



# ADVISEN

Insurance Intelligence®

**Q1: Contact Information**

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**Q2: Company Website**

www.esis.com

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

Global RiskAdvantage (R)

**Q4: Technology Deployment Options**

Web: client hosted

**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**

Texas Non-Subscribers  
Marine

**Q7: Please describe your system's document management capabilities.**

Clients can view and print claim documents in GRA. We also provide sort and filter features for easy look-up of claim documents.

**Q8: Do you provide user-defined fields?**

Yes,

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

There is no limitation on the number of fields that a client can bring into GRA

**Q9: Please identify all of the browsers supported by your system, including the earliest versions (i.e Internet Explorer 9)**

Internet Explorer 9  
Google Chrome  
Mozilla Firefox  
Safari

**PAGE 3: SYSTEM FUNCTIONALITY**

**Q10: 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	Unavailable

**Q11: Maximum amount of dashboards allowed by your system**

18 charts and reports

**Q12: Please describe any unique dashboard or alert that we did not list above**

Unique Dashboard features

- closely monitor claims on Claim Watch List
- view scheduled reports
- keep track of tasks/diaries that become due

Unique Alert Features:

- Bring back detailed report information when the criteria has been met

**Q13: Standard Reports**

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

**Q14: Policy and Exposure Tracking**

Policy tracking (list of policies)	Unavailable
Policy management (details of policies)	Unavailable
Underwriting	Unavailable
Certificate tracking	Unavailable
Certificate issuance	Unavailable
Property tracking (values)	Unavailable
Safety/loss control analysis	Standard
Bonds/contracts tracking	Unavailable
Asset Management	Unavailable
COPE Tracking	Unavailable
Fleet Management	Unavailable
Integrated Policy Management	Unavailable
Basic Values / Exposures Entry	Unavailable
Retention vs Premium Calculator	Unavailable
Coverage Gaps and Overlaps	Unavailable
Intelligent Mapping	Unavailable

**Q15: Analytics & Metrics Analysis: Please describe any third party software used to perform business analytics**

Web Focus - Active Report Technology

**Q16: Typical Analytics/Metrics reports**

Key Performance Indicators (KPI) measurements	Standard
Loss Forecasting	Unavailable
Cost of risk allocation	Custom
Heat Map reports on loss distribution/location	Unavailable

**Q17: How, if at all, does your RMIS compare client data to non-client data?**

This function is done by another department in ESIS

**Q18: Please describe any features or functions that are designed to support enterprise risk management processes:**

*Respondent skipped this question*

**Q19: Other notable features or comments**

Web focus - Active Report technology allows clients to drill down on the custom KPI/metrics to identify trends, causes of losses, large losses, etc.

**PAGE 4: Claims Self Administration Features**

**Q20: Please describe how your system develops premium and loss allocation estimation**

N/A

**Q21: Please describe your business process / workflow collection tools**

N/A

**Q22: Claims management features**

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard
Reserve Analysis (worksheet)	Standard
Other Claim Management Features	Predictive model scores Scanned claim documents Payments and reserve changes for claims Legal data ESIS Medical Impact Field Case Mgmt data ESIS Medical Imp[act Telephonic Case Mgmt ESIS Medical Impact Utilization review ESIS Nurseline data Disability data Recovery

**Q23: Third party reporting and documentation**

OSHA reporting	Standard
Other Carrier Data	Standard
Describe other carrier data & include names of carriers	AIG Safety National Hartford Star Indemnity MWECC One Beacon Discover Re XL Kemper Legion CNA Old Republic Zurich St. Paul Chubb Arch Sumo Japan

**Q24: Other notable features or comments**

Predictive Model scores- scores are assigned based on clam's unique characteristics.

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

**Q25: Did your organization develop the software platform your solution resides on?** Yes

**Q26: If another organization develops the software platform your solution is based upon, please describe this relationship.**

N/A

**Q27: Who maintains your software platform?**

IN-HOUSE AND CONSULTANT PROGRAMMERS

**Q28: What software is used to track your RMIS solution's defects, bugs, and problems?**

BUG TRACKER

**Q29: Do you have a need to develop software outside of your primary platform?** No

**Q30: If so, what applications are involved?**

N/A

**Q31: What third party vendors do you partner with to provide functionality?**

IBI - WEB FOCUS

**Q32: Does your firm use off-shore resources at all?** Yes,  
If yes, what company? COGNIZANT

**Q33: Who maintains your software infrastructure?**

In-house development team supports the RMIS system  
Operating system infrastructure is supported by ACE

**Q34: Are there multiple, separate data center facilities used to host data for global clients?**

NO

**Q35: Do you provide the ISO 27001 certification to your clients?** No

**Q36: Does your solution allow for full encryption at rest for all client data in all hosting facilities used by your organization?** Yes

**Q37: Does your solution provide the ability to encrypt specific fields while at rest?** No

**Q38: What technology/data standards are used/supported by your application? (e.g. WSI, WSS, ACCORD XML)**

N/A

**Q39: Describe encryption protocols used within, and in communication with, the product.**

We use HTTPS in communicating through the Web Application. When data is sent through FTP we use PGP, SFTP, and other available secure FTP protocols

**Q40: Describe any API offered**

N/A

**Q41: VENDOR or THIRD PARTY HOSTED DEPLOYMENTSSAS 70 audit (vendor/third party hosted versions only)**

Type II

**Q42: Does your company purchase cyber risk coverage to protect your clients' data assets?**

Yes

**Q43: Any additional comments related to software, technology and security**

*Respondent skipped this question*

**PAGE 6: Interfaces**

**Q44: List standard insurer/TPA interfaces (in order of frequency)**

Liberty  
C NA  
Travelers  
GBS  
GAB  
Frank Gates  
RSKCo  
Murphy and Beane  
Sedgwick  
Kemper  
AIG  
Zurich  
Matrix  
Highlands

**Q45: What is your hourly rate for custom interface work?**

\$175.00

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

**Q46: Briefly describe your standard training approach (when and to whom) and your methods utilized**

We provide training to our clients in three different methods:

1. We host four web-training sessions per month. Our clients have access to the web schedule on-line. We use Microsoft Live Meeting to facilitate all training sessions.
2. We service a toll free telephone number that clients can use between 8:00am - 5:00pmET.
3. We provide on-line access to job aids and manuals.

**Q47: Number of staff dedicated to training and/or support**

3

**Q48: Support types offered:**

Toll free number, Online help,  
Print user manual, Screen “tips” or mouse-overs

**Q49: Telephone support hours**

8:00am- 5:00pm ET

**Q50: Position regarding support of prior product versions**

We will provide support for prior product versions.

**Q51: Do you host a user conference?**

Yes

**Q52: What was the date of your last user conference?**

10/2014

**Q53: How many customers / prospects were in attendance?**

70

**Q54: What other methods do you use to obtain customer and/or prospect feedback and input on feature priorities?**

We have a customer feedback site in GRA for clients to use to provide instant feedback in the system. We host annual user conferences and solicit feedback from sessions designed to get back new features/enhancements. And we distribute surveys. We take the list of client enhancements and prioritize for future releases in GRA. Usually, within the next year or two they will see some of their enhancements released in production.

**PAGE 8: Implementation**

**Q55: Describe your delivery team’s structure:Do you have a dedicated service team approach or does one account executive handle multiple responsibilities?**

Dedicated service team who's responsibility is provide access to the RMIS tool.  
Dedicated implementation practice leader that manages large account implementation.



**Q56: Do you have dedicated business analysts?**

YES.

**Q57: Describe your process of tracking delivery team activities**

We use standard project management processes.

**Q58: Do you have a defined methodology for implementing projects?**

Yes, life cycle development process are used.

**Q59: Do you have a defined oversight or governance process for your implementations?**

YES

**Q60: How long is the typical implementation time?**

3 to 7 days for a typical implementation time for a new RMIS account. Time line for other custom RMIS implementation will vary.

**PAGE 9: Business Information**

**Q61: What was the year of your first RMIS implementation?**

1984

**Q62: Parent Company (if applicable)**

ACE USA

**Q63: Business Locations**

436 Walnut Street  
Philadelphia, PA 19106

**Q64: Top Officers**

Top Executive 1:	David Patterson
Top Executive 2:	Joseph Vasquez
Top Executive 3:	Jim Bond

**Q65: Number of employees (RMIS division only) in 2013**

Executives / Senior Management	5
Product Management, Marketing & Sales	3
Project Management, Development and Quality Assurance	19
Customer Support and Training	4
Other	5
Total Employees	36

2015 RMIS REVIEW Questionnaire: Bundled Vendors

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**Q67: Total annual revenue for all product versions offered** Privately held information

**Q68: Approximate percent of revenue spent on R&D** *Respondent skipped this question*

**Q69: Customer Statistics**

Total Current Users—all versions	9112
New Clients in Last Fiscal Year	221
Largest Number of Users in Single Contract	125
Number of lost clients in Last Fiscal Year	7

**Q70: Largest customer markets (Please rank top 5)**

Construction	3
Energy	5
Healthcare	2
Manufacturing	1
Transportation	4

**Q71: Top 5 RMIS competitors**

1.	CS Stars
2.	RiskConsole
3.	Origami
4.	RSG
5.	RiskTrac

**Q72: Predominant programming language** .Net / C#

**Q73: Databases supported** Microsoft SQL Server

**Q74: Please identify all mobile devices that can be used by your system**

Tablets - IOS & Androids  
Smart Phones - IOS & Androids

**PAGE 10: Pricing**

**Q75: Pricing approach for ongoing usage (check all components that drive cost for client; do not check if no charges associated)**

Named users, Read only (limited access users),  
Data conversions/feeds/EDI, Maintenance,  
Other (please specify)  
Reports Access & Adding self-admin claims to  
GRA

**Q76: Does your RMIS act as a “channel partner” for any 3rd party information or a la carte services?**

No

**Q77: Approximate total annual cost (ranges) excluding initial implementation**

10 Named Users	Less than \$25,000
100 Names Users	Less than \$25,000

**Q78: What are the associated fees and hourly rates to implement your system?**

Please see question 80.

**Q79: What is the typical one-time cost to implement your system?**

There is no charge associated with implementing GRA.

**Q80: Additional comments on pricing**

There are no fees charged for setting up access to the RMIS tool.  
There is a maintenance fee that is allocated back based on claim service fees.  
T&E charges for other RMIS services.

**PAGE 11: Other Information**

**Q81: Please comment on your recent system uptime/availability performance, as well as methods that you use to measure and monitor it.**

We maintain an in-house tracking tool that measures and monitors the systems performance.

**Q82: Please describe if your RMIS is multilingual.If so, please list the other languages supported.**

*Respondent skipped this question*

**Q83: List the top 3 reasons that you believe set you apart from other RMIS vendors**

- |   |  |
|---|--|
| 1 | Dashboard - Interactive reporting & active report tech |
| 2 | Ease of Use - screen navigation is user friendly       |
| 3 | Proactive monitoring features -Alerts                  |