14 January 2021

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. SGI CANADA Online Quoting and Credit Score Feature for Auto Policies (AB) – Brokers who write business in Alberta with SGI CANADA can access SGI CANADA's Online Quoting and Credit Score feature for PPV Auto policies for new business and renewals.

1. SGI CANADA Online Quoting and Credit Score Feature for Auto Policies (AB)

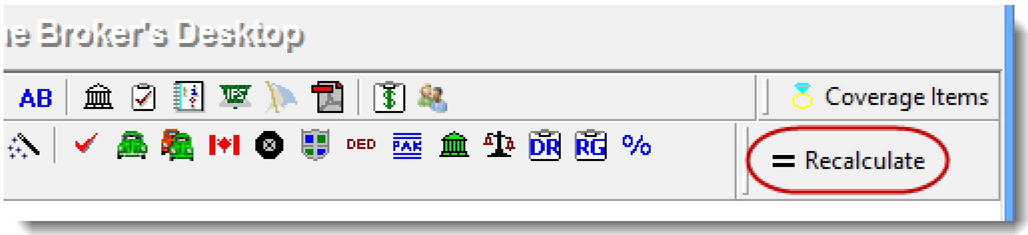
Brokers who write business in Alberta with SGI CANADA can access SGI CANADA's Online Quoting and Credit Score feature directly from TBW and IntelliQuote for PPV (private passenger vehicle) Auto policies. These new features are effective immediately for new business and renewals.

Online Quoting for Auto Policies

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

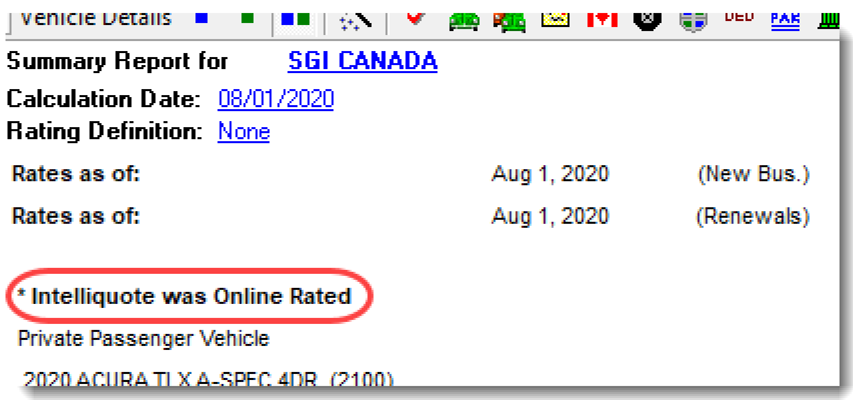
Once the one-time setup for this feature (see below) has been completed, SGI CANADA's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1) for an SGI CANADA Auto IQ for new business and renewals.

(Figure 1.1)



The results of the web service call will be displayed immediately on the Summary Report tab in the IntelliQuote. Note that use of online rating will also be indicated on the Summary Report tab (see Figure 1.2). Any alerts that have been returned from the web service will be displayed on the Alerts tab.

(Figure 1.2)



Please note the following when using the SGI CANADA Online Quoting feature for Auto policies:

- Brokers can quote up to one year in advance with the Quoting Tool. However, quotes are only valid for 30 days as described in SGI CANADA's Personal Auto Underwriting Manual.
- For Auto policies, online rating will be for private passenger vehicle types only.
- Please ensure the ABD (Agency, Branch, and Department) matches what was set up in TBW Lists for the Broker Number for SGI CANADA.
- When quoting clients who have a current SGI CANADA PPV policy, please indicate "SGI CANADA" in the Active Policy Being Replaced/Renewed field for all renewals to ensure the correct rating is applied.

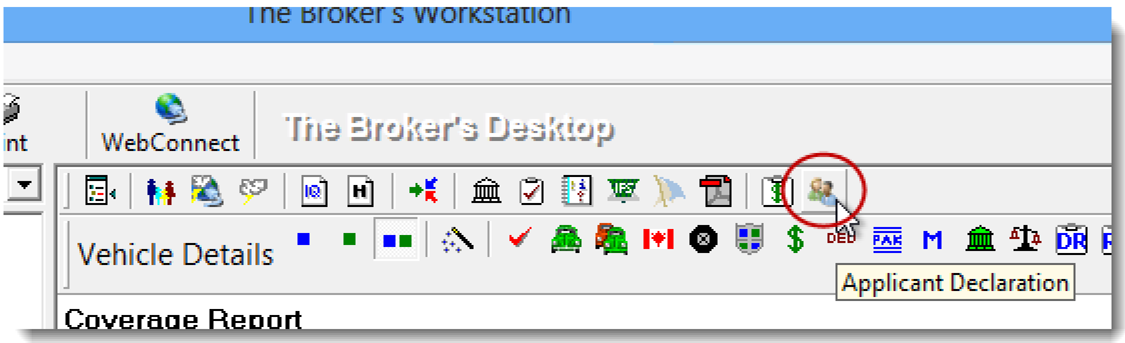
If you have any questions regarding the SGI CANADA Online Quoting feature, please contact your SGI CANADA Business Development Account Manager or call SGI CANADA's Personal Auto Underwriting department.

Credit Score Feature for Auto 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 a payment plan.

The **Credit Score form** will appear automatically as part of the workflow when you are creating a new SGI CANADA Auto 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).

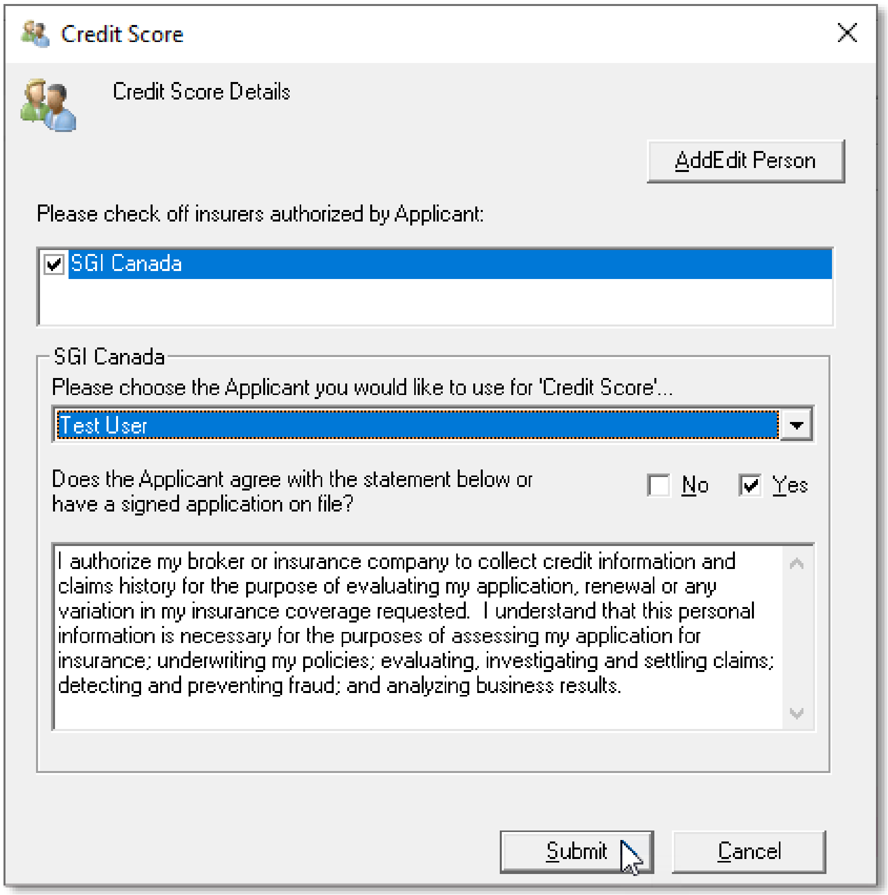
(Figure 1.3)



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.
4. Click the **Submit** button to send the consent information to SGI CANADA (see Figure 1.4).

(Figure 1.4)



Please note the following when using the SGI CANADA Credit Score feature:

- SGI CANADA Credit Score information will be sent through SGI CANADA's Rate Bridge web service as one request.
- Ensure you inform the client that they are 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, the information will not be sent through the Rate Bridge web service. Based on submitted information, SGI CANADA will determine whether the client qualifies for a payment plan. If the client is not eligible for a payment plan, this will be displayed on the Alerts tab.
- Click the **Applicant Declaration**  button on the IQ toolbar to update information for pre-existing or new IntelliQuotes.

If you have any questions regarding the SGI CANADA Credit Score feature, please contact your SGI CANADA Business Development Account Manager or call SGI CANADA's Personal Auto Underwriting department.

Setup for SGI CANADA Online Quoting and Credit Score Feature

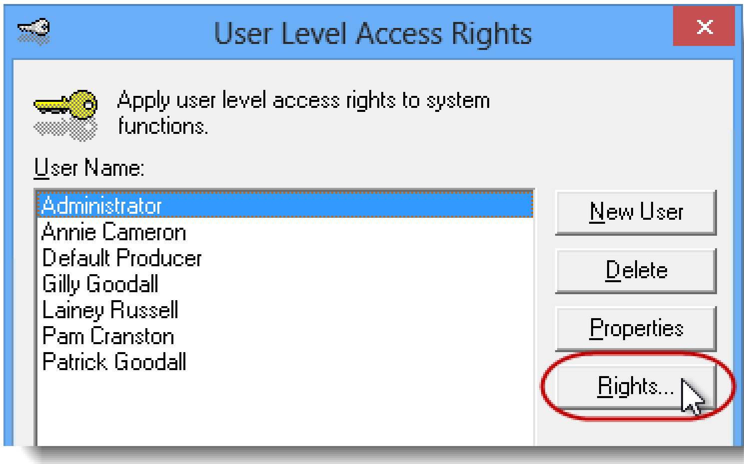
The following one-time setup for SGI CANADA Online Quoting and the Credit Score feature for Auto Policies must be completed in TBW before the functionalities can be used.

Please note, users may already have completed setup steps 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 SGI CANADA 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).

Complete the setup as follows:

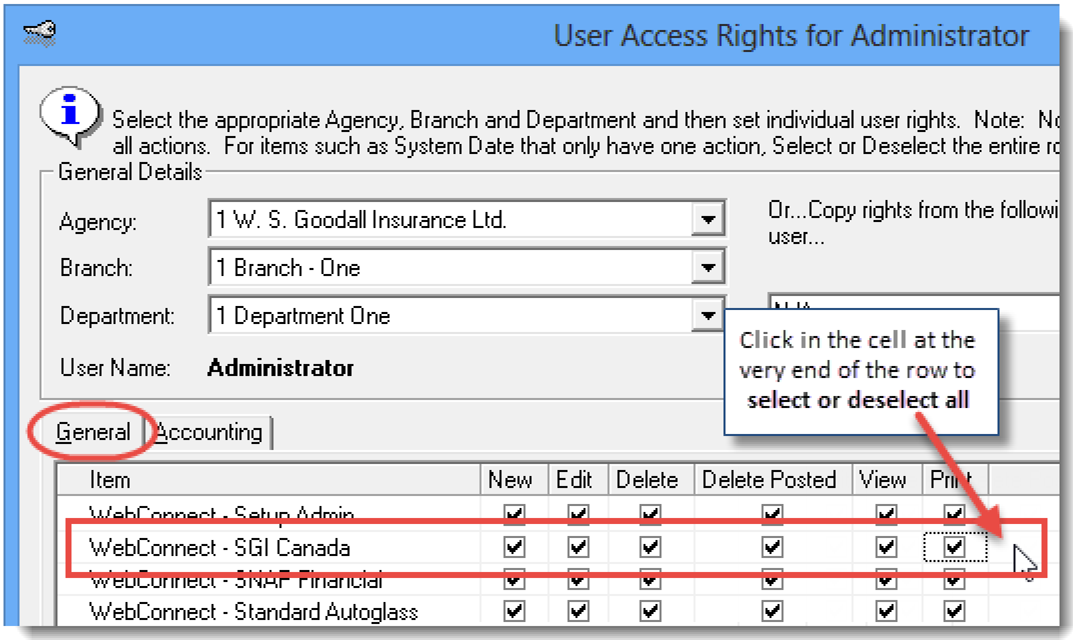
1. Confirm you have the required SGI CANADA User ID and Password.
   - This User ID and Password are required for WebConnect setup as described below.
   - If you require a User ID and Password, please contact your SGI CANADA Personal Lines representative for assistance.
2. Ensure appropriate **User Rights** are enabled for applicable TBW users as follows.
   a. Click **Tools**, **Administrative**, **User Manager**.
   b. In the User Level Access Rights window, select the **Username** and click the **Rights** button (see Figure 1.5).

(Figure 1.5)



   c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – SGI Canada** (see Figure 1.6).

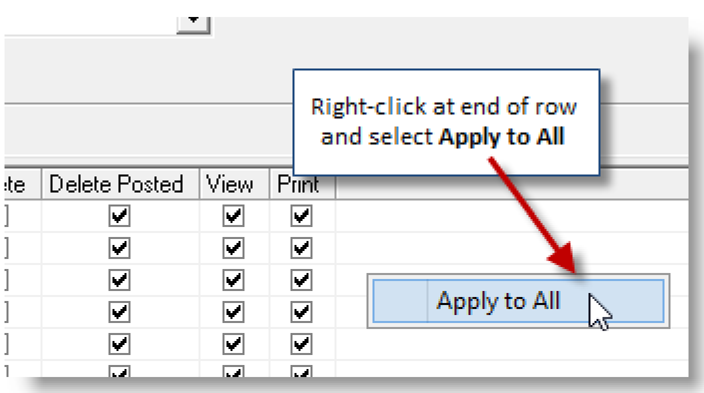
(Figure 1.6)



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 pop-up.

e. If required, repeat Steps c—d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – SGI Canada* 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 1.7).

(Figure 1.7)



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

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

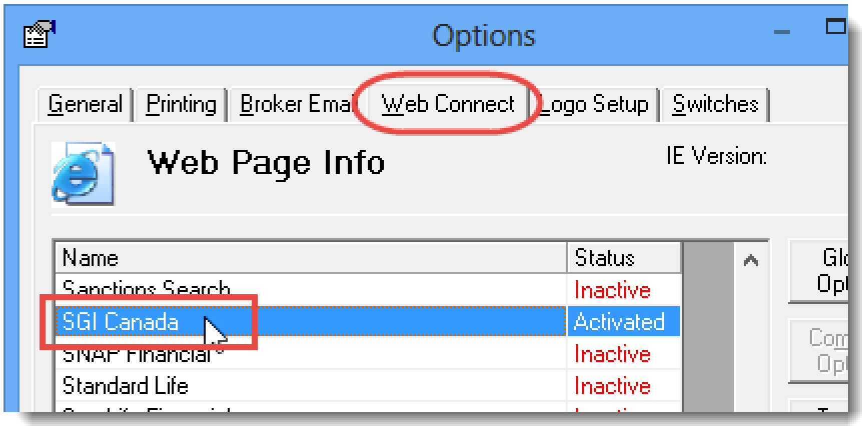
h. Click **OK** in the User Level Access Rights window.

3. Next, for each applicable TBW user, set up SGI CANADA in WebConnect as follows.

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

b. On the **WebConnect** tab in the Options window, find and double-click **SGI Canada** (see Figure 1.8).

(Figure 1.8)



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

i. Select the applicable **User**.

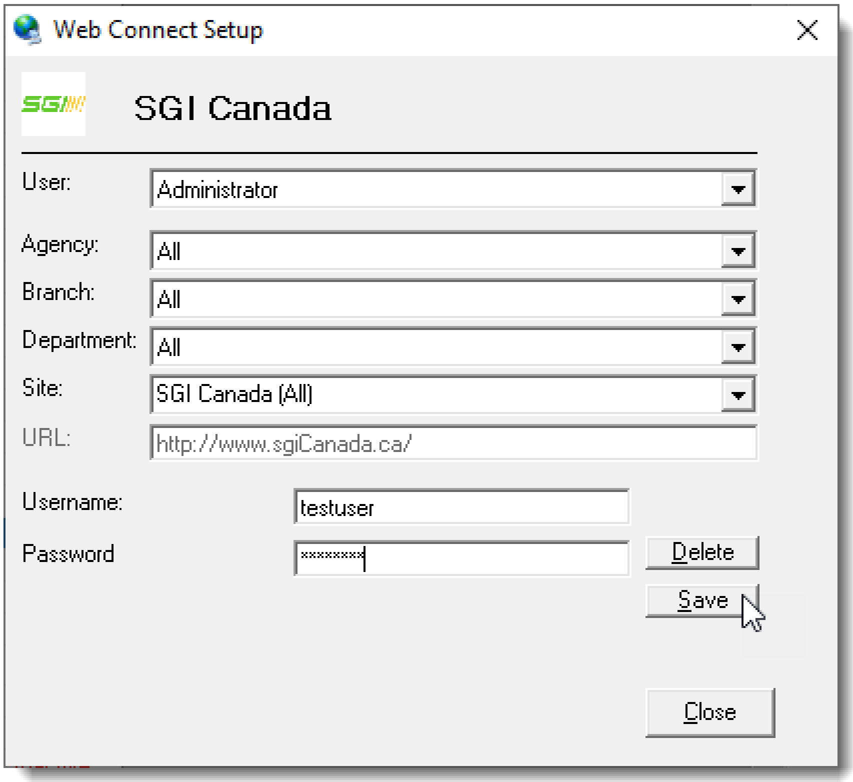
ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department).

iii. In the **Site** menu, select **SGI CANADA (All)**.

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

v. Click **Save** (see Figure 1.9).

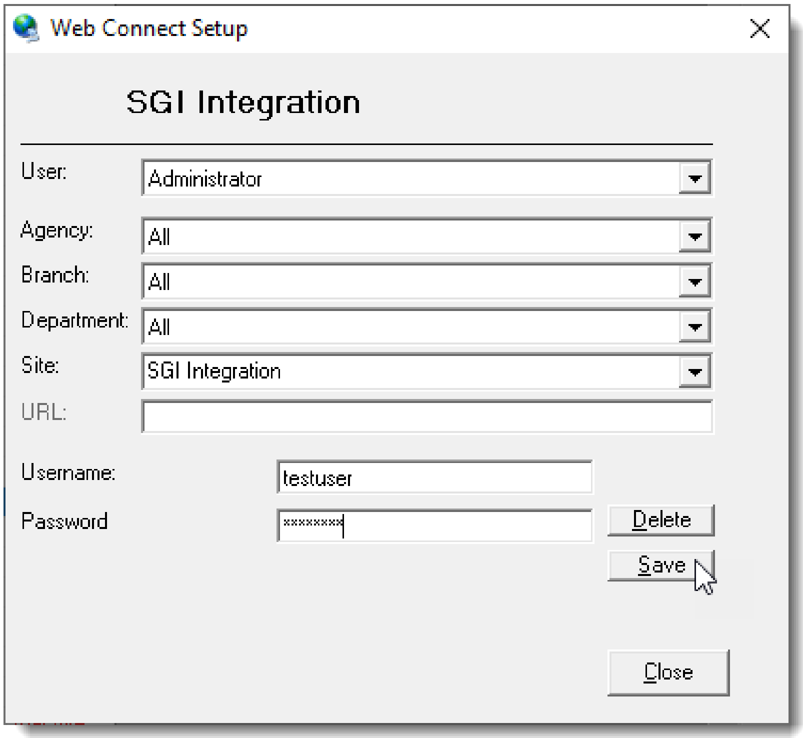
(Figure 1.9)



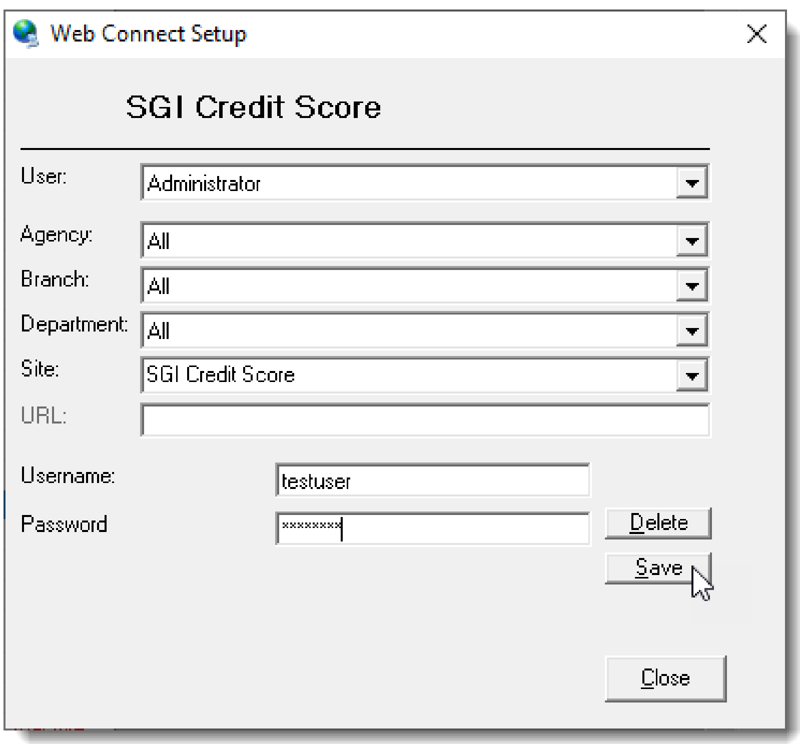
vi. Click **OK** in the Save Username/Password pop-up.

vii. Repeat steps iii—vi to add the Username and Password for **SGI Integration** and **SGI Credit Score** in the **Site** menu (see Figures 1.10 and 1.11).

(Figure 1.10)



(Figure 1.11)



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

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

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

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

4. Close TBW and then reopen the program.

If you have any questions regarding setup for SGI CANADA Online Quoting and the Credit Score feature, please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

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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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