

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

Aviva and Aviva Traders Telematics Program (Ontario) – Brokers in Ontario who write business with Aviva and Aviva Traders now have access to the 'Aviva Journey' Telematics Program for Auto policies, effective May 20, 2022 for new business and renewals.

Aviva and Aviva Traders Telematics Program (Ontario)

Brokers in Ontario who write business with Aviva and Aviva Traders now have access to the 'Aviva Journey' Telematics Program for private passenger vehicles, effective May 20, 2022 for new business and renewals. The Telematics Program enables Aviva to collect data on driving behavior using a smart phone app. Enrolling in the Usage Based Insurance (UBI) Program may make the customer eligible for additional discounts.

When you are creating or modifying an Aviva or Aviva Traders Auto IntelliQuote, the **UBI** button will display on the IQ toolbar (see Figure 1.1).

(Figure 1.1)



Click the UBI toolbar button to open the **Usage Based Insurance** form. Complete the form as follows:

1. Review the given consent statement with your customer and select **Yes** or **No** based on the customer response.
2. Choose the applicable **Enrollment Status** for the driver(s) (see Figure 1.2).
 - Only person(s) assigned as a Primary Driver in the Auto IQ will be available in the UBI form.
 - In this example, the Auto IQ has two private passenger vehicles and two Primary Drivers.

(Figure 1.2)

The screenshot shows a window titled "UBI Usage Based Insurance". It contains two identical sections for "Aviva" and "Aviva Traders".

Aviva Section:

- Question: "Does the Applicant agree with the statement below?" with a checked Yes and an unchecked No.
- Statement: "To assess your eligibility for discounts in the telematics program and to discuss your policy with you, do you give permission to (1) collect, use and disclose your personal information such as car location and driving habits to applicable third parties; and (2) receive communications, commercial electronic messages, such as text messages, from applicable third parties in connection with the telematics program?"
- Tom Test Enrollment Status:
- Emma Test Enrollment Status:

Aviva Traders Section:

- Question: "Does the Applicant agree with the statement below?" with a checked Yes and an unchecked No.
- Statement: "To assess your eligibility for discounts in the telematics program and to discuss your policy with you, do you give permission to (1) collect, use and disclose your personal information such as car location and driving habits to applicable third parties; and (2) receive communications, commercial electronic messages, such as text messages, from applicable third parties in connection with the telematics program?"
- Tom Test Enrollment Status:
- Emma Test Enrollment Status: (dropdown menu is open showing: Enrolled, Not Interested, Cancelled By Company, Cancelled By Client)

Buttons:

3. Click OK.

If Yes is selected for the customer consent and the Enrollment Status is *Enrolled*, the Telematics Discount will be applied to the premium. The discount will show as 'Aviva Journey Discount' in the Auto IQ.

- In the Summary Report for Aviva, the discount will display as 'Aviva – Aviva Journey Discount' (see Figure 1.3). For Aviva Traders, the discount will show as 'Aviva Traders – Aviva Journey Discount.'

(Figure 1.3)

Summary Report for Aviva		
Calculation Date: 05/20/2022		
Rating Definition: None		
Rates as of:	May 20, 2022	(New Bus.)
Rates as of:	May 20, 2022	(Renewals)
Driving Record (TPL)	9	
Driving Record (Coll)	9	
AB Rate Group	33	
Coll Rate Group	42	
Comp Rate Group	40	
Discounts/Surcharges		
- Conviction Free Discount Applied		
- Aviva – Aviva Journey Discount Applied		
Third Party Liability		
No Fault BI	\$1,000,000	\$342

If Yes is selected and the Enrollment Status is *Not Interested*, *Cancelled by Company*, or *Cancelled by Client*, the Telematics Discount will not apply.

If No is selected, the Telematics Discount will not apply (regardless of the selection in the Enrollment Status menu).

Please note the following with the Aviva UBI feature:

- Be sure to inform the client that they are giving consent for the Company to obtain additional information required to make an informed decision as to the client's eligibility for discounts in the Telematics program.
- Only person(s) assigned as Primary Drivers in the IQ can be enrolled in the Aviva Telematics program. As such, only Primary Drivers (not Occasional Drivers) will be available in the UBI form.
- If you click **Cancel** in the Usage Based Insurance form, changes will not be saved.
- Click the **UBI** button on the IQ toolbar to update information for pre-existing or new IntelliQuotes.
- As the Aviva UBI feature is currently applicable only in Ontario, the UBI form will not be available for Aviva Auto policies in other regions.

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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