

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)**:

Contents

[Additional Calculation Method for Endorsements \(TUW\)](#) – TUW users now have the option to select either a Short Rate or Pro Rata Calculation Method in the Endorsement Request form.

Additional Calculation Method for Endorsements (TUW)

For TUW users, a Short Rate Calculation Method is now available for Endorsements. When you are creating an Endorsement Request, please select the applicable calculation method (Pro Rata or Short Rate) in the Method menu.

The screenshot shows the 'Endorsement Request' window. The 'Method' dropdown menu is highlighted with a red box, showing three options: 'Short Rate', 'Pro Rata', and 'Short Rate'. The 'Short Rate' option is currently selected. The form includes fields for Agency, Branch, Department, Transaction Qualifier, Description, Class of Business, Insurance Company, Contract No., Endorsement Type, Eff./Time/Expiry, Policy No., Billing Type, and a 'Replace' button.

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.



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