SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to utilize the third of four (4) renewal options with Marsh ClearSight, LLC fka CS Stars, LLC. Period of service is from October 1, 2018 through September 30, 2019. Total revised estimated annual expenditure in the amount of $492,000.00, for a not to exceed expenditure amount of $1,922,478.00

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Letter/Quote and Previous Awards

This award is subject to appropriation by the City in the fiscal year beginning October 1, 2018. No funds have been appropriated to date. The City has no obligation for payment and work hereunder is not authorized unless funds are appropriated for the work herein. A written notification will be provided in the event that funds are appropriated.

ANALYST _____ RESPECTFULLY SUBMITTED _____
ANNETTE BURNEY for GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED_____ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

City of Jacksonville, Florida

ONE CITY. ONE JACKSONVILLE.

Lenny Curry, Mayor

Division of Insurance and Risk Management
117 West Duval Street
Suite 335
Jacksonville, FL 32202
(904) 630-7521
www.coj.net

MEMORANDUM

TO: Greg Pease, Chairman
Professional Services Evaluation Committee

FROM: Twane Duckworth, Chief of Risk Management

SUBJECT: BID No. ESC-0358-15, Risk Management & Claims Administration Information System, Contract 7661-05

DATE: July 13, 2018

The current term for the contract No. 7661-05 with Marsh Clearsight, LLC for providing a Risk Management and Claims Administration Information System is coming up for expiration as of September 30, 2018. This contract has two renewals remaining. Risk Management is exercising the third of four one-year renewal options for the period October 1, 2018 to September 30, 2019 with one one-year renewal options remaining. The maximum indebtedness to the City will be a not–to-exceed amount of $492,000.00 to a new maximum indebtedness of $1,922,478.00. The FY19 fee for services October 1, 2018 to September 30, 2019, described in Exhibit "B" Statement of Work #9. All other terms and conditions shall remain the same.

Accordingly, I recommend:

That the City Contract No. 7661-05, with Marsh Clearsight, LLC for providing a Risk Management and Claims Administration Information System (i) be renewed for the term October 1, 2018 to September 30, 2019. The fee for the Services October 1, 2018 to September 30, 2019 as described in Exhibit "A" Contract Fee Schedule. (ii) Increase the maximum indebtedness to the City by a not exceed amount of $492,000.00 for a new total maximum indebtedness of $1,922,478.00 All other terms and conditions remain the same.

Thank you for your consideration in this matter.

Marsh Clearsight, LLC acknowledgement attached

MARSH CLEARSIGHT

July 13, 2018

Mr. Twane Duckworth
City of Jacksonville, Florida

Re: **Renewal of Agreement**

Dear Twane:

This letter confirms our agreement that, subject to the execution of the attached Amendment #5, and in consideration of Marsh ClearSight's receipt of payment in the amount of ~~$494,000,~~ $492,000 the term of Contract No. 7661-05 entered into between Marsh ClearSight and the City of Jacksonville as of October 1, 2015 (as amended, the "***Agreement***"), including Statements of Work #7 and #8, shall be renewed from October 1, 2018 through September 30, 2019. Such renewal shall be the third of four (4) one-year renewal options under the Agreement.

Please confirm the City of Jacksonville's desire to extend the Agreement and Statements of Work #7 and #8 in accordance with the terms of this letter by returning a signed copy of this letter and Amendment #5 by September 30, 2018.

Sincerely,
Marsh ClearSight LLC

DocuSigned by:
By: Kevin Tobin
10A71E6AAB3046E...

ACKNOWLEGED AND AGREED by an authorized representative of **THE CITY OF JACKSONVILLE, FLORIDA**

Signature: Twane Duckworth

Name: Twane Duckworth

Title: Chief of Risk Management

Date: 7/16/18

APPROVED
By Jill Kenko-Matoka at 3:34 pm, Jul 10, 2018

MARSH

MARSH CLEARSIGHT

Marsh ClearSight Platform Statement of Work No. 9 | 2018

CLIENT NAME	CLIENT BILLING ADDRESS AND CONTACT INFORMATION
City of Jacksonville Florida	117 West Duval Street, Suite 335 Jacksonville, FL 32202
	CLIENT PURCHASE ORDER NUMBER OR OTHER REFERENCE:
STATEMENT OF WORK EFFECTIVE DATE	**STATEMENT OF WORK TERM**
1 October 2018	12 months
APPLICABLE MARSH CLEARSIGHT SAAS AGREEMENT EFFECTIVE DATE	**APPLICABLE MARSH CLEARSIGHT SAAS AGREEMENT EXPIRATION DATE**
1 October 2015	30 September 2019

DOES THIS STATEMENT OF WORK SUPPLEMENT A PRIOR STATEMENT OF WORK?			PRIOR STATEMENT OF WORK NUMBER	PRIOR STATEMENT OF WORK DATE
☐ YES	☒ NO	IF YES, THIS STATEMENT OF WORK SUPPLEMENTS THE STATEMENT OF WORK BETWEEN THE PARTIES WITH THE FOLLOWING NUMBER AND DATE:		Click here to enter a date.

CLIENT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT	MARSH CLEARSIGHT STATEMENT OF WORK ACKNOWLEDGMENT AND AGREEMENT
Click here to enter text.	**Marsh ClearSight LLC**
Signature:	Signature:
Printed Name:	Printed Name:
Title:	Title:
Signature Date:	Signature Date:

Unless executed, this Offer will expire as of Click here to enter a date.

FEES	LIST PRICE	DISCOUNT	CLIENT TOTAL	PAYMENT SCHEDULE	ADDITIONAL DETAILS
Annual Subscription Fee	**$492,000**		**$492,000**	**Monthly**	Click here to enter text.
Annual Fee - Other					
Annual Fee - Other					
Choose an item.				Choose an item.	Click here to enter text.

LICENSES & STORAGE	LICENSE TYPE	NUMBER OF LICENSES
User License(s):	General User	**58**
User License(s):	Business Intelligence Concurrent Sessions Licenses (Up to 5 max)	**5**
User License(s):	Incident/Audit Entry	**30 (concurrent) for:** • **The entry of Safety incidents and for the Driver Coordinators/Safety Representatives that will review those incidents** • **The entry of Workplace Injury incidents** • **The entry of Special Events Certificates**

MARSH

MARSH CLEARSIGHT

User License(s):	Choose an item.	Click here to enter text.
Storage:	400 gb	

SUPPORT – Support offerings descriptions appear at www.marshclearsight.com			SERVICE HOURS – Service Hours usage explained at www.marshclearsight.com	
☒ Standard	☐ Premier	☐ Global	Quantity	505 Hours

MARSH

LICENSED MARSH CLEARSIGHT PRODUCT EDITIONS				
	Edition →	☐ Standard	☐ Pro	☐ Ultimate
	↓ Product	To Be Implemented	To Be Implemented	To Be Implemented
☐	**Risk Identification**	☐ Values Collection Administration ☐ Values Entry	☐ Values Collection Admin ☐ Values Entry ☐ Risk Register	☐ Values Collection Admin ☐ Values Entry ☐ Risk Register ☐ Dynamic Risk Maps
☒	**Insurance Management**	☐ Policy Management	☐ Policy Management ☐ Premium Benchmarking ☐ Program Management ☐ Certificates of Insurance	☐ Policy Management ☐ Premium Benchmarking ☐ Program Management ☐ Certificates of Insurance
☐	**Risk Mitigation**	☐ Recommendations / Action Plans	☐ Recommendations/Action Plans ☐ Audits Manager ☐ Discovery – Audit iPad App	☐ Recommendations/Action Plans ☐ Audits Manager ☐ Discovery – Audit iPad App ☐ Audit Designer
☒	**Incident Management**	☐ Intake ☐ Incident Management	☐ Intake ☐ Incident Management – Similar Incidents ☐ Root Cause Analysis ☐ OSHA Reporting	*N/A*
☒	**Claims Management**	☐ Claims Management	☐ Claims Management ☐ Claims Management Analytics (Overview, Rankings, Similar Claims) ☐ Root Cause Analysis	☐ Claims Management ☐ Claims Management Analytics (Overview, Rankings, Similar Claims) ☐ Root Cause Analysis ☐ Claims Management Severity Model
☒	**Claims Administration**	☐ Claims Management ☐ Claims Management Analytics (Overview, Rankings, Similar Claims) ☐ Claims Administration ☐ Return to Work	*N/A*	*N/A*
☐	**Physician Administration**	☐ Physician Administration: ***[Insert]*** *# of expected doctors* ☐ Contacts Application	*N/A*	*N/A*
ASSUMPTIONS NECESSARY FOR THE IMPLEMENTATION OF ANY OF THE ABOVE-IDENTIFIED PRODUCT EDITIONS OR THEIR INDIVIDUAL COMPONENTS:				
[Comments/Caveats Line Items from LOE inserted here]				

STANDARD FUNCTIONALITY INCLUDED

FUNCTIONS	WHAT'S INCLUDED IN THIS DELIVERABLE
1099 Setup	Marsh ClearSight will configure standard 1099 tool based on specifications provided by Client that will create an export file that Client can load into outside 1099 processing software. Fees for third-party 1099 software not included in this Statement of Work and shall be payable by Client to the third-party vendor/supplier of such software. Client may contact its Marsh ClearSight representative for details about third-party software that Marsh ClearSight has worked with in the past. Configuration of standard 1099 tool that will allow Client to export 1099 data from the SaaS Application that Client will import into 1099 form generating software.
Calendars	[Comments/Caveats Line Items from LOE inserted here]
Codes and Fields	Coverages Used by Client: LIST ALL COVERAGES INCLUDING INCIDENT TYPES HERE (I.E. WORKERS COMPENSATION, AUTO LIABILITY, PROPERTY) Client will use **[CHOOSE ONE: Standard codes/non-standard]** claim codes and fields. Standard code and field setup for Contacts, Location, C.O.P.E. (Construction, Occupancy, Protection and Exposure) and Policy data NOTE: Changes/configuration in screen fields labels and codes beyond 5 changes/configuration for each coverage will be calculated in implementation
Language Dictionary	Marsh ClearSight will configure multi-language capabilities. Languages: **[LIST HERE]** Client is responsible for providing translations of Codes and Field deliverables
Screen Design	Claim/Incident Screens – **[One]** standard screen design per major coverage Occurrence Screens – **[One]** occurrence screen design per major coverage Parent Occurrence Screens – One parent occurrence screen designed Location – **[One]** standard location screen Transaction – **[One]** standard transaction screen Policy – **[One]** standard policy screen Policy Program – **[One]** program screen NOTE" Nonstandard screen design will be included in implementation
Contacts Manager & Contact Management Application	**[One]** standard contacts screen NOTE: Nonstandard contact screen will be included in implementation
Dashboards & Dashboard Application	[#] of widgets to be configured for each dashboard [#] of dashboard roles NOTE: Nonstandard Dashboards will be included in implementation
Employee Manager	Standard Deployment
Events / Validations	Up to **[five]** Events or Validations are included **[OR]** The following events and validations are included: (**LIST HERE**)
Location Hierarchy	Initial load of hierarchy from data provided in Microsoft® Excel® or other agreed upon format Data must contain unique location identifier for each location, and methodology to determine a single hierarchical relationship for each location. If OSHA reporting is included, Marsh ClearSight recommends that Client include SIC or NAICS codes in this data.
Location Manager & Location Management Application	Load of C.O.P.E. (construction, occupancy, protection and exposure) and values information is not included in this deliverable. C.O.P.E. Data Tracking – Yes ☐ No ☐ • Client will use standard codes • Up to **[5]** hours are included to assist in configuration of C.O.P.E. screens.
Notes/ Tasks	**[#]** of Note templates and/or # of Task templates
Security Configuration	Includes assistance with Client setup of user IDs and access rights for users in the SaaS Application - up to four hours of remote training and assistance to Client System

	Administrator to configure user rights and security groups. **[OR]** Includes setup of user IDs and access rights for users in the SaaS Application based on specifications provided by Client. MARSH CLEARSIGHT will configure user IDs and security for **[X]** users for up to **[X]** distinct access type groups.
Standard Reports	Standard Reports that MARSH CLEARSIGHT will set up after consultation with Client Up to **[5]** hours are included to assist client with standard report configuration.

IF CHECKED, THE FOLLOWING FUNCTIONALITY WILL BE INCLUDED DURING IMPLEMENTATION

☐	Multi-Language Incident Intake	Configuration of Incident Intake forms in multiple languages. **[#]** of Languages **[#]** of Incident Templates Client is responsible for providing translations of Incident Intake forms
☐	Multi-Language Screen Design	Translation of screens to multiple languages. **[#]** of Languages **[#]** of Screen Design Client is responsible for providing translations of Screen Design
☐	Multi-Language Code and Field Setup	Translation of codes and fields to multiple languages. **[#]** of Languages Client is responsible for providing translations of Codes and Field deliverables

INDIVIDUAL APPLICATIONS

Available as Single or Multiple additions to Marsh ClearSight Editions

			IMPLEMENTATION OF ANY OF THE INDICATED PROCESSES OR FUNCTIONALITY LICENSED UNDER THIS SOW WILL BE PERFORMED USING THE FOLLOWING METHODOLOGY
INCLUDED	**TO BE IMPLEMENTED**	**FUNCTIONS**	**ASSUMPTIONS**
☐	☐	Risk Register	Standard Implementation **[#]** of registers to establish
☐	☐	Dynamic Risk Maps	Standard implementation
☐	☐	Exposure Analytics Data Discovery	Standard implementation NOTE: Client specific pages will be included
☐	☐	Premium Benchmarking	Standard implementation
☐	☐	Program Management – *requires Policy Management*	Standard implementation **[#]** of programs to set up
☐	☐	Erosion Analytics Data Discovery (Claims data feeds are not part of this service)	Standard implementation Claims data feeds are not included as a part of this service
☐	☐	Incident Management	Standard implementation **[#]** of coverages for incidents Standard incident screens are deployed for each coverage. Nonstandard screens or field labels and codes are included in implementation.
☐	☐	Claims Management Analytics (Overview, Rankings, Similar Claims)	Standard implementation
☐	☐	Root Cause Analysis	Standard implementation Requires another application – Incident Management, Claims Management, Claims Administration or Enterprise
☒	☐	Claims Management Data Discovery	Standard Implementation

			Claims data feeds are not included as a part of this service NOTE: Client specific pages will be included in implementation
☒	☐	Intake	**[#]** coverage forms and **[#]** paths List coverages Up to **[X]** review roles are included **[OR]** No review roles are included Mobile-capable **[OR]** no mobile requirements
☐	☐	Return to Work – *requires Claims Administration deployment to access*	Standard implementation NOTE: Includes ODG screens. Client must have a separate contract with ODG (not included in this contract)
☒	☐	Certificates of Insurance (COI) ☐ Enterprise ☐ ClearSight	**[#]** of coverages **[#]** of exceptions

ADD-ON FUNCTIONS

			IMPLEMENTATION OF ANY OF THE INDICATED PROCESSES OR FUNCTIONALITY LICENSED UNDER THIS SOW WILL BE PERFORMED USING THE FOLLOWING METHODOLOGY
INCLUDED	**TO BE IMPLEMENTED**	**FUNCTIONS**	**ASSUMPTIONS**
☐	☐	Asset Manager (Enterprise)	**[#]** of types of assets Standard screen, field, and code deployment Beyond 5 changes in standard screen, field, or codes will be included in implementation.
☐	☐	Audit Recommendations/Action Plan	**[#]** of audit templates recommendations included in **[#]** of recommendations and action plans
☐	☐	Audit Assignments/Calendar	Types of assignment – single assignment or multiple assignments of an audit
☐	☐	Audit Discovery – iPad app	**[#]** of audit templates Standard deployment
☐	☐	Audit Designer	Standard deployment
☐	☐	Audit Performer (offline)	Standard deployment
☐	☐	Audit STP Template Library	**[#]** of audit templates given from library
☐	☐	Chargeback allocations	Standard deployment of manager NOTE: Creation of additional policies or locations are included implementation NOTE: Build of formulas and reports are included in implementation
☐	☐	Chargebacks (fees)	Standard deployment **[#]** of fees to be charged back
☐	☐	Check Vouchers	Configuration of check printing module which will allow Client to print check vouchers from the SaaS Application. Client will not print checks directly from the SaaS Application, but will manually provide printed voucher to its accounts payable department. Setup of **[one]** bank account Configuration of **[one]** check voucher template based on sample provided by Client.
☒	☐	Custom Letters	**[#]** of letters Configuration of data merged claim letters based on Word documents and requirements provided by Client. Samples included in Custom Letter Appendix.
☐	☐	Direct Deposit (ACH)	Marsh ClearSight will configure standard ACH feature based on specifications provided by Client that will allow Client to transmit direct deposit data to Client's banking institution. Details needed include, but are not limited to: account number, routing number, optional data elements, and pre-note setup information. Marsh ClearSight will support Client in initial testing with Client's banking institution.

			Set up of standard direct deposit feature with **[one]** banking institution. Assistance with Client testing with Client's banking institution.
☐	☐	Document Management	Standard Deployment
☒	☐	Electronic First and Subsequent Reports of Injury (FROI and SROI)	Marsh ClearSight will configure the standard Electronic Data Interface (EDI) reporting tool based on specifications provided by Client within standard functionality parameters offered in the SaaS Application. The feature will allow Client to submit FROI and SROI records to State jurisdictions that comply with IAIABC standard. **NOTE: CONFIRM WITH VINCE HOMER THAT MARSH CLEARSIGHT PROVIDES EDI FUNCTIONALITY FOR REQUESTED STATES BEFORE SENDING TO CLIENT]** **[X] (list all states by code)**
☒	☐	Indemnity Benefits Manager	**[X] (list all states to be used)** Marsh ClearSight will configure the standard Indemnity Benefits tool based on data rules provided by Client.
☐	☐	Integrated Disability Management	**[#]** of disability types
☐	☐	Premium Allocation	Standard deployment of manager NOTE: Creation of additional policies or locations are included implementation NOTE: Build of formulas and reports are included in implementation
☒	☐	Reserve worksheet	**[#]** Number of coverages
☒	☐	State Forms	Configuration of State Forms using the standard form tool feature. Up to ten (10) forms per State are Included. **[X]** (list number of states)
☐	☐	Table-Based Lookup	Standard Deployment **[#]** of table-based lookup
☐	☐	Check Writing/Printing	Client will be required to get the check template approved by its banking institution prior to use of such template. Setup of **[one]** bank account Configuration of **[one]** check template based on sample provided by Client.
☐	☐	Positive Pay	Marsh ClearSight will configure standard Positive Pay feature based on format provided by Client that will allow Client to transmit check data to Client's banking institution. Marsh ClearSight will support Client in initial testing Client's banking institution. Set up of positive pay feature with one banking institution. Assistance with Client testing with Client's banking institution.
☐	☐	Medical Bill Review Integration	Marsh ClearSight will configure standard interface that will allow Client to import medical bill payment or check data into the SaaS Application and export claim data from the SaaS Application. Marsh ClearSight will provide standard solution specifications which will include required file formats. Includes set up of tool and assistance with Client testing with Client's chosen vendor. Vendor Name: **[LIST VENDOR NAME]** Only one vendor can be used per coverage. Files **will/will not** be encrypted based on specifications provided by Marsh ClearSight. Import and export of claim notes **are/are not** included.
☐	☐	ISO Setup	Marsh ClearSight will configure standard tool to transmit data to the Insurance Services Office ("ISO") based on specifications provided by Client within the standard functionality parameters of the SaaS Application. Requires Client subscription with ISO. Some codes that are specific to ISO (ISO policy type, coverage and loss types) may require additional

			system events to automate population (unless Client plans to manually input this data on each claim). These events are not included in this deliverable and will be included in the Events and Validations deliverable in the Advanced System Setup section if such services are included in this Statement of Work. Transmission of **[X]** fields in addition to required fields. Codes being transmitted to ISO and used in the SaaS Application **do/do not** match ISO required coding. Client will manually initiate transmissions to ISO **[OR]** Marsh ClearSight will configure up to 5 standard automations for data transmissions to ISO.
☐	☐	OFAC Setup	Marsh ClearSight will configure the SaaS Application to support the Office of Foreign Assets Control ("OFAC") scanning in addition to ISO setup based on details provided by Client. Requires that Client has purchased ISO's OFAC services under an agreement with ISO. Client will manually initiate transmissions to OFAC **[OR]** Marsh ClearSight will configure up to five (5) standard automations for data transmissions based on OFAC rules
☐	☐	Anonymous Login used with Incident Intake	Marsh ClearSight will configure anonymous login for use with Incident Intake based on specifications provided by Client. Client is responsible for validating that anonymous login security does not permit access to Client Data. Setup of anonymous access in included for up to **[X]** distinct anonymous logins based on **[floor/site/hospital/location/insert other]**. **[OR]** Setup of one enterprise-wide anonymous login is included. Anonymous entry does not permit identification of individual users, including their IP addresses. Client shall be solely responsible for its decision to permit access without requirement for individual usernames and passwords and acknowledges and agrees that foregoing individual unique usernames and passwords for each user will eliminate the security features inherent in the use of such unique usernames and passwords. Client shall be solely responsible for ensuring that the appropriate access restrictions in the SaaS Application are established for the users of Incident Intake feature, including by setting access controls that limit the Client Data accessible and viewable by such users.
☐	☐	Single Sign On (SSO)	Single Sign On (SSO) utilizes SAML web authentication technology to allow Client to authenticate employees allowed to access the SaaS application. SSO will require the Client to have a web application (Identity Provider) capable of authenticating users and providing user credentials via a SAML message to the SaaS application. The user can then launch the SaaS application through an internal web portal link distributed by Client. Users authenticated by SSO will bypass the log in screen. Client is responsible for maintaining user ID correlation table if required and for passing required authentication information to Marsh ClearSight.
☐	☐	Code Dependencies	Marsh ClearSight will configure business rules related to coded field selections in the system after consultation with Client and based on specifications mutually agreed to by the parties. Configuration of up to **[5]** code dependencies are included

☐	☐	Generic Lookup Configuration	Configuration of standard lookup functionality. Data must feed in separately. **[X]** (Number of) lookups required **[X]** (Number of) time deployed on screens
☐	☐	Currency Exchange Rate Import Tool	Marsh ClearSight will work with Client to configure standard Currency Exchange rate tool that will allow client to import exchange rate information into the SaaS Application. Marsh ClearSight is not responsible for ongoing maintenance of exchange rates.
☐	☐	Values Setup	Configuration of placeholders to maintain exposure/values data on locations. Configuration for up to **[three]** exposure/value types is included. **[OR]** Configuration for the following exposure types is included: **(LIST HERE)**
☐	☐	OSHA Set Up and Report	Configuration of OSHA 300 and 300A templates after consultation with Client and based on specifications mutually agreed to by the parties. Electronic Reporting **[Yes/No]**
☐	☐	Multi-Client Configuration	See Standard System configuration section for details on setup services included.
☐	☐	Policy Erosion Configuration Analysis	Analysis work done by Marsh ClearSight with assistance from Client to determine level of effort required to configure standard Policy Erosion feature. Up to **[40]** hours of analysis work to identify Policy Erosion needs and determine supplemental project hours needed to configure feature based on specifications provided by Client. Time to configure Policy Erosion feature will erode ongoing service hours **[OR]** Time to configure Policy Erosion feature will be added as a new Statement of Work.
☐	☐	Email Encryption	Marsh ClearSight will configure the SaaS Application to automatically encrypt, through a third-party application, any emails generated by any Seat and transmitted through the Licensed Software. Seats must log in to a secure server before the email can be unencrypted. Encryption is deployed at the schema-level.
☒	☐	Risk Goggles	Configuration will include only those standard external layers and tools that are available as of the date the parties execute this Statement of Work. Future layers are not included in this Statement of Work and will require a new Statement of Work or Work Order and will either require an additional fee or erode Client Support Hours.
☒	☐	Business Intelligence Reporting	Design and/or creation of Business Intelligence reports are not included in this Statement of Work. Marsh ClearSight will set up a Business Intelligence environment for Client's use.
☐	☐	Email Attachments	Marsh ClearSight will configure an application feature to enable the submission of record attachments via email. This feature allows Marsh ClearSight users to send / forward emails to a monitored Marsh ClearSight email address with attachments indicating within the subject line the record that is the target for the attachments. The body of the message and any message attachments are attached to the indicated record. Response messages are configured by default to be sent back to the sender to indicate if the message sent was successfully attached or if there were errors. Response messages do not include any attachments included with the submission e-mail. Error messages do not include any attachments included with the submission e-mail but do include the body text of the submission e-mail. Includes **[X]** email entities **[list apps in scope]**

		Imports/Exports/Integrations		
☐	☐	ACORD Incident Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	Check Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Ad Hoc Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Ad Hoc Incident Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	AP Export	FAMIS	
☐	☐	AP Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Asset Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	Attachment Loader	AmeriSys file attachments loaded weekly	
☒	☐	CMS	☐ Option 1 (Examworks Integration - Recommended) ☐ Option 2 (Manual export) **[INSERT]** RREs	
☐	☐	Contact Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Contact Attachment Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Employee Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Exchange Rate Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Generic Code Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Generic Lookup Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	HL7 Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	HR Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	IAIABC Incident Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	ImageRight IR Linker	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Incident Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	IRS 1099 Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	ISO® Indexing	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	ISO Claim Search®	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	ISO OFAC Compliance Service Reporting	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Liberty WC Incident Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Links Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Location Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☒	☐	Medical Bill Review Import/Export (Claim Export, Contact Export, Bill Import, Paid File Export)	AmeriSys	
☐	☐	Multi-values Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Occurrence Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Occurrence Notes Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	ODG Lost Time	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	ODG Reserve Guidelines	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Policy Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Policy Manager	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Positive Pay Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Premium Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Sedgwick Export	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	The Network Incident Import	[Scheduling: Y/N; Standard Layout: Y/N]	
☐	☐	Transaction Import	[Scheduling: Y/N; Standard Layout: Y/N]	

☐	☐	User Import	[Scheduling: Y/N; Standard Layout: Y/N]
☐	☐	Values Collection	[Scheduling: Y/N; Standard Layout: Y/N]
		Web Services	
☐	☐	Claims (receive or send)	[#] of web services Type of web services (list to an app/manager)
☐	☐	Incident (send)	[#] of incident types
☐	☐	Contact (receive)	[#] of contact types
☐	☐	File Attachment (send)	[#] of types of attachments
☐	☐	Comments (send)	[Comments/Caveats Line Items from LOE inserted here]
☐	☐	Data Lookup (receive)	[#] of data lookups
☐	☐	Task (New) (receive)	[#] of types of task templates
		Custom Reports	
☒	☐	SI - 17	[Comments/Caveats Line Items from LOE inserted here]
☐	☐	Report Name 2	[Comments/Caveats Line Items from LOE inserted here]

DATA SERVICES

	DATA CONVERSION			
	Source	**Components**	**Frequency**	**Assumptions**
☐	[Source 1 Name]			
		Choose an item.		
		Other Historical Data:		
		[List Specific Data Components]		
☐	[Source 2 Name]			
		Choose an item.		
		Other Historical Data:		
		[List Specific Data Components]		
☐	[Source 3 Name]			
		Choose an item.		
		Other Historical Data:		
		[List Specific Data Components]		

ADDITIONAL SERVICES

TYPE	SCOPE AND ASSUMPTIONS
Choose an item.	
Choose an item.	

This Statement of Work (the "***SOW***") sets forth the terms generally applicable to the services provided by Marsh ClearSight LLC ("***Marsh ClearSight***") to the client named in this SOW (the "***Client***") under the Product and Services Schedules (the "***Schedules***") and Software as a Service Agreement entered into by Marsh ClearSight and Client and described in this SOW (the "***Agreement***"). Client agrees that any deliverables described herein will be delivered in accordance to the specifications contained within the Agreement and will represent the entire scope of deliverables to be provided under this SOW. For any deliverable contained in this SOW that requires configuration or development to achieve the stated deliverable, configurations will be completed in accordance with the specifications described and agreed upon in a jointly developed Business Requirements Document ("***BRD***") which will represent the entire scope of configuration work to be provided for such deliverables under this SOW. Fees stated in this Statement of Work have been provided to Client based on the assumptions that information provided by the Client used to create this SOW is accurate and complete. Should these or other assumptions Marsh ClearSight has deems critical to the process which are set forth in the Agreement, Products and Services Schedule and this Statement of Work, prove to be inaccurate, Marsh ClearSight reserves the right to jointly review and revise this SOW with Client, or terminate without penalties. Client will pay all applicable rates and fees for the Services set forth in the Schedules and the Agreement as set forth in this SOW, which is incorporated by reference therein. Applicable taxes are not included in amounts set forth in this Statement of Work. Travel and other expenses not set forth in this Statement of Work shall be billed as incurred. During the term of the Agreement, this SOW shall automatically renew for successive periods equal to the term set forth above. All subscription and annual services fees are billed on the Statement of Work Effective Date and on its subsequent anniversaries. The terms of the Agreement shall supersede any terms provided by Client

unless mutually agreed in writing by both parties. Unless expressly indicated to supplement a prior Statement of Work or otherwise agreed in writing by the parties, this SOW shall supersede prior Statements of Work for the same Services. Fees stated in this Statement of Work have been agreed with Client based on the assumption that the information required for work to be performed is made available by Client and Client key personnel during the course of work. If delays or other unanticipated problems which are beyond Marsh ClearSight's control occur this may result in additional fees, which Marsh ClearSight will discuss with Client as soon as identified. Assumptions Marsh ClearSight has made that Marsh ClearSight deems critical to the process are set forth in the Agreement, Products and Services Schedule and this Statement of Work. Client will provide required resources to facilitate execution of all deliverables by the Marsh ClearSight team within the project schedule mutually agreed before the commencement of the project; this will include time from business users and source system owners for meetings, data requests, gathering of data required and most importantly help obtaining timely decisions from relevant parties.

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to utilize the second of four (4) renewal options with Marsh ClearSight, LLC fka CS Stars, LLC. Period of service is from October 1, 2017 through September 30, 2018. Total revised estimated annual expenditure in the amount of $504,000.00, for a not to exceed expenditure amount of $1,430,478.00

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Letter/Quote and Previous Awards

This award is subject to appropriation by the City in the fiscal year beginning October 1, 2017. No funds have been appropriated to date. The City has no obligation for payment and work hereunder is not authorized unless funds are appropriated for the work herein. A written notification will be provided in the event that funds are appropriated.

ANALYST ANNETTE BURNEY

RESPECTFULLY SUBMITTED GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 9/21/17

OTHER:

Teresa R. Eichar

ACTION OF AWARDING AUTHORITY DATE 9/21/17

APPROVED: DISAPPROVED:

OTHER:

SIGNATURE OF AUTHENTICATION

Sam E. Mousa
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of
Executive Order No. 2015 05

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to utilize the first of four (4) renewal options with Marsh ClearSight, LLC fka CS Stars, LLC. Period of service is from October 1, 2016 through September 30, 2017. Total revised estimated annual expenditure in the amount of $475,000.00, for a not to exceed expenditure amount of $926,478.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #3 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Letter/Quote and Previous Awards

ANALYST _____ ANNETTE BURNEY

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 9/8/16

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 9/08/16

APPROVED ✓ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

Sam E. Mousa
Chief Administrative Officer
For: Mayor Kenny Curry
Under Authority of
Executive Order No. 2015-05

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: **31** NUMBER RECEIVED: **8** OTHER: **0**

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award with Marsh ClearSight, LLC fka CS Stars, LLC for additional services as outlined in the attached exhibits in the amount of $53,895.00 through the initial period ending September 30, 2016. Total revised not to exceed expenditure in the amount of $451,478.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #2 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Quote and Previous Awards

ANALYST _____ RESPECTFULLY SUBMITTED _____
ANNETTE BURNEY GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Twane Duckworth, Chief, Risk Management Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 9-1-16

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE 9/01/16

APPROVED ✓ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____ Sam E. Mousa
Chief Administrative Officer
for Mayor Lenny Curry
Under Authority of
Executive Order No. 2015-5

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: 31 NUMBER RECEIVED: 8 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to amend the award with Marsh ClearSight, LLC fka CS Stars, LLC to add the implementation of the Claims Management Ultimate Edition and the Incident Management Standard Edition to the Risk Management & Claims Administration System for a five (5) month term in the amount of $32,583.00. The period of service for the implementation will expire September 30, 2016. Total revised not to exceed expenditure in the amount of $397,583.00.

Funding Source: AFRM581AD – 03109 - To be executed by formal contract amendment #1 through the Office of General Counsel (Contract #7661-05)

Attachments: Recommendation Memo, Vendor Quote and Previous Awards

BUYER ANNETTE BURNEY RESPECTFULLY SUBMITTED GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: TWANE DUCKWORTH, CHIEF, RISK MANAGEMENT

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING ____ DATE: 4/7/16

OTHER: ____

Sam E. Mousa
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of:
Executive Order No. 2015-05

ACTION OF AWARDING AUTHORITY DATE 4/07/16

MR APPROVED ✓ DISAPPROVED: ____

OTHER: ____

SIGNATURE OF AUTHENTICATION ____

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15

OPEN DATE: 1/14/15

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: 31 NUMBER RECEIVED: 8 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Demonstrations were held on January 30, 2015 with the top ranked firms as approved on the award dated January 22, 2015.

Recommend approval of award to the highest ranked firm, CS Stars, LLC as a result of scoring based on demonstration evaluation criteria. As a result of the awarded contractor being the incumbent, there will be no transition phase cost to the City for the implementation (Item # 1) as the current contract does not expire until 9/30/2015. The base project cost will be in the amount not-to-exceed $365,000.00 (Item # 2) for the new contract that will commence October 1, 2015, to be executed by formal contract thru the Office of General Council.

Attachments: Recommendation Memo, Attachment B1 Evaluation Matrix and Scoring Sheet and Previous Award

BUYER _____ for ANNETTE BURNEY

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: TWANE DUCKWORTH, CHIEF, RISK MANAGEMENT

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING ____ DATE: 02/05/15

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 2/4/15

APPROVED _____ DISAPPROVED: Cleveland Ferguson III, Deputy Chief Administrative Officer, For: Mayor Alvin Brown, Under Authority of: Executive Order No. 2015-01

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

SUBJECT: RISK MANAGEMENT & CLAIMS ADMINISTRATION INFORMATION SYSTEM

BID # ESC-0358-15 **OPEN DATE: 1/14/15**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: From date of executed contract through October 1, 2015 with four (4) one (1) year renewal options

FOR: Risk Management

BASIS OF AWARD: Evaluated Criteria

NUMBER OF BIDS INVITED: 31 NUMBER RECEIVED: 8 OTHER: 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to reject JDi Data for failure to submit Form 1, Price Sheet, as required in the specifications.

Recommend approval to conduct demonstrations and interviews with the top 3 ranked firms in accordance with the specifications. The results will be documented and presented to the CSPEC Committee for approval.

1. PCIS
2. CSC
3. CS Stars, LLC

Attachments: Recommendation Memo, Tabulation, Rejection Letter, Scope of Work, Matrix and Scoring Sheet

BUYER _____ ANNETTE BURNEY

RESPECTFULLY SUBMITTED _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: TWANE DUCKWORTH, CHIEF, RISK MANAGEMENT

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)

ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING 5 MEMBERS DISAPPROVING _____ DATE: 01/22/15

OTHER _____

ACTION OF AWARDING AUTHORITY DATE 1/22/15

APPROVED _____ DISAPPROVED: _____

OTHER: _____

SIGNATURE OF AUTHENTICATION _____

Cleveland Ferguson III
Deputy Chief Administrative Officer
For: Mayor Alvin Brown
Under Authority of
Executive Order No. 2015-01

DESCRIPTION ESC-0358-15	DATE	ANNUAL AMT.	INCREASE	RENEWAL AMT.	NTE
Award	2/5/2015	$365,000.00			$365,000.00
AMENDMENT	4/7/2016		$32,583.00		$397,583.00
AMENDMENT	9/1/2016		$53,895.00		$451,478.00
1ST RENEWAL	9/8/2016			$475,000.00	$926,478.00
2ND RENEWAL	9/21/2017			$504,000.00	$1,430,478.00
3rd RENEWAL (Pending)				$492,000.00	$1,922,478.00