



**1. Creating an Account**

Adding a Vendor in Ebix

Ebix accounts should be created *after* the agreement has been approved as to form and signed by the vendor. Why? We want to make sure the insurance requirements outlined in the contract are agreed to by the vendor. Please address any vendor-requested changes to the agreement before dealing with their insurance documentation.

If you are entering a new contract, make sure to deactivate any outdated vendor accounts (for example, if you are awarding an RFP for on-call maintenance services to a new contractor, make sure to mark the incumbent’s account inactive once their agreement expires, reference Section 3). If you are extending an existing contract and the scope of services and insurance requirements remain the same, you can modify the contract end date in the existing Ebix account to reflect the new date.

Types of Agreements

The screenshot shows the 'Add Insured' form. The 'Account Information' section includes fields for 'Account Number\*' (with an 'Auto Number' button), 'Risk Type\*' (a dropdown menu), 'Description of Services', and 'Tax ID'. The 'Address Information' section includes fields for 'Mailing Address', 'Insured\*', 'Address 2', 'State/Province\*', and 'Country'. The 'Risk Type' dropdown menu is open, displaying a list of agreement types including 'Beacon Bay 1994', 'Beacon Bay 2012', 'CDBG Contract', 'Commercial Tidelands Lease', 'Commercial Tidelands Lease- POLLUTION POLICY', 'Commercial Tidelands Permit', 'Commercial Tidelands Permit- POLLUTION POLICY', 'Franchise Waste Hauler Agreement', 'Franchise Waste Hauler Agreement-2019', 'Maintenance/Repair Services Agreement', 'MOU w/ Youth Sports Commiusion Members Org', 'Non-Exclusive License Agreement', 'Professional Services Agreement', 'Public Works Formal Agreement', 'Public Works Informal Agreement', 'Recreation Instructor Agreement', 'Recreation Instructor Agreement - Alliant Insurance', 'Recreation Instructor Agreement - SAM', 'Recreation Instructor Agreement - SCMAF', and 'Telecom Agreement'.

The templates shown above are built to encompass the most insurance requirements for each type of agreement. Your agreement may not require every insurance requirement built into the template. You should choose the template best suited for your agreement and contact risk management about any unnecessary requirements (continued in the Insurance Waivers Section).

Contract Details

Add the description of services and the contract start and end date for every account. The description of services should be at the top of every agreement, e.g., on-call plumbing, bookkeeping and financial reporting services, and executive recruiting services. The more information provided on the account information page, the less questions risk management will have to ask if you need help.



# Ebix Training Guide

## City of Newport Beach – Human Resources Department

**FOR INTERNAL CITY USE ONLY**

### Account Information

Account Number\*

Risk Type\* Professional Services Agreement

Description of Services

Tax ID

Departments\*

Do Not Call

### Address Information

Mailing Address

Insured\*

Address 2

State/Province\*

Country

Address 1\*

City\*

Zip/Postal Code\*

### Physical Address

Insured

Address 2

State/Province

Country

Address 1

City

Zip/Postal Code

### Contract Information

Misc

Start Date

Effective Date

Cert Received

End Date

Expiration Date

Contract On File

### Contact Information

The vendor contact listed in the agreement may not be the same person handling insurance. Please contact the vendor directly and list the best person for any insurance-related requests and questions. If a contact is available for the vendor’s insurance broker, please include both the vendor contact and the insurance contact.

If you would like to receive notices on your department’s accounts, list your email address as an additional contact in this section.

#### Contact Information

Contact Name

Phone Number

E-Mail Address

\*Multiple email addresses should be split with ' ; ' \*

Do you have the agreement signed by the vendor? Select the “Contract on File” check box and upload the agreement for review. If you already have their Certificate of Insurance, you will also mark the “Cert Received” box and upload the document.



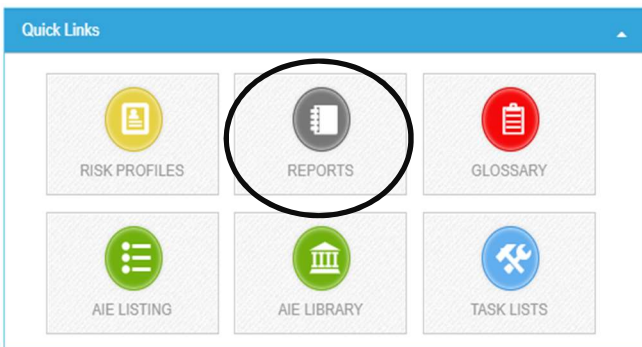
## 2. Insurance

### Insurance Deficiencies

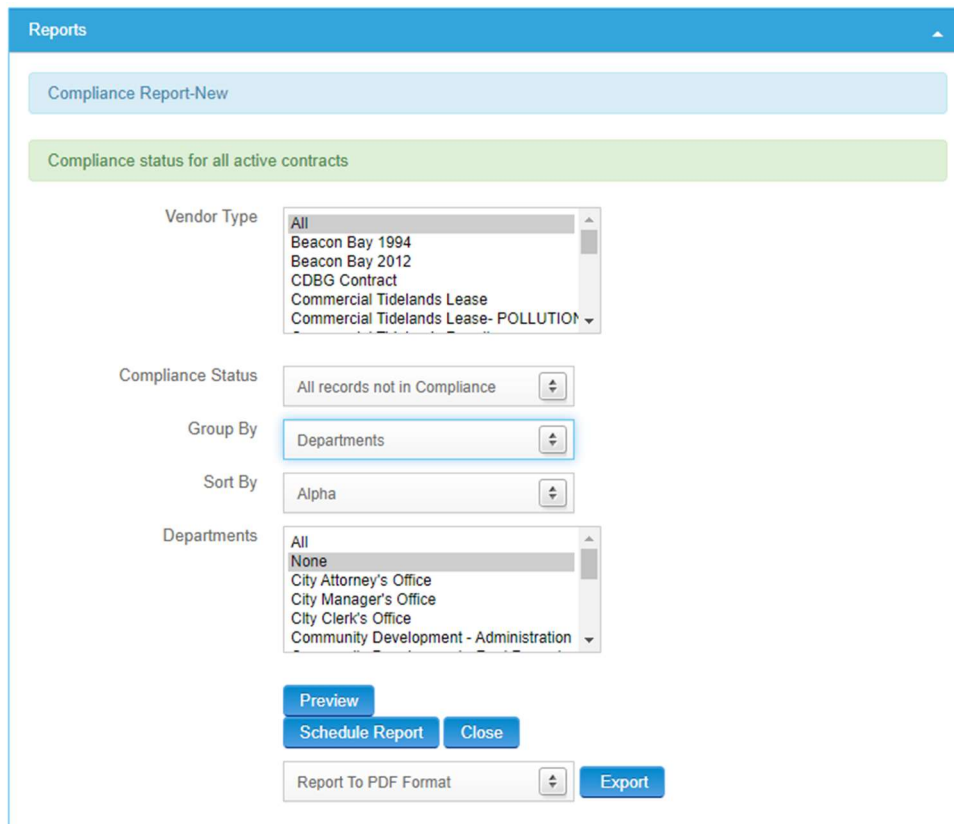
Common deficiencies include not providing all required endorsements, missing policy numbers on endorsements, and endorsements not reflecting the vesting language as outlined in the agreement. Unless the vendor or contractor provided blanket endorsements, the schedule on every endorsement should reflect the vesting language as outlined in the agreement, which should be the same as or similar to the following: *“The City of Newport Beach, its City Council, boards and commissions, officers, agents, volunteers and employees.”* For more information, please reference the Insurance Checklist.

### Pulling a Deficiency Report

The easiest way to keep track of your department’s deficient accounts is by pulling a compliance report.



Step 1: Click on the last report option, “Compliance Report – New.”



Step 2: Select “All records not in Compliance,” group by Departments, choose your department, and click Export.



Insurance Waivers

- Declarations of Exemption
  - o We offer declarations of exemption for Auto Liability and Workers’ Compensation. Here is when these forms can be used:
    - Auto: The contractor or vendor will not be driving as a part of their agreement. For example, they are working entirely remote and will not be coming on-site for any meetings or trainings.
    - Workers’ Comp: The contractor or vendor does not have any W-2 employees and does not need workers’ compensation coverage.
  - o These declarations must be signed and uploaded into the Ebix account. Risk management can then waive these requirements for 1 year. The vendor must provide new signed and dated declarations every year for the duration of the agreement.
- All Other Waivers
  - o As mentioned in “Types of Agreements,” your agreement may not have the same insurance requirements as the template agreements in Ebix. Below are some examples of common waivers and how to know if you need risk management to waive a requirement:
    - A Professional Services Agreement that does not require professional liability. If professional liability is not listed as a requirement in the signed agreement, it is not required. We will want to verify this before waiving. Please send the insurance requirements from the agreement with your request for a waiver. Once we confirm professional liability is not required, risk management can waive this requirement for the duration of the contract.
    - The “Any Auto” requirement has not been satisfied and is being marked deficient. By marking “Any Auto” on their Certificate of Insurance, the vendor or contractor is certifying they have coverage for all owned, hired, non-owned, and scheduled vehicles. Many contractors, however, do not need coverage for every type of vehicle because they are only using certain types, most commonly, hired and non-owned coverage only. If the contractor has hired and non-owned coverage, we will want to confirm they do not have any company-owned automobiles. Once we have this confirmed, risk management can waive this requirement for 1 year. This must be reaffirmed every year of the agreement.

AUTOMOBILE LIABILITY			
<input type="checkbox"/>	ANY AUTO	<input type="checkbox"/>	SCHEDULED AUTOS
<input type="checkbox"/>	ALL OWNED AUTOS	<input type="checkbox"/>	NON-OWNED AUTOS
<input checked="" type="checkbox"/>	HIRED AUTOS	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>	

- Contractor’s Pollution Liability is being marked deficient. For commercial tidelands lease agreements and permits, Contractor’s Pollution Liability is required in the Ebix template. This type of insurance is only needed if there is any active or planned construction happening on the property. Once we confirm there is no construction at the property, risk management can waive this requirement for 1 year. This must be reaffirmed every year of the agreement.
- Self-Insured Retention. The vendor’s insurance has a Self-Insured Retention (SIR) amount on their policy(ies). This will require risk management and the Finance Department’s review of the vendor’s financials before an SIR can be accepted by the City.



**3. Deactivating an Account**

Once an agreement has expired and you are no longer doing business with the vendor, please mark the account inactive. To do this, on the vendor account’s home page, click “edit,” then “edit insured.” Scroll to the bottom of the page and select “deactivate.”

Insured Tasks	Admin Tools	Contact Information
View		Contact Name: <input type="text" value="Lori"/>
Add		Fax Number: <input type="text" value="### ##-####"/>
Edit		E-Mail Address: <input type="text" value="Lori.Alcala@Ebix.com"/>
Edit Insured		<i>*Multiple email addresses should be split with ';' ;'</i>
Help		
Video Tutorials		<div style="border: 1px solid black; padding: 5px; display: inline-block;">DeActivate</div> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-left: 10px;">Submit</div> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-left: 10px;">Reset</div>

**Risk Management Contact Information**

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