



25 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. [SMI Rating by Peril for Habitational Policies \(AB, MB, SK\)](#) – For brokers who write business with Saskatchewan Mutual Insurance in Alberta, Manitoba, and Saskatchewan, SMI has introduced a new rating model, Rating by Peril, for Homeowners, Rented Dwelling, and Seasonal Homeowners policies. This is effective March 1, 2021 for new business and renewals.

1. SMI Rating by Peril for Habitational Policies (AB, MB, SK)

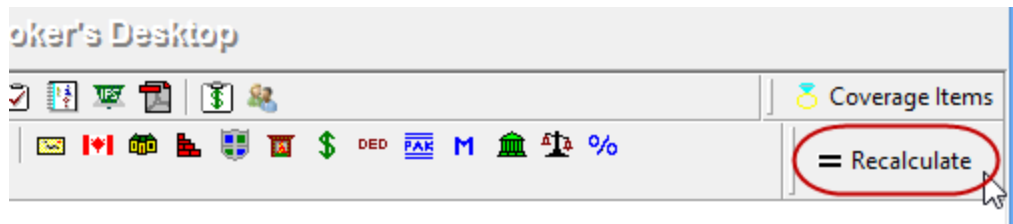
For brokers who write business with Saskatchewan Mutual Insurance (SMI) in Alberta, Manitoba, and Saskatchewan, SMI has introduced a new rating model, Rating by Peril, for Homeowners, Rented Dwelling, and Seasonal Homeowners policies. This is effective March 1, 2021 for new business and renewals.

With the Rating by Peril rating model, peril scores are based on client information (including risk address), which is supplied in TBW and then relayed to SMI's web service. Peril scores will automatically be included in the calculation of the dwelling premium, and peril score details will not display separately in the IntelliQuote Summary Report.

To ensure successful IntelliQuote rating that includes peril scoring, please ensure the one-time setup for the SMI Rating by Peril feature ([see below](#)) has been completed in TBW.

When the setup has been completed, proceed to create a new or modify an existing SMI Homeowners, Rented Dwelling, or Seasonal Homeowners IntelliQuote in the usual way. SMI's web service will automatically be called whenever you click the **Recalculate** button on the IQ toolbar (see Figure 1.1).

(Figure 1.1)



The web service call will return the peril scores, as well as prepopulated iClarify construction data and valuation on the home. **Please verify and update the prepopulated construction data as required.**

Then, click the **Recalculate** button again to pull the peril scores again (as these may have changed based on the updated data). The updated peril scores will automatically be included in the calculation of the dwelling premium.

Setup for SMI Rating by Peril

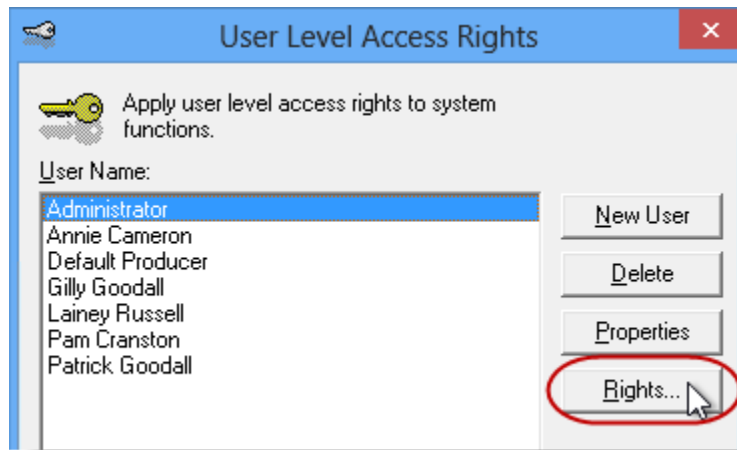
The following one-time setup for SMI Rating by Peril must be completed in TBW before the functionality can be used.

Please note, users may already have completed the following 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 SMI WebConnect functions.

To set up the SMI Rating by Peril feature,

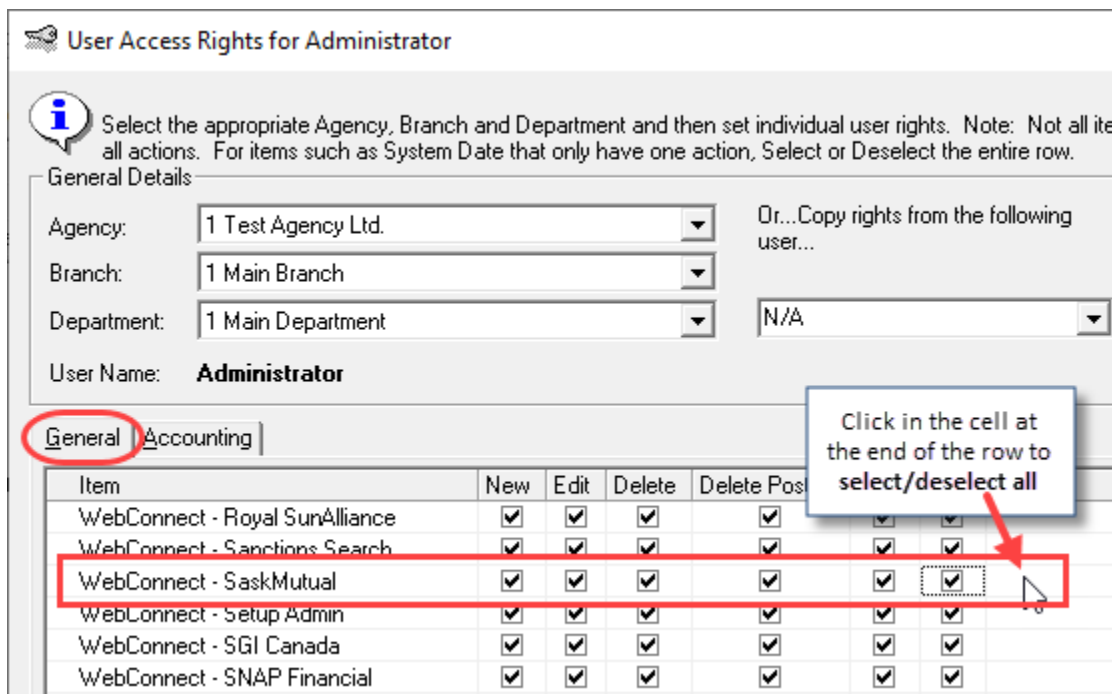
1. Confirm you have the required SMI User ID and Password.
 - This User ID and Password are required for WebConnect setup as described below. If you require a User ID and Password, please contact your SMI Personal Lines Representative for assistance.
2. Ensure appropriate **User Rights** for this feature are set up for applicable TBW users as follows.
 - a. Click **Tools, Administrative, User Manager**.
 - b. In the User Level Access Rights window, select the **Username** and click the **Rights** button (see Figure 1.2).

(Figure 1.2)



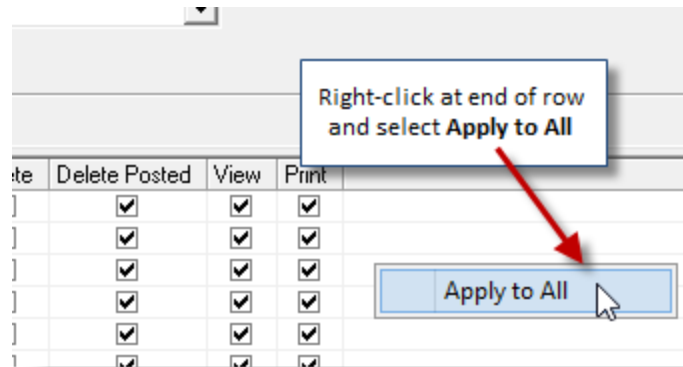
- c. On the **General** tab in the User Access Rights dialog, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – SaskMutual** (see Figure 1.3).

(Figure 1.3)



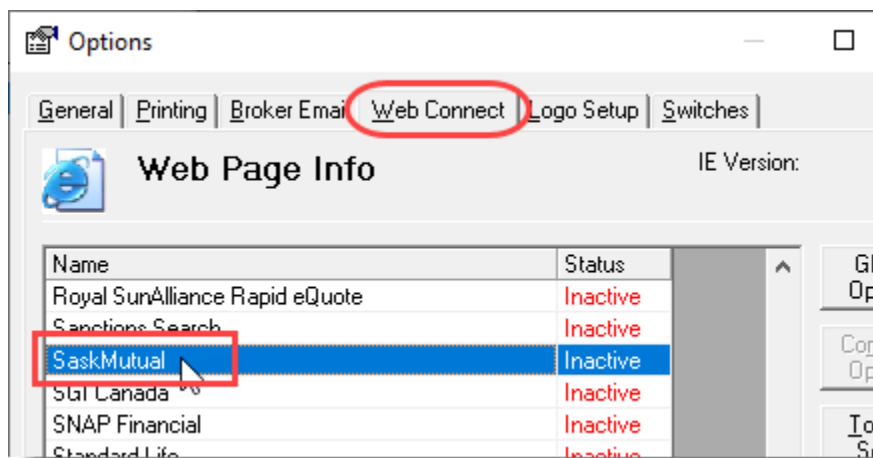
- d. Click **OK** in the User Access Rights window to save these rights for this user for this ABD, and click **OK** in the Attention pop-up.
- e. If required, repeat Steps c – d for additional ABDs for this user, *or*, to apply the selected rights for *WebConnect – SaskMutual* to **all** ABDs for this user, right-click at the end of the row and click **Apply to All** in the right-click menu (see Figure 1.4).

(Figure 1.4)



- 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, confirm each applicable user is set up for SMI in **WebConnect** as follows.
- a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, double-click **SaskMutual** (see Figure 1.5).

(Figure 1.5)



- c. In the WebConnect Setup window,
 - i. Select the applicable **User**.
 - ii. Select **All** or the applicable **ABD** (Agency, Branch, and Department).
 - iii. Ensure **SaskMutual (All)** is selected in the **Site** menu.
 - iv. Enter the appropriate **Username** and **Password**.
 - v. Click **Save** (see Figure 1.6).

(Figure 1.6)

The screenshot shows a 'Web Connect Setup' dialog box for 'SaskMutual'. It features several dropdown menus for 'User', 'Agency', 'Branch', 'Department', and 'Site'. The 'User' dropdown is set to 'Administrator', 'Agency' to 'All', 'Branch' to 'All', 'Department' to 'All', and 'Site' to 'SaskMutual (All)'. A text field for 'URL' contains 'http://www.saskmutual.com/'. Below these are text fields for 'Username' (testuser) and 'Password' (masked with 'xxxxxxx'). To the right of the password field are 'Delete', 'Save', and 'Close' buttons. A mouse cursor is pointing at the 'Save' button.

- vi. Click **OK** in the **Save Username/Password** pop-up.
 - vii. Repeat these steps as necessary for additional ABDs and/or Users.
 - viii. Click **Close** in the WebConnect Setup window.
 - o *Be sure to update WebConnect Setup details whenever you reset your password.*
 - d. Click **OK** in the Options window.
4. Close TBW, run the TBW Update Utility, and then reopen the program.

If you have any questions about the SMI Rating by Peril rating model, please contact your SMI Personal Lines representative for assistance. If you require assistance with setup for this feature, please contact CSSI Client Services 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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