Manager**.
    b. In the **User Level Access Rights** dialog, select the **Username** and then click the **Rights** button (see Figure 1.7).

(Figure 1.7)



c. On the **General** tab in the **User Access Rights** dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Wawanesa** (see Figure 1.8).

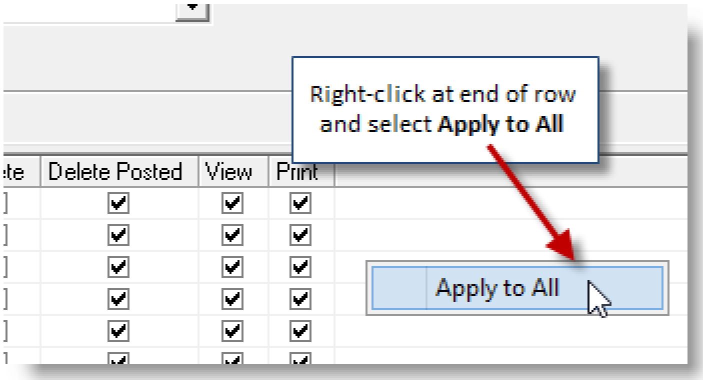
(Figure 1.8)



d. Click **OK** in the **User Access Rights** window to save these rights for this user for this ABD, and then click **OK** in the **Attention** window.

e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – Wawanesa* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.9).

(Figure 1.9)



f. Click **Close** in the **User Access Rights** window.

g. Repeat Steps b – f for each additional TBW user requiring these rights.

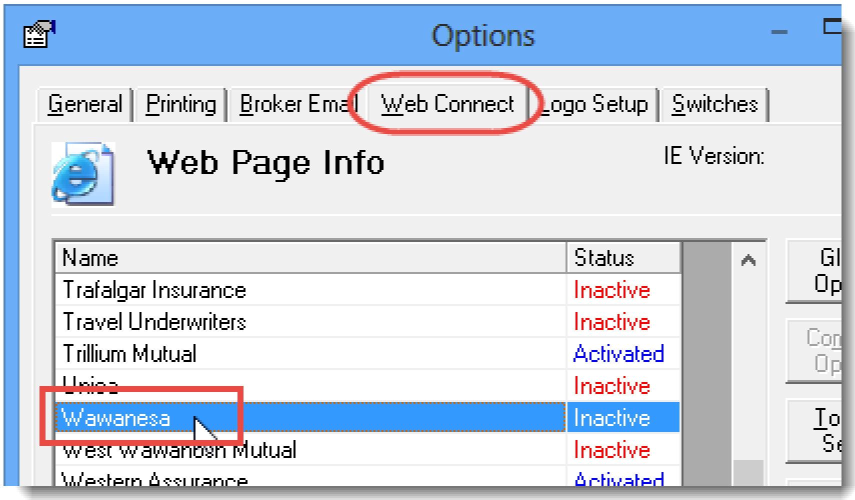
h. Click **OK** in the **User Level Access Rights** window.

6. Next, ensure each applicable user is set up for Wawanesa in WebConnect as follows:

a. Click **Tools**, **Options** in the TBW window.

b. On the **WebConnect** tab in the Options dialog, find and double-click **Wawanesa** (see Figure 1.10).

(Figure 1.10)



c. In the **WebConnect Setup** window,

i. Select the applicable **User**.

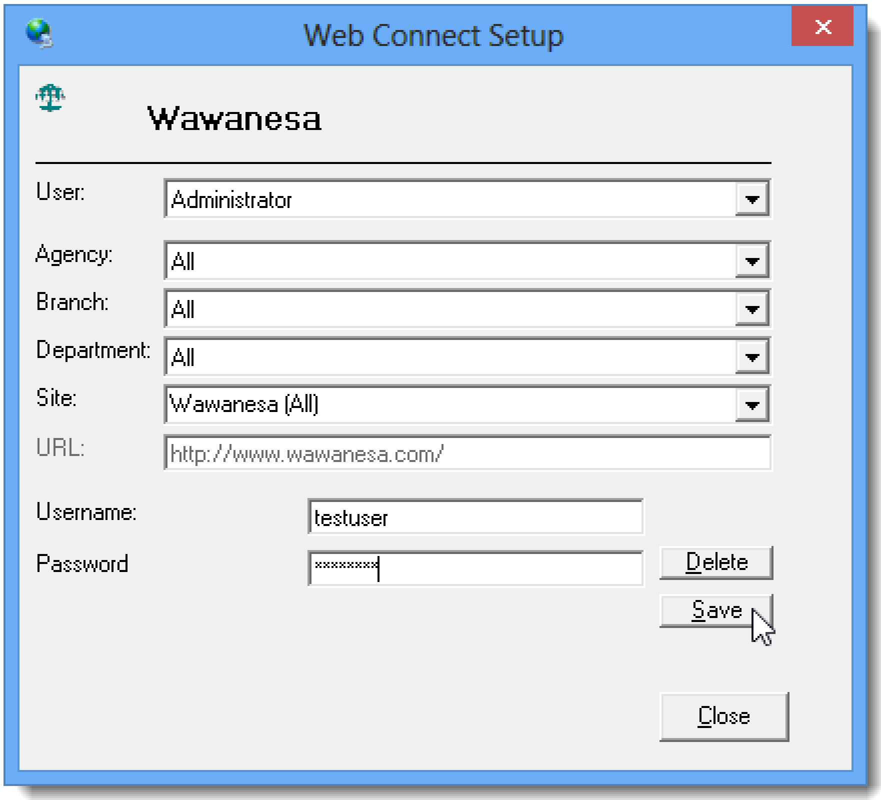
ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department).

iii. Ensure **Wawanesa (All)** is selected in the **Site** menu.

iv. Enter the appropriate **Username** and **Password**.

v. Click **Save** (see Figure 1.11).

(Figure 1.11)



vi. Click **OK** in the **Save Username/Password** box.

vii. Repeat these steps as necessary for additional ABDs and/or Users.

viii. Click **Close** in the WebConnect Setup dialog.

- *Be sure to update WebConnect Setup details whenever you reset your password.*

d. Click **OK** in the Options dialog.

7. Close TBW and run the TBW Update Utility.

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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,

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