



# ADVISEN

Insurance Intelligence®

**Q1: Contact Information**

Name: Robert Petrie  
Company: Origami Risk LLC  
Address: 444 North Orleans Street  
City/Town: Chicago  
State: IL  
ZIP: 60654  
Country: USA  
Email Address: rpetrie@origamrisk.com  
Phone Number: (847) 786-2060

**Q2: Company Website**

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

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

Origami

**Q4: Technology Deployment Options**

Web: Third party hosted (Public Cloud)

**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**

Origami's on-screen tools provide the capability of managing all lines of commercial insurance.

**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: Origami's policy underwriting/rating capabilities are built so that clients have the flexibility of managing any commercial line of business.

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

Origami's document management tools are fully integrated into the Origami application, eliminating the need to utilize third party tools. Built with the flexibility and configurability found throughout the application, documents and electronic files can be uploaded into Origami in a number of ways:

- Uploading a single file or multiple files at one time and associating with a record such as an incident, claim, policy or location.
- Forwarding a single or multiple electronic files into Origami via email, automatically associating the email and any attachments with the desired record such as a specific incident, claim, policy or location.
- Single or multiple paper documents can be scanned and loaded into Origami, initiating any configured workflow and notification actions and automatically routing them to the correct user for processing.

Once documents are automatically processed into Origami, they can be easily managed on a single or multiple computer monitors, allowing users to perform a number of of actions, including:

- Quickly associate documents with one or many records in Origami, such as a claim, incident, contact or location.
- Update any of the configurable fields associated with documents such as document type, status or description.
- View all pages of a document with thumbnail previews, with the ability to split, copy or reassign on the fly.

Documents are automatically routed to client defined queues, based on the values of the fields associated with documents so that they are automatically routed to the correct user for processing.

**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?

There are not limits on the number or type of fields in Origami. Various types of custom fields can be added by administrative users, including: - Text -Number -Narrative Text (unlimited character) -Money -Drop Down -Multi Select - Contact lookup -User lookup -Yes/No

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

Origami is browser agnostic and supports all modern browsers, including:  
 Internet Explorer 8 and higher  
 Mozilla Firefox  
 Google Chrome  
 Safari

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

Origami can accommodate an unlimited number of levels in the location hierarchy. Clients can also create an unlimited number of hierarchies.

**PAGE 3: SYSTEM FUNCTIONALITY**

**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 are an unlimited number of dashboards allowed in Origami.

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

Origami give users the ability to configure their own dashboards through user friendly, point-and-click tools. These tools enable users to create an unlimited number of dashboards with an unlimited number of analytics ranging from filtered graphs, charts, notification lists and pre-defined data views. Users can utilize pre-defined analytics or build custom analytics using simple on-screen tools. Dashboards can be exported to PDF, scheduled and distributed via email, combined with reports to create report packages and more.

There are a number of aspects of Origami that provide immediate alerts to specific users. Primarily, the email and task notifications can be generated and delivered directly to a user's inbox or task list on the dashboard. For example, Employee Health and Safety Inspections in Origami drive a number of follow up actions with due dates. Origami's dashboard alert capabilities give users the advanced notice they need to complete their assigned tasks on time.

Origami recently introduced Weather Alerts, which is tied to the National Weather Service and provides immediate alerts for any specific type of weather events specified by the client. The weather events are associated to the client's locations and provide alerts and notifications to the right people in the right place.

**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	Origami has a number of mapping capabilities within the application, in dashboards and reports, providing the user the ability to integrate various types of data (losses, exposures) into geo-coded locations onto a map.

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

Business Analytics are fully integrated within Origami without the need for third party software or licensing.

**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	Loss Analysis; Actuarial; Risk Control/Safety; Exposures and Values; Risk Pool

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

Origami is able to compare client data to non-client data in a number of ways, including:

- Integration with Advisen Insurance Program Benchmarking that compares the client's policy data (limits, deductibles, premiums, etc.) to that of it's peers.
- Origami's Benchmarking tools allow clients to load and compare their own data to various industry data sets

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

Origami's ERM tools give client's the ability to automate and manage their ERM process with the same flexibility and configurability found throughout the Origami platform. Specifically, Origami's ERM tools help clients manage:

- Risks - define risk and associate with specific business units or functional areas, with specific risk owners
- Risk Assessments and Assessment Sets - automatically email web-based risk assessments to risk owners, allowing them to assess and score risks based on Impact and Likelihood
- Risk Action Plans - for those risk that require an action plan, Origami can generate an action plan for mitigation, assign to the applicable owner and provide follow up notifications for completion.

In addition, Origami provides a number of analytics around ERM programs including bubble charts that define the quadrant in which specific risks fall, taking into account Impact, Likelihood, Velocity and Vulnerability.

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

Origami is the most agile RMIS on the market today, providing releases of new and enhanced functionality every 6 to 8 weeks on average. We are constantly evaluating our list of innovations based on the direct feedback from our current and prospective clients. A couple of examples that we are looking to deploy in the near term are:

1. Integration with the Tableau analytics platform

Origami's Batch Processing tool was built explicitly for designing the ideal in-and-out transmissions to any third party application as needed, giving clients full visibility and access to their integration schedules, encryption details, source and destination directories and history logs. Clients regularly use the tool to interface with a variety of innovative tools, such as Tableau. Now, with the click of a button, Origami clients will be able to export data automatically or manually to Tableau for additional expert analysis.

2. Claimant Mobile Application

Origami is completely accessible on any mobile device, but we will soon be releasing a mobile application specifically for claimants. The application will be available for download from Google Play and Apple's App Store, and it will allow a claimant to self-register and view limited details about their claim, indemnity payments, and be able to easily contact their claim adjuster. Origami sees this specific application being valuable to liability oriented claims administration shops in industries such as retail business, as well as TPA's.

---

**Q22: Other notable features or comments**

Origami's tools are built to accommodate a wide range of clients, from the highly complex process of a large TPA or Risk Pool, to the mid sized company who is looking to aggregate a couple of TPA feeds. Some specific on-screen tools with Origami that provide a great deal of value to our clients include:

-The Origami Portal gives clients the opportunity to replace old technology or manual processes for outward facing stakeholders (Clients TPAs or Brokers, for example) with a robust and highly configurable webpage that provides access an unlimited number of users to accomplish any number of defined tasks. By simply placing a button on their website or intranet site, parties such as customers or employees in the field, can be automatically logged into Origami without a username and password, and brought to a client defined webpage that presents any type of information and functionality defined by the Origami client. Examples of Portal usage are:

+ A large multi-national corporation has automated its internal process for Certificate of Insurance requests. The Origami Portal has an intake screen that can be completed by any employee requesting a certificate. Once the request is saved, the entire process is automated in Origami from logging the details for the Risk Management department to sending a request to the Insurance Broker to providing a simple way for the broker to send the Certificate back to Origami where it is saved to the request record and routed to the original requestor.

+ Risk Pools provide a clean and professional member portal, streamlining the process to conduct a number activities such as incident/claim reports, exposure management (add/remove a vehicle, for example), request Certificates and more.

-Origami's Batch processing tool has brought RMIS system interfacing technology out from behind the curtain, allowing clients to now view, update and manage any configured interface using on-screen functionality. Traditional RMIS providers typically build and manage interfaces on a server inaccessible to client administrators, with a very cumbersome and expensive model for the creation and maintenance of the interfaces. In Origami, clients have the ability to see the interfaces, update information such as scheduling, exception handling notifications, encryption, delivery details such as FTP directories and more. For more technically advanced clients, the tool provides access to configure their own interfaces, though this is typically managed by Origami's Service Professional.

- Non-users of Origami can be granted access to the specific record to which workflow criteria applies, through an automated email containing a token-embedded link. This link allows the recipient to click on the link and be automatically logged into Origami with access to the single record, and nothing else in the system. Great use case examples of this functionality are:

- a Safety Manager does not have access to Origami, but needs to review infrequent but severe employee accidents when they occur. Grant Access can give the Safety Manger immediate access to the incident, with any security access (read/write by field) automatically applied as specified.

- a defense attorney is required to deliver client a status report on litigation on a monthly basis, and is typically delivered in PDF format. Grant Access can be set up to send an email reminder monthly, with a Grant Access link so that the attorney can input the status report directly into Origami, without having access to anything else within the application.

- Origami has been architected from the beginning with two priorities in mind: provide our Service Professionals with the tools to implement client quickly and efficiently and then to provide clients with the administrative, on-screen tools that they want to be able to change, manage and configure their application on an ongoing basis, without having to call their Service Professional for assistance. Naturally, many clients ask Origami to perform these functions for them, but the application provides the tools should the client choose to use them.



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

Origami clients are able to calculate their TCOR by configuring the system to calculate the cost elements that apply to their specific cost of risk. Naturally, items such as as losses (claims) and premiums (policies) are easily pulled into he calculation as cost elements, but clients can also designate cost elements not traditionally found in a RMIS, such as expenses for a specific Loss Control program, or the cost of a RMIS.

Once the cost elements are defined, clients can utilize Origami's on-screen tools to build weighted formulas to apply to the various cost elements. By providing flexible and easy to use tools, Origami gives clients the ability to quickly arrive at an accurate TCOR.

Not only is TCOR calculated with reports within Origami, but inline analytics can be generated directly from any entity or level within the location hierarchy, generating graphs and data in a clean year over year analytic. Taking it one step further, Origami also provides the ability to quickly generate loss ratio's on the various cost elements with value drop down fields that the user can quickly assign to each cost element. By displaying the dollar value of the TCOR, as well as loss ratios for each element, clients can quickly understand their year over year TCOR as it relates to the overall exposures.

---

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

Origami's workflow management tools provide the ability for clients to define and set up automated tasks, notifications, field updates and more. Through the use of Data Entry Events, Trigger Notifications and Validations, Origami provides one of the most intuitive and advanced workflow management toolset.

When defining a business process that will be automated within Origami, the administrative user will simply define the criteria in which a specific action will take place through the use of Origami's advanced filters. For example, she can specify that a process applies only when an existing claim is edited, the coverage is equal to Property and the field "Flood Zone" is changed. Once the filter criteria is defined, an action can be specified, prompting Origami to automatically kick off any number of actions including:

- Non-users of Origami can be granted access to the specific record to which the filter criteria applies, through an automated email containing a token-embedded link. This link allows the recipient to click on the link and be automatically logged into Origami with access to the single record, and nothing else in the system. Great use case examples of this functionality are:
  - a Safety Manager does not have access to Origami, but needs to review infrequent but severe employee accidents when they occur. Grant Access can give the Safety Manger immediate access to the incident, with any security access (read/write by field) automatically applied as specified.
  - a defense attorney is required to deliver client a status report on litigation on a monthly basis, and is typically delivered in PDF format. Grant Access can be set up to send an email reminder monthly, with a Grant Access link so that the attorney can input the status report directly into Origami, without having access to anything else within the application.
- Tasks can be automatically created, with data from the record (or associated records) being populated into the subject or body of the task and assigned to any users or user roles selected. Due dates can be generated relative to any other record date and a variety of ancillary task information can be defined (project, priority, etc.)
- Emails can be automatically sent out from Origami to static email addresses, or to any email address found within the specific record or corresponding records. For example, Origami can pull a safety manager's email address from the location associated with a claim. Fields can be tagged in the subject and body of the email and populated from the record and attached documents can be pulled from the record onto the email. In addition, Origami can insert URL links into the email, giving the recipient of simply clicking on the URL and navigating directly to the record specified.
- Mail Merge documents can be generated in PDF or Word format and sent via email with the process mentioned above.
- For more complex requirements, the Origami's workflow tools provide the ability to craft a script (typically by the Service Professional) to accomplish any number of requirements. For example, when an incident is completed, a script can automatically generate a corresponding investigation record in Origami. Now, when the Safety Manager mentioned above receives the Grant Access URL, they can be brought directly into a distinct investigation record, which was automatically created prior to receiving the email.
- A number of other actions can be driven through the workflow tools: data validations that prevent saving or simply provide a warning message; initiate batch a batch process; run a report, and more.

Everything described is available through on screen tools accessible to clients. Origami can handle the most complex of process automation in the most user friendly fashion.

**Q25: Claims management features**

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard

Reserve Analysis (worksheet)

Standard

Other Claim Management Features

Origami's claims management functionality is designed to be simple and easy to use, but robust enough to accommodate the most complex of risk management organizations. There are a number of tools that give clients greater insight into their overall claims management process, as well as granular details as they apply to individual claims. A few of these feature are:

1. Claim Supervisor Details - Origami provides a number of dashboard analytics and reports that provide insight into the overall management of claims, overall workload, claim closure rates, reserving practices and more.
2. On screen filters and analytics - not only can clients configure claim screens to fit their own layout requirements and workflow, but Origami's administrative tools also provide the ability to build onscreen filters and analytics directly on the claim screen. Want to quickly see a grid of all other claims involving the claimant? Simply insert a filter on the claim screen.
3. Claim Comparison analytic - Origami Risk designed to be elegant and easy to use. While Origami provides all of the various features found in a standard RMIS, it was built upon the premise that software should follow the organic workflow of its users, not the other way around. Powerful analytic tools are found throughout Origami and can be accessed with a single mouse click, instead of segregated functionality that require users to constantly navigate to separate silos of the system in order to gather information. The Claim Comparison tool is accessed directly from the claim and quickly runs a comparison of all claims to the current claim, based on the matching criteria selected by the user, within the dates selected by the user. Within seconds, the user is able to identify how the current claim compares to other matching claim on a scatter chart based on date of loss and severity, with a number of other details provided such as minimum, maximum and average incurred, standard deviation and more. Finally, within seconds of clicking a check box, Origami can level all claims to show their valuations at the same age as the primary claim.
4. Reserve Analysis tools - Origami has a number of dashboard analytics and reports to assist in reserve analysis for practices such as under

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

reserved claims, stair stepping reserves and more.

**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	Origami's Claims Administration tools are used by a variety of organizations from smaller self-insureds to large, complex, multi-client TPA's, and are built to provide robust capabilities with intuitive usability. Some specific Claims Administration capabilities include: Configurable Reserve Worksheets, Indemnity Benefits, EDI and CMS-111, Check / ACH processing with financial authority routing, MedBill third party integrations and State Fee Scheduling, Auto Reserving, Litigation Management, Integrated Email Communications, Full Document Management and more.

**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**

Origami was built to enable clients to integrate their RMIS with any third party applications without the need for custom development or cumbersome, back-end processes to be solely managed by our Data Processes. Two tools were specifically built to enable Origami's service professionals to be more effective in the implementation and ongoing service of our client's data needs, but were also built to enable our clients to take as much control or oversight of their interfaces as they see fit. Specifically:

- The Origami Batch Processing tool is an on-screen administrative tool that allows Origami's service professionals and client the ability to perform custom scripting of the database, with full scheduling capabilities, manual process kick off and encryption.

- Origami's Data Import Center comes with a number of pre-defined spreadsheets that can be utilized in order to import data such as Incidents, Policies, HR information, vehicles or other any other of the over 75 standard data sources provided. The spreadsheets (or delisted files) are dynamic to allow for the import of custom fields and can be scheduled and pulled into Origami on any frequency needed by the client, with full encryption, exception handling and notifications.

**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?**

Origami Risk maintains and regularly enhances our own platform.

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

Origami Risk uses Trac Integrated SCM and Project Management to manage product enhancements and fixes internally.

**Q33: Do you have a need to develop software outside of your primary platform?** No

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

Origami Risk has developed and owns our technology platform. We integrate with other applications (Excel, PDF, etc.) but no other applications are required to develop or support Origami Risk.

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

We do not outsource any work to third parties other than hosting, where our vendor is Amazon Web Services.

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

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

Origami Risk IT Operations and Development employees maintain our software infrastructure.

**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)**

Origami Risk utilizes technologies that support industry standard data interchange formats, including EDI, fixed and variable length file formats and XML formats including ACCORD.

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

Origami Risk utilizes PGP encryption for files at rest and in transit, SSL for all web-based requests, and FTPS/SFTP for file transfers. Origami Risk encrypts all client databases with database encryption technology (AES256) and file systems using AES256 based encryption. Origami Risk utilizes a key management system to manage and rotate keys.

**Q44: Describe any API offered**

Origami Risk offers a web services API providing a secure, REST-based web service to query and update most modules within the Origami application.

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

Our clients only need an internet connection and a browser to access and use Origami Risk.

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

**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**

Security at Origami Risk is paramount. Our ability to provide a fast, always-available RMIS in the most secure environment possible is a daily focus for Origami professionals. Our constant investment in Origami's application security, our AWS environment and Origami's internal controls are a testament to the fact that our role as steward of our clients' sensitive data is first and foremost on the minds of every Origami professional.

To that end, Origami Risk has attained an SSAE16 SOC2 attestation indicating the effectiveness of the security design and controls for the Origami application. In order to achieve this status, Origami Risk has implemented controls governing the handling of client data from its origination, in transit, and throughout its existence within the Origami infrastructure and system. These controls include policies, procedures, and technology to protect the privacy, integrity and availability of the Origami system and its data. These controls cover colleague equipment and interactions with data using a least privilege approach, encryption of data at various points utilizing centralized key management, robust access control rules and technology, high availability and redundancy architecture, and sophisticated monitoring systems.

Origami Risk also recently underwent a NIST-800 audit for a Medium/Moderate System Categorization with favorable results. Origami Risk employs third party agencies to conduct penetration and vulnerability testing, as well as security audits.

**PAGE 6: Interfaces**

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

Origami interfaces with a number of third party claim organizations, such as TPAs and Carriers. Some of those are:

- Gallagher Bassett
- Sedgwick
- Broadspire
- Carl Warren
- Liberty Mutual
- Travelers
- Hartford
- CCMS
- Zurich
- AIG
- ACE
- ESIS
- Chubb
- CNA
- FM Global
- PMA
- AmTrust
- Sentry

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

Origami transmits EDI via the two largest providers of this service for its self-insured and TPA clients that administer WC claims. Origami has an open API which provides a seamless interface for integrating with vendors with specialized capabilities such as EDI reporting to the states. All the data for EDI compliance is maintained in Origami and EDI processes can be managed and controlled through Origami. with vendors with specialized capabilities such as EDI reporting to the states. All the data for EDI compliance is maintained in Origami and EDI processes can be managed and controlled through Origami.

**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**

Origami interfaces with dozens of third party systems for a variety of types of data. Some of the more common are:

- Legal Bills
- Matter Management
- Pharmacy Services
- Locations
- ISO
- Fleet
- Maintenance
- Training
- Incidents
- Lost Time Records

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

Origami's Professional Services rate is \$185 / hour



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

For each client, Origami Risk has separate training sessions for each type of user of Origami. We provide this training on-site, via video training, or at Origami Risk's office. We work with the client throughout the implementation to understand the full needs of the client, it's users and then provide a recommended training plan.

Origami provides intensive group training at their User's Conferences, allowing clients to choose which level of expertise they would like training on (101, 201, etc.). Online webinars are also a great avenue in which user's receive training in a group setting, provided by Origami's Service Professionals.

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

40

**Q57: Support types offered:**

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

**Q58: Telephone support hours**

Standard US support is 7AM to 9PM, EST, with specific support hours offered to international clients. After hours support is available through a dedicated email address and cell phone numbers of the client's service team.

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

Origami is a single version, Software-as-a-Service RMIS application. All clients are always on the most recent version and automatically receive upgrades every 6-8 weeks.

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

Yes

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

February 2014 and the next conference is in September 2015

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

126

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

Origami Risk's product development priorities are built upon client feedback. Other than at the client conference, there are a number of ways that we receive feedback or input, primarily through the day to day interaction between Origami's service professionals and clients. In addition, Origami conducts regular surveys soliciting feedback and hosts a number of meetings with groups of clients with specific interests or needs.

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

Origami Risk's approach to professional services, whether it be for new client implementations or ongoing service of existing clients, is tailored to provide the best possible business outcome for each individual client. Our model is extremely flexible and every Service Professional has the technical expertise and business knowledge to complete implementation single handedly.

For more complex implementations, Origami's approach is to provide a team of professionals led by a Client Executive, and typically includes a Project Manager, a Data Specialist, a Business Analyst, and additional resources as needed.

On more simple and straightforward implementations, often times a single Service Professional can effectively accomplish all tasks in order to help the client reach their business objectives using Origami.

Regardless of the size or complexity of the implementation, Origami Risk's model maintains continuity of service for clients after they are live. There is a great deal value in the knowledge transfer, day to day decision making and discussions that take place throughout an implementation, so the Service Professional running the implementation remains the primary point of contact after go-live as well.

---

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

Yes

---

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

Using the implementation methodology described in the next question, Origami tracks the process of delivery team activities through the use of internal metrics based on the various aspects of an implementation: Planning, Execution, Monitoring, Controlling and Closing. For example, prior to a kick off, there are a number of activities that take place after a team is assigned that constitute the planning phase. An internal kick off call is held, a preliminary project plan is developed based on the Statement of Work, a client kick off meeting takes place, additional working meetings are scheduled and conducted and weekly status calls are scheduled updating team activities. All of the deliverables in these activities are the responsibility of the Service Professional managing the account, with oversight provided within our service organization.

---

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

Origami Risk's implementation methodology utilizes best practices designed by the Project Management Institute. We focus on Planning, Execution, Monitoring, Controlling and Closing. Our project plans identify responsibilities for Origami Risk as well as the client and we utilize proper change control documents to keep track of iterative decisions made by the team throughout the process.

The primary Service Professional oversees the Origami support team which includes specialists in data conversion and integration, system configuration, and user training. We follow an iterative methodology, with weekly deliverables.

---

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

Yes

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

We implement systems in as little as two weeks if there are no dependencies on carriers/TPAs or other vendors for data, with most other complex implementations ranging anywhere from two to six months. For each implementation we provide a draft project plan with proposed timing of deliverables by all parties. We agree jointly with the client on the dates for the agreed project plan and work towards those dates.

**PAGE 9: Business Information**

**Q70: What was the year of your first RMIS implementation?** 2009

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

**Q72: Business Locations**

Chicago, Illinois  
 Atlanta, Georgia  
 Denver, Colorado  
 New York, NY  
 Philadelphia, Pennsylvania  
 Rotterdam, Netherlands  
 Various Remote Locations

**Q73: Top Officers**

Top Executive 1: Robert Petrie  
 Top Executive 2: Stephen Fischer  
 Top Executive 3: Aaron Shapiro

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

Total Employees 33

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

Total Employees 55

**Q76: Total annual revenue for all product versions offered** We are a private company and consider that information to be proprietary information.

**Q77: Approximate percent of revenue spent on R&D** We are a private company and consider that information to be proprietary information.

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

**Q78: Customer Statistics**

Total Current Parent Level Clients –this client version	190
Total Current Parent level Clients- all previous versions	N/A
Total Current Users—all versions	Origami averages about 100,000 users per day
New Clients in Last Fiscal Year	52
Largest Number of Users in Single Contract	10,000
Number of lost clients in Last Fiscal Year	0

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

Other (please specify)	The answer varies by market segment. For RMIS/Claims Admin, our largest customer markets are: Manufacturing, Retail/Hospitality, Healthcare, Transportation, Energy, Public Sector. For claims administration they are: Public sector, TPAs, and retail.
------------------------	--

**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**

1.	Riskconnect
2.	STARS
3.	Systema
4.	Ventiv (formerly Aon eSolutions)
5.	DAVID NavRisk

**Q82: Predominant programming language**

.Net / C#

**Q83: Databases supported**

Microsoft SQL Server

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

Origami operates on all mobile platforms including iOS, Android, Windows, Blackberry, etc.

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

2013	N/A
2014	N/A

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

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

Software license sales,  
Data Conversion and Consolidation activities,  
Consulting, Ongoing maintenance,  
Please list all other revenue generating activities  
Professional Services

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

Software license sales	N/A
Custom applications	N/A
Data Conversion and Consolidation activities	N/A
Consulting	N/A
Ongoing maintenance	N/A
Other	N/A

**Q88: Does your RMIS act as a “channel partner” for any 3rd party information or a la carte services?**

Yes,  
If yes, please describe and include additional pricing information if relevant.  
Origami is a channel partner for Advisen to integrate Advisen's innovative policy benchmarking database and tools into Origami.

**PAGE 10: Pricing**

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

Named users,  
Non-named users (concurrent usage),  
Read only (limited access users),  
Data conversions/feeds/EDI, Support, Training,  
Integration with HR, A/P systems

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

10 Named Users	\$25,000 - \$50,000
100 Names Users	\$75,000 - \$100,000

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

\$185/hour

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

between \$25,000 and \$150,000

**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.**

In 2014 we had 8 minutes of unplanned downtime (99.998% uptime), 6 hours of planned downtime (maintenance and releases). We utilize several monitoring tools and client reports for determining outages, including Pingdom and New Relic. Unplanned downtime is an outage that affects all clients ability to use the system. Planned downtime includes maintenance windows that are communicated at least a week ahead of time.

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

Origami has users in dozens of countries and includes features that support internationalization. Fields and field labels are available in all languages except for languages that require complex symbols (such as Japanese). Embedded help text is also available in multiple languages and coded fields support decodes in multiple languages. Origami supports international standards for displaying dates and also support both local currency and a rollup currency for comparison.

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

- |   |                       |
|---|-----------------------|
| 1 | Client Success        |
| 2 | Experienced Employees |
| 3 | Platform              |