



8 March 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)**:

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1. [Gender "X" Option in Personal Details Wizard](#) – An additional gender identifier is available in the Personal Details Wizard in TBW/TUW. When you are adding or editing a Person, an "X" option is now available in the **Sex** drop-down menu on the Personal Details tab.

## 1. Gender "X" Option in Personal Details Wizard

An additional gender identifier is available in the Personal Details Wizard in TBW/TUW. When you are adding or editing a Person, an "X" option is now available in the **Sex** drop-down menu on the Personal Details tab (see Figure 1.1).

(Figure 1.1)

The screenshot shows a software window titled "Test Client - Address Validated". It has several tabs: "Driver Details", "Conviction History", "Driver Lapses", "Drivers Policy History", "Personal Details", "Education/Occupation", "Address", and "Drivers License". The "Personal Details" tab is selected and circled in red. The form contains the following fields: "Title" (dropdown), "First Name" (text box with "Test"), "Middle Name" (text box), "Last Name" (text box with "Client"), "Marital Status" (dropdown), "Sex" (dropdown with "X" selected and circled in red), "Birth Date" (text box with "DD/MYYY"), and "Smoker" (checkbox). A mouse cursor is pointing at the "X" option in the "Sex" dropdown.

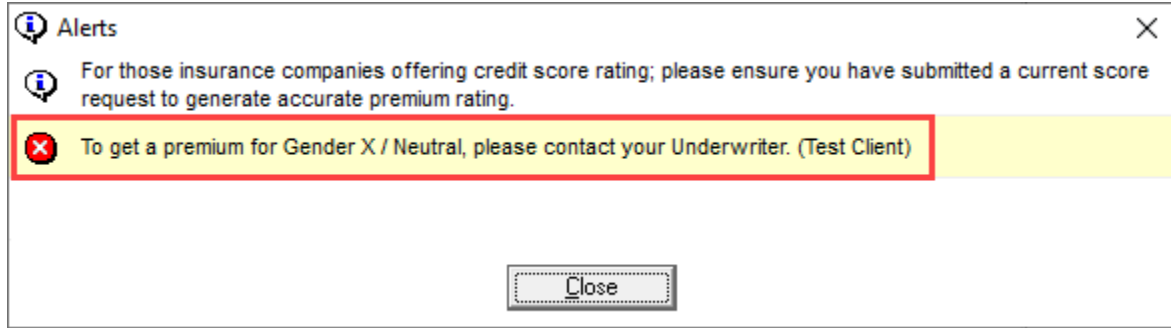
For an Auto IntelliQuote, if any driver on the vehicle has Gender "X" selected, an Alert will display if a selected company does not support rates for Gender "X" (see Figure 1.2). This alert applies at the vehicle level.

(Figure 1.2)

The screenshot shows an "Alerts" window with a blue border. It contains a red "X" icon and the following text: "Coverage Item - 2016 CHEVROLET CRUZE ECO TURBO 4DR. Rates for Gender 'X' are not supported. Please contact your underwriter. This vehicle was not rated." At the bottom center, there is a "Close" button.

Also for an Auto IQ, an Alert message will be provided if you must contact your Underwriter for a premium for a driver with Gender "X" selected (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.



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Gold Independent Software Vendor (ISV)

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