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Q1: Contact Information

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Q2: Company Website

www.pcisvision.com

Q3: Product NameNote: Please include all names of systems currently supported

ClaimsVISION

Q4: Technology Deployment Options

Client server, 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

Excess & Surplus

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:
 The Underwriting/Rating/Commission modules are for WC only.

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

ClaimsVISION has a rich variety of document management capabilities. Correspondence module leverages a built in forms engine where the user configures which templates are attached conditionally to a claim (automatically when a business rule is met). Creating a new document could not be simpler, the solution uses simple Microsoft Mail Merge technology to do so; it also supports copy and pasting from Microsoft Word. ClaimsVISION comes out of the box pre-integrated with ImageSite 9.0. This is a sophisticated imaging system that also has an advance workflow component, that ties into ClaimsVISION's rules engine.

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 NO limitations to the number of field types an end user , with authority, can add. They have the ability to do so as a drop down, free text, radio button. An end user can make the field mandatory or not. The most powerful aspect to this is it ties to ClaimsVISION's unlimited hierarchy so it allows for an unlimited amount of fields. These fields, once added, are reportable. *Different user fields can be seen depending on the user, the LOB, the State, and other parameters so that only the fields relevant to the user's workflow appear appropriately.

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

IE 8+
Google Chrome

Q11: Please list the levels of hierarchy of your RMIS

The system supports an unlimited amount of hierarchy levels, as well as multiple hierarchies. The Hierarchy levels drive business rules, correspondences, workflows, and notification, and more.

PAGE 3: SYSTEM FUNCTIONALITY

Q12: Dashboards and Alerts

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

Q13: Maximum amount of dashboards allowed by your system

There are no limitations to how many dashboards are allowed by the system.

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

Our philosophy on dashboarding is different than just a display of reporting metrics on a page. ClaimsVISION treats dashboards as snapshots of relevant information that are highly visual and equally functional, tying into user workflow and expediting processes. The flavors of dashboards in ClaimsVISION are User (workload focused), Claim Activity, Claim Health Report Card (fraud and suspicious activity related) *next release, and Reporting Metrics.

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	Configurable
Loss triangles for data development and trending	Standard
Deductible reimbursement tracking	Standard
Profiling, red-flagging events	Standard
Goal tracking	Unavailable
Loss forecasting	Custom
Experience Modification	Unavailable
Cost of risk/premium allocation	Standard
Underwriting/rating calculation	Unavailable

Q16: Policy and Exposure Tracking

Policy tracking (list of policies)	Standard
Policy management (details of policies)	Standard
Underwriting	Unavailable
Certificate tracking	Configurable
Certificate issuance	Unavailable
Property tracking (values)	Configurable
Safety/loss control analysis	Custom
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	Unavailable
Coverage Gaps and Overlaps	Unavailable
Intelligent Mapping	Unavailable

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

Proprietary Data Analytics tool allows for all data to be delivered via secure vpn tunnel to users preferred reporting tool Excel, Crystal, etc.

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	Unavailable
Other Key Reports	Risk Analysis Reports: Loss Triangle Builder integrated within the system.

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:

The robust claims management tools provide detailed and quantified data that drives enterprise risk management practices. Trending reports, proactive notifications, configurable plan of action workflows and more are all driven from ClaimsVISION.

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

Claims Health Report Card; Integrating big data/ social media mining into fraud detection; pilot program with wearables technology company for workplace safety practices & data analysis.

Q22: Other notable features or comments

PCIS also gives clients access to a reporting database for their reporting needs.

PAGE 4: Claims Self Administration Features

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

ClaimsVISION captures all data points required to calculate TCOR, in a variety of ways, we calculate it on a custom basis per clients' methodology and leverage ClaimsVISION's reporting platform to generate estimates on an ongoing basis.

Q24: Please describe your business process / workflow collection tools

ClaimsVISION comes pre-integrated with ImageSites workflow management tool. This tool allows end users to define workflows- actions and reactions of events including processes, notifications, alerts, and business rule triggering.

Q25: Claims management features

Customizable Diary	Standard
Adjuster Notes access (if applicable)	Standard
Reserve Analysis (worksheet)	Standard
Other Claim Management Features	Forms engine that maintains all state forms in real time. All state benefits calculator. User configurable business rules engine.

Q26: Claims administration features

Incident Tracking	Standard
Check writing	Standard
Utilization review	Standard
Medical Bill Repricing	Standard
Transitional Work Management	Configurable
Built-in Reserve Estimation Worksheets	Standard
Fraud Detection capability	Configurable
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	Standard
First Report of injury	Standard
FROI/SROI reporting	Standard
CMS reporting	Standard
EDI reporting	Standard

Q28: Other notable features or comments

Our FROI/SROI reporting solution is "No Touch" and 100% automated between ClaimsVISION and the state via our partner ISO. There is no adjuster intervention required to trigger a FROI/SROI system's intelligence knows when reportable and sends for pre-screening to ISO then to the State.

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.

ClaimsVISION is written in Microsoft .NET

Q31: Who maintains your software platform?

PCIS maintains it in house.

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

Seapine's Testrack & Solosubmit

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

Q34: If so, what applications are involved?

For interface processes, Microsoft Biztalk server is used.

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

ISO, CMS, Workerscompensation.com, Imagesite, JQuery

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

Q37: Who maintains your software infrastructure?

PCIS

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

Yes. We use Internap Collocation facility.

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

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

TLS encryption is used to secure communication to/from the client. TDE encryption is used to secure data at rest.

Q44: Describe any API offered

Respondent skipped this question

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

Web/Application Server: 4x CPU, 4GB RAM, 50GB HDD
 SQL/Database Server: 8x CPU, 8GB RAM, 100GB HDD
 File/Document Server 2x CPU, 4GB RAM, 100GB HDD
 MS Windows Server Standard
 MS SQL Server Standard
 Javascript Spellcheck

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,

Explanation \$2,000,000

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)

HR, Bill Review, CMS Medicare Reporting, ISO ClaimSearch, No Touch Froi SROI, TPA, Notes,

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

We have extensive experience with ISO and Healhtech. Our new FROI/SROI reporting solution is "No Touch" and 100% automated between ClaimsVISION and the state via our partner ISO. There is no adjustor intervention required to trigger a FROI/SROI system's intelligence knows when reportable and sends for pre-screening to ISO then to the State.

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

Bank Recon , Positive Pay, Policy Systems

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

Typially between \$150-\$225.

PAGE 7: Training, Support and Customer Feedback

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

PCIS offers multiple courses ranging from Train the Trainer to End User classes. Our sessions are completely customizable depending on the needs of the client. We have a base set of training modules for end-user and administrator. Broken up by Users, Admin, and Interfaces. And generally provided in several phases, project initiation and train the trainer. Webinars are also often utilized for training if the client desires, especially for ongoing training for new features, as well as a robust Online Help system.

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

8

Q57: Support types offered:

Toll free number,
Dedicated (not pooled) support person,
Online help, Print user manual

Q58: Telephone support hours

8 am EST to 8pm EST.

Q59: Position regarding support of prior product versions

PCIS supports all versions as well as modifications to a respective version for the duration of the contract.

Q60: Do you host a user conference?

Yes

2015 RMIS REVIEW Questionnaire: Unbundled Vendors

Q61: What was the date of your last user conference? January 2015

Q62: How many customers / prospects were in attendance? 22 Attendees

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

Customer Surveys, Industry forums, and Risk Management seminars and Training Institutions.

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 approach.

Q65: Do you have dedicated business analysts?

Yes

Q66: Describe your process of tracking delivery team activities

We use ActiveCollab software to be in constant contact with clients on deliverables and tracking progress.

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

PCIS utilizes an iterative and agile implementation methodology. Iterative in that our process is cyclical as we configure, test and improve in increments rather than waiting for all development to occur. And, it is agile in that we put more value on the results than the process – there is constant dialogue between product managers, analysts and developers. A combination of these two approaches works well and has proven results in successfully meeting business needs while keeping the project on schedule and budget.

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

Yes. Every implementation gets had a Governance Committee assigned to provide overall guidance, make significant decisions, manage client related risks and and communication.

Q69: How long is the typical implementation time?

Highly variable depending on client complexity and size. Typically 5-10 months.

PAGE 9: Business Information

Q70: What was the year of your first RMIS implementation? 2012

Q71: Parent Company (if applicable)*Respondent skipped this question***Q72: Business Locations**New York, NY
Valencia, CA**Q73: Top Officers**

Top Executive 1:	Mike Loizou CEO
Top Executive 2:	McRae Johnston COO
Top Executive 3:	Georgette Loizou EVP

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

Executives / Senior Management	4
Product Management, Marketing & Sales	4
Project Management, Development and Quality Assurance	10
Customer Support and Training	4
Other	1
Total Employees	23

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

Executives / Senior Management	4
Product Management, Marketing & Sales	5
Project Management, Development and Quality Assurance	10
Customer Support and Training	5
Other	1
Total Employees	25

Q76: Total annual revenue for all product versions offered

PCIS does not disclose this information.

Q77: Approximate percent of revenue spent on R&D

27%

Q78: Customer Statistics

Total Current Parent Level Clients –this client version	4
Total Current Parent level Clients- all previous versions	19
Total Current Users—all versions	1600
New Clients in Last Fiscal Year	3
Largest Number of Users in Single Contract	906
Number of lost clients in Last Fiscal Year	0

Q79: Largest customer markets (Please rank top 5)

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

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.	CS Stars
2.	Ventiv
3.	Origami
4.	Guidewire
5.	Systema

Q82: Predominant programming language .Net / C#

Q83: Databases supported Oracle, Microsoft SQL Server

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

Entire Application Any Device that run IE or Chrome.
Intake & Dashboard App for Droid & IOS devices.

Q85: Please list the RMIS-related revenue for the following years: *Respondent skipped this question*

Q86: Please identify all revenue-generating activities: Software license sales,
Data Conversion and Consolidation activities,
Consulting, Ongoing maintenance

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

Software license sales	60%
Data Conversion and Consolidation activities	10%
Consulting	10%
Ongoing maintenance	20%

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) Module/LOB pricing, Named users, Read only (limited access users), Data conversions/feeds/EDI, Training, Integration with HR, A/P systems

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

10 Named Users	\$50,000 - \$75,000
100 Names Users	\$100,000 - \$200,000

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

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

Dependent on size and complexity one-time costs range between \$50,000-\$500,000.

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.

PCIS maintains 99% availability, which is monitored by multiple servers including Zenoss, and MS SCCM.

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

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

- 1 Flexibility in getting the desired data in and out of the system
- 2 Usability and Ease of Use- the intuitive layout & shortcuts all designed to expedite the claims process.
- 3 The sophistication of ClaimsVISION's interface capabilities in terms of level of automation achievable, ease of implementation, and low cost.