

ORIGAMI TRAINING

RISK TRANSFER/CONTRACT MANAGEMENT PROCESSES

INSTRUCTOR: HELENDRA RUIZ

2 ACCESSING ORIGAMI TO SUBMIT YOUR REQUEST TO RISK MANAGEMENT

- Intranet

<http://www.cod>



**TWO WAYS
TO ACCESS
ORIGAMI
TO SUBMIT
YOUR
REQUEST**

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

- 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)

ORIGAMI RISK

Welcome

What would you like to do today?

[Submit a new Risk Review](#) [Submit Other Risk Request](#) [Submit New Vendor Insurance Certificate/Policy for Review](#)

CLICK ON SUBMIT NEW VENDOR INSURANCE CERTIFICATE/POLICY FOR REVIEW

Log Out and Exit

Please **DO NOT** use this portal to submit renewal certificates or to submit COIs in response to a non-compliance memo.

If you need to log into Origami to check on request status or view documents, [click here to log in](#).

[Risk Review Request](#) [Risk Inquiry/Question Instructions](#) [New Vendor Insurance Certificate/Policy Review Instructions](#)

Instructions to view entries after submission:
[Viewing Risk Reviews and Insurance Requirements](#)
[Viewing Compliance Status, Memos, and COIs](#)


NOTE: Due to new security settings from Information and Technology Services, you may receive Server Connection or Time Out errors. Submissions are often successful despite the error message. If you are unsure if your submission was successful, you may follow the instructions linked above or contact Kimberly Mackey at 671-9193 or kimberly.mackey@dallascityhall.com

- 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

 **ORIGAMI RISK**

Edit Certificate Profile Next -> Enter Policy Information

Insured Details

Vendor/Company Legal Name *

DBA Name (if Applicable)

Address1 *

Address2

City *

State *

Postal *

Country

Vendor Contact Information

Contact Name *

Please do not put your contact information

Email *

Phone *

Fax

Subcontractor Information

Subcontractor

Project/Contract Information

Insured Type *

Assigned To

Senior Risk Analyst Assigned to Original Risk Review

Award Type *

Contract/Project/Event Start Date *

Contract/Project/Event End Date *

Project Value ⓘ

Lookup Project Manager

Project Manager *

Project Manager Email *

Project Manager Phone Number * ext

Enter digits for 'US' or type + for international numbers.

Department *

6 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*

Upload Additional Forms (Optional)

Additional File

Additional File

Additional File

Additional File

7 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

8 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.

9 RISK TRANSFER TEAM CONTACTS

- Robert Cook, Sr. Risk Analyst
 - Robert.Cook@dallascityhall.com
 - (214) 670-7695
- Tiffany Harris, Sr. Risk Analyst
 - Tiffany.Harris@dallascityhall.com
 - (214) 671-5403
- Pam Parnell, Sr. Risk Analyst
 - Pamela.Parnell@dallascityhall.com
 - (214) 243-1137
- Donna Taylor, Sr. Risk Analyst
 - Donna.Taylor@dallascityhall.com
 - (214) 670-3574
- Damesha Turner, Sr. Risk Analyst
 - Damesha.Turner@dallascityhall.com
 - (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