



13 October 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)**:

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1. [Short-Rate Cancellations for Wawanesa Farm Policies \(AB\)](#) – Effective December 1, 2020 for brokers in Alberta who write business with Wawanesa, Farm policies cancelled at the Insured's request will be calculated by Short Rate.

## 1. Short-Rate Cancellations for Wawanesa Farm Policies (AB)

Effective December 1, 2020 for brokers in Alberta who write business with Wawanesa, Farm policies cancelled at the Insured's request will be calculated by Short Rate. This is applicable for cancellations for Wawanesa Farm policies with a 12-month policy term.

To view this feature, create a Cancellation Request in the usual way for a Wawanesa Farm policy. In the Cancellation Request form, select **Insureds Request** in the **Reason** drop-down menu, and make applicable selections in the **Canc. Code/Method** menus (see Figure 1.1).

- Note that **Short Rate** is available for selection in the Method menu.

(Figure 1.1)

Multiple policy code  Multiple carriers or subscription

h: 1 Main Branch Department: 1 Main Department

Billing Type: Direct Bill

Reason: Insureds Request

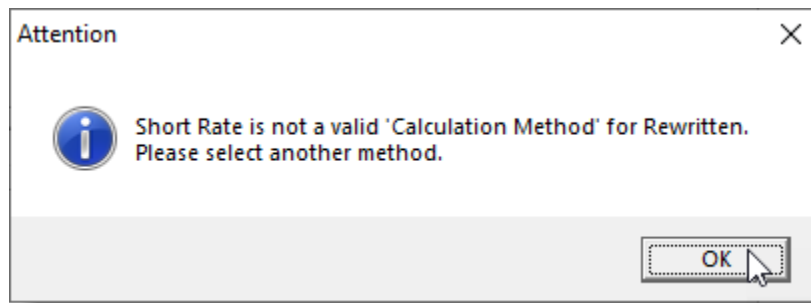
Canc. Code/Method: Deceased

Short Rate  
Pro Rata  
Short Rate

Term Premium (-): 496.00 Annualized Premium: 496.00

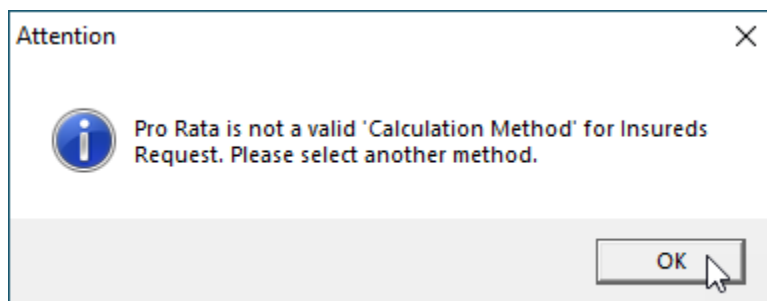
Please note, if you select Short Rate as the Method but this is not valid for the selected Reason, you will be prompted to select another method (see Figure 1.2).

(Figure 1.2)



Similarly, if an invalid Method is selected for the Insureds Request Reason, you will be prompted to make another selection (see Figure 1.3).

(Figure 1.3)



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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](mailto: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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