

# Risk Management: Contract Insurance Flowchart

This flowchart is a summary of risk management's involvement in the contracting process and should not be intended to represent every situation.

Please initiate this process at least ten business days prior to providing the RFP/RFQ/RFB documents to Finance, or at least ten business days prior to providing the materials to the City Attorney's Office if utilizing an alternative solicitation method.

- Originating department
- Risk Management
- Purchasing
- City Attorney's Office
- City Clerk's Office

Email Risk Management requesting insurance requirements. Please include: draft contract, draft scope of services, and prior agreements with similar scope of services (if available).



\*Please allow at least 10 business days for review.

Risk Management will provide the insurance exhibit.



RFP/RFQ/RFB

Insert insurance provisions into the instructions section of the RFP/RFQ/RFB.



Other Solicitation Method

Ensure the vendor is aware of the insurance requirements and can satisfy them.

When evaluating responses, determine if proposers have noted they will request insurance exceptions. If exceptions are requested, email risk management with a description of the request, all applicable documentation, and justification for the request.



Provide the insurance exhibit to the City Attorney's Office to be inserted into the draft agreement.



Create an Ebix account for the vendor.



\*Each Ebix review can take up to 10 business days, and several reviews may be necessary.

Collaborate with the vendor and Ebix to gain compliance.



Print out the Ebix screen indicating the account is compliant. Attach to the agreement when routing to the City Clerk's Office for final execution.