

24 January 2022

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. [Additional Auto Claims Fields](#) – Two additional fields have been added to the Auto Claims Wizard: DCPD Payment and Estimated DCPD Payment. The Claims File Report has also been updated to show the DCPD Payment and Estimated DCPD Payment.
2. [Improved Credit Consent Feature](#) – When an Applicant is selected in the Credit Score form, the Applicant consent status (Yes/No) will now be updated automatically.

1. Additional Auto Claims Fields

Two additional fields have been added to the Auto Claims Wizard: DCPD Payment and Estimated DCPD Payment. When you create or modify an Express or Full Auto Claim, these new fields are available in the Auto Claims Wizard for all companies in applicable regions.

For an **Express Auto Claim**, the new DCPD fields are found on the **Claim Details** tab in the Payment By Insurer and Estimated Payment By Insurer sections (see Figure 1.1).

(Figure 1.1)

Claims Details

Claim Details | Accident Details

Policy Type: Auto

Location:

Loss Date: / / MM/DD/YYYY

Description:

Pertains To:

Perit:

Insurance Company: AAA Insurance Company

Policy Number: TestAuto12345

Reference Number:

Payment By Insurer	Estimated Payment By Insurer	Payment By Insurer
Coll. Payment:	Collision Payment:	Collision:
Cmp. Payment:	Cmp. Payment:	
TPL Payment:	TPL Payment:	
BI Payment:	BI Payment:	
PD Payment:	PD Payment:	PD:
AB Payment:	AB Payment:	
DCPD Payment:	DCPD Payment:	
Amount Paid:	Total Estimate: 0.00	

Estimated Loss Amount:

For a **Full Auto Claim**, the new DCPD fields are found on the **General/Named Insured Details** tab in the Amounts Paid and Estimated Amounts sections (see Figure 1.2).

(Figure 1.2)

Claims Report (Auto) - Claims Document - (Auto)

Policy and Coverage Details | Insured Vehicle Details | Driver Details | Owner Details | Lienholder Details | Third Party Details | Injury Details | Contacts | Corrections | Broker Details | **General / Named Insured Details**

General Info

Report Date: 01/10/2022 MM/DD/YYYY Client ID: TESTJ12 Catastrophe Number: Ref12345

Amounts Paid	Estimated Amounts	Payment by Insurer
Coll: 200.00	Coll: 210.00	Coll.:
Cmp: 0.00	Cmp: 0.00	
AB: 0.00	AB: 0.00	
TPL: 0.00	TPL: 0.00	PD:
BI: 0.00	BI: 0.00	
PD: 0.00	PD: 0.00	
DCPD: 200.00	DCPD: 210.00	
Total Paid: 400.00	Total Estimated: 420.00	Closed: <input type="checkbox"/> / /

Named Insured(s)

Name: John Test Preferred Language:

The **Claims File Report** has also been updated to show the DCPD Payment and Estimated DCPD Payment. To generate a Claims File Report, double-click Claims File in the Desktop Tree. Click the Filter or Quick Search button, enter filtering details, and click OK to generate the report. In the report results, the **DCPD Payment** and **Est. DCPD Payment** columns will display applicable amounts (see Figure 1.3).

(Figure 1.3)

Client ID	Amount Paid	Coll. Payment	TPL Payment	DCPD Payment	Est. Coll. Payment	Est. TPL Payment	Est. DCPD Payment
TESTJ09	\$225.00	\$25.00	\$0.00	\$200.00	\$25.00	\$0.00	\$200.00
TESTJ09	\$325.00	\$25.00	\$0.00	\$250.00	\$25.00	\$0.00	\$250.00
TESTJ09	\$257.00	\$0.00	\$58.00	\$200.00	\$0.00	\$50.00	\$200.00

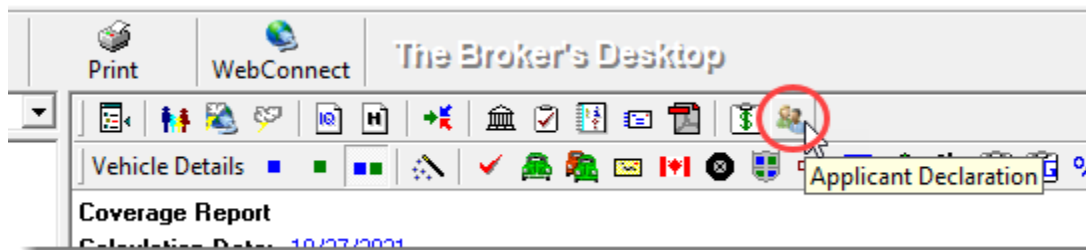
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2. Improved Credit Consent Feature

Improvements have been made to the Credit Consent feature. Now, when an Applicant is selected in the Credit Score form, the Applicant consent status (Yes/No) will be updated automatically.

The Credit Score form appears automatically during the workflow when you are creating a new Property or Auto IntelliQuote. For existing IntelliQuotes, you can access the Credit Score form by clicking the **Applicant Declaration** button on the IQ toolbar (see Figure 2.1).

(Figure 2.1)



To complete the Credit Score form, select the Insurer(s), select the Applicant, enter consent details, and click Submit to send the information to the company(ies).

With this improvement, whenever you open the Credit Score form and select an Applicant, appropriate consent details for that Applicant will now display automatically.

- If consent details have been entered and submitted previously for the selected Applicant, the appropriate consent status (Yes or No) will be selected automatically.
 - For example, if “Yes” was previously submitted for this Applicant for this company, the Yes checkbox will automatically be selected (see Figure 2.2).

(Figure 2.2)

Credit Score

Credit Score Details

Add/Edit Person

Please check off insurers authorized by Applicant:

- Intact Insurance
- Optimum Insurance
- Peace Hills
- Portage Mutual

Intact Insurance

Please choose the Applicant you would like to use for 'Credit Score'...

John Test

Does the Applicant agree with the statement below?

No Yes

To prepare an application for insurance, do you authorize (your brokerage name)...

- If consent details have not been submitted for the selected Applicant, the Yes/No checkboxes will be unselected (see Figure 2.3).

(Figure 2.3)

Peace Hills

Portage Mutual

Intact Insurance

Please choose the Applicant you would like to use for 'Credit Score'...

Jane Test

Does the Applicant agree with the statement below?

No Yes

To prepare an application for insurance, do you authorize (your brokerage name)...

If a different Applicant is selected, appropriate consent details (as described above) will automatically display for that person.

Please note, this improvement applies for all companies and regions with existing credit score functionality.

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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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