

RISK MANAGEMENT - LIABILITY

Presented by Caroline Hua and Gracie Setter on June 17, 2025



CITY OF
NEWPORT BEACH

EMAILS TO RISK MANAGEMENT

To assist in routing your email to the correct team member, please refer to the below:

Insurance Compliance/Ebix

- Direct email to **Gracie Setter** and cc Caroline Hua.
- Subject line should indicate that the email is about insurance compliance and include the vendor name and number as it appears in Ebix.
 - For example: *Temporary Staffing Professionals, Inc. (FV00001209) Ebix Compliance*
 - Please refrain from forwarding emails from Ebix without adding the vendor name and number.
- Include all relevant documentation and justification for your request.
- Please allow at least 5 business days for a response.

Insurance Limits/Language

- Direct email to **Caroline Hua** and cc Gracie Setter.
- Subject line should indicate that the email is requesting insurance limits or modification to the insurance limits or language.
 - For example: *Insurance Limits Request – Janitorial Services*
 - For example: *Insurance Language Modification – Janitorial Services*
- Include all relevant documentation and applicable discourse between the vendor and the department.
- Please allow at least 10 business days for a response.



Note: Please be sure to provide all relevant documentation and information to streamline the review process.

REQUESTING: EXEMPTIONS VS EXCEPTIONS

- Exemptions (Ebix)

- The consultant/vendor/contractor does not:

- Have W-2 workers; and/or
- Use auto; they are remote

- Exceptions

- Consultant/vendor/contractor is unable to meet the insurance limit(s) required
- Consultant/vendor/contractor redlines to the insurance language

BEST PRACTICES:

- If the Ebix account is not compliant after several submittals, please reach out to Risk Management for assistance.
- Provide the insurance limits and language to the consultant/vendor/contractor prior to City Attorney's Office signing ATF (as to form) to address any redlines.



UPCOMING FROM RISK MANAGEMENT:

Online webinar that will cover:

- How to create an Ebix account
- How to navigate an Ebix account
- When to email the City's Ebix account representative
- When to email Risk Management

THANK YOU

