



2010 RMIS REPORT

CREATED AND WRITTEN BY
DAVID TWEEDY
AND
PATRICK O'NEILL



2019 RMIS REPORT

INTRODUCTION BY
DAVID A TWEEDY, CMC
and
PATRICK O'NEILL

Welcome to the 2019 edition of the *RMIS Report*. Our inaugural edition, the *2018 RMIS Report*, was well received. The report was downloaded over 2,500 times in the past year. We are pleased that the report has been a valuable resource in understanding the RMIS market, and we are excited to provide the latest edition of the report for your review.

The *RMIS Report* is the only independent review of the risk management information systems (RMIS) market. The report encompasses independent RMIS providers, specialty technology providers and the solutions offered by insurance carriers and third-party administrators. In addition to the vendor information contained in the report, you will find our expert analysis of the marketplace and insights from this year's user survey. Our goal is to provide independent, unbiased, expert opinion and analysis to assist buyers and prospective buyers to better understand the marketplace and what is available.

It is important to note that the *RMIS Report* does not rank the vendors or select a winner in any category. The

scoring in the report is based on our own experience, expert analysis, and the feedback from the user survey. The final results are based on general criteria and weighting that we believe provides valuable insight into the solutions offered. The report should only be used as one tool in an evaluation process. To determine the right fit for an organization, the results would have to be compared to an organization's specific needs and goals. Decisions should be based on a comprehensive vendor analysis that includes a needs assessment, system reviews, demonstrations, and user feedback.

We hope that you find the *2019 RMIS Report* a valuable tool in researching and understanding the RMIS industry.

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ABOUT THE AUTHORS



DAVID A. TWEEDY, CMC MBA

Senior Advisor, Redhand Advisors

David Tweedy brings over thirty-four years of risk technology and claims management experience to Redhand Advisors. He provides a wide spectrum of clients with risk information technology strategies creating premium solutions in this ever changing and growing area of risk management. He assists organizations including large multinational corporations, non-profits, colleges and universities and a variety of public entities, states and risk pools to assess their risk and enterprise risk technology needs. He also works with insurers and TPAs to help improve their risk and claims offerings.

David is an internationally recognized expert in the RMIS and claims management arena, having served in senior consultative roles for IBM Global Services, Deloitte, Marsh Risk Consulting, Bickmore Risk Services and Betterley Risk Consultants.

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PATRICK J. O'NEILL

FOUNDER & PRESIDENT, REDHAND ADVISORS

Patrick is the founder and president of Redhand Advisors. A widely respected thought leader in insure-tech with more than three decades of experience in risk and insurance management information systems and claims management systems, as well as workers' compensation and enterprise risk management solutions.

Based in Atlanta, Mr. O'Neill founded Redhand Advisors in 2015 to help organizations maximize their investment in risk technology and to develop and incubate innovative solutions to meet market needs.

Previously, he was president and chief operating officer of an insure-tech startup focused on workers' compensation and disability management technology solutions. Earlier, at Marsh, he was a founding member of the broker's Risk Management Information System business and held a series of leadership roles in that unit. During his tenure, he worked directly with hundreds of clients helping them implement and utilize the technology solutions.

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+1 (404) 666-0418

www.linkedin.com/in/patrickjosephoneill

www.redhandadvisors.com

DATA INSIGHTS

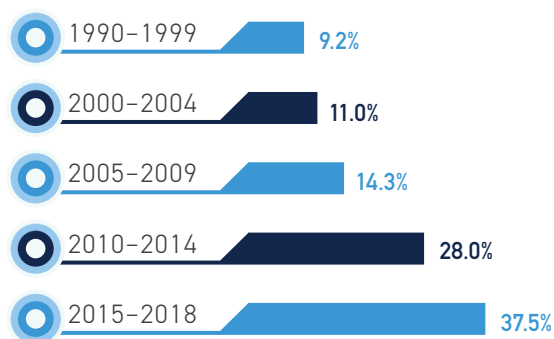
RESPONDENT DEMOGRAPHICS

RMIS Report User Survey respondents represented various industries, organizational sizes, experience with the system, and roles within the organization and decision making process.

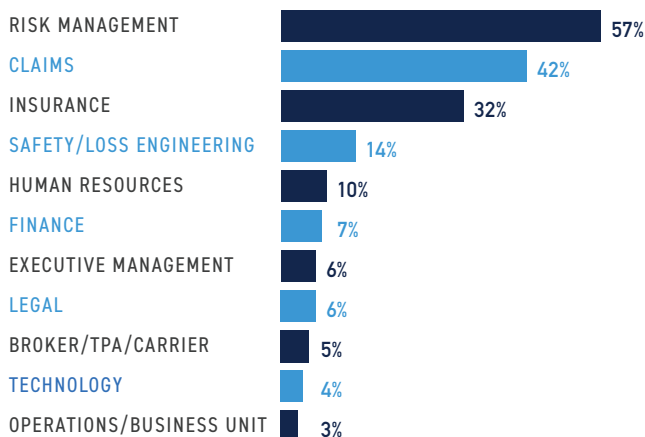
NUMBER OF SURVEY RESPONSES



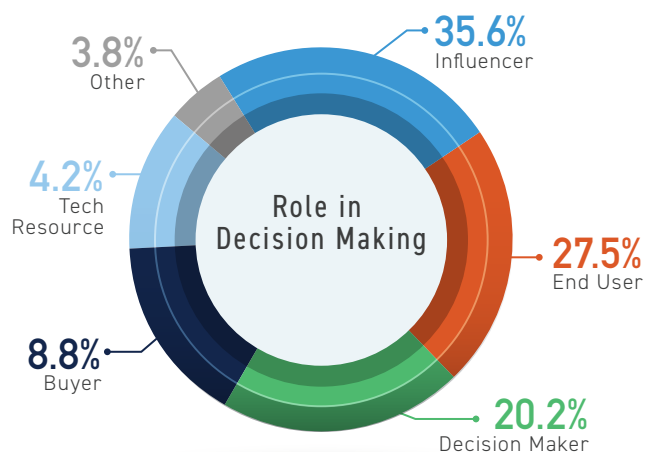
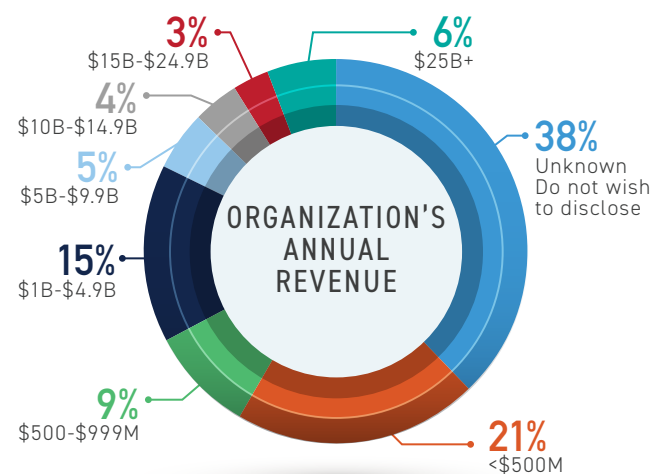
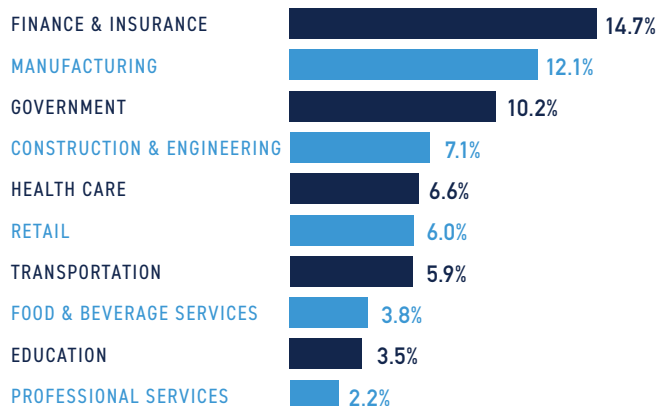
IMPLEMENTATION YEAR



ROLE THAT BEST DESCRIBES YOU



PRIMARY INDUSTRY



RMIS REPORT METHODOLOGY

ABOUT THIS REPORT

The *RMIS Report* is a comprehensive review of the risk management information system (RMIS) market and vendors. The report is based on three key inputs.

- **RMIS Users**—The authors invited more than 30,000 industry contacts to participate in the *RMIS Report* User Survey to gather feedback on their RMIS usage and needs. We received more than 1,175 survey responses covering more than 25 RMIS providers. The information provided by the respondents is kept confidential and can be submitted anonymously. The *RMIS Report* makes its best effort to authenticate the survey respondents but cannot completely confirm the validity of each respondent.
- **RMIS Vendors**—For the 2018 report, we conducted an extensive request for information (RFI) to which 22 RMIS vendors who responded. This year, we used our own industry experience and publicly available information to update the vendor profiles. Additionally, sponsors were given the opportunity to submit updates regarding their offerings and given the opportunity to provide an executive briefing to the authors.

- **Industry Expertise**—David Tweedy and Patrick O'Neill have over 60 years of combined RMIS experience to draw upon as they evaluate the market. The report is divided into two distinct sections based on the type of system provider: independent RMIS vendors and third-party administrators and insurers. Within each section of the report you will find an executive overview of the marketplace, detailed profiles for each vendor, and summary charts regarding their solutions.

The *RMIS Report* does not attempt to rank the vendors or determine a winner, nor should anyone try to assume a winner based on the results published. The *RMIS Report* is a guide to understanding the market and the vendors. The scoring of the vendor RFP and user survey results is based on a general criteria and weighting that the authors believe provide valuable insight into the solutions offered. True rankings can only be determined based on a specific organization's needs and goals.



RMIS REPORT METHODOLOGY

VENDOR PROFILE LEGEND

The information displayed on the vendor profiles was gathered from the three key sources described on the previous page.

- **General Information** - Company and product overviews, and other descriptive information was sourced from the Vendor RFI responses. The information provided is related to the companies RMIS business and not the company as a whole when the RMIS is part of a larger organization.
- **Product Scorecard** – The results displayed on the Product Scorecard are based on the author's expert opinion. The attributes of each functional category are displayed in the table.
- **Customer Experience** and **Implementation Experience** – The results are based solely on User Survey results. Users were requested to rate their satisfaction with their vendor's customer support and implementation experience.
- **System Wide Functionality** and **System Attributes** – The scoring was based on a combination of Vendor RFI scoring and User Survey results.





ANNUAL REVENUE (IN THOUSANDS)

	< \$10,000
	\$10,001 - \$25,000
	\$25,001 - \$50,000
	> \$50,000

USERS

	< 1,000
	1,001 - 5,000
	5,001 - 10,000
	> 10,000

CUSTOMERS

	< 100
	100 - 250
	251 - 500
	> 500

CLAIMS MANAGEMENT

- TPA/Carrier data consolidation
- Adjuster notes access
- Return-to-work management
- Litigation management

CLAIMS ADMINISTRATION

- Lines of business supported
- Reserve analysis
- Incident tracking
- Check writing
- Utilization review
- Medical bill review
- Fraud detection
- Subrogation/Salvage tracking
- Adjuster tracking/performance management
- WC FROI/SROI
- EDI reporting
- CMS/MMSEA reporting
- ISO reporting

ENVIRONMENTAL, HEALTH AND SAFETY (EH&S)

- Root cause analysis
- Corrective action tracking
- Inspection and Compliance audits
- OSHA tracking/reporting
- Incident reporting
- Training and Certification management

EXPOSURES

- Exposure types supported
- Web collection of values/exposures
- Property/Asset values tracking
- Physical asset management
- Fleet management
- COPE tracking

ENTERPRISE RISK MANAGEMENT / GOVERNANCE, RISK AND COMPLIANCE (ERM/GRC)

- Compliance/Regulatory management
- Contract/Vendor management
- Business continuity planning
- Action planning
- Risk register
- Risk assessment
- Risk heat maps
- Issue/Incident management and remediation tracking
- Sarbanes Oxley (SOX) tracking

CAPTIVE AND POOLING

- Member portal
- Claims administration
- Policy/Program management
- Underwriting capabilities
- Exposure tracking
- Certificate management
- Inspection and Compliance audits for members
- Actuarial analysis

POLICY AND INSURANCE

- Policy tracking/register
- Policy quotes
- Policy binding and issuance
- Policy billing
- Policy rating
- Policy erosion monitoring
- Deductible tracking
- Identification of coverage gaps and overlaps
- Graphical representation of coverages, limits and deductibles
- Certificate tracking
- Certificate issuance
- Experience modification calculation
- Bond and Contract tracking
- Premium allocation
- TCOR calculation

REPORTING

- Ad-hoc reporting
- Graphical reporting
- “As-of” date reporting
- Report scheduling
- Report bursting
- Reports to PDF/Excel
- Loss triangles
- Dashboard capabilities
- External benchmarking
- Loss forecasting
- Business intelligence tools
- Advanced visualization tools
- Predictive modeling
- Statistical analysis
- KPI tracking and reporting
- Budget tracking
- Cash flow forecasting

SYSTEM WIDE FUNCTIONALITY

- Notifications and alerts
- Search capabilities
- Workflow/automation tools/business rules
- Document management
- Multi-currency/multi-language
- Mobile capabilities

SYSTEM ATTRIBUTES

- Security
- Ease of use
- Look and feel
- System platform
- Hosting/deployment options
- System uptime/availability
- System performance/speed
- Browser compatibility
- Third-party integration
- Single Sign-on/LDAP

ALL-IN-ONE SOFTWARE
FOR THE RISK AND
INSURANCE
INDUSTRY



CHSI
CONNECTIONS

CHSI CONNECTIONS®

Accelerate Your Insurance Operations

CHSI Connections® incorporates powerful CRM, underwriting, billing, claims integration, broker and policy holder portals into a single cloud-based insurance practice management system.



CRM - CLIENT RELATIONSHIP MANAGEMENT

Easily find, edit, and add member information in one location. From task management to email, our CRM has everything you need to strengthen your client relationships.



POLICY ADMINISTRATION & UNDERWRITING

Connections is configured to meet your specific underwriting guidelines and business rules so that your underwriting, rating & billing, audits, renewals and more are automated.




BILLING & RECEIVING

Send premium invoices & receive payments. Data is easily imported to your accounting system.

CONTACT US

 info@chsitech.com

 866-434-3561

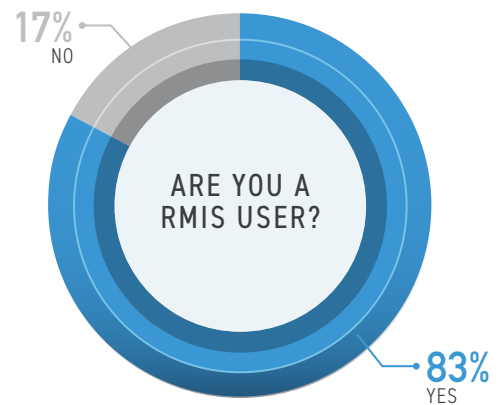
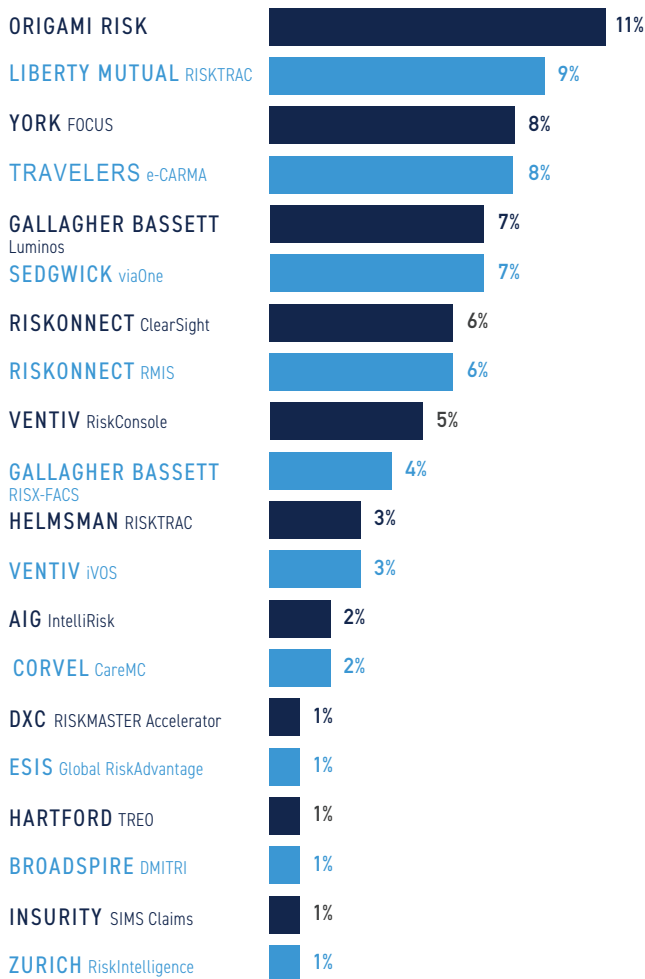
 www.chsitech.com

DATA INSIGHTS

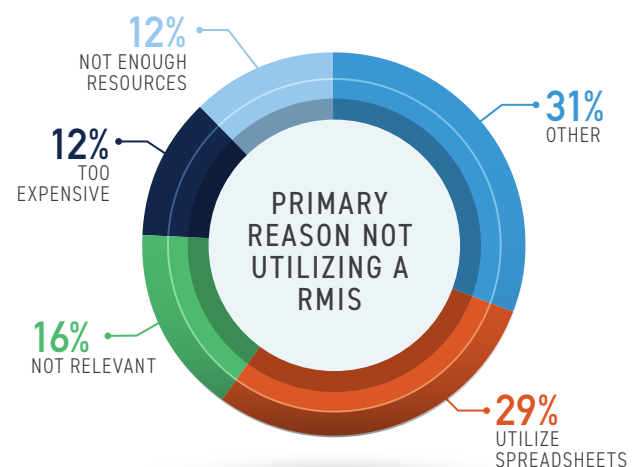
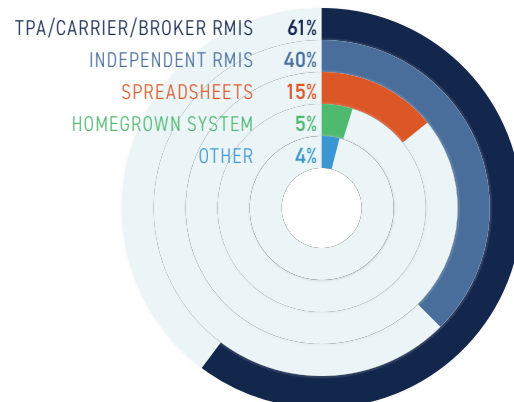
RESPONDENT UTILIZATION

RMIS Report User Survey respondents were asked if they utilized a RMIS; what type of RMIS and which system did they primarily use. If they did not utilize a RMIS they were asked why not.

SYSTEM UTILIZED FOR RMIS



PRIMARY TYPE OF SYSTEM



INDEPENDENT RMIS PROVIDERS

2018 was an eventful year in the RMIS market. Several significant events took place to change the landscape of the marketplace.

The two primary forces driving the market are technology innovations that vendors are integrating into their solutions; and demands by more sophisticated risk management users and organizations.

Both of these forces are fueling rapid change and growth in this market.

The top-tier vendors in the market continue to stand out from the crowd in terms of capabilities, but specialty providers are making their mark and differentiating themselves through best-in-class capabilities, unique solutions, and competitive pricing. This year's report notes three organizations that we classify as leaders in the industry: Origami Risk, Riskconnect, and Ventiv Technology.

Analysis and Commentary

We note the following trends in the market for 2019.

1. Investment and consolidation in the marketplace

For many years, the RMIS market was dominated by broker-owned systems that operated as independent providers. The last broker-owned system, Marsh ClearSight, was sold to Riskconnect in 2018. This is the largest acquisition to take place in the RMIS market in some time because Marsh held the largest share of the market prior to the acquisition. This change to technology ownership in the market is a very good trend in our opinion.

In addition to the Marsh deal, there were several other significant events that took place in 2018. Earlier in the year, Riskconnect acquired GRC provider Aruvio; a private equity firm took a minority stake in Origami Risk; and Ventiv acquired David Corporation at the beginning of 2019. The big three (Riskconnect, Ventiv, Origami Risk) are all private-equity backed, which provides its own dynamics for the future of the marketplace.

2. Expanding definition of risk

The market is also reacting to the ever-expanding definition of risk and the increased importance of risk management in organizations. Historically, RMIS focused on more traditional risks, but over the past few years, we have seen an increase in support for broader requirements. Enterprise risk, governance risk, and compliance are becoming more standard features in the marketplace, although the capabilities from RMIS providers vary. While there is an entire market of enterprise risk management (ERM) vendors, we are seeing the RMIS vendors aggressively pursuing this market and expanding their capabilities.

3. Specialty providers on the rise

While we have seen consolidation at the top of the market, we are seeing a trend of an increase in specialty providers. These providers focus on specific solutions and do not offer the broad capabilities that some RMIS providers do. Many are early to market and utilizing new technology trends to solve problems. We have carved out the specialty providers in this year's report.

4. Tech innovation impacting RMIS market

Technology is also driving the innovation in the industry. It takes time for newer tech innovations to make their way into mainstream use. For example, cloud and mobile computing took a number of years to become mainstays in the industry, but today they are prevalent based on our survey. Newer technology trends such as analytics and big data have not been adopted as widely, although they are offered by all the top vendors. Other trends to watch are the internet of things and artificial intelligence, which will have a significant impact on the risk technology market in the years to come.

Conclusion

The RMIS market continues to evolve very quickly. With private equity playing a bigger role in the industry, we do not expect things to slow down. We also believe that we have not seen the last of mergers and acquisitions and wouldn't be surprised to see more activity in 2019.

That said, we are watching closely how these recent acquisitions affect the vendors' ability to deliver, how they integrate disparate systems, and how they go-to market moving forward.

INDEPENDENT RMIS PROVIDERS

DXC Technology

www.dxc.technology.com

OWNERSHIP

Public company

FOUNDED
2017

HEADQUARTERS
Austin, TX

LEADERSHIP
Mike Lawrie, Chairman,
President & CEO
Mike Nefkens,
Executive VP, General
Mgr Regions & Industry
Phil Ratcliff, VP &
General Mgr
Global Insurance

EMPLOYEES
350

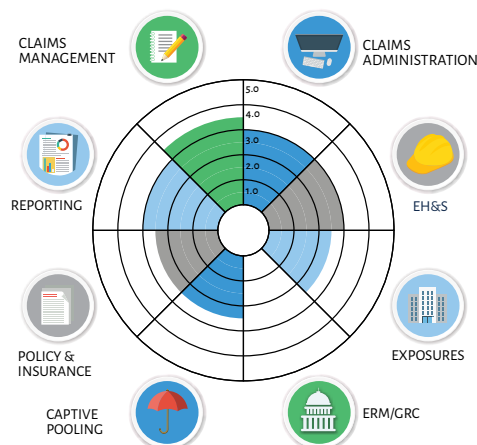
ANNUAL REVENUE
\$ \$ \$ \$

TOP INDUSTRIES
Insurance-Carrier
and Self Insured
Retail and Transportation
Energy and Technology
Manufacturing
Public Sector
Healthcare

CONTACT
512.275.5883

MARKETS SERVED
Captive/Pool Mgmt
Certificate Mgmt
Claims Admin
Claims Mgmt
EH&S
Exposure/Asset Mgmt
Healthcare RMIS
Incident Mgmt
Insurance Renewal Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt

DXC Technology, formed as a result of the merger of CSC and HP Enterprise Services in 2017 has been a market leader for over 50 years. DXC's claims solution is used by numerous carriers and hundreds of self insureds. DXC's claims solution provides a comprehensive system to streamline companies entire claims and risk environment.



PRODUCT

DXC Insurance *RISKMASTER™* claims management system integrates multiple business functions into one cohesive solution to provide faster, smoother processes and more accurate, up-to-date data.

This browser-based software provides real-time analytics to help you spot trends and mitigate future losses. It gives your staff a highly efficient system that simplifies workflows and promotes best practices throughout your organization. It ensures your claimants receive first-class service, and it helps your management team track key metrics to control costs and improve performance.

RISKMASTER Accelerator

INITIAL RELEASE
1982

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS – n/a

SUPPORT OFFERED – n/a

USER CONFERENCE – n/a

CLIENT ADVISORY COUNCIL – n/a

CUSTOMER EXPERIENCE – 2.3/5

IMPLEMENTATION EXPERIENCE – 2.4/5

IMPLEMENTATION TIMELINE – n/a

TECHNOLOGY

DEPLOYMENT OPTIONS

Client Hosted, Vendor hosted, Third party hosted (Public Cloud)

SYSTEM DEVELOPED BY In-House

HOSTED BY Third Party

SYSTEM WIDE FUNCTIONALITY 3.2/5

SYSTEM ATTRIBUTES 3.5/5

SECURITY

CERTIFICATIONS

SSAE16

ISO 9001

PRICING

PRODUCT LICENSING – n/a

ONGOING FEES – n/a

INDEPENDENT RMIS PROVIDERS

Ebix

www.ebix.com

OWNERSHIP

Public company

FOUNDED

1973

HEADQUARTERS

Johns Creek, GA

LEADERSHIP

Robin Raina, CEO

EMPLOYEES

55

ANNUAL REVENUE



TOP INDUSTRIES

Manufacturing
Government
Health Care
Utilities
Business & Consumer
Services
Government

CONTACT

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shayne.garner@ebix.com

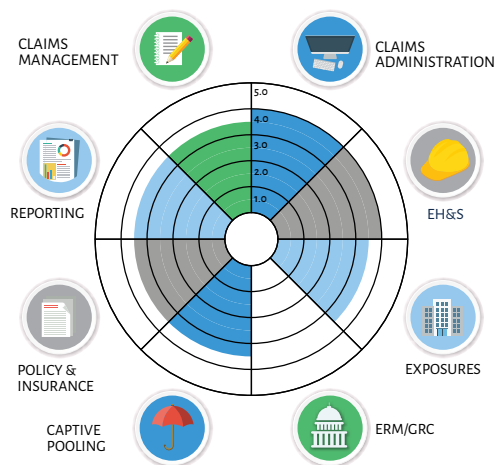
MARKETS SERVED

Certificate Mgmt
Claims Admin
Claims Mgmt
Exposure/Asset Mgmt
Healthcare RMIS
Incident Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
RMIS

SURVEY INSIGHTS

RiskEnvision is EBIX's specific product for the RMIS industry. RiskEnvision is a modular suite of enterprise-level RMIS products that offers a 100% web-based risk management and claims administration solution.

A leading international supplier of on-demand software and e-commerce services to the insurance industry, Ebix, Inc., provides end to end solutions ranging from infrastructure exchanges, carrier systems, risk management systems and BPO services to custom software development for all entities involved in the insurance industry.



PRODUCT

RiskEnvision is a browser based application that can be accessed anywhere you have an internet connection. RiskEnvision is written in JAVA and uses either an Oracle or MS SQL database. It supports all lines of business and includes functionality that is a necessity to claims management professionals.

INITIAL RELEASE

1994

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

Monday to Friday 8AM to 6PM (EST)

SUPPORT OFFERED

Help desk Email
Website Screen "tips" or
User manual mouse overs
Phone

USER CONFERENCE Yes

CLIENT ADVISORY COUNCIL Yes

CUSTOMER EXPERIENCE n/a

IMPLEMENTATION EXPERIENCE n/a

IMPLEMENTATION TIMELINE

Basic 4 Months
Moderate 6 Months
Complex 8 Months

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS, Hosted, On-Premise-Private Cloud

SYSTEM DEVELOPED BY 3rd Party

HOSTED In-House

SYSTEM WIDE FUNCTIONALITY 3.1/5

SYSTEM ATTRIBUTES 3.2/5

SECURITY

CERTIFICATIONS

ISO 27001 SSAE16-SOC2

PRICING

PRODUCT LICENSING

Module license per line of coverage, optional features and concurrent user license.

ONGOING FEES

Hosting, support, and maintenance.

Insurity, Inc.

www.insurity.com

OWNERSHIP

Privately held

FOUNDED

1985

HEADQUARTERS

Hartford, CT

LEADERSHIP

Chris Giglio, CEO

EMPLOYEES

850

ANNUAL REVENUE



TOP INDUSTRIES

Government
Finance & Insurance
Insurance carriers
TPA's
Risk Pools

CONTACT

Mark Menard

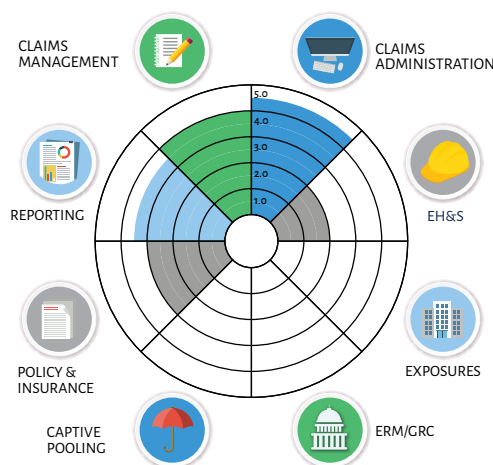
Mark.Menard@insurity.com

508-758-1345

MARKETS SERVED

Claims Admin
Claims Mgmt

Insurity has enabled property & casualty insurers to modernize their enterprise and achieve their business goals through our complementary suites of core processing applications and data integration and analysis components.



PRODUCT

Claims Decisions™ is a pure browser-based system, built by experienced enterprise system architects with direct input from a knowledgeable group of seasoned insurance professionals. The system provides a complete set of out-of-the-box functionality enabling claims organizations to reduce expenses and increase productivity. SIMS also provides the flexibility companies need to configure the application to meet their unique business needs.

INITIAL RELEASE

2007

DELIVERY

SUPPORT HOURS

Monday to Friday 8AM to 6PM (EST)

SUPPORT OFFERED

Help desk	Website
Online help	Phone
Wizards /	Email
Contextual help	Community
Knowledge base	Forums

USER CONFERENCE Yes

CLIENT ADVISORY COUNCIL Yes

CUSTOMER EXPERIENCE 3.4/5

IMPLEMENTATION EXPERIENCE 3.7/5

IMPLEMENTATION TIMELINE

Basic	4 to 6 Months
Moderate	6 to 12 Months
Complex	9 to 18 Months

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS, On-Premise, Public Cloud

SYSTEM DEVELOPED In-House

HOSTED BY Amazon Web Services

SYSTEM WIDE FUNCTIONALITY 3.5/5

SYSTEM ATTRIBUTES 3.8/5

SECURITY

CERTIFICATIONS

HIPAA	ISO 27001
NIST	SSAE 16 - SOC 2
SSAE 16 - SOC 1	

PRICING

PRODUCT LICENSING

SIMS Claims is offered on a Term License basis that is driven by the requirements of the client.

ONGOING FEES

Monthly fee for software licensing, maintenance / support and optional hosting services.

SURVEY INSIGHTS

Claims Decisions (formerly known as SIMS Claims) is a comprehensive claims administration system including traditional property/casualty lines of business. Insurity acquired Systema Software in December 2016.

INDEPENDENT RMIS PROVIDERS

Origami Risk, LLC

www.origamirisk.com

OWNERSHIP
[Privately held](#)

FOUNDED
2009

HEADQUARTERS
[Chicago, IL](#)

LOCATIONS
[Atlanta, GA](#)
[Denver, CO](#)
[Philadelphia, PA](#)
[London, UK](#)

LEADERSHIP
[Bob Petrie, CEO](#)
[Jon Nichols, COO](#)
[Steve Fischer, Exec Dir Development](#)
[Earne Bentley, Exec Dir Sales](#)

EMPLOYEES
235

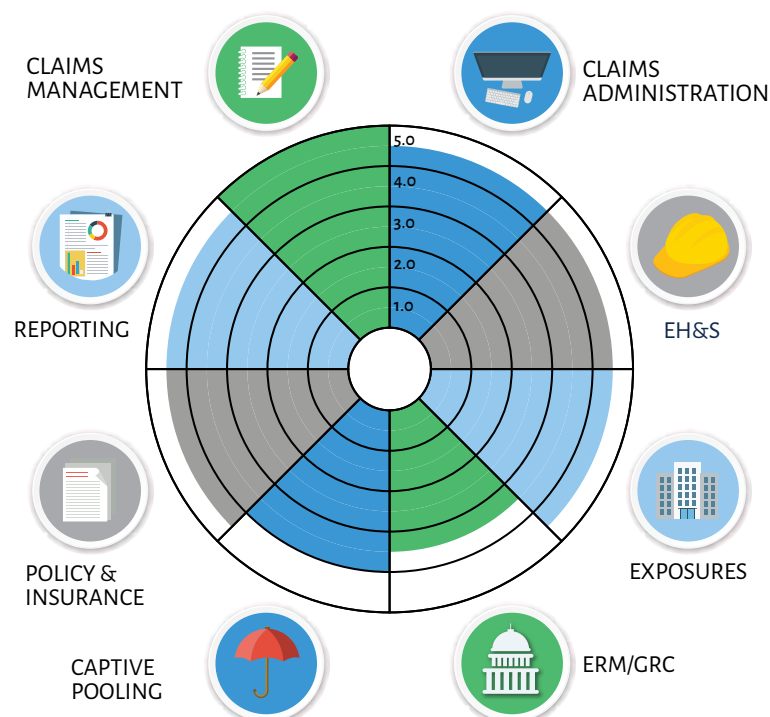
ANNUAL REVENUE
\$ \$ \$ \$

TOP INDUSTRIES
[Government](#)
[Finance & Insurance](#)
[Retail](#)
[Construction](#)
[Healthcare](#)

CONTACT
[Earne Bentley](#)
(404) 425-9655
ebentley@origamirisk.com

MARKETS SERVED
[Captive/Pool Mgmt](#)
[Certificate Mgmt](#)
[Claims Admin](#)
[Claims Mgmt](#)
[ERM/GRC](#)
[EH&S](#)
[Exposure/Asset Mgmt](#)
[Incident Mgmt](#)
[Insurance Renewal Mgmt](#)
[Litigation Mgmt](#)
[Loss Control/Safety](#)
[OSHA Compliance](#)
[Policy/Program Mgmt](#)
[RMIS](#)
[Underwriting](#)

Origami Risk is an award-winning web-based software provider for the risk and insurance industry. Origami was established to focus on new innovation at a time when the pace of advancement within the risk and insurance software industry had slowed dramatically. Origami is led by one of the most knowledgeable management team in the RMIS industry. This team has focused on client success through the delivery of a highly functional, secure platform architecture and professional services excellence. Our product and team of experts have been built from the ground up with a singular focus on our clients' business objectives.



PRODUCT
SCORECARD
[Origami Risk, LLC](#)

PRODUCT

Origami Risk is a cloud-based, Software as a Service (SaaS) Risk, Safety and Insurance solution. Origami can be accessed from any browser as well as mobile devices and does not require any additional hardware or plug-ins to operate. As a SaaS, single-version solution, all of our clients are on the same version of the system. Origami is fully configurable, from the look and feel to the robust workflow capabilities, as well as the advanced reports and analytics.

INITIAL RELEASE
2009

CURRENT RELEASE
[SaaS Model](#)
2/9/19

USERS



CUSTOMERS





DELIVERY

SUPPORT HOURS

Monday to Friday
7AM to 8PM (CST)

SUPPORT OFFERED

Online help Website
Wizards/ User manual
Contextual help Phone
Video tutorials
Knowledge base

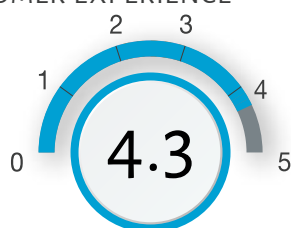
USER CONFERENCE

Every 18 months. Last Fall 2018

CLIENT ADVISORY COUNCIL

No

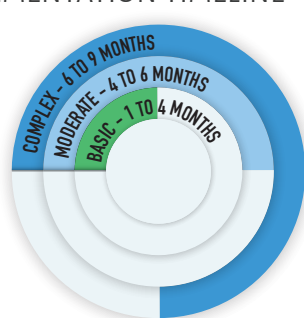
CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE



TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS

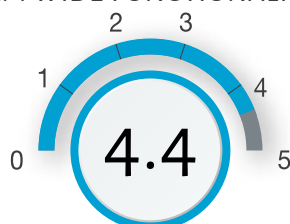
HOSTED BY

Amazon Web Services

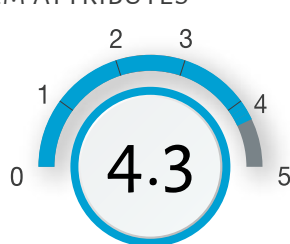
SYSTEM DEVELOPED

In-House

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

HIPAA, NIST, Shield, FSIMA
SSAE 16 - SOC 2, Compliant
EU-U.S. Privacy

LAST 3RD PARTY ASSESSMENT

2/1/18

PRICING

PRODUCT LICENSING

Based on usage, which could be per seat or enterprise-wide

ONGOING FEES

Licensing, Data Security, Storage and Processing, data interfaces and professional services.



“By taking advantage of the wide abilities that Origami has to offer we have been able to make processes more efficient and focus more on proactive investigation versus reactive actions.”

- Heather McCleve, Sr. Systems Consultant, Banner Health

“We have now almost 3 years of use and what we have been able to accomplish has improved our operations substantially.”

- Sandy Moser CPCU, Underwriting & Technology Manager, Idaho Counties Risk Management Program

SURVEY INSIGHTS

In 2018, Spectrum Equity, a growth equity firm, made a minority investment in Origami Risk. Origami continued to focus on creating a broad and configurable platform.

Recent enhancements include workflow automation/business rules engine improvements, additional administrative tools, system-wide configuration capabilities and enhanced security functionality.

ONE Version

ONE Destination for the industry's top talent

ONE Team from implementation to renewal

ONE Very satisfied client base

ONE Sure thing in a sea of uncertainty



ORIGAMI RISK

www.origamirisk.com

INDEPENDENT RMIS PROVIDERS

PCIS

www.pcisvision.com

OWNERSHIP

Privately held

FOUNDED

2001

HEADQUARTERS

New York, NY

LEADERSHIP

Mike Loizou, CEO

EMPLOYEES

35

ANNUAL REVENUE



TOP INDUSTRIES

n/a

CONTACT

Mike Loizou

(212) 405-1625

michael.a.loizou@pcisvision.com

[@pcisvision.com](mailto:michael.a.loizou@pcisvision.com)

MARKETS SERVED

Captive/Pool Mgmt

Certificate Mgmt

Claims Admin

Claims Mgmt

ERM/GRC

EH&S

Exposure/Asset Mgmt

Incident Mgmt

Insurance Renewal Mgmt

Litigation Mgmt

Loss Control/Safety

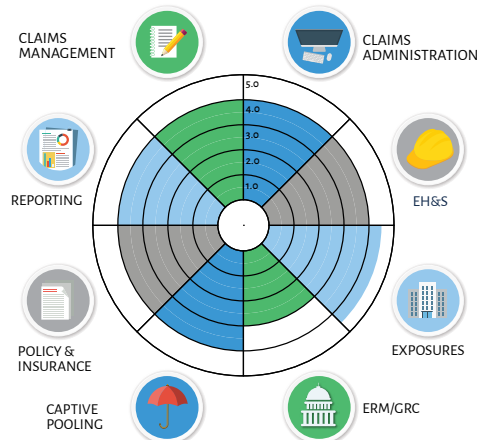
OSHA Compliance

Policy/Program Mgmt

RMIS

Underwriting

PCIS is a recognized industry leader in Insurance Technology specializing in risk management, claims administration and policy mgmt for insurance carriers, TPAs, pools, and public/private self-insureds.



PRODUCT

ClaimsVISION® is a highly automated multi-line claims & risk management system. This SaaS deployed system boasts industry leading dashboards, built in workflows, and a touchless state and federal compliance tool set designed to streamline managing risk, while offering end-user friendly data analytics.

INITIAL RELEASE

05/17/2017

CUSTOMERS



USERS



CompVISION® is a comprehensive PAS allowing carriers, captives, and pools to handle multi-company, 50-state quote, rate, policy issuance, policy administration, premium accounting, audit, and NCCI compliance reporting.

INITIAL RELEASE

2011

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

Monday to Friday 8AM to 8PM (EST)

SUPPORT OFFERED

Help desk

Online help

Knowledge base

Phone

Email

USER CONFERENCE

SaaS, On-Premise - Private Cloud

CLIENT ADVISORY COUNCIL No

CUSTOMER EXPERIENCE n/a

IMPLEMENTATION EXPERIENCE n/a

IMPLEMENTATION TIMELINE

Basic 3 Months

Moderate 6 Months

Complex 9 - 12 Months

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS, On-Premise - Private Cloud

SYSTEM DEVELOPED BY In-House

HOSTED BY Internap

SYSTEM WIDE FUNCTIONALITY 3.6/5

SYSTEM ATTRIBUTES 3.1/5

SECURITY

CERTIFICATIONS

HIPAA

SSAE 16 - SOC 2

PRICING

PRODUCT LICENSING

SaaS model, monthly subscription that is based on users, modules, and integration points.

ONGOING FEES

Lease to use the system, hosting, IT support, customer support, backups and upgrades/maintenance.

SURVEY INSIGHTS

PCIS' philosophy constructing solutions is to bake-in content and regulatory requirements with automation. PCIS' products ClaimsVISION RMIS and CompVISION PAS are offered standalone or fully integrated.

Maximize your investment Minimize your risk

Redhand Advisors provides consulting services to help organizations develop strategies and implement systems that build business value and drive performance. Specializing in risk, insurance and health information management with deep RMIS experience our offerings

Technology strategy and insights
System planning and design
System analysis and selection
Implementation services
Process improvement/best practices
System optimization
Project management



Riskconnect, Inc.

www.riskconnect.com

OWNERSHIP

Private equity

FOUNDED

2007

HEADQUARTERS

Kennesaw, GA

LOCATIONS

Chicago, Dallas, Amarillo,
London, Sydney,
Mangalore, Ahmedabad

LEADERSHIP

Jim Wetekamp, CEO
Teri McEvily, CFO
Andrea Brody, CMO
Roger Dunkin, VP

EMPLOYEES

500

ANNUAL REVENUE

\$\$\$

TOP INDUSTRIES

Finance & Insurance
Retail
Manufacturing
Health Care
Construction

CONTACT

Jim Haas
jim.haas@riskconnect.com

MARKETS SERVED

Captive/Pool Mgmt
Certificate Mgmt
Claims Admin
Claims Mgmt
ERM/GRC
EH&S
Exposure/Asset Mgmt
Healthcare RMIS
Incident Mgmt
Insurance Renewal Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
RMIS
Underwriting

Founded in 2007, Riskconnect is the innovative, leading source of true Integrated Risk Management technology, offering a growing suite of solutions on a world-class cloud computing model that enable clients to elevate their programs for effectively and comprehensively managing risk across their enterprise. Riskconnect allows organizations to holistically understand, manage and control risks, positively affecting shareholder value. Through its strategic, operational and insurable risk and GRC software applications, Riskconnect provides organizations around the world and in every industry with the specific, configurable solutions needed to reduce losses, control and leverage risk and positively affect shareholder value.

PRODUCTS

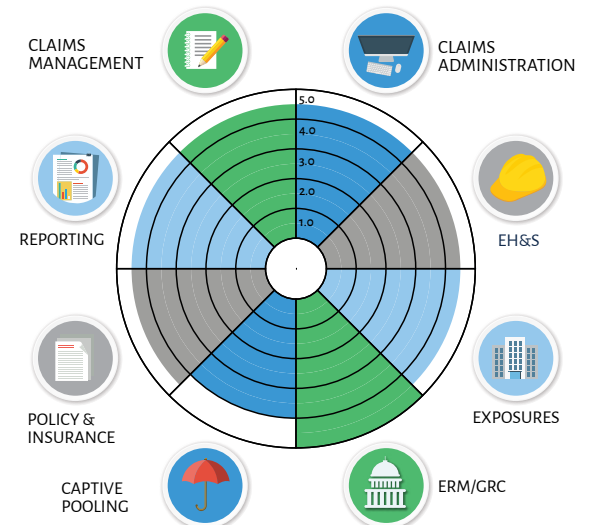
Riskconnect RMIS, built on a cloud computing model with unsurpassed technology and thought-leading risk management expertise, is an innovative approach to incidents, claims, litigation, exposure, property (including COPE) policy and asset management and more.

Enterprise Risk Management (ERM) brings together all the significant risks of an organization in a way that enables the organization to most effectively manage those risks. As businesses explore new methods for managing risks, ERM provides a framework to identify and proactively address those risks. Through Riskconnect's platform, you can easily measure and manage all risk-related elements in order to quickly and accurately report the status of your organization's end goals.

ClearSight is a new-generation RMIS that capitalizes on the latest technology to provide risk, safety and claims professionals with unprecedented insight into their risks. ClearSight was designed around the way people work.

PRODUCT SCORECARD

Riskconnect, Inc.



Riskconnect RMIS

INITIAL RELEASE
2007

CURRENT RELEASE
Summer 2018

Enterprise Risk Management

INITIAL RELEASE
2007

CURRENT RELEASE
Summer 2018

ClearSight

INITIAL RELEASE
2008

CURRENT RELEASE
Spring 17.1
Release 05/18/18

USERS

○○○○

CUSTOMERS

○○○○



DELIVERY

SUPPORT HOURS

24/7 365

SUPPORT OFFERED

Online help Knowledge base
Wizards/ User manual
Contextual help Phone
Video tutorials Email
Client
Communities

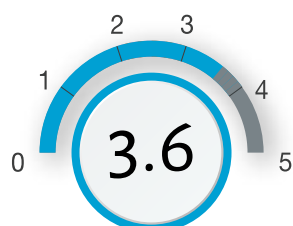
USER CONFERENCE

November 2019

CLIENT ADVISORY COUNCIL

Yes

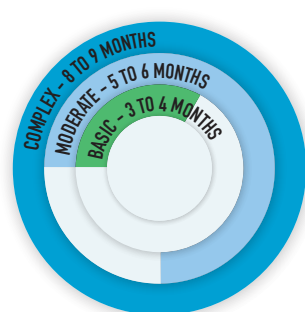
CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE



TECHNOLOGY

DEPLOYMENT OPTIONS

Saas
On-Premise

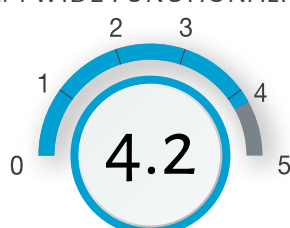
HOSTED BY

3rd Party

SYSTEM DEVELOPED

In-House
Force.com

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

HIPAA SSAE 16 - SOC 2
SSAE 16 - SOC 1 SSAE 18 - SOC2
ISO 27001

LAST 3RD PARTY ASSESSMENT

Q3 2018

PRICING

PRODUCT LICENSING

Annual subscription and support.

ONGOING FEES

Licensing, ongoing data and support.



"The system is always improving and providing new modules which allows us to leverage the system to other functions within the organization."

- Senior Risk Analyst, Fortune 500 Company

"Wendy's has embarked on a significant initiative to integrate traditional and non-traditional/emerging business functions related to Risk Management, and Riskconnect is the foundation upon which our strategy is being implemented."

- Bob Bowman, Director Risk Management, The Wendy's Company

SURVEY INSIGHTS

Riskconnect acquired Marsh ClearSight in 2018. The acquisition positions Riskconnect as the largest RMIS provider. The ClearSight platform does have overlapping capabilities in some areas but complements the current offering with new solutions not previously available.

The Riskconnect platform delivered a new user interface designed to improve productivity and make the system more intuitive and accessible. A new questionnaire framework was also released which enables field/safety audits.

Additionally the acquisition of cloud-based GRC vendor Aruvio in late 2017 added significant capabilities in ERM/GRC.

MEET THE NEW RISKONNECT!

AND SEE RISK FROM AN
ENTIRELY NEW PERSPECTIVE.

Solutions that integrate risk from
across the organization and across
the globe to change the way you
manage risk

- RMIS
- Claims Administration
- Vendor Risk Management
- Enterprise Risk Management
- Internal Audit
- Governance & Compliance
- Health & Safety



riskconnect.
Integrated Risk Management Solutions™

riskconnect.com 770-790-4700

Ventiv Technology, Inc.

www.ventivtech.com

OWNERSHIP

Private equity firm,
Symphony Technology

FOUNDED

1972

HEADQUARTERS

London
Atlanta, GA

LEADERSHIP

Bill Diaz, CEO

EMPLOYEES

400

ANNUAL REVENUE



TOP INDUSTRIES

Manufacturing
Health Care
Construction
Retail
Public Sector

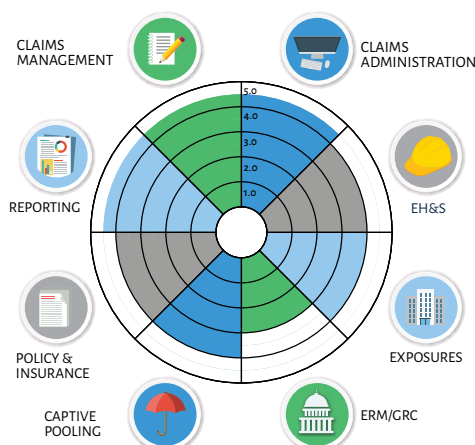
CONTACT

Jim Dickinson
jim.dickinson@ventivtech.com

MARKETS SERVED

Captive/Pool Mgmt
Certificate Mgmt
Claims Admin
Claims Mgmt
ERM/GRC
EH&S
Exposure/Asset Mgmt
Healthcare RMIS
Incident Mgmt
Insurance Renewal Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
RMIS

Ventiv Technology provides integrated risk and insurance, claims, and EH&S technology solutions.



PRODUCTS

RiskConsole Advance is Ventiv Technology's next-generation risk mgmt information system. RiskConsole Advance gives risk managers everything they want from a risk platform: powerful, fully embedded analytics and reporting; speed and responsiveness.

iVOS is Ventiv Technology's claims administration solution. Now more than ever, claims organizations rely on iVOS to improve examiner efficiency and deliver cost savings through enhanced productivity and consistency.

RiskConsole

INITIAL RELEASE
2001

USERS



iVOS

INITIAL RELEASE
2002

CUSTOMERS



DELIVERY

SUPPORT HOURS

24 hours / 7 days a week

SUPPORT OFFERED

Help desk	Knowledge base
Online help	User manual
Wizards/	Phone
Contextual help	Mouse overs
Video tutorials	

USER CONFERENCE Yes

CLIENT ADVISORY COUNCIL Yes

CUSTOMER EXPERIENCE 3.0/5

IMPLEMENTATION EXPERIENCE 2.8/5

IMPLEMENTATION TIMELINE

Basic	3-6 Months
Moderate	6-9 Months
Complex	6-9 Months

TECHNOLOGY

DEPLOYMENT OPTIONS SaaS

SYSTEM DEVELOPED BY In-House

HOSTED BY On-Premise, Private Cloud

SYSTEM WIDE FUNCTIONALITY 3.6/5

SYSTEM ATTRIBUTES 3.8/5

SECURITY

CERTIFICATIONS

EU-Data Privacy	SOC1 Type2
Shield	ISO 27001:2013
Swiss Privacy Shield	

PRICING

PRODUCT LICENSING

RCA licenses are specific to general job functions. iVOS user licenses are on a concurrent user basis..

ONGOING FEES

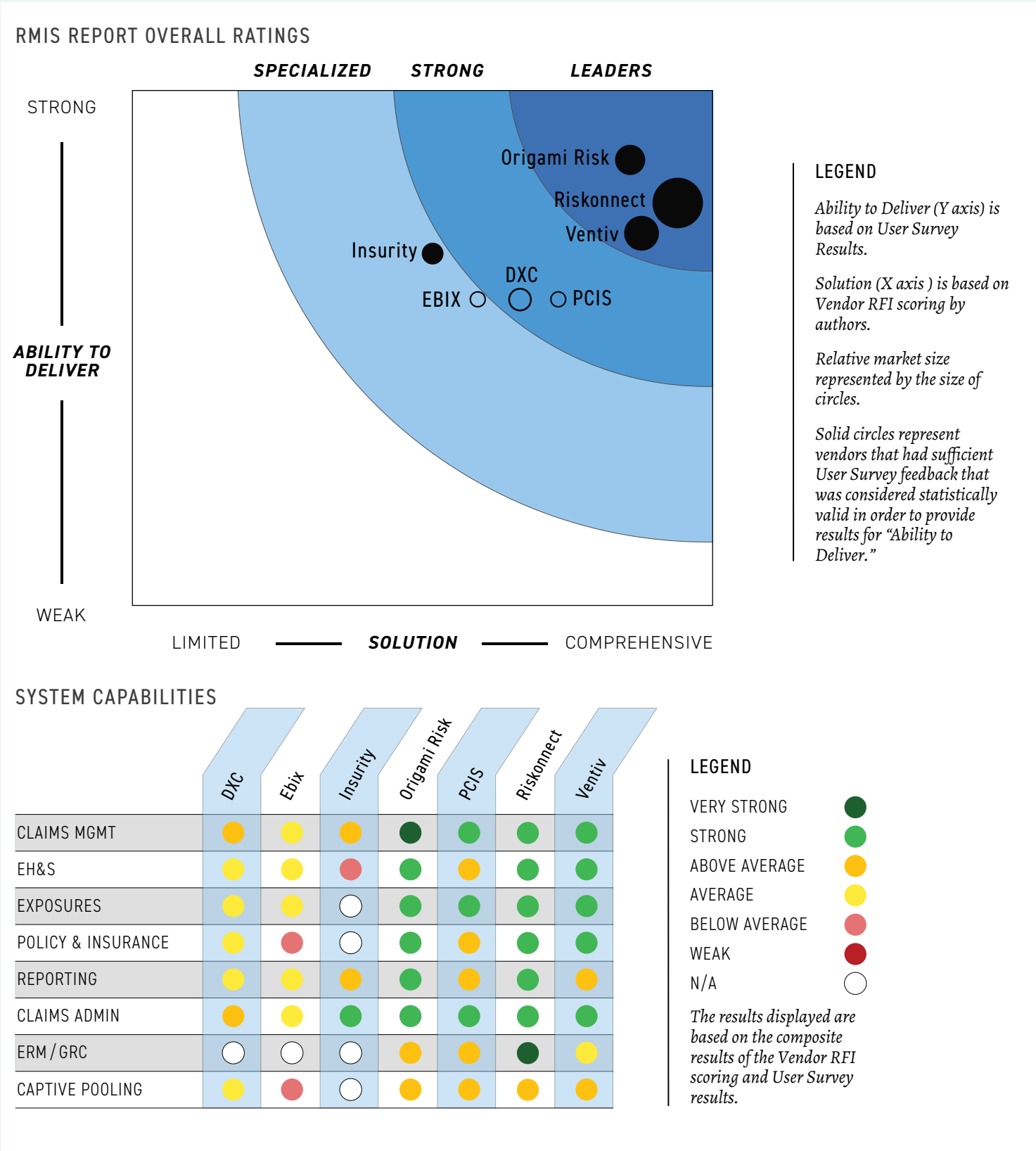
System support, managed service hours, technical support, license fees / subscription fees, data conversion fees, and data storage costs.

SURVEY INSIGHTS (rev. 5/1/19)

Ventiv offer 3 distinct products providing unique capabilities that can be integrated when multiple solutions are required. We have heard from several reliable and disparate sources that Symphony may be looking to sell Ventiv this year.

PROVIDERS AT-A-GLANCE:

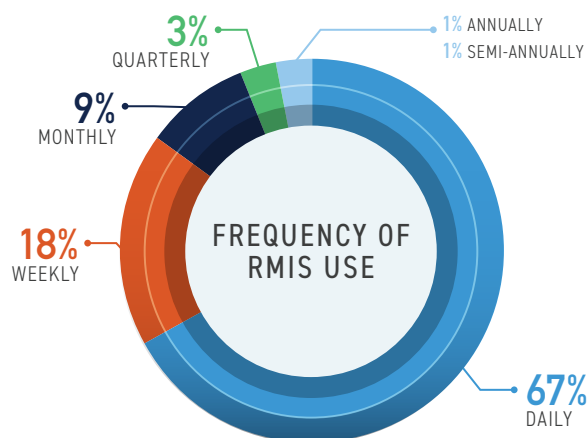
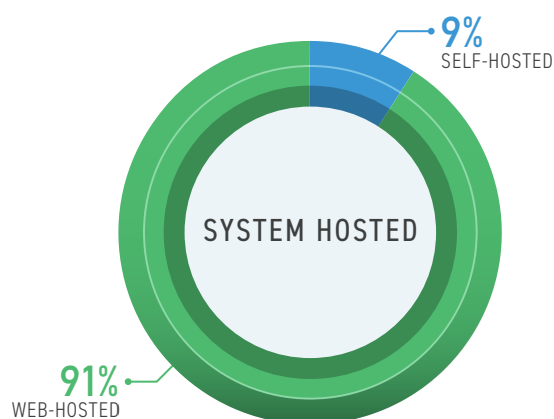
INDEPENDENT RMIS PROVIDERS



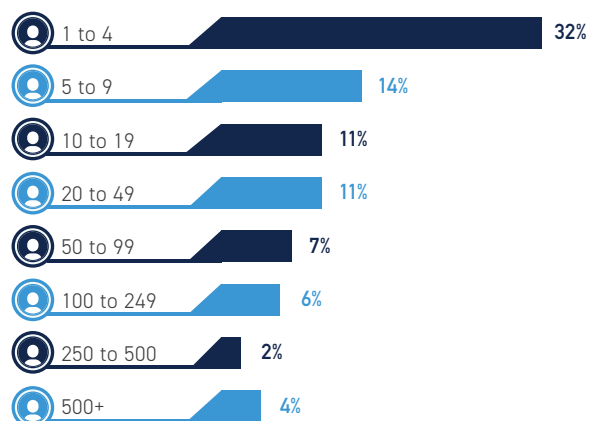
DATA INSIGHTS

SYSTEM INFORMATION

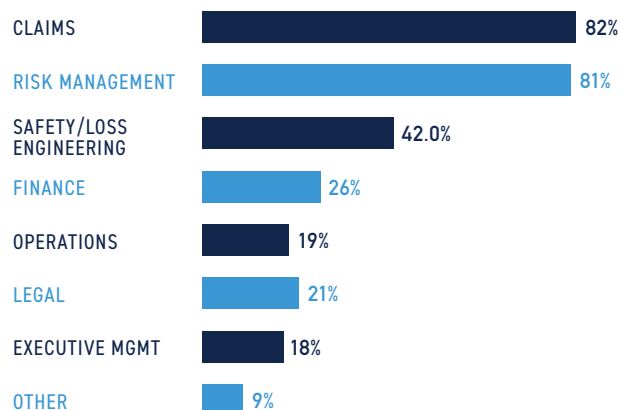
RMIS Report User Survey respondents described how their system was deployed, how many used the system, types of user roles, and system usage frequency.



NUMBER OF SYSTEM USERS



SYSTEM USER ROLES



Riskconnect[®] IS THE LEADING integrated risk management software solution provider

THAT EMPOWERS ORGANIZATIONS TO
ANTICIPATE, MANAGE AND

RESPOND
IN REAL-TIME

to strategic and operational risks
across the extended enterprise.[®]

Through our **UNIQUE** **risk** **CORRELATION**
TECHNOLOGY,
OVER 900 customers **ACROSS 6** continents

are benefiting from ACTIONABLE INSIGHTS
that have not been previously attainable
to deliver better business outcomes.

Meet the New Riskconnect ...
and see risk from an entirely new perspective.
Booth # 1117



SPECIALTY PROVIDERS

CHSI Technologies Corporation

www.chsiconnections.com

OWNERSHIP

C Corp

FOUNDED

2010

HEADQUARTERS

Henderson, NV

LEADERSHIP

Jim Leftwich, CEO
 Lee Mashore, CPO
 Richard Mathis, CTO
 Trevor Lightbound, VP
 Partner Services

EMPLOYEES

23

ANNUAL REVENUE



TOP INDUSTRIES

Monoline WC Carriers
 Self-Insured Groups
 Public Entity Pools
 Captives

CONTACT

Lee Mashore
 (702) 947-7493
lmashore@chsitech.com

MARKETS SERVED

Captive/Pool Mgmt
 Certificate Mgmt
 Claims Admin
 Claims Mgmt
 Exposure/Asset Mgmt
 Insurance Renewal Mgmt
 Loss Control/Safety
 Policy/Program Mgmt
 RMIS
 Underwriting

CHSI Technologies is a company comprised of people who are passionate about creating and being part of something extraordinary. Our vision is to be “The Leader in Hosted Insurance Management Solutions”. The name CHSI was chosen to communicate the company’s passion, spirit, and values for which it stands: Commitment, Honesty, Service and Innovation.

PRODUCT

CHSI Connections is a cloud-based policy administration system specifically designed for tier four insurance carriers, public entity pools and captives. CHSI Connections has modules for complete policy administration, CRM, billing, claims integration, loss control, data collection, business intelligence and both policy and agent facing portals.

INITIAL RELEASE

2004

CURRENT RELEASE

SaaS Model

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

Monday to Friday 6AM to 6PM (PST)

SUPPORT OFFERED

Help desk	Phone
Video tutorials	Email
Community forums	Screen “tips” or mouse overs
Website	
User manual	

USER CONFERENCE Yes

Annually, last held September 2018

CLIENT ADVISORY COUNCIL No

CUSTOMER EXPERIENCE n/a

IMPLEMENTATION EXPERIENCE n/a

IMPLEMENTATION TIMELINE

Basic	4 Months
Moderate	6 Months
Complex	8 Months

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS, Hosted, On-Premise-Private Cloud

SYSTEM DEVELOPED BY 3rd Party

HOSTED In-House

SYSTEM WIDE FUNCTIONALITY n/a

SYSTEM ATTRIBUTES n/a

SECURITY

CERTIFICATIONS

SSAE 18 - SOC 1

PRICING

PRODUCT LICENSING

Traditional SaaS manner based on modules and users.

ONGOING FEES

Monthly modules and user fees.

SURVEY INSIGHTS

CHSI Connections introduced a new Agency Portal with AI automation which is used to automate manual and repetitive tasks in issuing insurance policies. The AI component works with internal business rules to change the outcome of a policy submission. Clients’ set their business rule logic and the system will compute all variables to calculate premium, auto bind policies, collect e-signatures and pay fees based on user inputs in the submission session

EXPECT MORE

Get everything you need
in one place...



CRM



CLAIMS



REPORTING



POLICY ADMIN &
UNDERWRITING



BILLING &
RECEIVING



CLIENT
CONNECT

CHSI Connections™ incorporates powerful CRM, underwriting, billing, claims integration, broker and policy holder portals into a single cloud-based insurance operations management system.

Open possibilities previously thought impossible due to cost and lengthy implementation, through CHSI Connections.

Contact CHSI Technologies to do more with your data:

Crossmark Solutions

www.crossmarkrisk.com

OWNERSHIP
[Privately held](#)

FOUNDED
2013

HEADQUARTERS
[Roseville, CA](#)

LEADERSHIP
[David Glende, President and CEO](#)

EMPLOYEES
7

ANNUAL REVENUE


TOP INDUSTRIES
[Government](#)
[Finance & Insurance](#)
[Public Entity Risk Pools](#)

CONTACT
[Dave Glende](#)
(916) 837-7380
dave@crossmarkrisk.com

MARKETS SERVED
[Captive/Pool Mgmt](#)
[Certificate Mgmt](#)
[Claims Mgmt](#)
[Loss Control/Safety](#)
[RMIS](#)

CrossMark provides comprehensive software solutions and services specifically designed and tailored to meet the unique needs of Public Entity Risk Pools.

PRODUCT

CrossMark Pool Management System enables public entity risk pools to leverage existing and future technology to decrease cost of coverage through proactive risk management while improving member service and operational efficiency. By using CrossMark RMIS, CRM, LMS, and Portal, pooling organizations can stay on mission, remain competitive and serve members with excellence.

INITIAL RELEASE
[2014](#)

USERS


CUSTOMERS


DELIVERY

SUPPORT HOURS
[Monday to Friday 8AM to 6PM \(EST\)](#)

SUPPORT OFFERED
[Online help](#) [User manual](#)
[Wizards /](#) [Phone](#)
[Contextual help](#) [Email](#)

USER CONFERENCE [No](#)

CLIENT ADVISORY COUNCIL [No](#)

IMPLEMENTATION TIMELINE
[Basic](#) [3-6 Months](#)
[Moderate](#) [9-12 Months](#)
[Complex](#) [12-18 Months](#)

TECHNOLOGY

DEPLOYMENT OPTIONS
[Hosted, On-Premise-Private Cloud](#)

SYSTEM DEVELOPED [In-House](#)

HOSTED BY [3rd Party](#)

SECURITY

CERTIFICATIONS
[ISO 27001](#) [SSAE16-SOC2](#)

PRICING

PRODUCT LICENSING
[Annual subscription based on functional components licensed with unlimited users.](#)

ONGOING FEES
[Annual software license and support fees.](#)

SURVEY INSIGHTS

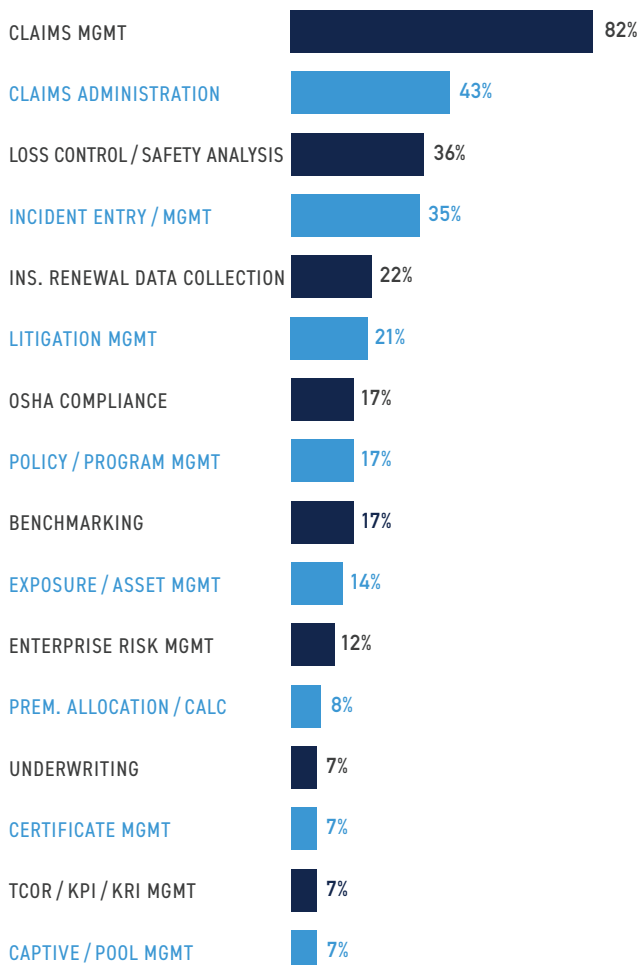
CrossMark solutions are specifically built to address the requirements of risk pools and the business/operations model that pooling uses. CrossMark has developed their Risk Management Suite, a set of pool industry tools including CRM, RMIS, learning management and member portal capabilities.

DATA INSIGHTS

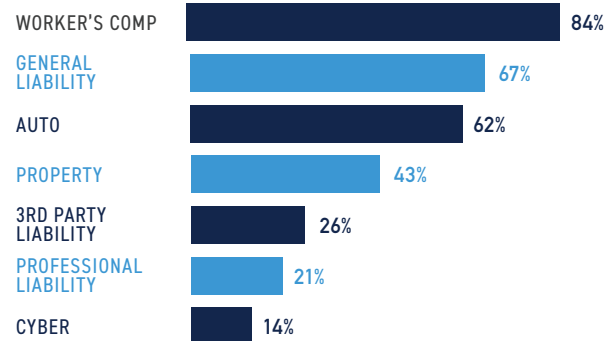
USES OF RMIS

RMIS Report User Survey respondents described the coverages and system functions in use as well as how well the system was utilized.

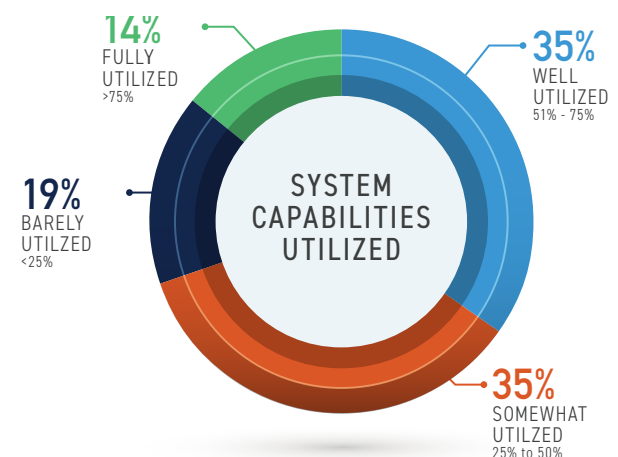
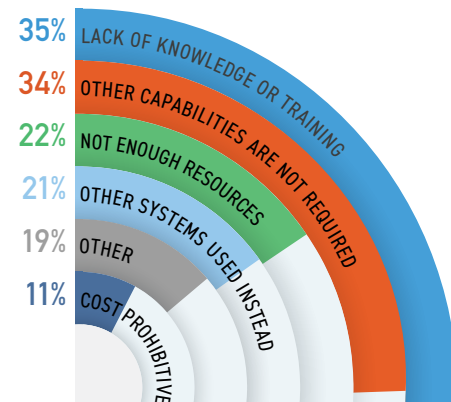
ORGANIZATION USAGE OF SYSTEM



LINE OF INSURANCE TRACKED



REASON NOT UTILIZING A RMIS SYSTEM



DATA INSIGHTS

IMPLEMENTATION ADVICE

RMIS Report User Survey respondents were asked if they had any advice for others implementing a RMIS. These are the recurring themes we heard.

Project management is key to a successful implementation

Document everything

Invest time up front to ensure success

Focus on training

Standard functionality and configurable solutions rather than customization

Prioritize your needs

It's going to take longer than expected

Internal resources are critical to success

Data mapping is critical

Communicate regularly with RMIS team

User acceptance testing is critical prior to going live

THE TRUE COST OF SWITCHING RMIS

There are many reasons to switch RMIS. Organizations switch systems typically when the current system is thought to no longer meet its needs or does not have the latest technology capabilities.

The *RMIS Report* User Survey tells us that 38 percent of respondents have switched systems in the past four years. The survey also tells us that an additional 15 percent are currently in the market or will be in the next 12 months. That is more than 50 percent that have switched or are planning to switch.

In the past 10 years, technology has changed exponentially, and the definition of risk has continued to broaden as well. While many organizations continue to invest and enhance their system, not all of the enhancements make it to the existing client base. Many installations are on premise, and upgrades are not as frequent or mandatory as they are if they were in a software-as-a-service (SaaS) model. Other vendors support multiple versions of their system and may charge to upgrade to the latest version. In fact, 35 percent of our respondents have been with their current RMIS for over 10 years.

All of these factors lead to switching systems. But while switching systems can be exciting

and offer more capabilities, it can also be daunting and expensive. The RMIS market is very competitive, and that has made it a buyers' market in many ways. But there are other costs to consider beyond the implementation and annual systems costs that should be considered and understood when switching systems.

Needs Assessment/ Business Review/Market Research

To support the goal of switching systems, a thorough needs assessment, requirements gathering, and identification of desired results must take place. Whether you do this on your own or use a third party to perform the review, there is a cost to the organization in this process.

The next step is to identify potential vendors that can meet your needs. The *RMIS Report* is a source for that type of analysis, but time and cost will be invested in this phase as well. This is where an independent consultant who knows the market can bring significant value and pay for themselves. Their knowledge of the market, similar projects, and vendors' capabilities can be invaluable.

RFP/Vendor Selection/ Contract Negotiation

The vendor selection process, whether it's a formal RFP or competitive situation, can be time consuming. You also need to ensure that you are comparing apples to apples when reviewing proposals and comparing with your current vendor.

What costs are included in one vendor's pricing compared to another? Is there software or hardware needed to run the system that is not included in the proposal? What about licenses for third-party reporting tools? How does the vendor handle subscription and maintenance fees? What annual increases can be applied automatically within the contract period? Does the license include all the system capabilities or just the features that you need today? What is the cost of integrating with other systems? These are just a few of the factors that must be understood when evaluating systems.

Implementation and Data Conversion

Once you have selected a new vendor and signed a contract, you are not out of the woods yet. Most implementations experience unforeseen delays and previously unidentified requirements that were not originally contemplated. These costs can add up. We recommend setting aside an additional 20 percent of the total implementation costs to address these types of unexpected costs.

One of the more significant costs of switching systems is the cost of converting the existing data to the new system. In our experience, this is the most common underestimation, leading to delays and additional costs. Additionally, one of the costs that many organizations fail to account for is the costs associated with extracting the old data from the vendor that you are moving away from. Our research indicates that certain vendors are charging exorbitant fees and

taking significant time to provide clients their data. We polled the vendors to understand their data return policies and have provided the information in the table on the next page for your reference. All but one vendor provided us their policy. We recommend that you confirm your specific terms with your provider and include in your contract the data extraction services and associated fees.

Despite all the potential unexpected costs, switching systems can be a very good investment. A new system can bring benefits to an organization like improved workflow, new system capabilities, and reduced administrative costs among many others that can far outweigh the switching costs. Additionally, the switching costs should be seen as an investment that pays over many years to come.

Provider	Does Client Own Data	Fees Associated with Data Requests	What is your policy for returning client data when requested?
RMIS PROVIDERS			
CHSI Technologies	Yes	Work performed at our current hourly rate	For clients in good standing, we'll provide the data at their request.
CrossMark Solutions	Yes	Time and material	CrossMark will endeavor to fulfill the request in a timely manner. In general, CrossMark solutions are deployed on-premises, and thus allow clients direct access to the data for their own reporting and exporting needs.
Ebix	Yes	No	Data is provided in a standardized export layout in a CSV format and includes documents.
Insuirty	Yes	No	Client data will be provided in a SQL Server database backup format, with documents and attachments provided in their native format (.pdf, .jpg, etc.).
Origami Risk	Yes	No	Origami will return data to the client upon request and without charge during the term of the agreement and for up to 30 days thereafter. Origami will provide the data in text delimited format or in another format as mutually agreed between Origami and the client, and attachments will be returned in the same format as stored in Origami.
PCIS	Yes	No	Implementations include data dictionary and direct access to a replicated database (ClaimsVISION reporting database), this allows clients to access and extract data in real time. For clients requiring data conversion off system clients typically engage PCIS via a SOW if there is mapping and data cleanup or other services that might be required.
Riskconnect	Yes	No	In the unlikely event of contract termination, all data will be returned as a CSV file.
Ventiv Technology	Not Disclosed	Not Disclosed	Ventiv did not respond to our request for their data policy but market information indicates that they are quoting excessive fees and lengthy timeframes to provide data extracts during a system migration. Our recommendation is to negotiate up-front the cost to extract your data and specifically address the timeframe and format that the data will be provided.
INSURERS			
AIG	Yes	There may be fees associated with transition services	Claims data belongs to AIG and is retained by AIG subject to corporate compliance policies including legal and regulatory requirements.
The Hartford	No	Yes	The Hartford offer MIS data feeds for our customers who would like data feed to a vendor or another carrier. As a carrier the data is owned by the carrier.
Travelers	No	Based on requirements	Travelers offers our customers several outbound data delivery options for a fee. Customer authorizations and a network access agreement are required to release the data.
THIRD PARTY ADMINISTRATORS			
Broadspire	Yes	Based on requirements	Client own their data, will have unlimited, real-time access to all files, claim notes, investigation materials, correspondence, medical billings and financial data through the use of our Dmitri RMIS application.
CCMSI	Yes	\$2,500	Client will receive our standard extract of data and images.
CorVel	Yes	Yes	Negotiated on per client basis, including fees, in the contract.
ESIS	Yes	No	Negotiated on per client basis, including fees, in the contract.
Gallagher Bassett	Yes	There may be fees associated with transition services.	Subject to notice and consent from the Client's insurer and the terms of its agreement, GB would return the Client's data if requested.
Sedgwick	Yes	Contractually defined.	Sedgwick can facilitate final transfer of claim data which will include preliminary and final data extracts in a standard format for a predetermined fee.
York	Varies by state and carrier	No	
York/FOCUS	Varies by state and carrier	No	

PRESS RELEASE

FEBRUARY 2019

DAVID TWEEDY AND PATRICK O'NEILL TEAM UP AT REDHAND ADVISORS

Redhand Advisors a risk management technology consulting organization, is pleased to welcome David Tweedy as Senior Risk Advisor and Partner.

“Dave and I have worked closely together since I founded Redhand Advisors. It was a logical move to bring Dave on board. He brings a tremendous amount of experience and knowledge in the RMIS space,” comments Patrick O’Neill, President and Founder of Redhand Advisors.

Mr. Tweedy, a claims professional by background, brings over 30 years of experience in risk and claims management information consulting. Dave previously held positions with Bickmore Risk Services, Albert Risk, Marsh and Deloitte.

David and Patrick co-author The RMIS Report, the widely read annual guide to the risk management information system industry, downloaded each year by more than 2,000 risk management professionals.

“I’m really excited to join Pat at Redhand to continue my work as an independent RMIS consultant. We’ve worked together so well for the last several years it was an obvious move. Together, we bring 60 years of combined experience in this space,” noted Dave.

Redhand Advisors is a risk management technology consulting firm with expertise in a broad range of risk technology solutions advising organizations on how to best use technology to manage risk and maximize their investment in technology.

For more information on Dave and Redhand Advisors visit our website at: www.redhandadvisors.com



DATA INSIGHTS

FAVORITE FEATURES

RMIS Report User Survey respondents were asked what their favorite feature of their RMIS was. Below are the recurring themes we heard.

FAVORITE FEATURE	COMPANY
Automated Workflows	Origami Risk
Real-time data	Liberty Mutual RISKTRAC
Mobile capabilities	York FOCUS
Graphical Reporting	Traveler e-CARMA
Adhoc Reporting	Gallagher Bassett Luminos
Email the adjuster from the claim	Sedgwick viaOne
Email documents directly to claim file	Riskconnect ClearSight
Incident Reporting	Riskconnect RMIS
Business intelligence	Ventiv RiskConsole
Dashboards	AIG IntelliRisk
Email notification of new claim	CorVel CareMC
Claims management	DXC RISKMASTER Accelerator
Claim Notes and Management	ESIS Global RiskAdvantage
Dashboards	Hartford TREO
OSHA record keeping	Broadspire DMITRI
Search Features	Insurity SIMS Claims
CRM	CHSI
Member Dashboards	Crossmark

INSURER/THIRD PARTY ADMINISTRATORS

From our user survey, subscriber interviews, and system demonstrations, we have concluded that the bundled vendor community continues to exhibit the following trends:

- Reliance on proprietary software rather than a private-label-system option
- Aggressive focus on developing core functionality (i.e., claims management, data analytics)

The third-party administrator (TPA) subindustry is more likely to move toward private-labeled vendors (i.e., Gallagher Bassett and York) than is the insurer subindustry. The latter tends to be more proprietary-software oriented because the departments to whom the RMIS function reports are less likely to invest large-scale dollars into a brand-new system.

1. TPAs

In last year's *RMIS Report*, we commented on how technologically aggressive the TPAs had become. It was clear, and still is, that significant investment continues to be made in their client-facing claims and risk management technology.

That is evident with Gallagher Bassett (GB). Its Luminos system has continued to expand in a fashion that is starting to approach the full functionality of its private-labeled system from Origami Risk. In January, GB embedded its Interactive Luminos Dashboard to allow for visualization of analytics and scorecards. It is also making good investments in the size of its support team to deliver Luminos' capabilities throughout its client base.

York's FOCUS (another Origami private label) continued to make functional improvements as well, such as adding OSHA and the absence management database. It also added a new data analyst position. This year, it plans to add policy management.

2. Insurers

Since last year's *RMIS Report*, there have been no significant changes in how insurers are using their client-facing RMIS. Continued functional improvements to align with insureds' desires were the primary focus of these vendors.

The Travelers' eCARMA platform has been reimaged to be even more user-friendly than its predecessor. Travelers continues to invest in its predictive modeling function and added score carding and a new "configure" widget.

AIG's IntelliRisk 7 was released in 2018. It has also added an analyze database function and improved its data-mining capabilities.

INSURERS

American International Group, Inc.

www.aig.com

OWNERSHIP

Public company

FOUNDED

1919

HEADQUARTERS

New York, NY

RMIS LOCATIONS

Atlanta, GA
 Berkeley Heights, NJ
 Chicago, IL
 Cleveland, OH
 Dallas, TX
 London, GB
 Manila, PH
 New York, NY
 Philadelphia, PA
 Santa Ana, CA

RMIS LEADERSHIP

Adriana Belli,
 Head of Claims
 Enablement & Reporting
 Dylan Austin,
 Head of Claims Data,
 Analytics & Reporting
 Joseph Jordan, AVP/AIO,
 IntelliRisk Customer
 Engagement

RMIS EMPLOYEES

50

TOP INDUSTRIES

Retail
 Manufacturing
 Construction &
 Engineering
 Lodging
 Oil & Gas

CONTACT

Joseph Jordan
 (973) 390-3786
joseph.jordan@aig.com

MARKETS SERVED

Claims Mgmt
 Exposure/Asset Mgmt
 Incident Mgmt
 Insurance Renewal Mgmt
 Litigation Mgmt
 Loss Control/Safety
 OSHA Compliance
 Policy/Program Mgmt

American International Group, Inc. (AIG) is a leading global insurance organization. Founded in 1919, today AIG member companies provide a wide range of property casualty insurance, life insurance, retirement products, mortgage insurance and other financial services to customers in more than 100 countries and jurisdictions. These diverse offerings include products and services that help businesses and individuals protect their assets, manage risks and provide for retirement security. AIG common stock is listed on the New York Stock Exchange and the Tokyo Stock Exchange.

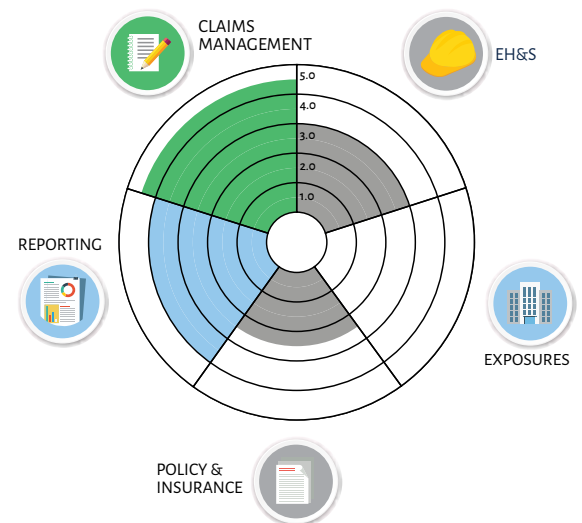
PRODUCTS

IntelliRisk is AIG's premier risk management information system, which focuses on the visualization of key metrics, trends, and advanced data exploration through flexible and innovative claim searches and customizable preformatted and ad hoc reports. IntelliRisk employs data driven analytics to empower customers' risk management strategies. On-demand access is facilitated through self-registration, and Responsive Web Design ensures an optimal experience on any device.

IntelliRisk Basic is an online claim information and reporting system, which provides fast, convenient access to basic claim and policy information, with the ability to create month-end and point-in-time valuated loss reports on demand. A customizable dashboard summarizes claims, and contains drill down links to more detailed information.

PRODUCT SCORECARD

AIG



IntelliRisk

INITIAL RELEASE

11/1/16

CURRENT RELEASE

Version 7.3

February 2019

IntelliRisk Basic

INITIAL RELEASE

2/1/09

CURRENT RELEASE

Version 2.8

February 2019

USERS





DELIVERY

SUPPORT HOURS

Monday - Friday,
9AM - 6PM (EST)

SUPPORT OFFERED

Help desk	Email
Online help	Screen "tips" or
Video tutorials	mouse overs
Website	FAQs
Phone	Quick start guides

USER CONFERENCE

Yes

CLIENT ADVISORY COUNCIL

Yes

CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE

Self-registration and authentication,
full access to system in minutes.

TECHNOLOGY

DEPLOYMENT OPTIONS

On-Premise

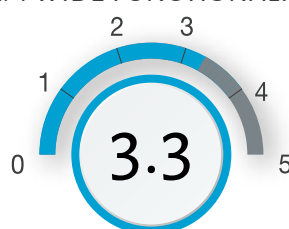
HOSTED BY

In-House

SYSTEM DEVELOPED

In-House

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

SSAE 16 - SOC 1

LAST 3RD PARTY ASSESSMENT

1/10/18

PRICING

PRODUCT LICENSING

Access to IntelliRisk is provided at no
charge to active/inactive policyholders
and brokers.

ONGOING FEES

Fees may be assessed for inactive
policyholders and for custom work
associated with non-standard data
files, development of customer-specific
system functionality, reports, projects
and consulting engagements.



"I'm extremely pleased with IntelliRisk. The system is simple to use and the dashboards provides enough information without having to run reports. Without having to drill in and wait, I can get the information I'm looking for with a few clicks."

- Krystle Blystone, Sr. Operations
Professional, Cargill

SURVEY INSIGHTS

AIG deployed their newest IntelliRisk platform while sun setting older versions. Enhancements include: Medical management and litigation dashboards, performance metrics, and improved text mining search.



Global Risk Management. When you need it most.

Understand and help manage risk with AIG's all-new IntelliRisk®

We've combined advanced data analytics with multi-platform mobile functionality to create our most efficient Risk Management tool yet. Customizable analysis. Insightful visualizations. Built to pinpoint and help mitigate risk from the top-level to the bottom line. Because you should manage risk at every level.

Learn how the new IntelliRisk® platform can help your business at [AIG.com/NewIntelliRisk](https://www.aig.com/NewIntelliRisk)



Insurance, products and services are written or provided by subsidiaries or affiliates of American International Group, Inc. Insurance and services may not be available in all jurisdictions, and coverage is subject to actual policy language. For additional information, please visit our website at www.aig.com.

Liberty Mutual Insurance

business.libertymutualgroup.com

OWNERSHIP

[Liberty Mutual Group Inc.](#)

FOUNDED

1912

HEADQUARTERS

Boston, MA

RMIS LEADERSHIP

[Christopher Woodman,](#)
Director, Service
Experience

RMIS EMPLOYEES

48

TOP INDUSTRIES

[Manufacturing](#)
[Finance & Insurance](#)
[Construction &](#)
[Engineering](#)
[Retail](#)
[Services](#)

CONTACT

[Heather McMinn](#)

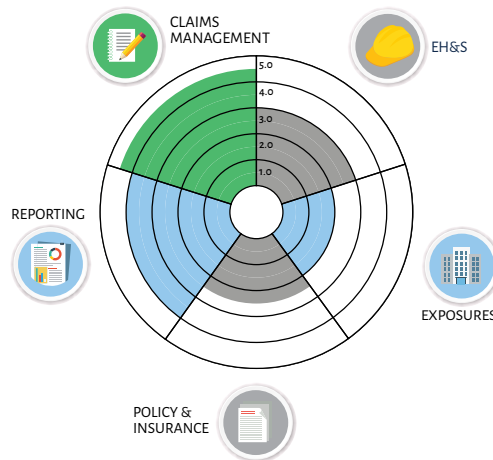
(603) 245-0889

[heather.mcminn](mailto:heather.mcminn@libertymutual.com)
@libertymutual.com

MARKETS SERVED

[Captive/Pool Mgmt](#)
[Certificate Mgmt](#)
[Claims Mgmt](#)
[EH&S](#)
[Incident Mgmt](#)
[OSHA Compliance](#)
[Policy/Program Mgmt](#)
[RMIS](#)

Liberty Mutual Insurance offers a broad range of multi-line property and casualty and employee benefits solutions for mid-size and large businesses. As a leading commercial insurer with more than a century of experience, we have the resources and expertise to safeguard your business against risk and in partnership with independent agents, brokers, and consultants, provide you the tailored coverage you need.



PRODUCT

RISKTRAC is a secure web-based risk management information system that provides access to current and historical views of your entire casualty claims inventory. From reports and alerts to advanced data analysis tools, RISKTRAC enables you to track and trend claims activity with ease. You'll get a rich set of analytical tools that help you to identify key cost drivers and uncover emerging claim trends.

INITIAL RELEASE

2009

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

[Monday to Friday](#) 8AM to 8PM (EST)

SUPPORT OFFERED

[Help desk](#)
[Online help](#)
[Video tutorials](#)
[Website](#)
[User manual](#)
[Phone](#)
[Email](#)
[Screen "tips" or](#)
[mouse overs](#)

 USER CONFERENCE [No](#)

 CLIENT ADVISORY COUNCIL [Yes](#)

 CUSTOMER EXPERIENCE [4.0/5](#)

 IMPLEMENTATION EXPERIENCE [4.0/5](#)

 IMPLEMENTATION TIMELINE [10 Days](#)

TECHNOLOGY

 DEPLOYMENT OPTIONS [Hosted](#)

 SYSTEM DEVELOPED [In-House](#)

 HOSTED [In-House](#)

 SYSTEM WIDE FUNCTIONALITY [3.7/5](#)

 SYSTEM ATTRIBUTES [3.9/5](#)

SECURITY

CERTIFICATIONS

[n/a](#)

PRICING

PRODUCT LICENSING

[n/a](#)

ONGOING FEES

[n/a](#)

SURVEY INSIGHTS

RISKTRAC is a SaaS based, comprehensive and much improved RMIS offered to both Liberty Mutual and Helmsman clients. They have expanded beyond claims mgmt and analysis to include safety (EHS), policy and exposure mgmt capabilities. For Helmsman clients, they offer limited claims admin functions as well.

The Hartford Financial Services

www.thehartford.com

OWNERSHIP
Public company

FOUNDED
1810

HEADQUARTERS
Hartford, CT

RMIS LEADERSHIP
Lentz Merisier
AVP Strategy & Operations, Specialty Commercial

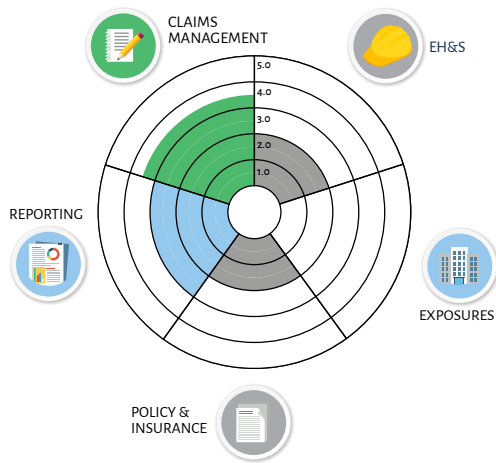
RMIS EMPLOYEES
10

TOP INDUSTRIES
n/a

CONTACT
Cathy Leonard
(860) 547-8269
cathy.leonard@thehartford.com

MARKETS SERVED
Claims Mgmt
Loss Control/Safety
OSHA Compliance
RMIS

The Hartford is a leader in property and casualty insurance, group benefits and mutual funds. With more than 200 years of expertise, The Hartford is widely recognized for its service excellence, sustainability practices, trust and integrity.



PRODUCT

TREO, a RMIS solution, was designed to simplify claims management by enabling the power of data and analytics; creating transparency, highlighting proof points and identifying the root causes of cost drivers. TREO facilitates the right balance of technology, people and time. The combined experience helps risk professionals focus their energy and resources on the right claim drivers to achieve a greater understanding of cause of loss and effectively manage the cost of risk.

INITIAL RELEASE
2009

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS
Monday to Friday
7:30AM to 6:00PM (EST)

SUPPORT OFFERED
Help desk
Video tutorials
Knowledge base
Website
User manual
Phone
Email
Screen "tips" or mouse overs

USER CONFERENCE n/a

CLIENT ADVISORY COUNCIL n/a

CUSTOMER EXPERIENCE n/a

IMPLEMENTATION EXPERIENCE n/a

IMPLEMENTATION TIMELINE n/a

TECHNOLOGY

DEPLOYMENT OPTIONS Hosted

SYSTEM DEVELOPED In-House

HOSTED In-House

SYSTEM WIDE FUNCTIONALITY 3.5/5

SYSTEM ATTRIBUTES 3.1/5

SECURITY

CERTIFICATIONS
n/a

PRICING

PRODUCT LICENSING
n/a

ONGOING FEES
n/a

SURVEY INSIGHTS

The Hartford replaced its old @Venture system (from the time when they owned SRS) with a new SaaS based RMIS called TREO (Track Risks, Explore Opportunities). It is a claims management oriented RMIS and it's offered to all Hartford clients.



e-CARMA®

FASTER

MORE
CUSTOMIZABLE

EASIER

Your job is about to get just a little bit easier.

Introducing the all-new e-CARMA.

You asked, and we delivered: e-CARMA is now faster, easier and totally customizable—transforming the way you analyze data and share information. Now, with just a few clicks, you can simplify your analysis with a personalized dashboard. You can convert data into interactive graphs in seconds. You can make your reports and presentations more impactful with simple, intuitive design. And you can receive critical risk management information directly, as often as you choose—even daily.

Welcome to the reimagined e-CARMA where you can see more. Do more. Act quicker. Work smarter.

To see how the new e-CARMA can help you, go to travelers.com/RMIS

TRAVELERS 
It's better under the umbrella®

travelers.com

The Travelers Indemnity Company and its property casualty affiliates. One Tower Square, Hartford, CT 06183

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Travelers

www.travelers.com

OWNERSHIP

Public company

RMIS FOUNDED

1980

HEADQUARTERS

Hartford, CT

LOCATIONS

Hartford, CT

Los Angeles, CA

Irvine, CA

Walnut Creek, CA

Chicago, IL

Alpharetta, GA

St Paul, MN

Richardson, TX

Philadelphia, PA

Pittsburgh, PA

Charlotte, NC

RMIS LEADERSHIP

Michael Strietelmeier,

Vice President, RMIS

Les Samsel, Senior

Director, RMIS

Consulting Group

David Lanza - Senior

Director, Operations

Pam Gregory - Senior

Director, Development

RMIS EMPLOYEES

100

TOP INDUSTRIES

Retail

Business & Consumer

Services Wholesale

Manufacturing

Health Care

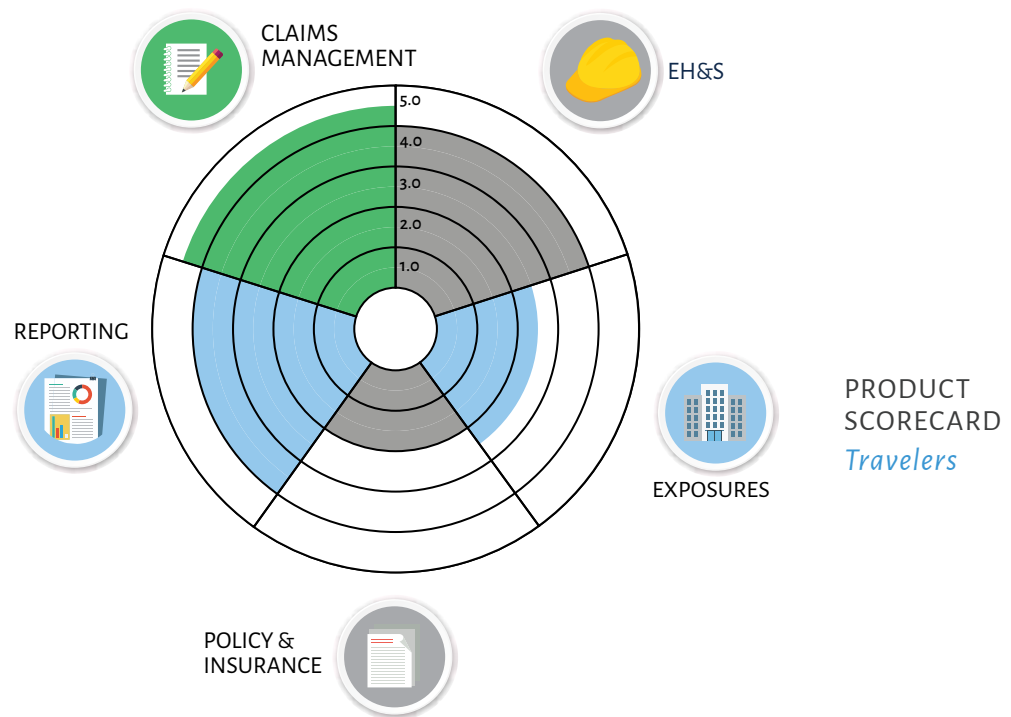
CONTACT

Michael Strietelmeier

(860) 277-9182

mstriete@travelers.com

The Travelers Companies, Inc. (NYSE: TRV) is a leading provider of property casualty insurance for auto, home and business. The company's diverse business lines offer its global customers a wide range of coverage sold primarily through independent agents and brokers. A component of the Dow Jones Industrial Average, Travelers has approximately 30,000 employees and operations in the United States and selected international markets. The company generated revenues of approximately \$29 billion in 2017.



PRODUCT

Travelers *e-CARMA*® is a risk management information provider combining customer-focused tools and services designed to meet the objectives of our customers. Evaluating risk, managing a risk portfolio, or measuring outcomes, *e-CARMA* connects service, data management, online analysis and information delivery tools to a highly customized user experience. *e-CARMA* integrates claim, managed care, risk control, policy, customer specific, billing and exposure information in a highly secured and controlled database that is re-certified annually.

INITIAL RELEASE

1981

CURRENT RELEASE

11/2018

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

Monday to Friday
7AM to 8PM (EST)

SUPPORT OFFERED

Dedicated Account Rep	User manual
Virtual Training	Phone
Help desk	Email
Online help	Screen "tips" or mouse overs
Video tutorials	

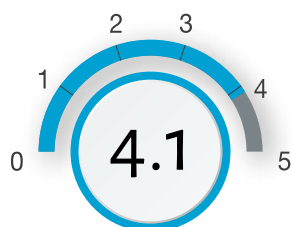
USER CONFERENCE

Yes, next conference 10/2019

CLIENT ADVISORY COUNCIL

Yes

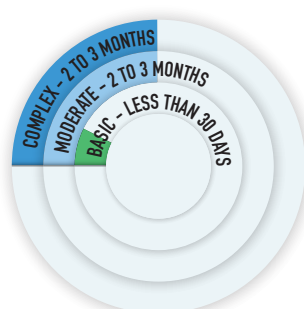
CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE



TECHNOLOGY

DEPLOYMENT OPTIONS

Hosted

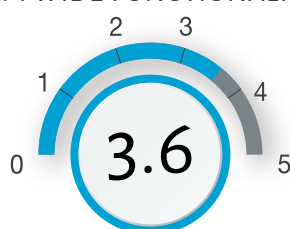
HOSTED BY

OSHA Solution by 3rd party

SYSTEM DEVELOPED

In-House

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

SSAE 16 - SOC 1 SSAE 16 - SOC 2

LAST 3RD PARTY ASSESSMENT

4/1/2018

PRICING

PRODUCT LICENSING

Subscription basis.

ONGOING FEES

Secured system access, on-going training, data management, Customized data capture, Customized reporting and a dedicated service consultant are all included in annual subscription fee.

TRAVELERS



"We love this system – it is so easy to maneuver around and everything is at your fingertips – very user friendly."

- Lisa Greenly, Corporate Workers Compensation Specialist, Enersys.

MARKETS SERVED

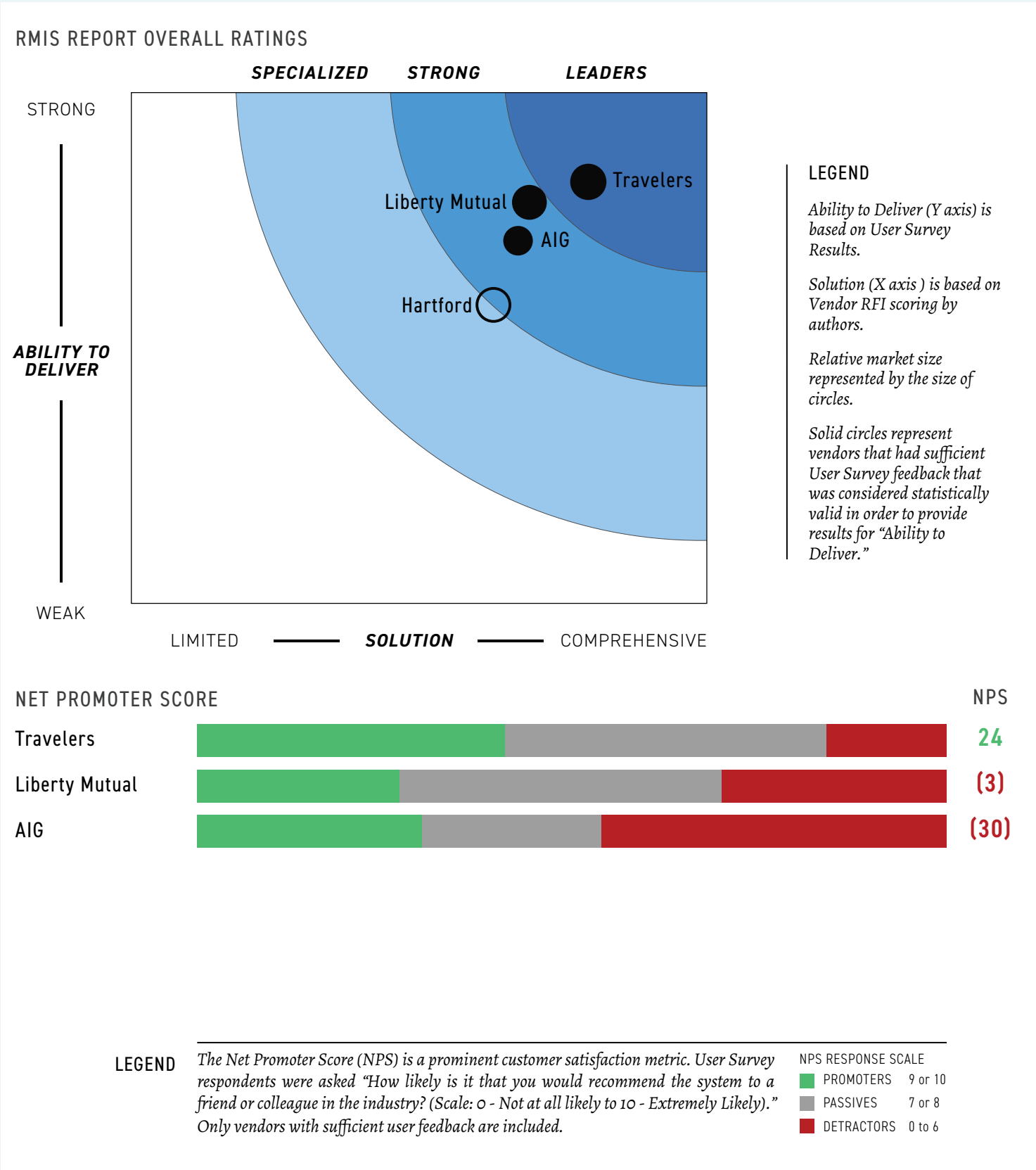
Claims Mgmt
ERM/GRC
EH&S
Exposure/Asset Mgmt
Incident Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
RMIS

SURVEY INSIGHTS

Travelers released a re-imagined (new) e-CARMA platform. The new platform includes improved infrastructure, simplified customer navigation, faster and easier dynamic data analysis functionality and standard customized page views. Agent/Customer release is in progress.

PROVIDERS AT-A-GLANCE:

INSURERS

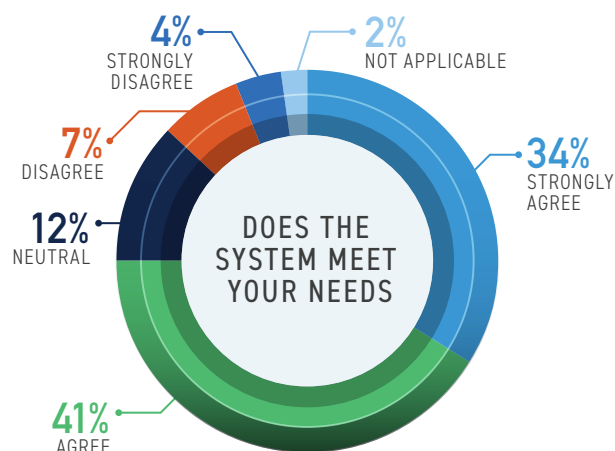
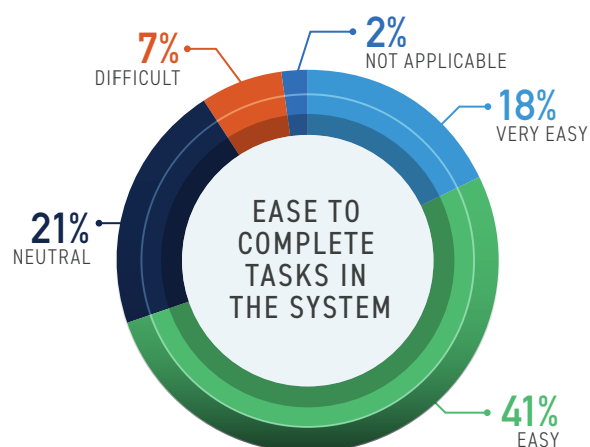
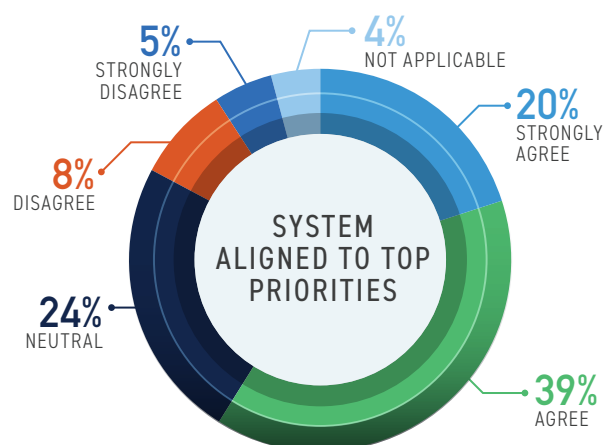
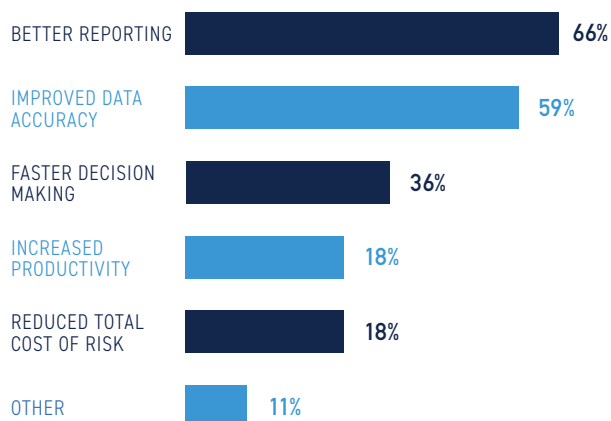


DATA INSIGHTS

RESULTS ACHIEVED THROUGH RMIS

RMIS Report User Survey respondents were asked to describe the results they have achieved, how well the system was aligned to the organization's priorities, their use of analytics and their return on investment.

RESULTS ACHIEVED



We Innovate.

"LUMINOS is a key component in the Sampo Global Risk Solutions **white glove service** model. It helps us attract insureds to our program by providing easy access to their claims data via **powerful** dashboards and reports. We are excited to now be utilizing the LUMINOS OSHA module and look forward to extending it to our insureds. The **collaboration** between Sampo Global Risk Solutions and Gallagher Bassett makes a winning combination and allows us to offer this **leading RMIS solution** to our clients."

- Michael Chang, CEO Sampo Global Risk Solutions



"LUMINOS has helped us create automated dashboards that can be **customized** for our group captives and their members that help them **better understand** what is driving their cost of Risk."

- Kevin Marks, HSD, ARM, VP Risk Control Services, Captive Resources, LLC

"The GB LUMINOS team took on the task of creating a **global** values collection tool to help address very specific needs for our **international** insurance renewal. The tool will be accessed by nearly **100 countries** across the globe. As with all other LUMINOS modules, our values collection tool does not disappoint. We are grateful for our working relationship and look forward to further enhancements of the tool in the future."

- A Global Fortune 500 Corporation



GALLAGHER BASSETT

GUIDE. GUARD. GO BEYOND.

gallagherbassett.com



THIRD PARTY ADMINISTRATORS

Broadspire

www.choosebroadspire.com

OWNERSHIP

[Crawford](#)

FOUNDED

1978

HEADQUARTERS

[Atlanta, GA](#)

RMIS LEADERSHIP

[Danielle Lisenbey,](#)
President & CEO

RMIS EMPLOYEES

108

TOP INDUSTRIES

[Manufacturing](#)
[Professional Services](#)
[Transportation](#)
[Health Care](#)
[Retail](#)

CONTACT

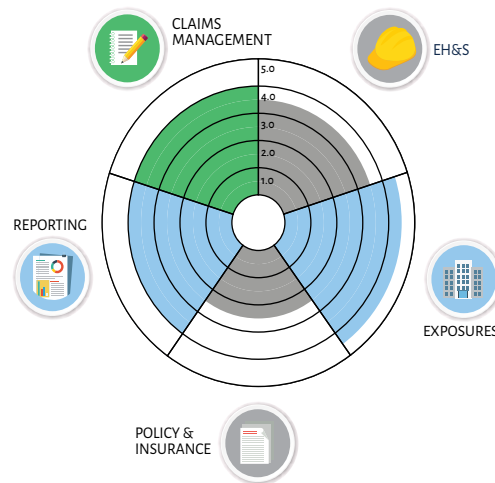
[Joel Raedeke](#)
(224) 361-1882

joel.raedeke@choosebroadspire.com

MARKETS SERVED

[Claims Admin](#)
[Claims Mgmt](#)
[EH&S](#)
[Exposure/Asset Mgmt](#)
[Incident Mgmt](#)
[Litigation Mgmt](#)
[Loss Control/Safety](#)
[OSHA Compliance](#)
[Policy/Program Mgmt](#)
[RMIS](#)

Broadspire has been providing workers' compensation claim services for over a century; liability claim services since 1941. The Broadspire brand was launched in 2003. In 2006, Broadspire was purchased by Crawford & Company, the world's largest independent provider of claims management solutions to insurance companies and self-insured entities. Atlanta-based Crawford, founded in 1941, combined the two companies' third party administrator experience and expertise to provide clients with an unmatched depth of claims and medical management service.



PRODUCT

Dmitri Suite (Dmitri) is a comprehensive, scalable RMIS that makes the complex effortless. It's the sophistication you need with the simplicity you want. Configure data the way you want it and get the analytics needed to control your company's risk and protect your brand.

INITIAL RELEASE

2010

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

[Monday to Friday](#)
[8AM to 5PM \(Local\)](#)

SUPPORT OFFERED

[Wizards/Contextual help](#) [Phone](#)
[Community forums](#) [Email](#)
[Website](#) [Screen "tips" or mouse overs](#)
[User manual](#)

USER CONFERENCE [Yes](#)

CLIENT ADVISORY COUNCIL [Yes](#)

CUSTOMER EXPERIENCE [3.3/5](#)

IMPLEMENTATION EXPERIENCE [3.6/5](#)

IMPLEMENTATION TIMELINE

[Basic](#) [2-5 Days](#)
[Moderate](#) [2-5 Weeks](#)
[Complex](#) [1-3 Months](#)

TECHNOLOGY

DEPLOYMENT OPTIONS

[SaaS](#), [Hosted](#)

SYSTEM DEVELOPED BY [In-House](#)

HOSTED BY [In-House](#)

SYSTEM WIDE FUNCTIONALITY [3.7/5](#)

SYSTEM ATTRIBUTES [3.8/5](#)

SECURITY

[SSAE 16-SOC 2](#)

PRICING

PRODUCT LICENSING

[Per user basis.](#)

ONGOING FEES

[Users licenses](#), [ongoing data sources](#), [additional modules](#), [custom requirements.](#)

SURVEY INSIGHTS

Dmitri is a SaaS based RMIS offered now only to Broadspire clients. In November of 2016, Crawford/Broadspire sold the majority of its unbundled Risk Sciences Group client base to Origami Risk. Dmitri draws data from Broadspire's claims administration system.

CCMSI

www.ccmsi.com

OWNERSHIP

Employee owned

FOUNDED

1978

HEADQUARTERS

Danville, IL

RMIS LEADERSHIP

Bryan Thomas, CEO

RMIS EMPLOYEES

98

TOP INDUSTRIES

Transportation
Government
Education
Health Care
PEO/Temporary Staffing

CONTACT

Kristin Meeker

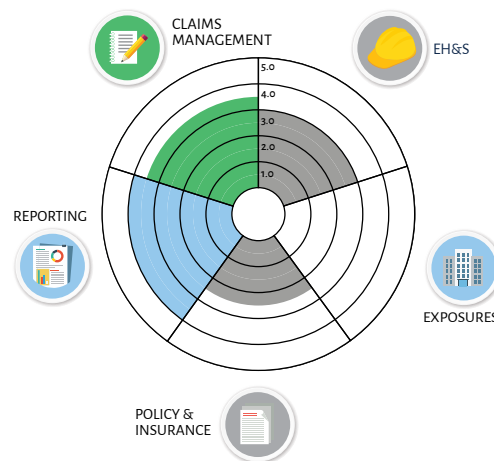
(217) 649-4179

kmeeker@ccmsi.com

MARKETS SERVED

Captive/Pool Mgmt
Certificate Mgmt
Claims Admin
ERM/GRC
EH&S
Incident Mgmt
Litigation Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
RMIS

One of the largest, independent TPAs in the country, we assist our clients with self-insured property and casualty claims management – including workers' compensation, liability and property coverage. For more than 30 years, we have successfully administered individual and group self-insured programs for thousands of companies.



PRODUCT

iCE is CCMSI's proprietary Risk Management Information System. iCE is a powerful claim analysis and reporting tool that makes accessing your data as transparent as it sounds.

INITIAL RELEASE

1996

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

Monday to Friday 7AM to 6PM (CST)

SUPPORT OFFERED

Help desk	User manual
Online help	Phone
Wizards/Contextual help	Email
Video tutorials	Screen "tips" or mouse overs

USER CONFERENCE

No

CLIENT ADVISORY COUNCIL

No

CUSTOMER EXPERIENCE

n/a

IMPLEMENTATION EXPERIENCE

n/a

IMPLEMENTATION TIMELINE

Basic	10-45 Days
Moderate	1-2 Months
Complex	2-3 Months

TECHNOLOGY

DEPLOYMENT OPTIONS

Hosted

SYSTEM DEVELOPED

In-House

HOSTED

In-House

SYSTEM WIDE FUNCTIONALITY

3.4/5

SYSTEM ATTRIBUTES

2.8/5

SECURITY

CERTIFICATIONS

SSAE16-SOC2

PRICING

PRODUCT LICENSING

All applications are available to clients on a bundled basis with TPA services.

ONGOING FEES

User access to iCE for large numbers of users and our OSHA reporting module additional modules, custom requirements.

SURVEY INSIGHTS

iCE is a combined claims administration/claims management information system provided by CCMSI to their client base. Both adjusters and users have access to the same system.

CorVel Corporation

www.corvel.com

OWNERSHIP

Public company

FOUNDED

1987

HEADQUARTERS

Irvine, CA

RMIS LEADERSHIP

Maxim Shishin, CIO

RMIS EMPLOYEES

300

TOP INDUSTRIES

Manufacturing
Government
Education
Health Care
Retail

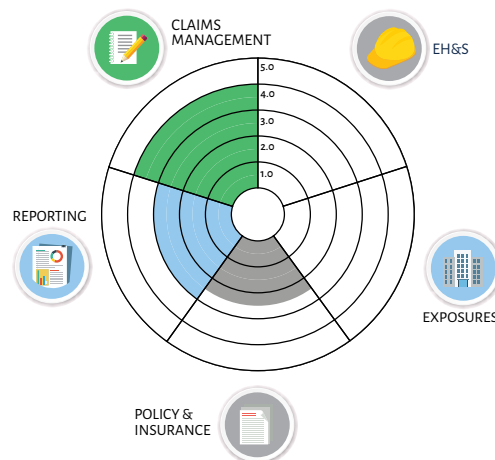
CONTACT

Heather Burnham
(949) 838-1900
heather_burnham@corvel.com

MARKETS SERVED

Claims Mgmt
Incident Mgmt
Litigation Mgmt
OSHA Compliance

CorVel is a national provider of risk management solutions to employers, third party administrators, insurance companies and government agencies. With a robust technology platform at its core, our connected solution is delivered by a national team of associates who are committed to helping clients design and administer programs that meet their organization's performance goals.



PRODUCT

CareMC is the award winning risk management portal from CorVel Corporation. Utilizing proprietary predictive analytics and business intelligence tools, CareMC delivers immediate, actionable information that streamlines work flows, improve outcomes and reduce costs. CareMC is the next generation of on demand information processing solutions for risk management..

INITIAL RELEASE

2000

USERS



CURRENT RELEASE

8/2017

CUSTOMERS



DELIVERY & SERVICE

SUPPORT HOURS

24 hours / 7 days a week

SUPPORT OFFERED

Help desk	User manual
Online help	Phone
Video tutorials	Email
Knowledge base	Mouse overs
Website	

USER CONFERENCE Yes

CLIENT ADVISORY COUNCIL Yes

CUSTOMER EXPERIENCE 3.7/5

IMPLEMENTATION EXPERIENCE 4.1/5

IMPLEMENTATION TIMELINE

Basic 70-75 Days

Moderate 75-80 Days

Complex 180 Days

TECHNOLOGY

DEPLOYMENT OPTIONS Hosted

SYSTEM DEVELOPED In-House

HOSTED In-House

SYSTEM WIDE FUNCTIONALITY 3.8/5

SYSTEM ATTRIBUTES 4.1/5

SECURITY

CERTIFICATIONS

HIPAA	SSAE 16 - SOC 2
SSAE 16 - SOC 1	

PRICING

PRODUCT LICENSING

n/a

ONGOING FEES

n/a

SURVEY INSIGHTS

CareMC is a SaaS based, proprietary developed claims administration system for CorVel. It serves as both the primary claims administration/managed care system for adjuster and nurse case managers and as the client facing RMIS to CorVel clients. Unique among bundled systems, CareMC was designed primarily as a managed care system that also performs claims administration.



Discover new ways to help improve your bottom line with powerful technology and superior claims management.

ESIS Global RiskAdvantage® (GRA) provides risk, claims, and safety professionals with personalized and interactive dashboards, robust data analytics, and impactful loss trending and reporting capabilities – all from the convenience of a mobile device or web browser. To learn more about ESIS' suite of client- and claimant-facing technologies including GRA, contact us at info@esis.com.

esis.com

ESIS®

THIRD PARTY ADMINISTRATORS

ESIS, Inc.

www.esis.com

OWNERSHIP

Chubb

FOUNDED

1953

HEADQUARTERS

Philadelphia, PA

RMIS LEADERSHIP

Alex Williams, VP
Technology Product
Management
Joe Fitzpatrick, AVP
Client Facing
Technologies

RMIS EMPLOYEES

22

TOP INDUSTRIES

Transportation
Construction
Retail & Hospitality
Healthcare
Staffing

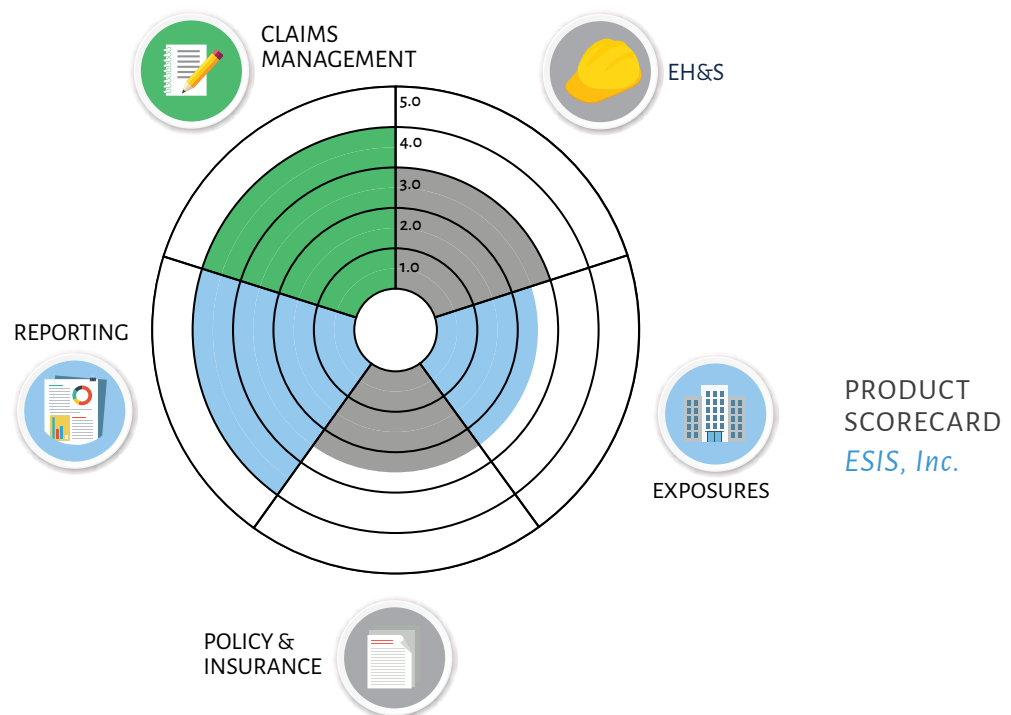
CONTACT

Paul Holden
678-795-4220
paul.holden@esis.com

Alex Williams
678.725-4907
alex.williams@esis.com

Joe Fitzpatrick
470.539.5418
joe.fitzpatrick@esis.com

ESIS provides a full range of sophisticated risk management services built on a global technology platform to organizations that self-insure property and casualty exposures or that purchase insurance services independently. Our core service offering includes workers compensation services; a broad spectrum of casualty insurance products, including general liability, automobile liability, products liability, professional liability, and medical malpractice; and disability services. Several innovative services support our core offering, including medical cost containment, quality control measures, strategic outcomes/predictive modeling, subrogation and second injury fund recovery, special investigations unit, litigation management, and health, safety and environmental consulting.



PRODUCT

ESIS provides some of the most advanced RMIS systems support in the industry through our proprietary ESIS Global RiskAdvantage® (GRA) system. Our product combines analysis of loss data with the power of Web technology and incorporates multiple carrier data as well as internal claim data into a combined reporting and analysis system. This proprietary risk management tool was designed to generate risk management reports, analyze loss trends, and display claim activities in real time.

INITIAL RELEASE
1999

CURRENT RELEASE
v2019.1.2.23

USERS



CUSTOMERS



DELIVERY & SERVICE

SUPPORT HOURS

Monday to Friday
7AM to 7PM (EST)

SUPPORT OFFERED

Help desk	Phone
Online help	Email
Video tutorials	Screen “tips” or
Knowledge base	mouse overs
Website	
User manual	

USER CONFERENCE

Yes, Annually

CLIENT ADVISORY COUNCIL

Yes

CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE

n/a

TECHNOLOGY

DEPLOYMENT OPTIONS

n/a

HOSTED

n/a

SYSTEM DEVELOPED

n/a

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

SSAE18/SOC1 Type II

LAST 3RD PARTY ASSESSMENT

June 2018

PRICING

PRODUCT LICENSING

Included as part of the core service.

ONGOING FEES

None.

SURVEY INSIGHTS

GlobalRiskAdvantage (GRA) is a proprietary, client-facing risk/claims system developed by ESIS. It extracts claims information from the underlying claims administration system. ESIS is one of the most experienced in the market. They are continually investing and upgrading with new capabilities each year and the core technology is on current versions.

THIRD PARTY ADMINISTRATORS

Gallagher Bassett

www.gallagherbassett.com

OWNERSHIP

Arthur J. Gallagher & Co.

FOUNDED

1963

HEADQUARTERS

Rolling Meadows, IL

LOCATIONS

USA

Canada

UK

Australia

New Zealand

RMIS LEADERSHIP

Russ Pass - Gallagher Bassett EVP Product and CIO

Jennifer Turner - Gallagher Bassett SVP Product - Luminos

RMIS EMPLOYEES

126

TOP INDUSTRIES

Retail

Manufacturing

Transportation

Food & Beverage

Carriers

Captives

CONTACT

Jennifer Turner

(847) 505-8904

[jennifer_turner1](mailto:jennifer_turner1@gbtpa.com)

[@gbtpa.com](mailto:jennifer_turner1@gbtpa.com)

MARKETS SERVED

Captive/Pool Mgmt

Claims Admin

Claims Mgmt

ERM/GRC

EH&S

Exposure/Asset Mgmt

Incident Mgmt

Litigation Mgmt

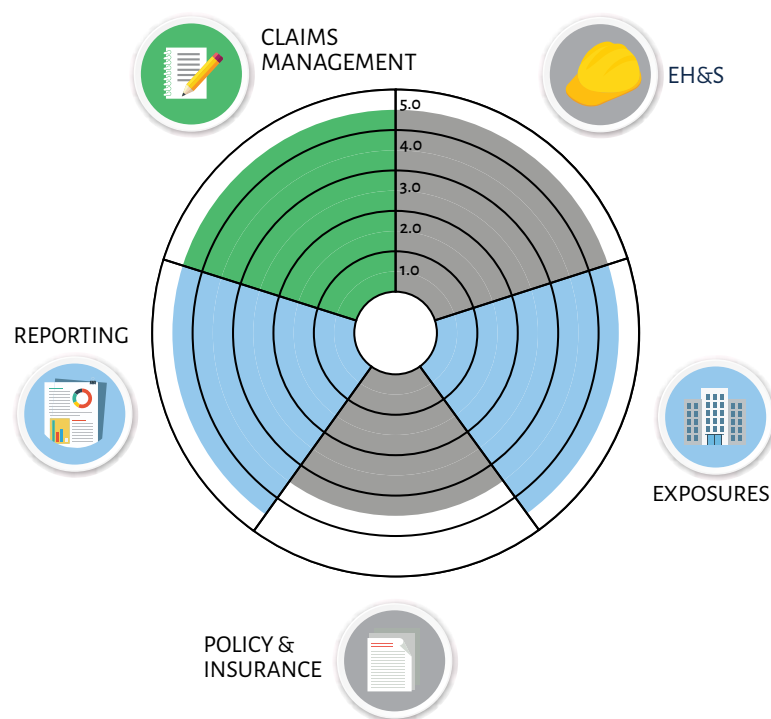
Loss Control/Safety

OSHA Compliance

Policy/Program Mgmt

RMIS

Gallagher Bassett's mission is to be the premier provider of claims services throughout the world with demonstrably superior outcomes. Gallagher Bassett is partnering with more than 4800 organizations from every economic sector and managing claims in over 60 countries. We are here to make things easier for our clients and all the people they serve - bringing to bear all the tools and solutions which our experience tells us will deliver superior claim outcomes. We believe our greatest success is only a reflection of yours. We free you to focus on the opportunities of tomorrow, rather than the challenges of today.



PRODUCT SCORECARD

Gallagher Bassett

PRODUCT

Luminos is a fully functional RMIS offering bundled together with GB claim administration services. Claim inquiry and analytics, policy management, exposures, data integration, ERM and other claim, risk and safety modules are all components of our product offering that allow GB clients to manage their Total Cost of Risk. Luminos is based upon a long-term partnership between Gallagher Bassett and Origami Risk. Luminos is a cloud-based, Software as a Service (SaaS) Risk, Safety and Insurance solution.

INITIAL RELEASE
2015

CURRENT RELEASE
SaaS model updated
quarterly

USERS



CUSTOMERS



DELIVERY & SERVICE

SUPPORT HOURS

3 AM CST - 9 PM CST M - Th
3 AM CST - 6 PM CST Friday
24X7 support desk available

SUPPORT OFFERED

Help desk	User manual
Online help	Phone
Wizards/	Email
Contextual help	Screen "tips" or
Video tutorials	mouse overs
Knowledge base	
Website	

USER CONFERENCE

Annually, each Fall

CLIENT ADVISORY COUNCIL

No

CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE

Basic	1 Day
Moderate	1 Day
Complex	Custom

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS

HOSTED BY

Amazon Web Services

SYSTEM DEVELOPED BY

Origami Risk

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

HIPAA, NIST,	Shield, FSIMA
SSAE 16 - SOC 2,	Compliant
EU-U.S. Privacy	

LAST 3RD PARTY ASSESSMENT

2/1/18

PRICING

PRODUCT LICENSING

Standard Luminos configuration provided to all GB clients. Upgrades to Expanded functionality for a fee.

ONGOING FEES

License fees, module fees, ongoing data conversion fees and hosting fees.



"Luminos has increased the company's overall visibility to the claims process and increased my personal productivity. I'm able to get more done in one place due to the various features available in the system. The ease of use and custom features are unparalleled."

- Sara Marcum, Risk Analyst, TruGreen

"Luminos provides a comprehensive, one-stop-shop RMIS portal to efficiently manage all of the elements of our global TCOR program. GB's consultative implementation approach was key to designing innovative solutions that take advantage of the flexibility available in their RMIS product suite."

- VP Risk Management, Global Fortune 500 Specialty Retailer.

SURVEY INSIGHTS

GB continued to expand the functionality available in their private-labeled Origami Risk system. Expansion of data analytics, improved reporting and dashboards, duplicate claims identification, policy management and claims administration were among the newest features.

Are you managing in the dark?



LUMINOS lights the way to better outcomes
through innovative analytic capabilities and the
most robust RMIS platform in the TPA industry.

To learn how LUMINOS can bring brighter insights to
your program, visit us at gallagherbassett.com



GALLAGHER BASSETT
GUIDE. GUARD. GO BEYOND.



Helmsman Management Services LLC

www.helmsmantpa.com

OWNERSHIP

[Liberty Mutual Insurance](#)

FOUNDED

1983

HEADQUARTERS

Boston, MA

RMIS LEADERSHIP

[Christopher Woodman,](#)
Director, Service
Experience

RMIS EMPLOYEES

48

TOP INDUSTRIES

[Manufacturing](#)
[Finance & Insurance](#)
[Construction & Engineering](#)
[Retail Services](#)

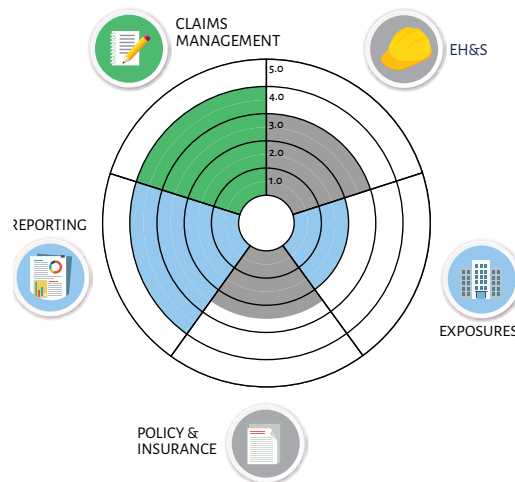
CONTACT

[Heather McMinn](#)
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heather.mcminn@libertymutual.com

MARKETS SERVED

[Captive/Pool Mgmt](#)
[Certificate Mgmt](#)
[Claims Mgmt](#)
[EH&S](#)
[Incident Mgmt](#)
[Loss Control/Safety](#)
[OSHA Compliance](#)
[Policy/Program Mgmt](#)
RMIS

Helmsman Management Services LLC is a wholly owned subsidiary of Liberty Mutual Insurance, one of the nation's largest property and casualty insurers. We offer the strength of a carrier and flexibility of a TPA as we manage auto, general liability and workers compensation claims to the best possible outcome. With over \$5.5 billion in losses under management, Helmsman is the TPA partner of choice for businesses with 1,000 employees or more.



PRODUCT

RISKTRAC is a secure web-based risk management information system that provides access to current and historical views of your entire casualty claims inventory. From reports and alerts to advanced data analysis tools, RISKTRAC enables you to track and trend claims activity with ease. You'll get a rich set of analytical tools that help you to identify key cost drivers and uncover emerging claim trends.

INITIAL RELEASE

2009

USERS



CUSTOMERS



DELIVERY

SUPPORT HOURS

[Monday - Friday](#)
[8 am to 8 pm \(EST\)](#)

SUPPORT OFFERED

[Help desk](#)
[Online help](#)
[Video tutorials](#)
[Website](#)
[User manual](#)
[Phone](#)

[Email](#)
[Screen "tips" or mouse overs](#)

USER CONFERENCE [No](#)

CLIENT ADVISORY COUNCIL [Yes](#)

CUSTOMER EXPERIENCE [3.8/5](#)

IMPLEMENTATION EXPERIENCE [3.9/5](#)

IMPLEMENTATION TIMELINE [10 Days](#)

TECHNOLOGY

DEPLOYMENT OPTIONS [Hosted](#)

SYSTEM DEVELOPED [In-House](#)

HOSTED [In-House](#)

SYSTEM WIDE FUNCTIONALITY [3.6/5](#)

SYSTEM ATTRIBUTES [4.2/5](#)

SECURITY

CERTIFICATIONS
[n/a](#)

PRICING

PRODUCT LICENSING
[n/a](#)

ONGOING FEES
[n/a](#)

SURVEY INSIGHTS

RISKTRAC is a SaaS based, comprehensive and much improved RMIS offered to both Liberty Mutual and Helmsman clients. They have expanded beyond claims mgmt and analysis to include safety (EHS), policy and exposure mgmt capabilities. For Helmsman clients, they offer limited claims admin functions as well.

Sedgwick Claims Management Services, Inc.

www.sedgwick.com

OWNERSHIP
Privately held, majority shareholder is KKR

FOUNDED
1969

HEADQUARTERS
Memphis, TN

RMIS LEADERSHIP
Jason Landrum,
EVP & CIO

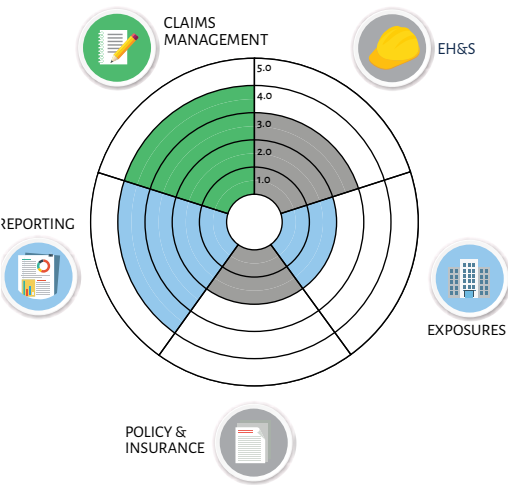
RMIS EMPLOYEES
500

TOP INDUSTRIES
Manufacturing
Transportation
Health Care
Retail
Public Sector

CONTACT
Leah Cooper
423.893.5310
Cooper@sedgwickcms.com

MARKETS SERVED
Captive/Pool Mgmt
Claims Admin
Claims Mgmt
Incident Mgmt
Loss Control/Safety
OSHA Compliance
Policy/Program Mgmt
RMIS

Sedgwick is a leading global provider of technology-enabled risk and benefits solutions. Delivering quality service in areas such as workers’ compensation, liability, property, disability and absence management.



PRODUCT

Sedgwick’s viaOne® suite of tools provides clients and their employees with 24/7 real-time access to information in our proprietary claims management system. Featuring customizable home pages, dashboards, reports and system alerts, viaOne provides multiple ways to view claim information, stay up to date on progress and connect with our team.

INITIAL RELEASE 2002 CURRENT RELEASE 8/11/2017

USERS

CUSTOMERS

DELIVERY

SUPPORT HOURS
24 hours / 7 days a week

SUPPORT OFFERED
Help desk
Online help
Video tutorials
Knowledge base

Phone
Email
Mouse overs

USER CONFERENCE Yes

CLIENT ADVISORY COUNCIL No

CUSTOMER EXPERIENCE 3.5/5

IMPLEMENTATION EXPERIENCE 3.5/5

IMPLEMENTATION TIMELINE 3 months

TECHNOLOGY

DEPLOYMENT OPTIONS SaaS

SYSTEM DEVELOPED In-House

HOSTED FIS

SYSTEM WIDE FUNCTIONALITY 3.8/5

SYSTEM ATTRIBUTES 3.8/5

SECURITY

CERTIFICATIONS
SSAE 16 - SOC 1
ISO 27001

PRICING

PRODUCT LICENSING
System subscription access is provided on a named user basis.

ONGOING FEES
User fees and associated ancillary services.

SURVEY INSIGHTS

ViaOne is a web-based set of tools that are offered to Sedgwick clients. The system has proprietary reporting and dashboard capabilities as well as customized screens and alerts based on user-defined parameters.



Annual RMIS Check-up

You rely on your RMIS as a vital part of your organization's health, but what do you do to ensure it is performing at its highest level?

How is your system meeting your current needs? Has your organization's priorities changed since you implemented the system? Is your vendor being responsive and proactively addressing your needs? What new functionality is available or not currently being utilized?

An annual review of your RMIS is critical to ensure that it is operating at its peak, addressing your highest priorities, maximizing your return on investment and taking advantage of technological advances.

ARE YOU GETTING THE MOST FROM YOUR RMIS?

RMIS Check-up Outcomes:

- ✓ Document current RMIS utilization
- ✓ Identify business process improvements
- ✓ Compare current processes to best practices
- ✓ Identify new functionality to be implemented or further evaluated
- ✓ Determine areas where training would be beneficial
- ✓ Develop strategies to address current issues
- ✓ Prioritize future roadmap
- ✓ Provide governance oversight
- ✓ Build business case for RMIS expenditure

Redhand Advisors, in partnership with Bickmore, can perform an annual RMIS Checkup to ensure that your system is performing at the optimal level.

Contact us at:

Patrick O'Neill
Redhand Advisors
404-666-0418

poneill@redhandadvisors.com

THIRD PARTY ADMINISTRATORS

York Risk Services Group

www.yorkrisk.com

OWNERSHIP

Private Equity Owners
and Investors

FOUNDED

1962

HEADQUARTERS

Jersey City, NJ

RMIS LEADERSHIP

Rhonda Sharp, Director -
Business Intelligence

RMIS EMPLOYEES

150

TOP INDUSTRIES

Government
Finance & Insurance
Education
Retail
Transportation

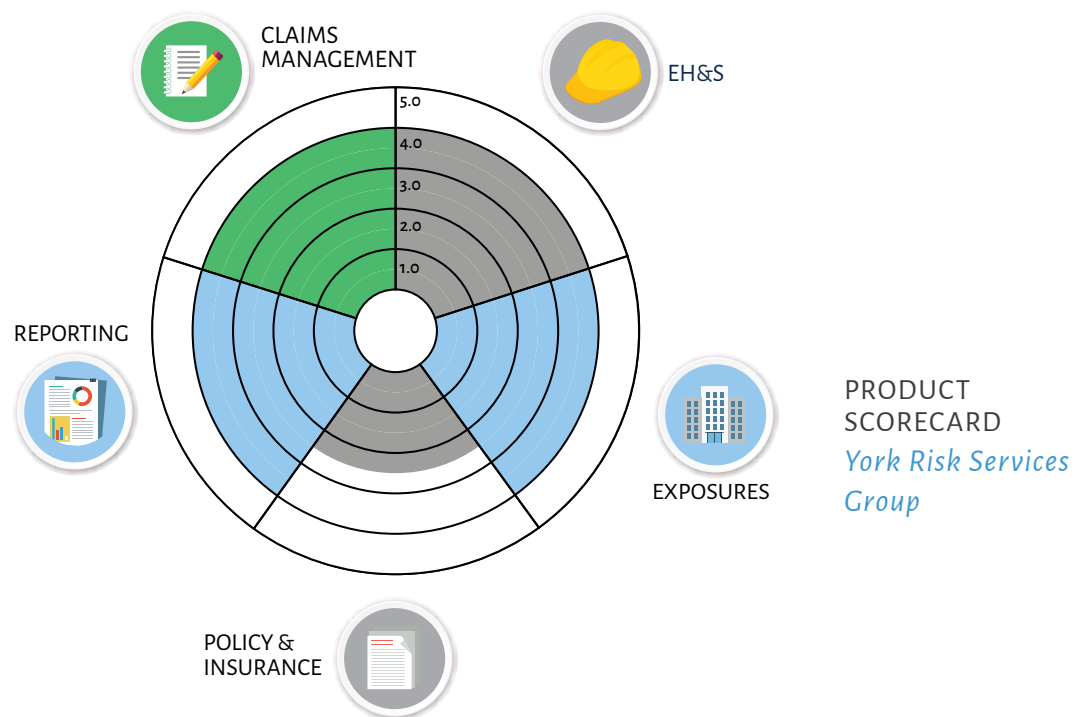
CONTACT

Rhonda Sharp
(985) 674-4758
rhonda.sharp@yorkrisk.com

MARKETS SERVED

Claims Mgmt
EH&S
Loss Control/Safety
Policy/Program Mgmt
RMIS

For more than 55 years, York has been delivering results our clients can see and feel. We serve corporations, the insurance industry and public entities to reduce risk and drive high-quality outcomes. We do this by offering integrated and customized solutions including risk management, claims administration, managed care and absence management. With our data-driven and compassionate approach, we deliver on our mission of reducing risk and getting people and organizations back to health, work and productivity.



PRODUCT

FOCUS is York's dynamic and fluid Risk Management Information System (RMIS). FOCUS is the one tool Risk Managers need to understand everything going on with their insurance program – day-to-day and long-term. FOCUS' powerful, yet easy-to-use customer interface lets users instantly transform volumes of data into useful information that can be understood at a glance. Dashboards, graphical information, analytics and reports let Risk Managers monitor and measure the key performance indicators that matter to them.

INITIAL RELEASE
2014

CURRENT RELEASE
SaaS Model updated
Quarterly

USERS



CUSTOMERS





DELIVERY & SERVICE

SUPPORT HOURS

Monday to Friday
8AM to 5PM (EST)

SUPPORT OFFERED

Help desk	Knowledge base
Online help	Website
Wizards/	User manual
Contextual help	Phone
Video tutorials	Email
Community	Screen "tips" or
forums	mouse overs

USER CONFERENCE

No

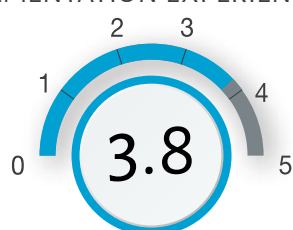
CLIENT ADVISORY COUNCIL

Yes

CUSTOMER EXPERIENCE



IMPLEMENTATION EXPERIENCE



IMPLEMENTATION TIMELINE

Basic	3 Days
Moderate	5 Days

TECHNOLOGY

DEPLOYMENT OPTIONS

SaaS

HOSTED BY

Amazon Web Services

SYSTEM DEVELOPED

Origami Risk

SYSTEM WIDE FUNCTIONALITY



SYSTEM ATTRIBUTES



SECURITY

CERTIFICATIONS

HIPAA	EU-U.S. Privacy
NIST	Shield
SSAE 16 - SOC 2	FSIMA Compliant

LAST 3RD PARTY ASSESSMENT

2/1/18

PRICING

PRODUCT LICENSING

The product is licensed on a per user basis.

ONGOING FEES

User fees.



"What I appreciate about the system is the customization it affords. I have been able to customize reports to exactly what people want to see."

- Megan M. Adkins, Sr. Benefits Analyst, Marathon Petroleum Co.

SURVEY INSIGHTS

York's Focus product, based on Origami Risk, deployed a number of new capabilities including: enhanced location hierarchy, improved configuration of forms, enhanced currency conversion, improved security and two-factor authentication when sending email/text.

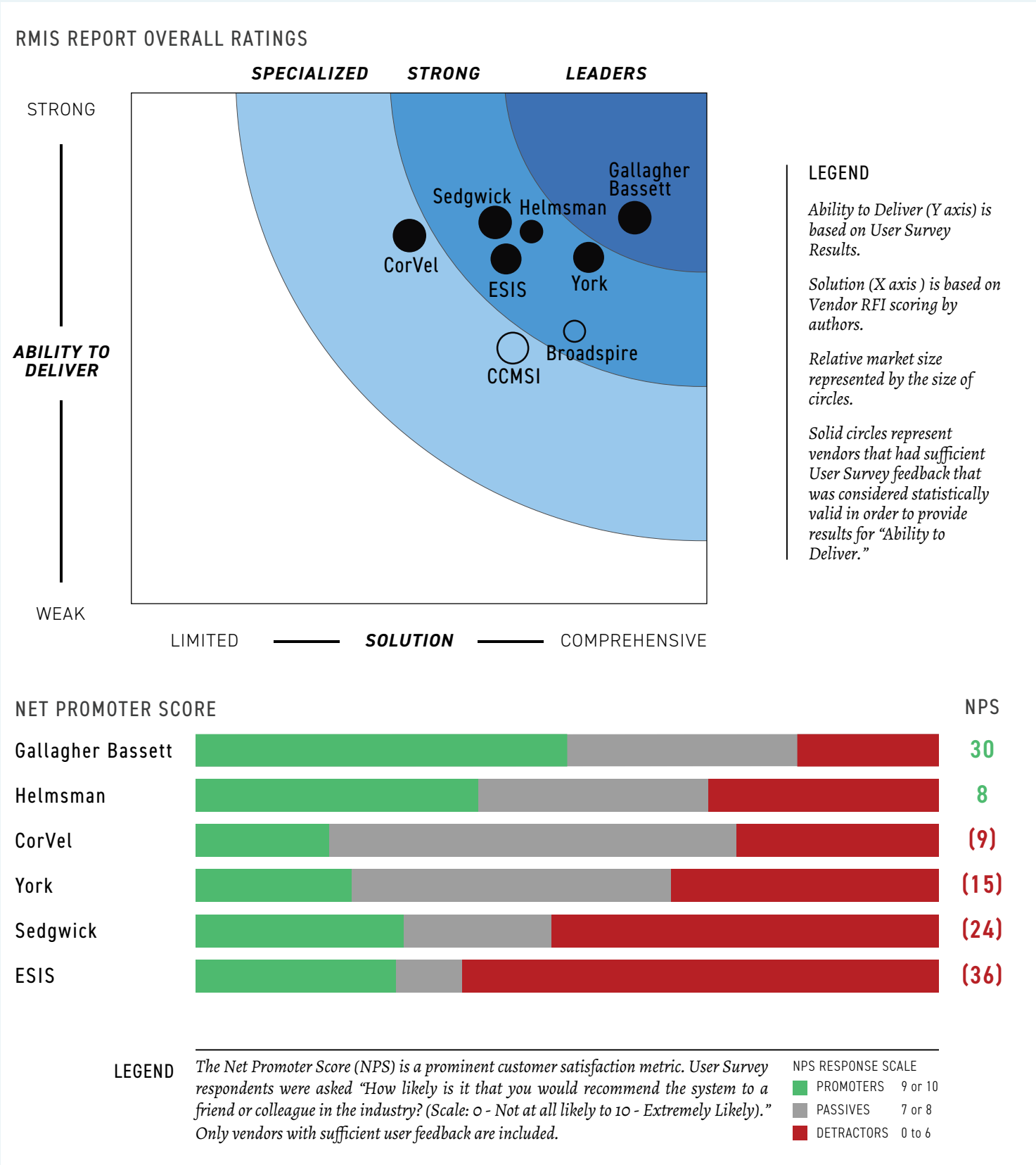
› We reduce risk and get people and organizations back to health, work and productivity.

york.

Behind every good outcome

PROVIDERS AT-A-GLANCE:

THIRD PARTY ADMINISTRATORS



OUR SERVICES



Redhand Advisors provides consulting services to organizations focused on risk, insurance and health information management. The firm specializes in helping organizations improve outcomes through information management and technology. They provide the following services - strategic planning, process improvement, best practices, system planning and design, and vendor analysis and selection.

www.redhandadvisors.com

FINAL THOUGHTS

Our primary goal with the *RMIS Report* is to provide system- and vendor-related information to a widely divergent audience. We desire to educate our readers on this constantly evolving marketplace. We do not seek to name a “winner” in the various categories that we track. Each user has unique situations that a number of vendor systems can address. One size does not fit all.

To make an informed decision, a careful needs-assessment and business-process review must be performed. The *RMIS Report* can then be used as a tool to provide information on the market and the solutions that may meet your requirements. This will help risk management professionals make informed RMIS decisions. Selecting a system is a challenging process requiring diligence and collaboration across all organizational departments. As RMIS consultants, we are available to help.

We would like to give special thanks to our sponsors and all the vendors who submitted updates on their functionality. We hope more vendors will become part of the expanded study next year. We also thank our readers and everyone who completed the User Survey.

Cordially,



Pat O'Neill



Dave Tweedy

THANK YOU TO OUR SPONSORS

GOLD SPONSORS



SILVER SPONSORS



RRMIS REPORT

