



**Q1: Contact Information**

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**Q2: Company Website** [http://ebix.com/risk\\_envision](http://ebix.com/risk_envision)

**Q3: Product Name** **Note: Please include all names of systems currently supported**

RiskEnvision

**Q4: Technology Deployment Options** Web: client hosted, Web: Vendor Hosted (ASP)

**Q5: Lines of Business Supported**

State WC	Standard
Federal WC (USLH, Jones Act)	Standard
General Liability	Standard
Auto	Standard
Property	Standard
Professional	Standard
Disability	Standard

**Q6: Other lines of business supported**

Product Liability

**Q7: Other related functionality**

Policy Administration,

Underwriting/Rating (Please list lines of business)

,

Member Portal, Billing, Reinsurance/Excess,

Agency Fee Commission tracking,

Identify the lines of business your underwriting/rating module can underwrite:  
All commercial lines

**Q8: Please describe your system's document management capabilities.**

Full featured document management including workflow automation

**Q9: Do you provide user-defined fields?**

Yes,

If Yes, are there any limitations on the number, field types or reporting capabilities on these fields?

An unlimited number of fields can be defined and they can be specified as decimal, date, integer, character and can include a pick list or drop-down

**Q10: Please identify all of the browsers supported by your system, including the earliest versions (i.e Internet Explorer 9)**

IE9 or above, Chrome, Firefox, and Safari

**Q11: Please list the levels of hierarchy of your RMIS**

RiskEnvision supports up to 9 levels in the hierarchy, and the names for those levels are user-definable.

**Q12: Dashboards and Alerts**

Configurable dashboard	Standard
Downloadable	Standard
Email alerts	Standard
Dashboard alerts	Standard
Clmt. Search from home page	Standard
Multi-level hierarchy	Standard
Multi-currency	Standard
Multi-lingual	Standard

**Q13: Maximum amount of dashboards allowed by your system**      There is no maximum

**Q14: Please describe any unique dashboard or alert that we did not list above**      *Respondent skipped this question*

**Q15: Standard Reports**

Scheduled reports with auto distribution	Standard
Report Bursting	Standard
Ad hoc reporting	Standard
“As of” date reporting	Standard
Searchable PDF reports	Standard
Download to Excel and PDF	Standard
Offline data manipulation allowed	Standard
Policy Erosion reports	Standard
Loss triangles for data development and trending	Standard
Deductible reimbursement tracking	Standard
Profiling, red-flagging events	Standard
Goal tracking	Standard
Loss forecasting	Standard
Experience Modification	Standard
Cost of risk/premium allocation	Standard
Underwriting/rating calculation	Standard

**Q16: Policy and Exposure Tracking**

Policy tracking (list of policies)	Standard
Policy management (details of policies)	Standard
Underwriting	Standard
Certificate tracking	Standard
Certificate issuance	Standard
Property tracking (values)	Standard
Safety/loss control analysis	Standard
Bonds/contracts tracking	Standard
Asset Management	Standard
COPE Tracking	Standard
Fleet Management	Standard
Integrated Policy Management	Standard
Basic Values / Exposures Entry	Standard
Retention vs Premium Calculator	Standard
Coverage Gaps and Overlaps	Standard
Intelligent Mapping	Standard
Please explain your intelligent mapping software capabilities	Integration with google maps and other GIS for coverage and experience

**Q17: Analytics & Metrics Analysis: Please describe any third party software used to perform business analytics**

Pentaho and Crystal are utilized for reporting and analysis.

**Q18: Typical Analytics/Metrics reports**

Key Performance Indicators (KPI) measurements	Standard
Loss Forecasting	Standard
Cost of risk allocation	Standard
Heat Map reports on loss distribution/location	Standard
Other Key Reports	Frequency, Predictive Analytics, EDI

**Q19: How, if at all, does your RMIS compare client data to non-client data?**

We are one of the largest providers of P&C EDI compliance services. Consulting services are available to compare summary EDI data against client data for benchmarking by industry, revenue, employee count, etc.

**Q20: Please describe any features or functions that are designed to support enterprise risk management processes:**

Document management on policies and the business hierarchy allows the creation and collection of enterprise risk management templates for policy and procedure.

**Q21: Please provide a list of current innovations that you are currently working on to deploy at a future date**

Enhanced reporting, dashboards, and analysis.

**Q22: Other notable features or comments**

Completely custom client portal for report and review of incidents and safety management.

**PAGE 4: Claims Self Administration Features**

**Q23: Please describe how your system develops a TCOR (total cost of risk) estimation**

It is a calculation built on the following components: Risk transfer costs (Premiums, self-insured funds, Brokerage Fees), Loss related costs (Retained losses, TPA expense, Allocated Loss Adjustment Expenses), Risk Administration Costs (Risk Management, RMIS, Claims, Loss Control, Safety, Training, etc.), and Risk Financing Costs

**Q24: Please describe your business process / workflow collection tools**

Workflow collection includes a visual process engineering feature for collection of workflow and automation definition.

**Q25: Claims management features**

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard
Reserve Analysis (worksheet)	Standard
Other Claim Management Features	Work load management, checklists, task calendar, and calendaring templates

**Q26: Claims administration features**

Incident Tracking	Standard
Check writing	Standard
Utilization review	Standard
Medical Bill Repricing	Standard
Transitional Work Management	Standard
Built-in Reserve Estimation Worksheets	Standard
Fraud Detection capability	Standard
Encryption of sensitive data	Standard
Subrogation & Salvage Tracking	Standard
Comprehensive Litigation Management Tracking	Standard
Adjuster Tracking/Performance	Standard
Other Claim Administration Features	EDI and Reporting Compliance

**Q27: Third party reporting and documentation**

OSHA reporting	Standard
NCCI Reporting	Standard
1099 Reporting	Standard
First Report of injury	Standard
FROI/SROI reporting	Standard
CMS reporting	Standard
EDI reporting	Standard

**Q28: Other notable features or comments**

Business rule definition and system automation

**PAGE 5: Software, Technology and Security**

**Q29: Did your organization develop the software platform your solution resides on?** Yes

**Q30: If another organization develops the software platform your solution is based upon, please describe this relationship.** *Respondent skipped this question*

**Q31: Who maintains your software platform?**

Ebix

**Q32: What software is used to track your RMIS solution's defects, bugs, and problems?**

Bugzilla

**Q33: Do you have a need to develop software outside of your primary platform?**

No

**Q34: If so, what applications are involved?**

*Respondent skipped this question*

**Q35: What third party vendors do you partner with to provide functionality?**

etFile, SAP

**Q36: Does your firm use off-shore resources at all?**

Yes,

If yes, what company? They are Ebix employees

**Q37: Who maintains your software infrastructure?**

Ebix

**Q38: Are there multiple, separate data center facilities used to host data for global clients?**

Yes

**Q39: Do you provide the ISO 27001 certification to your clients?**

Yes

**Q40: Does your solution allow for full encryption at rest for all client data in all hosting facilities used by your organization?**

No

**Q41: Does your solution provide the ability to encrypt specific fields while at rest?**

Yes

**Q42: What technology/data standards are used/supported by your application? (e.g. WSI, WSS, ACCORD XML)**

IAIABC, Acord XML

**Q43: Describe encryption protocols used within, and in communication with, the product.**

SSL

**Q44: Describe any API offered**

Web Services for WC EDI compliance

**Q45: CLIENT HOSTED DEPLOYMENTS** Minimum recommended hardware requirements and any third party software licensing requirements

Java Application Server (Tomcat 5.5):  
 OS: Windows 2000, 2003, Linux, or other OS supported by Apache Tomcat.  
 Microsoft SQL Server 2005 or later or Oracle 10 or later connectivity installed  
 2 GHz Processor  
 2 GB RAM  
 200 MB free storage  
 100 Mbps Network Card  
 Connectivity to the RV database server

**Q46: CLIENT HOSTED DEPLOYMENTS** Does the product support, and has it been tested with, virtualization software (VMware)?

Yes. VMware is supported

**Q47: VENDOR or THIRD PARTY HOSTED DEPLOYMENTS** SAS 70 audit (vendor/third party hosted versions only)

Type II

**Q48: Does your company purchase cyber risk coverage to protect your clients' data assets?**

Yes

**Q49: Any additional comments related to software, technology and security**

*Respondent skipped this question*

**PAGE 6: Interfaces**

**Q50: List standard insurer/TPA interfaces (in order of frequency)**

Travelers, Hartford, Liberty Mutual, Gallagher Bassett, ESIS, Sedgwick, Corvel, Stratacare, Mitchell

**Q51: Please describe your approach to state EDI compliance (e.g. vendor partnerships) and the breadth of your existing capabilities.**

We are the largest EDI compliance vendor. We are the only RMIS vendor supplying both RMIS and EDI compliance services. Our RMIS is integrated with our EDI service with full FROI/SROI sequencing automation available.

**Q52: Other System interfaces**

User authentication (e.g. LDAP)	Standard
HR Payroll	Standard
Accounting	Standard
External Document Management Services	Standard
External Bill Review Services	Standard



**Q53: Other interfaces not listed above**

Fleet and Asset Management including COPE

**Q54: What is your hourly rate for custom interface work?**

\$150

**PAGE 7: Training, Support and Customer Feedback**

**Q55: Briefly describe your standard training approach (when and to whom) and your methods utilized**

During the Kick-off meeting, a detailed training plan is reviewed with the implementation team and the process and format is finalized. Generally we approach training initially with a core group of users, and then end user training is provided close to go live. We provide administrator training during the configuration phase. This helps the client become accustomed with our application enough to help in the configuration decisions. We then provide user training within two weeks of going live on the system. We then provide go-live support the week of go live.

**Q56: Number of staff dedicated to training and/or support**

18

**Q57: Support types offered:**

Toll free number,  
 Dedicated (not pooled) support person,  
 Print user manual,  
 Screen "tips" or mouse-overs, Video tutorials

**Q58: Telephone support hours**

8am-5:30pm Eastern

**Q59: Position regarding support of prior product versions**

We do not sunset prior product versions. Clients may continue on older version as long as their support agreement and fees are current.

**Q60: Do you host a user conference?**

Yes

**Q61: What was the date of your last user conference?**

August 2013

**Q62: How many customers / prospects were in attendance?**

150

**Q63: What other methods do you use to obtain customer and/or prospect feedback and input on feature priorities?**

We chair an Enhancement Council made up of customer representatives from various industries. This group determines product direction and priority

**PAGE 8: Implementation**

**Q64: Describe your delivery team's structure: Do you have a dedicated service team approach or does one account executive handle multiple responsibilities?**

We utilize a triage team approach with a dedicated account representative as the first escalation point.

**Q65: Do you have dedicated business analysts?**

Yes

**Q66: Describe your process of tracking delivery team activities**

We have a CRM system that stores case information and status and automatically updates from emails.

**Q67: Do you have a defined methodology for implementing projects?**

Our project management approach is a classically linear and sequential approach to software design, system development, and implementation. Our standard approach combines philosophies from both the Agile and Waterfall methodologies.

**Q68: Do you have a defined oversight or governance process for your implementations?**

Yes

**Q69: How long is the typical implementation time?**

4-6 months

**PAGE 9: Business Information**

**Q70: What was the year of your first RMIS implementation?**

1994

**Q71: Parent Company (if applicable)**

*Respondent skipped this question*

**Q72: Business Locations**

We have more than 30 offices across the United States, Australia, Singapore, New Zealand, Canada, China, Japan and India

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

**Q73: Top Officers**

Top Executive 1:	Robin Raina, Chairman of Board, President & CEO
Top Executive 2:	Robert Kerris, Chief Financial Officer
Top Executive 3:	Graham Prior, Senior Vice President

**Q74: Number of employees (RMIS division only) in 2013**

Executives / Senior Management	3
Product Management, Marketing & Sales	4
Project Management, Development and Quality Assurance	10
Customer Support and Training	12
Other	2
Total Employees	31

**Q75: Number of employees (RMIS division only) in 2014**

Executives / Senior Management	4
Product Management, Marketing & Sales	8
Project Management, Development and Quality Assurance	12
Customer Support and Training	15
Other	4
Total Employees	43

**Q76: Total annual revenue for all product versions offered** \$25M

**Q77: Approximate percent of revenue spent on R&D** 20%

**Q78: Customer Statistics**

Total Current Parent Level Clients –this client version	40
Total Current Parent level Clients- all previous versions	45
Total Current Users—all versions	4000
New Clients in Last Fiscal Year	15
Largest Number of Users in Single Contract	45
Number of lost clients in Last Fiscal Year	1

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

**Q79: Largest customer markets (Please rank top 5)**

Education	5
Insurers/TPAs	2
Pools/Self-Insured Groups	4
Manufacturing	1
Public Sector	3

**Q80: Please rank order how you obtain most new accounts (unbundled systems only)**

Competitive RFPs	1
Sole source (no competition)	2
Client merger/acquisition	3

**Q81: Top 5 RMIS competitors**

*Respondent skipped this question*

**Q82: Predominant programming language**

Java, PHP

**Q83: Databases supported**

Oracle, Microsoft SQL Server

**Q84: Please identify all mobile devices that can be used by your system**

Smartphones and Tablets are supported

**Q85: Please list the RMIS-related revenue for the following years:**

2013	\$4M
2014	\$5M

**Q86: Please identify all revenue-generating activities:**

Software license sales, Custom applications,  
Data Conversion and Consolidation activities,  
Consulting, Ongoing maintenance,  
Please list all other revenue generating activities  
Hosting

**Q87: Please indicate the percentage of revenue derived from these activities:**

Software license sales	30%
Custom applications	10%
Data Conversion and Consolidation activities	10%
Consulting	5%
Ongoing maintenance	30%
Other	15%

**Q88: Does your RMIS act as a “channel partner” for any 3rd party information or a la carte services?** No

**PAGE 10: Pricing**

**Q89: Pricing approach for ongoing usage (check all components that drive cost for client; do not check if no charges associated)**

Site license, Module/LOB pricing,  
 Non-named users (concurrent usage),  
 Data conversions/feeds/EDI, Maintenance,  
 Support, Training,  
 Integration with HR, A/P systems

**Q90: Approximate total annual cost (ranges) excluding initial implementation**

10 Named Users	\$75,000 - \$100,000
100 Names Users	\$300,000 or more

**Q91: What are the associated fees and hourly rates to implement your system?**

Highly dependent on the modules, number of users, lines, and workflows. Blended rate of \$150/hr

**Q92: What is the typical one-time cost to implement your system?**

\$49k

**Q93: Additional comments on pricing**

*Respondent skipped this question*

**PAGE 11: Other Information**

**Q94: Please comment on your recent system uptime/availability performance, as well as methods that you use to measure and monitor it.**

We have had no unplanned outages in the last calendar year. We utilize internal systems to continually verify system availability.

**Q95: Please describe if your RMIS is multilingual. If so, please list the other languages supported.**

Our customer portal WebEnvision is multilingual and currently supports Spanish.

**Q96: List the top 3 reasons that you believe set you apart from other RMIS vendors**

- |   |   |
|---|---|
| 1 | Service                                 |
| 2 | Customizability                         |
| 3 | Breadth of functionality and experience |

