

ORIGAMI TRAINING

RISK TRANSFER/CONTRACT MANAGEMENT PROCESSES

INSTRUCTOR: HELENDRA RUIZ

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

3 ACCESSING ORIGAMI TO SUBMIT YOUR REQUEST TO RISK MANAGEMENT

- Access Via Intranet

<http://www.cod>



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

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

- Access Via SharePoint

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



**CLICK EITHER
ONE**

- Click on Risk Review Request Form or
Certificate of Insurance Request Form

(link available 10/1/19)

4 TYPES OF REQUESTS UNDER “OTHER RISK REQUESTS”

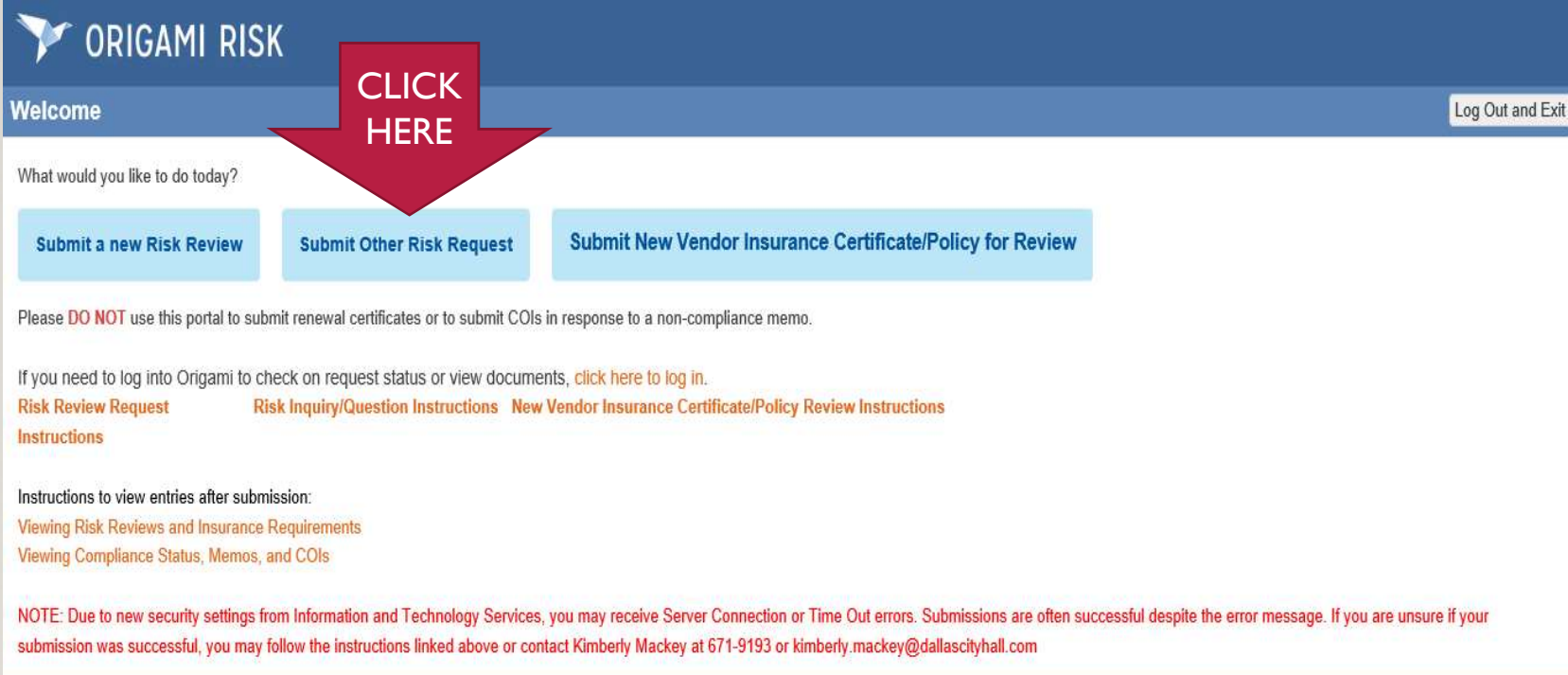
- **Exception Requests** – when a vendor or potential vendor has requested a change to the insurance requirements that were provided by ORM
- **Supplemental Agreement Review Request** – request to review a revised scope of work or contract to determine if the insurance needs to be amended
- **Consultation Requests** - requests that require a review and/or meeting of a special circumstance, event, project that you are not sure which direction to take
- **Self-Insured Letter** - a letter advising the City’s self-insured status when an organization wants us to provide them with evidence of insurance.
- PLEASE EMAIL THE ASSIGNED SR. RISK ANALYST OR THE GENERAL EMAIL BOX TO REQUEST STATUS, COPIES, ASK QUESTIONS, ETC. – **DO NOT USE THE REQUEST PORTAL FOR THESE ITEMS**

5 OTHER REQUESTS

(CONSULTATIONS, SELF INSURED LETTERS, EXCEPTION REQUESTS, SUPPLEMENTAL AGREEMENT REVIEWS)

NOTES:

1. Hover over button to get a description of what each item is for
2. Links to access Instructions are in red font
3. “[Click here to Log in](#)” - To check on request status or view & download documents



ORIGAMI RISK

Welcome Log Out and Exit

What would you like to do today?

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

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 Instructions](#) [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

6 OTHER REQUESTS

(CONSULTATIONS, SELF INSURED LETTERS, EXCEPTION REQUESTS, SUPPLEMENTAL AGREEMENT REVIEWS)

Submitting Request:

1. Select the type of request you need from the drop down menu in the Request Type field
2. Complete all required fields
3. Click Save Changes
4. Attach required documents
5. See the remaining slides that address each type of request

New Other Review Request Save Changes or Cancel

Entry Date/Time 01/01/0001 00:00:00
Modified Time 01/01/0001 00:00:00

Review/Request Information

Rush

Request Type *

Department *

Request Details *

- Consultation Request
- Exception Request
- Self Insured Letter Request
- Supplemental Agreement Review

Project Name/Title

Project Start Date

Project End Date

Contract/Bid/Permit Number


Project Manager/Contact Name *

Project Manager/Contact Title *

Project Manager/Contact Email *

Project Manager/Contact Phone Number *

Please don't forget to upload any supporting documentation after selecting Save.



Click arrow in Request Type field to select request type

7 OTHER REQUESTS (EXCEPTION REQUEST)

- **SUBMIT AS FOLLOWS**

- Fill in all required fields
- Include pertinent info in the Request Details field
- Click “Save Changes”
- Attach marked up insurance requirements
- Attach any additional emails, memo’s, letters related to the vendors request
- **After submittal:** Email updates and revisions to the assigned Sr. Risk Analyst
 - Please do not create a new request for the same review request

8 OTHER REQUESTS (SUPPLEMENTAL AGREEMENT REVIEW)

- **SUBMIT AS FOLLOWS**

- Complete all required fields
- Include a description of your request in the Request Details box
- Click “Save Changes”
- Attach the following:
 - Prior insurance requirements
 - Revised or new scope of work
 - Modified contract (if applicable)
 - Copy of Administrative Action (AA)
 - Any other relevant documents

9 OTHER REQUESTS (CONSULTATION REQUEST)

- **SUBMIT AS FOLLOWS**

- Fill in all required fields
- Describe the need in the request details box
 - If you need to know if insurance is required on a contract/project, please submit a risk review request instead
- Click “Save Changes”
- Attach any emails, memo’s, letters, or other documents related to the request

10 OTHER REQUESTS (SELF-INSURED LETTERS)

- **SUBMIT AS FOLLOWS**

- Before you start, have the following required information:
 - Start & end date of event or term of license/certification
 - Name of entity requesting insurance
 - Contact name at entity requesting insurance
 - Mailing address of entity requesting insurance
 - Email address of contact at entity requesting insurance
- Enter all info into the required fields
- Purpose of letter (type of event, licensing, certification, training, etc.). Input the purpose/description of the need in the Request Details box.
- Click “Save Changes” to Submit Request
- Attach copies of emails, letters, memo’s, contract, etc.

II 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

12 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.

13 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