

18 August 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

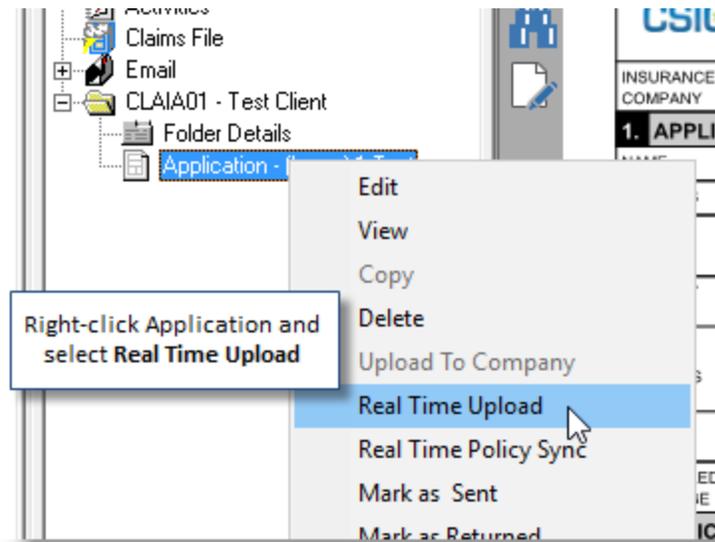
1. [Wawanesa Realtime Upload for New Business Property and Auto Policies \(NB, NS, PEI\)](#) – Effective August 22, 2021, brokers who write business with Wawanesa Insurance in New Brunswick, Nova Scotia, and Prince Edward Island can access Realtime Upload directly from TBW and IntelliQuote for new business Personal Lines Property policies and new business Personal Lines Auto policies.

1. Wawanesa Realtime Upload for New Business Property and Auto Policies (NB, NS, PEI)

Effective August 22, 2021, brokers who write business with Wawanesa Insurance in New Brunswick, Nova Scotia, and Prince Edward Island can access Realtime Upload directly from TBW and IntelliQuote for new business Personal Lines Property policies and new business Personal Lines Auto policies. With this feature, if a new business application that has been uploaded is accepted, the new policy document will be sent back in Realtime.

When the one-time setup for this feature ([see below](#)) has been completed, the "Realtime Upload" option will be available for new business applications. Once you have completed a new business Property or Auto application for Wawanesa, right-click the application document in the Desktop Tree and select **Realtime Upload** (see Figure 1.1).

(Figure 1.1)



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.
- When 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.

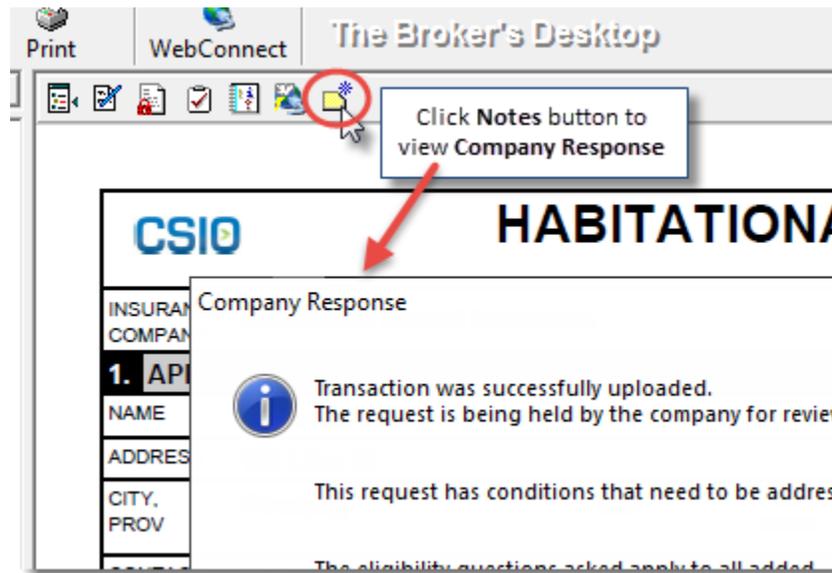
If the new business application has not been successful, you will be informed in the upload message box.

When the new business application has been uploaded, click the **Notes** button on the Application toolbar (see Figure 1.2) 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. You may need to refresh the application to view the button.

(Figure 1.2)



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

- **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.
- 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 Realtime Upload

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

- In the client folder, only one client name is to be entered in each **Insureds** field (see Figure 1.3).
 - 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 1.3)

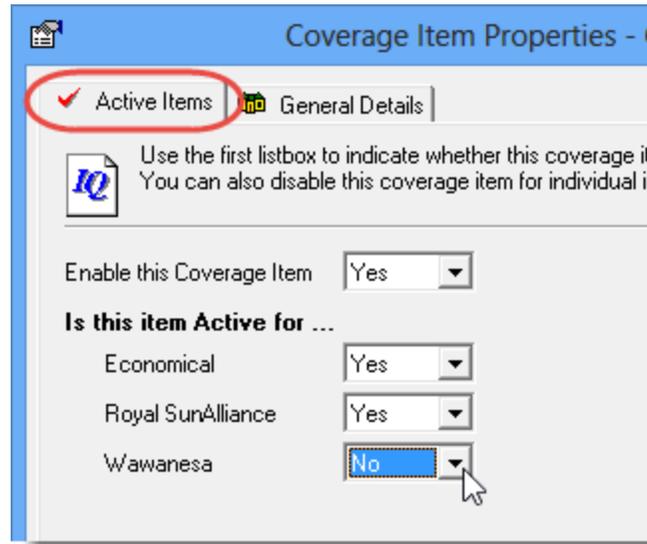
The screenshot shows a software window titled 'TEST04 - Address Validated'. It has several tabs: Folder Details, Persons, Claims, Documents, Current Policies, Ledger Card, Abeyance, and Act. The 'Insured Names (1 & 2) and Mailing Address' section is active. It contains two input fields for 'Insureds' with the text 'John Test' and 'Jane Test' respectively. A red rectangular box highlights these two fields. Below them are fields for 'PCode' (B3A 4C4), 'Find Address' (with a globe icon), and 'Override Ac'. At the bottom, there are fields for 'Street #' (123), 'Street Name' (Test), 'Street Type' (St), and 'Street Direc'.

- 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.

For Wawanesa Property IQs:

- The name in the **Insureds** field and the name on the **Persons** tab must exactly match (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.
- 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 1.4). Then, recalculate the IQ.

(Figure 1.4)



- 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

For Wawanesa Auto IQs:

- The name in the **Registered Owner** field, the name in the **Insureds** field, and the name on the **Persons** tab must exactly match. In addition, the name in each of these fields must be in proper case style and cannot be entered in all capital letters.
- The name in the first Insureds field **MUST** be a registered owner for at least one vehicle for the IQ to rate properly. If you select only the second Insured as a registered owner, the IQ will fail to rate.
- Ensure **License Class and valid dates** are entered for each Driver. Missing or inconsistent dates may result in Alerts (e.g. "Driver is too young for the selected driver class null" or "Driver class – missing required field 'driver class'").
- **MVRs** are required.

Setup for Wawanesa Realtime Upload

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

****Important:** 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).**

1. Before you begin, 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.
2. Confirm there is only one instance of Wawanesa in the Insurance Company List using the Wawanesa Rating Engine.
3. 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 window, ensure the **Realtime and CSIO checkboxes** are selected (see Figure 1.5).

(Figure 1.5)

The screenshot shows the 'Insurance Company - Wawanesa Insurance' window. The 'General Details' tab is selected and circled in red. Below the tabs, there is a message: 'Please enter the General Details for this company.' Under 'Company Details', the following fields are visible: 'Company Name: Wawanesa Insurance', 'Accounting Code: WAW', 'I-Biz: ', 'Realtime: ', 'CSIO: ', and 'Policy Number Manager: '. A callout box with a blue border points to the 'Realtime' and 'CSIO' checkboxes, containing the text: 'Ensure Realtime and CSIO checkboxes are selected'.

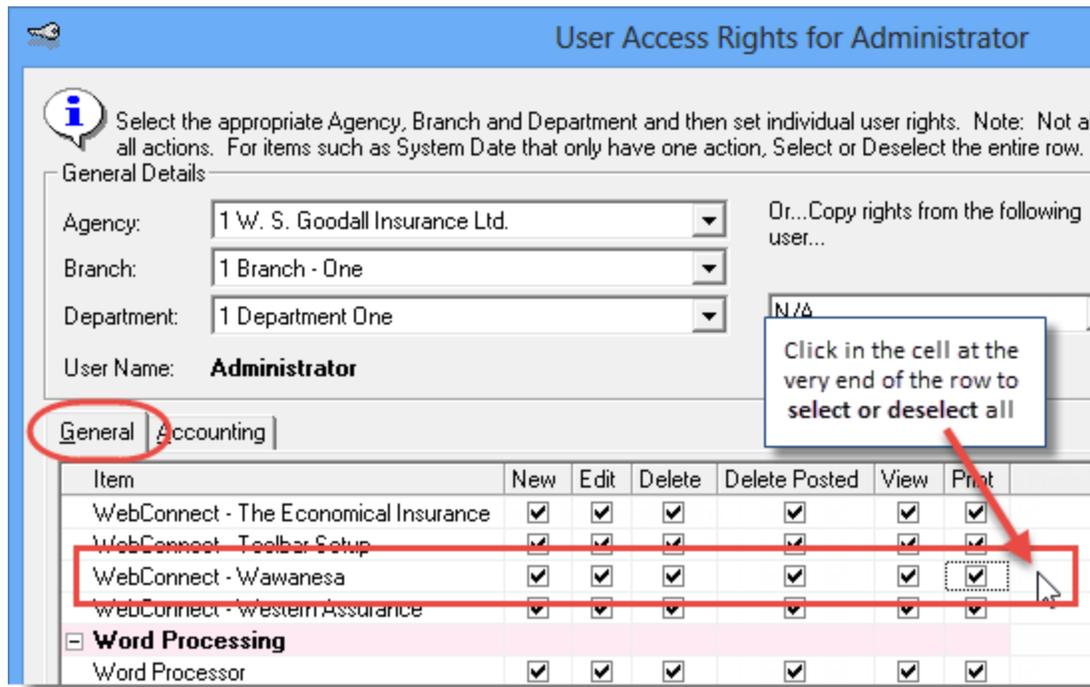
4. Still in the Wawanesa window, select the **Company Branch Details** tab and, in the **Broker Numbers** section, verify the following:
 - The applicable 7-digit and 10-digit broker numbers display for each ABD (Agency, Branch, and Department) in your organization.
 - Note that broker numbers for Guidewire (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.
 - Please contact Client Services if you require assistance in setting up broker numbers.
5. Click **OK** in the Wawanesa window and click **OK** in the Lists window.
6. Set appropriate **User Rights** for this feature 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 1.6).

(Figure 1.6)



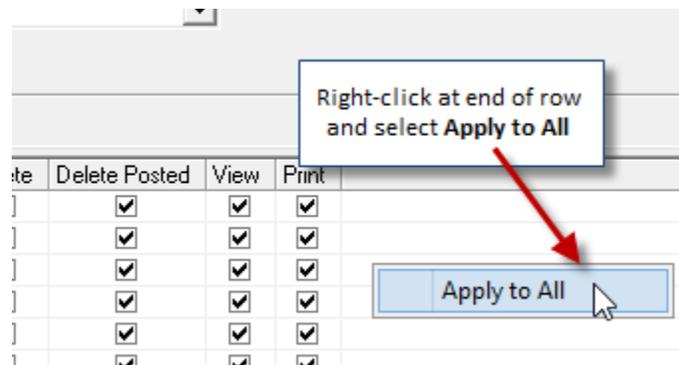
- c. On the **General** tab in the User Access Rights window, choose the **ABD** (Agency, Branch, and Department), and then enable user rights for this user for **WebConnect – Wawanesa** (see Figure 1.7).

(Figure 1.7)



- 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 – 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 1.8).

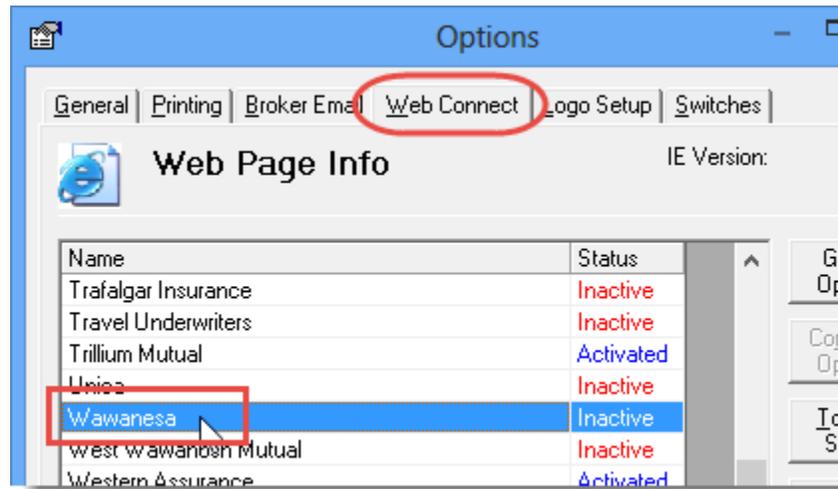
(Figure 1.8)



- 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.

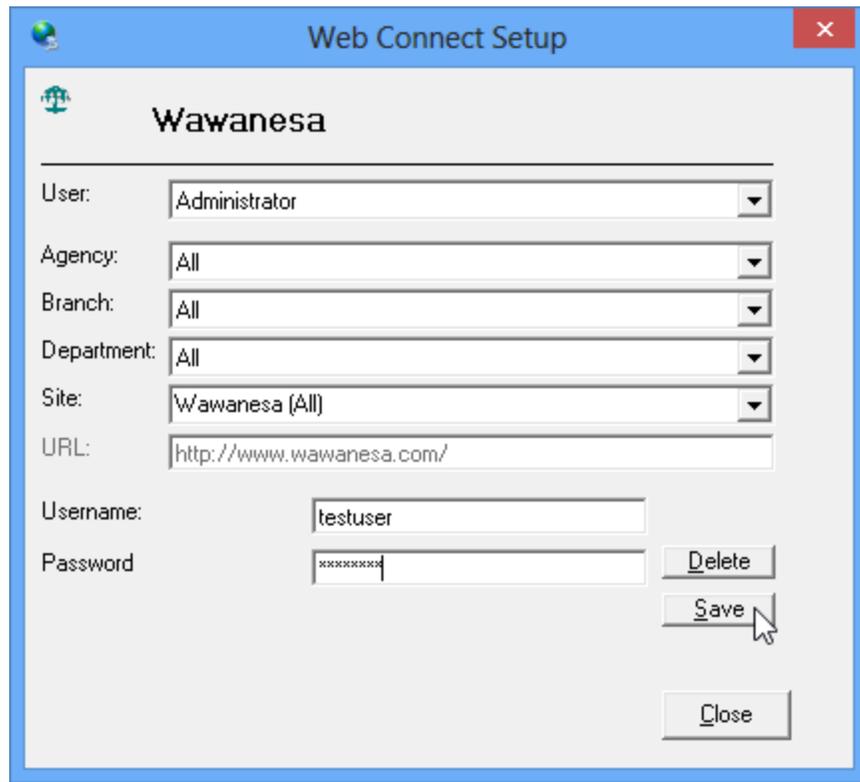
7. Next, confirm each applicable user is set up for Wawanesa in **WebConnect** as follows.
 - a. Click **Tools, Options** in the TBW window.
 - b. On the **WebConnect** tab in the Options window, double-click **Wawanesa** (see Figure 1.9).

(Figure 1.9)



- 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 1.10).

(Figure 1.10)



- 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.
8. Close TBW, run the TBW Update Utility, and then reopen the program.

Please contact your Wawanesa Personal Lines Representative for assistance with questions regarding this feature. For questions you have about setup for Wawanesa Realtime Upload, please contact our Client Services Team at clientservices@cssionline.com (email) or 1-888-291-3588 (toll-free telephone).

[Return to Contents](#)

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)

To unsubscribe from our email notifications and updates, please contact us at info@cssionline.com or reply to this email.

Connect with us on [Facebook](#) and [Twitter](#) for product updates and other news!