

13 July 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)**:

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["AutoPlus Date" is Now "Claims Experience Letter Date" \(Auto\)](#) – In TBW/TUW, the caption "AutoPlus Date" will now show as "Claims Experience Letter Date." **Note that user workflows and program functionality have not changed with this enhancement.**

## "AutoPlus Date" is Now "Claims Experience Letter Date" (Auto)

In TBW/TUW, the caption "AutoPlus Date" will now show as "Claims Experience Letter Date." The TBW/TUW interface has been updated to reflect this change in the Auto Application Wizard (see Figure 1), Auto Application Alerts, and the Driver Details tab for a Person (see Figure 2).

(Figure 1)

The screenshot shows a window titled "Application Wizard" with a "General Details" section. The section contains the following fields:

- Applicant Name(s): Test Client
- Named Insured(s): Test Client
- Test Client (Insured): Insured
- MVR Type: [Empty]
- MVR Date (MM/DD/YYYY): [Empty]
- Claims Experience Letter Date (MM/DD/YYYY): [Empty] (highlighted with a red circle)
- Driver Training Certificate Attached: No
- Policy effective time?: 12:01 AM

(Figure 2)

The screenshot shows a software window titled "Test Client - Address Validated". It features a tabbed interface with the following tabs: Conviction History, Driver Lapses, Vehicle Use, Drivers Policy History, Personal Details, Education/Occupation, Address, Drivers License, and Driver Details (which is selected and circled in red). The "Canada" section contains several date fields with dropdown menus for day and month, and a year field. The fields include: Driver Training Graduation Date (MM/DD/YYYY), Young Drivers Certificate Date, ATV Riders Course Grad. Date (\* For ATV risks only.), Motorcycle Driver Training Grad. Date (\* For motorcycle risks only.), Motorcycle Advanced Rider Grad. Date (\* For motorcycle risks only.), Remedial Driver Training Grad. Date, Drive For Life Training Grad. Date, ATV Operating Since (\* For ATV risks only.), Snowmobiling Since (\* For snowmobile risks only.), Motorcycle License Date (\* For motorcycle risks only.), Motorcycle Continuously Insured Since, MVR Type, MVR Date, and Claims Experience Letter Date. The "Claims Experience Letter Date" field, its dropdown, and its "Lookup" and "Persist" buttons are circled in red. At the bottom, there are sections for "Prior To Province" and "Prior To Canada".

Please note, **user workflows and program functionality have not changed** with this enhancement. Please continue to create and modify Auto policies in the usual way.

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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