

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 Review, COI Review, Supplemental Agreement Review, Exceptions Request, Self Insured Letter Request, Consultation Request)***

4 RISK REVIEWS (INSURANCE REQUIREMENTS REQUESTS)

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

NOTES:

1. Hover over button to get a description of what each item (button) is for
2. Links for Instructions for submitting requests in red font
3. “Click here to log in” - To check request status or view documents

5 RISK REVIEWS (INSURANCE REQUIREMENTS REQUESTS)

Submitting

Request:

1. Note the bold instructions/info at the top of the page
2. Complete all required fields (red)
3. Provide additional information for fields that are not required if you have it

New Risk Review Save Changes or Cancel

Please have supporting documentation ready to upload upon completion of this form. Failure to upload documents will cause your request to be automatically deleted and you will have to resubmit.

Modified Time: 01/01/0001 00:00:00
Department *
Rush Review:

General Information

Ordinance Based Requirements *
Children Involved:
Professional Certifications Verified:

Please do not use a Vendor Name as Project Name.

Project/Contract Name *
Project Manager/Buyer Name *
Project Manager/Buyer Phone *
Project Manager/Buyer Email *
Project Manager/Buyer Address *
City *
State *
Zip Code *
Manager/Supervisor of Project Manager/Buyer *
Contract Type *

Is this a COOP/Interlocal Agreement? *

6 RISK REVIEWS (CONT'D) (INSURANCE REQUIREMENTS REQUESTS)

Scope of Work/Specification

Check All That Apply *

Heavy Equipment will be used (i.e. Crane or Lift)

Other

Scope involves asbestos abatement

Scope involves the placement of temporary employees

Scope involves the sale of alcohol

Scope involves the use of regulated vehicles (i.e. 18-wheelers)

Scope involves XCU (Explosion, Collapse and Underground) Hazards

Special Event

Vehicles will be used to perform the duties outlined in the scope/specifications/contract

Work will take place on City premises

Minor Home Repair Project Components

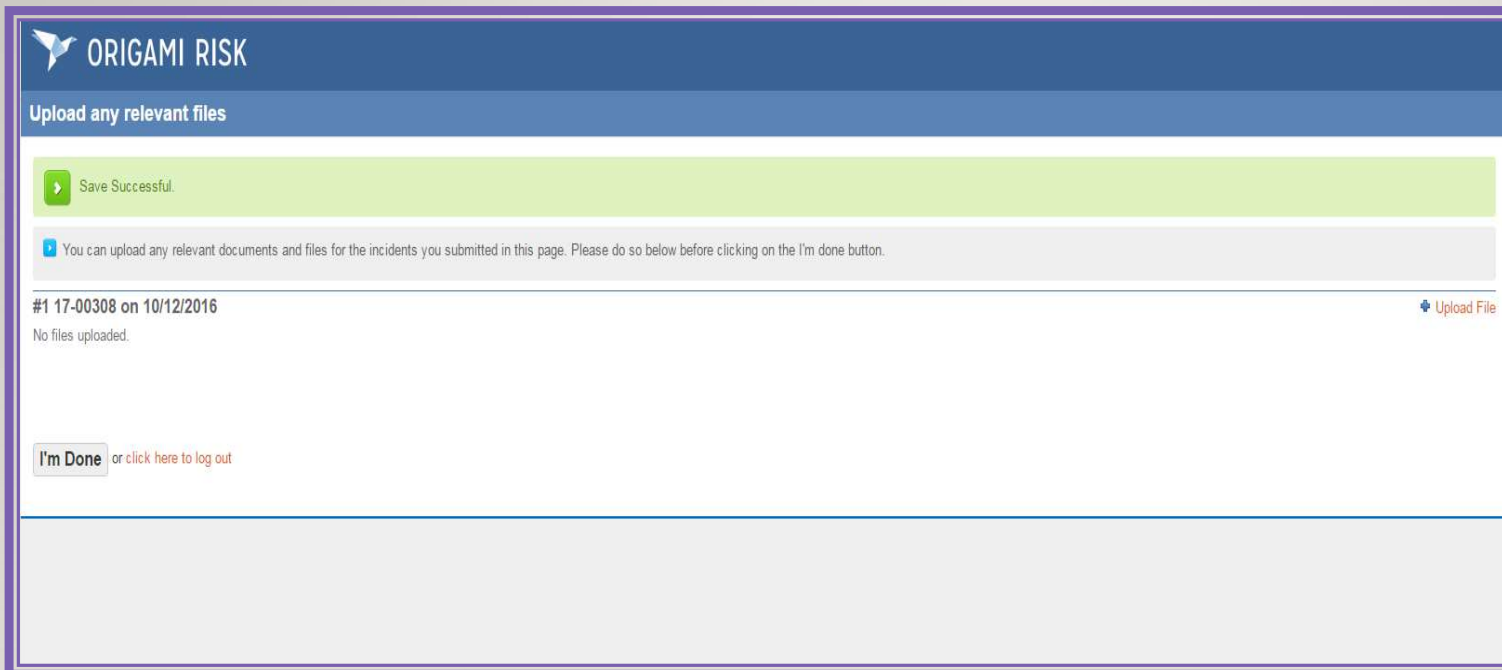
Select all that apply

Project Description *

Submitting Request:

1. Complete all required fields (red)
2. Project Description – provide a brief description of what the contract is for (what the vendor will be doing)

7 RISK REVIEW (CONT'D) UPLOADING DOCUMENTS



The screenshot shows the ORIGAMI RISK web interface. At the top left is the logo and the text "ORIGAMI RISK". Below this is a blue header bar with the text "Upload any relevant files". A green notification bar says "Save Successful." with a right-pointing arrow. Below that is a grey instruction bar: "You can upload any relevant documents and files for the incidents you submitted in this page. Please do so below before clicking on the I'm done button." The main content area shows an incident entry: "#1 17-00308 on 10/12/2016" with "No files uploaded." and an "Upload File" button. At the bottom left of the incident entry is an "I'm Done" button and a link "or click here to log out".

1. Click on "Upload File"
2. Attach your scope of work/specifications
3. Attach any other relevant documents
4. Click on "I'm Done" after you have uploaded all documents
- 5. IMPORTANT NOTE:** Scope of Work/Specifications MUST be attached or the request will be automatically deleted overnight and you will have to resubmit your request

8 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

9 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, our general email, or a team member 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.

10 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