ORIGAMI TRAINING

RISK TRANSFER/CONTRACT MANAGEMENT PROCESSES

INSTRUCTOR: HELENDRA RUIZ

ACCESSING ORIGAMI TO SUBMIT YOUR REQUEST TO RISK MANAGEMENT

- **Intranet**

  http://www.cod

  - Click on Submit Risk Request
    (link available 10/1/19)

TWO WAYS TO ACCESS ORIGAMI TO SUBMIT YOUR REQUEST

- **SharePoint**

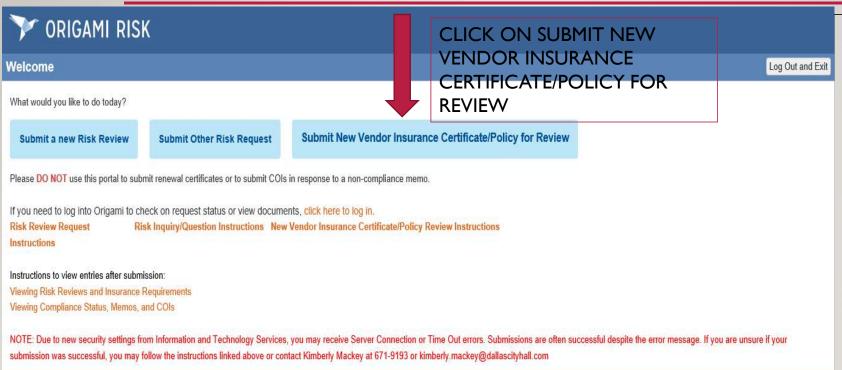 https://dallastxgov.sharepoint.com/sites/city/4eval/orm/SitePages/Department.aspx

  - Click on Risk Review Request Form or Certificate of Insurance Request Form
    (link available 10/1/19)

3   SUBMITTAL OF REQUESTS

- Risk Transfer works all requests in the Origami system; emails are no longer accepted

- All letters and the work we do to complete the requests are strictly in Origami

- We are not able to access the insurance requirements templates, letters, or work the requests outside of Origami as there are built in steps that have to be followed in order to access these things

- Therefore, all review requests MUST be submitted in Origami. ***This cannot be bypassed.***
  - Risk Reviews
  - COI Reviews
  - Other Review Requests (Exceptions, Supplemental Agreement Reviews, Self-Insured Letters)

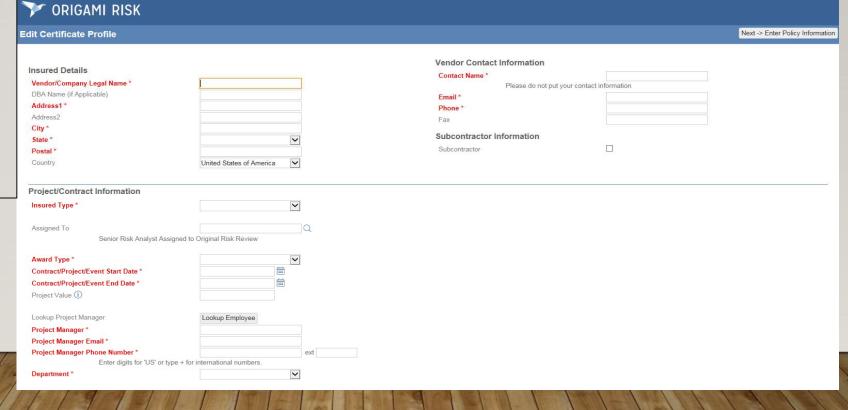# 4   CERTIFICATES OF INSURANCE (REQUESTING REVIEWS)

CLICK ON SUBMIT NEW VENDOR INSURANCE CERTIFICATE/POLICY FOR REVIEW

NOTES:
1. Hover over buttons to get a description of what each item is for
2. Instruction links for submitting requests are in red font
3. *Do not upload renewal or correction COI's.*
   - *Email renewals to our general email box.*
   - *Email correction COI's for compliance issues to the Sr. Risk Analyst handling the review*

5 CERTIFICATES OF INSURANCE (CONT'D) (REQUESTING REVIEWS)

Submitting Request:

1. Complete all required fields (red)
2. Provide additional information for fields that are not required if you have it

CERTIFICATES OF INSURANCE (UPLOADING COI'S AND BONDS)

Submitting Request:

1. This is where you upload the COI and additional insurance documents
2. The COI should always be the first document you attach
3. Origami reads PDF COI's, but if the COI is not a good PDF you may get errors; this is ok. Please continue by clicking NEXT until you have completed the submission to upload the documents.

Edit Certificate Profile - TBA

Next -> Review Policy Information

Certificate of Insurance Upload Instructions

Please upload the Certificate of Insurance file below. The success of properly reading the contents of the certificate depend on the following factors...

Quality/Clarity - An electronic copy will be more easily read than a scanned or faxed copy of the certificate.

Alignment/Positioning - If the file is scanned or faxed, please ensure it is not twisted or misaligned to its original content.

Single Form Type - Please ensure that you are only uploading one type of form at a time. This means do not upload a single file that contains pages from multiple ACORD form types/versions.

Acceptable PDF Format - Some versions of PDF files cannot be processed through automation. One such type is the XFA (aka AcroForms or Adobe XML Forms Architecture) format. Please *flatten* the PDF form before submitting. One way this can be done is by printing the PDF to PDF output.

Upload ACORD Form

File *   [_____] Browse...

Upload Additional Forms (Optional)

Additional File   [_____] Browse...
Additional File   [_____] Browse...
Additional File   [_____] Browse...
Additional File   [_____] Browse...

DEFINITIONS

- COI – Certificate of Insurance

- COI Review – review of certificate of insurance to determine if the COI is in compliance with the insurance requirements

- Exception Request - when a vendor potential vendor has requested a change to the insurance requirements previously provided by ORM

- Insured – entity that is providing services to the City or applying for a permit (consultant, vendor, permit applicant, etc.) whose COI needs to be reviewed for compliance

- Risk Review- review of scope of work to determine if insurance is required

- Self-Insured Letter - a letter that provides the City's insurance status to a requesting entity

- Supplemental Agreement – Contract modification due to a change in scope or other terms

GETTING HELP WITH ORIGAMI

- **COD Origami Administrator**:
  - Kim Mackey *(FOR TECHNICAL ASSISTANCE ONLY)*
    - 671-9193
    - kimberly.mackey@dallascityhall.com
- NOTES:
  - Contact the assigned Sr. Risk Analyst or our general email for help on the status of a review or a question related to a review.
  - Ms. Mackey does not process any reviews, so please do not contact her inquiring on the status of a review or for her to provide a copy of a document.

RISK TRANSFER TEAM CONTACTS

- Robert Cook, Sr. Risk Analyst
  - Robert.Cook@dallascityhall.com
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- Tiffany Harris, Sr. Risk Analyst
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- Pam Parnell, Sr. Risk Analyst
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- Damesha Turner, Sr. Risk Analyst
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  - (214) 671-5049

- Helendra Ruiz, Risk Transfer Administrator
  - Helendra.Ruiz@dallascityhall.com
  - (214) 670-4224

THE ENTIRE TEAM HAS ACCESS TO THE GENERAL EMAIL BOX

General Email Box: ORMDallasCOI@dallascityhall.com
Team Reports to: Zeronda Smith, Director, Office of Risk Management