

## “MAKE THE CONNECTION”

November 27, 2006

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### 1. IS-Elite

In the customer communication of October 2006 Peak announced the development and roll out plans for IS-Elite and how customers can migrate to the new solution. IS-Elite 1.0 was released June 30, 2006. IS-Elite 1.1 is planned to be released March 31, 2007, Customers who upgraded to the current release of IS4W were offered IS-Elite at no additional costs for license fees during 2006. IS4W upgrades to IS-Elite must be completed or contracted by 12-31-2006 for customers to receive this upgrade with no additional cost for license fees. This upgrade offer expires 12-31-06.

Those customers upgrading to IS-Elite after 12-31-06 will incur a license fee for the upgrade. This upgrade provides for an insurance specific Service-Oriented Architecture (SOA) platform. IS-Elite 1.1 will include all insurance administration core functions to be available in the release of IS-Elite 1.1. This includes policy administration, rating & quoting, Virtual Insurance Center, accounting, billing, forms & correspondences, claims, back office and a host of web management services.

***Highlights from our detailed technical direction document*** (full document available upon request):

- Standard N-tier, J2EE browser-based architecture
- Agent & Broker processing
- Online billing and payment processing
- Virtual Insurance Administration
- Service-Oriented Architecture
- Sequel and Oracle databases
- Leveraging of IS4W®, PolicyPointe®, RiskEnvision business functionality
- Supporting web-based management services

Plans are underway for IS-Elite 1.2 to be available sometime in the four quarter of 2007. IS-Elite 1.2 plans are to offer a solution that supports all the major lines of insurance, including commercial and personal lines and risk management functions, to eliminate dependencies for IS4W or other application interfaces.

## **2. RiskEnvision 4.0 – NOW AVAILABLE**

RiskEnvision 4.0 (RV 4.0) has been installed in customer sites for testing and production planning this month. RV 4.1 is currently under development with availability scheduled for 2007. RV 4.1 includes expanding the lines of business the solution will support, several workflow enhancements, and expanded business intelligence capabilities.

Customers on RV software maintenance will receive the upgrade to RV 4.0 at no additional license fees. Customers will be responsible for any implementation fees. Customers must upgrade to RV 4.0 by 12-31-07 to avoid upgrade license fees.

For customers not upgrading to RV 4.0 during 2007, Envision will continue software support for older versions of the software as long as customers remain on software maintenance.

## **3. Data Transfer Utility (Exporting/Importing/ Reporting)**

The Data Transfer Utility (DTU) is available, is fully operational and has been installed at customer sites.

The DTU is a bi-directional data pipe that can seamlessly transport data between two disparate systems. The DTU moves and transposes data from various systems and can operate in real time or batch processing modes. The DTU is compatible with any database, flat files, or XML files to transpose the data to the required API format.

Peak and Envision are offering the DTU to all customers currently on software maintenance. Peak is offering the DTU for all products and product releases including IS, IS4W, IS-Elite, RiskEnvision, CompVision, ModVision, WebVision and HeathVision. The DTU is offered to all current customers with no additional license fee through 2007.

#### 4. Product Roll Out Schedule

##### 2007 Schedule:

IS-Elite 1.1 (1<sup>st</sup> Quarter)  
IS-Elite 1.2 (4<sup>th</sup> Quarter)  
PolicyPointe 2.0  
Forms & Correspondences  
RiskEnvision 4.1  
RiskVision IQ  
WebEnvision 2.0  
CompVision 4.0

#### 5. Go To Meeting Sessions

Peak's web training sessions held in October were well received. Peak and Envision will conduct three training sessions to be held the week of December 11<sup>th</sup> 2006.

- The first session will be on IS4W: Correspondence Control, Diary, Data Access Definition, and Customer Information Management Tool scheduled for **December 12th at 2:00 PM EDT**.
- The second session will be on RiskEnvision Template Definition, Form Letters and WebVison (portal solution) scheduled for **December 13<sup>th</sup> at 2:00 PM EDT**.
- The third session will be for new product demonstrations RiskVision 4.0, OFAC and RiskVision IQ to be held **December 14<sup>th</sup> at 2:00 PM EDT**.

To reserve one of these sessions please email Sarah Isaac at [seisaac@peakpsi.com](mailto:seisaac@peakpsi.com) to register. Details will be provided once registration is completed. Each session will accommodate twenty users. Registration will be on a first come basis.

#### 6. OFAC Services

Peak Performance is proud to announce one of its newest offerings, OFAC Web services.

In an effort to help the government fight the funding of terrorism and money laundering, federal law requires financial and similar institutions to obtain, verify, and record certain identifying information from individuals or entities seeking monetary payments. Peak has developed and perfected the OFAC Web service to search against the governments Specially Designated Nationals (SDN) database by utilizing the most efficient and cost saving methods.

Peak's OFAC solution allows customers the ability to access the system by opening any standard web browser and populating a specified URL. Customers have the option to search by individual's first name, last name, and date of birth or by the name of an entity. The specified information will then be run against the SDN database to give a "No Match" or "Match" result. Both instances allow for reporting, in which a PDF can be generated creating an audit trail. Also, for clients with the need for a high volume of searches, the OFAC Web services enables batch processing and can be interfaced or even fully integrated into any existing system. Imagine the peace of mind of integrating your system with the OFAC Web service. Every time a payment request is processed the integration will automatically check each person's name against the government's SDN list thus assuring that your company is fully compliant and will not face any federal fines.

For a demo or to request more information please contact Matthew Abbitt at (614) 344-4645 or [mabbitt@peakpsi.com](mailto:mabbitt@peakpsi.com).

## 7. Company Overview

For an Overview of Peak's history and technology solutions, with plans for 2007 and beyond, please visit [www.peakpsi.com/media/Overview\\_06.html](http://www.peakpsi.com/media/Overview_06.html). (If you are unable to open the link, please copy and paste the URL into the address bar of your browser.)

Once you arrive at the overview page, you can view the presentation in flash, download a PDF version, or view it as a PowerPoint presentation.

**For more information about any of our services and solutions, please visit our websites at [www.peakpsi.com](http://www.peakpsi.com) , [www.envision-ts.com](http://www.envision-ts.com) and [www.peak-span.com](http://www.peak-span.com).**