

17 October 2022

To: Users of The Underwriter's Workstation

Dear Valued Client:

## Re: 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 Underwriter's Workstation (TUW)**:

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1. [Miscellaneous Section in Subscriptions Form and Wording Library \(TUW\)](#) – A Miscellaneous section has been added to the Subscriptions form and the Wording Library.
2. [Calculate MRP Checkbox in Cancellation Request Form \(TUW\)](#) – Select the Calculate MRP checkbox in the Cancellation Request form to include the policy MRP (Minimum Retained Premium) in the return premium calculation.
3. [Improvements to TUW Bordereaux Report](#) – Improvements have been made to the TUW Bordereaux Report, and you will notice speed optimizations when generating the report and minor changes in the report display.

## 1. Miscellaneous Section in Subscriptions Form and Wording Library (TUW)

For TUW users, a Miscellaneous section has been added to the Subscriptions form and the Wording Library.

In the Subscriptions form, the new **Miscellaneous** sub-section will appear in the All Property section.

- Note that the Miscellaneous section will only be visible in the Subscriptions form when applicable coverage item(s) have been added in the Rating Definition and the IntelliQuote.

Subscription / Fees

Subscriptions | Fees

✓ Please enter the subscription details for the root "Policy" or any Coverage Item/Form

Coverage Items	Complete	Subr	Subr Company	Contract	AAA Inst Ref. Code
<b>Broker Commission / MRP</b>					
Broker Commission / MRP					
<b>Policy Subscriptions</b>					
Policy	✓	No	AAA Insurance Company	AAA testcontract2	
All Property	✓	No			
Property	✓	No			
Business Interruption					
Boiler and Machinery					
Miscellaneous	✓	No	AAA Insurance Company	AAA testcontract2	
Crime					
All Liability					

The corresponding Miscellaneous Wording Library is available in the Misc. Wordings (Commercial Property) section in the Rating Definition.

To view this wording library, open the Rating Definition in TUW Lists and click the Coverage Items tab. Select the appropriate section and click the Add button. Under Miscellaneous > Misc. Wordings (Commercial Property), open the **Miscellaneous** sub-section to view/select applicable item(s) to add to the Rating Definition. Click OK.

Rating Definition - Commercial Property MB

Please select any applicable coverage items

Filter:

- IBC Wordings (Commercial Property)
- IBC Wordings (Crime)
- IBC Wordings (Habitational)
- IBC Wordings (Liability)
- Miscellaneous
  - Misc. Wordings (Accident)
  - Misc. Wordings (Auto Physical Damage)
  - Misc. Wordings (Commercial Auto)
  - Misc. Wordings (Commercial Property)
    - Aviation
    - Boiler & Machinery
    - Business Interruption
    - Contractors Equipment
    - Course & Greens
    - EQ Buydown
    - Habitational
    - Identity Theft
    - InlandMarine
    - Livestock
    - Marine
    - Miscellaneous
    - Property
    - Terrorism
  - Misc. Wordings (Crime)

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## 2. Calculate MRP Checkbox in Cancellation Request Form (TUW)

The Cancellation Request form has been improved with a Calculate MRP checkbox, allowing you to include the policy MRP (Minimum Retained Premium) in the return premium calculation.

Enter details in the Cancellation Request form as usual. Select the **Calculate MRP** checkbox if you would like to include the MRP in the return premium calculation. When you click the **Calculate** button and the return premium displays in the Change Premium field, the amount will take into account the policy MRP.

The screenshot shows the 'Cancellation Request' form with the following details:

- Agency: 1 Test Agency Ltd.
- Branch: 1 Main Branch
- Department: 1 Main Department
- Transaction Qualifier: CNX - Cancellation - First Term New Bus, Existing Cli
- Policy No: Test12345
- Description: Cancellation Request
- Tax Jurisdiction: MB
- Class of Business: Class 1
- Billing Type: Broker Bill - Net
- Lead Company: AAA Insurance Company
- Contract No: AAA testcontract2
- Reason: Insureds Request
- Eff. Date/ Eff. Time: 10/28/2022 11:09 AM
- Canc. Code/Method: Left Market Area
- Calculate MRP
- Change Premium (-): -1,700.00
- Calculate button
- Term Premium (-): 2,000.00
- Annualized Premium: 2,000.00

With this feature, please note:

- Ensure MRP details have been entered for the policy in the Subscriptions form. (For the MRP to apply, at least one subscription is required.)
  - MRP details can also be entered in the Rating Definition in TUW Lists. This information will pull forward automatically into the Subscriptions form but can be changed as needed.

The screenshot shows the 'Subscription / Fees' form with the following table:

Coverage Items	Complete	Subr	Subr Company	Contract	Ref. Code	%	Coverage	Annrl Prem	Billable	Policy Code	Brkr Comm	MRP Rate	MRP Amt
AAA Insurance Company (Referral)													
<b>Broker Commission / MRP</b>													
Broker Commission / MRP								\$2,000			20%	0%	\$250
<b>Policy Subscriptions</b>													
Policy	<input type="radio"/>	No							Yes				
All Property	<input checked="" type="radio"/>	No	AAA Insurance Company	AAA testcontract2		100%	\$475,000	\$1,000	Yes	COMMPROP	20%		
Property	<input checked="" type="radio"/>	No					\$475,000	\$1,000	Yes				
Business Information	<input checked="" type="radio"/>	No							Yes				

- The MRP will not calculate for a same-day cancellation. The cancellation effective date must be at least one day later than the policy effective date for the MRP to be included in the return premium calculation.

- The selection for the Calculate MRP checkbox in the yellow Cancellation Request form will carry forward to the green Policy Cancellation form, showing in read-only format.

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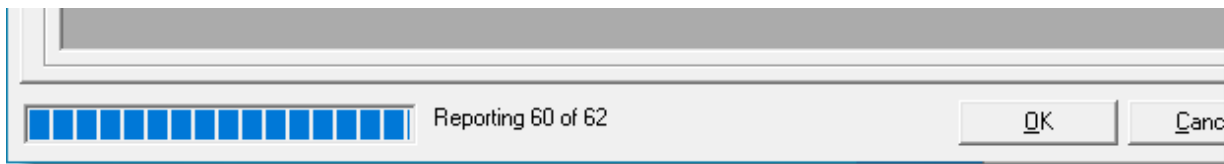
### 3. Improvements to TUV Bordereaux Report

Improvements have been made to the TUV Bordereaux Report, and you will notice speed optimizations when generating the report and minor changes in the report display.

- Please note, **user workflows and program functionality have not changed** with this enhancement. Please continue to use the Bordereaux Report in the usual way.

When a Bordereaux Report is generated, report data and results will be the same, but columns may be in a different order for all coverages and the order of policies may be slightly different. You may also notice small changes to address or other formatting.

As the report is generated, status updates will be provided by a progress bar and “Reporting x of y” details in the lower left corner of the screen.



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Please share this information with the appropriate TUV 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) or 1-888-291-3588 (toll-free telephone).

Thank you for using The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.

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