



# ADVISEN

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**Q1: Contact Information**

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**Q2: Company Website**

[www.jdidata.com](http://www.jdidata.com)

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

Policy Admin, Claims Manager

**Q4: Technology Deployment Options**

Client server, Web: client hosted,  
Web: Vendor Hosted (ASP,  
Web: Third party hosted (Public Cloud)

**Q5: Lines of Business Supported**

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

**Q6: Other lines of business supported**

N/A

**Q7: Other related functionality**

Policy Administration,  
 Underwriting/Rating (Please list lines of business)  
 ,  
 Member Portal, Billing, Reinsurance/Excess,  
 Agency Fee Commission tracking

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

Manage, organize, documents from third party sources into claims system through various intergradation points creating a paperless environment.

**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?  
 N/A

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

Chrome, IE 8 or higher, Safari, Firefox

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

Client, LOB, program, department, location, custom levels

**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	Configurable
Multi-lingual	Configurable

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**Q13: Maximum amount of dashboards allowed by your system**      No limit

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

Ad Hoc dashboards

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**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	Configurable
Cost of risk/premium allocation	Custom
Underwriting/rating calculation	Standard

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**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	Configurable
Asset Management	Configurable
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	Custom
Please explain your intelligent mapping software capabilities	N/A

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

IBM Cognos

**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

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

N/A

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

Real time dashboarding, Ad Hoc

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

Fully automated EDI reporting to states, Claims Manager Lite

**Q22: Other notable features or comments**

We have developed a new partnership with Artsyl, a document management software company in order to meet the evolving needs of our customers.

**PAGE 4: Claims Self Administration Features**

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

N/A

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

*Respondent skipped this question*

**Q25: Claims management features**

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard
Reserve Analysis (worksheet)	Standard

**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

**Q27: Third party reporting and documentation**

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

**Q28: Other notable features or comments**

Bank reconciliation (positive pay)

**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.**

N/A

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

JDi Data

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

JIRA

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

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

Document Management,

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

Artsyl, IBM

**Q36: Does your firm use off-shore resources at all?** No

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

Our IT Department

**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?** No

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

**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)**

Accord XML, .NET, C++, Java

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

**Q44: Describe any API offered**

Various API's, such as Quickbooks, SAP,



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

- Physical server or virtual server (VMWare or XenServer preferred)
- Microsoft Windows 2008 R2 or later with IIS, Standard edition or better
- Microsoft SQL Server 2008 R2 or SQL Server 2012, Web edition or better
- Microsoft .NET Framework v4.5.1
- Minimum of 2 CPUs, physical or virtual
- Minimum of 4 GB of RAM (8 GB preferred)
- Minimum of 40 GB disk space, though this can vary drastically depending on the documents that need to be imported into the system. Generally speaking, the total storage requirements amount to approximately 80 GB plus the space required for document storage.

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

Yes

**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)**

*Respondent skipped this question*

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

We continually monitor state websites in order to update forums around laws and regulations.

**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**

*Respondent skipped this question*

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

\$195.00

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

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

A JDi senior trainer will visit new clients to conduct a thorough 3 part training. End User, Power User, and Train the Trainer are individual classes offered. We also provide continuous classes in order to best equip users.

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

22

**Q57: Support types offered:**

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

**Q58: Telephone support hours**

8AM EST to 8PM EST Monday thru Friday.

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

We support past versions but require clients to move onto new updates.

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

Yes

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

*Respondent skipped this question*

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

*Respondent skipped this question*

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

We hold quarterly business meetings to insure client feedback is accounted for. Additionally, utilize JIRA to identify client needs.

**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 have a dedicated service team.

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

Yes

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

Utilizing project management software we track activities and notify clients of updates.

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

Yes

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

Yes, our account executive

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

Three to nine months depending on client needs.

**PAGE 9: Business Information**

**Q70: What was the year of your first RMIS implementation?** 1993

**Q71: Parent Company (if applicable)** *Respondent skipped this question*

**Q72: Business Locations**

Fort Lauderdale, FL

**Q73: Top Officers**

Top Executive 1:	James DeRosa
Top Executive 2:	Joe Wolczanski
Top Executive 3:	Joe Collins

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

Total Employees 24

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

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

Executives / Senior Management	6
Product Management, Marketing & Sales	6
Project Management, Development and Quality Assurance	14
Customer Support and Training	4
Total Employees	30

**Q76: Total annual revenue for all product versions offered** *Respondent skipped this question*

**Q77: Approximate percent of revenue spent on R&D** *Respondent skipped this question*

**Q78: Customer Statistics** *Respondent skipped this question*

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

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

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

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

**Q81: Top 5 RMIS competitors** *Respondent skipped this question*

**Q82: Predominant programming language** .Net / C#, Java, PHP, Visual Basic

**Q83: Databases supported** Oracle, Microsoft SQL Server

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

Android, Apple

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

2013 All financial information is confidential

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

<b>Q86: Please identify all revenue-generating activities:</b>	Software license sales, Custom applications, Data Conversion and Consolidation activities, Consulting
<b>Q87: Please indicate the percentage of revenue derived from these activities:</b>	<i>Respondent skipped this question</i>
<b>Q88: Does your RMIS act as a “channel partner” for any 3rd party information or a la carte services?</b>	No

PAGE 10: Pricing

<b>Q89: Pricing approach for ongoing usage (check all components that drive cost for client; do not check if no charges associated)</b>	Site license, Module/LOB pricing, Named users, Data conversions/feeds/EDI, Integration with HR, A/P systems
<b>Q90: Approximate total annual cost (ranges) excluding initial implementation</b>	<i>Respondent skipped this question</i>
<b>Q91: What are the associated fees and hourly rates to implement your system?</b>	<i>Respondent skipped this question</i>
<b>Q92: What is the typical one-time cost to implement your system?</b>	<i>Respondent skipped this question</i>
<b>Q93: Additional comments on pricing</b>	<i>Respondent skipped this question</i>

PAGE 11: Other Information

<b>Q94: Please comment on your recent system uptime/availability performance, as well as methods that you use to measure and monitor it.</b>	99.9% uptime.
<b>Q95: Please describe if your RMIS is multilingual. If so, please list the other languages supported.</b>	Our system can be configured to any language.

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

- |   |               |
|---|---------------|
| 1 | Support Model |
| 2 | Pricing       |
| 3 | Functionality |