

Risk Management: Contract Insurance Flowchart

This flowchart is a summary of Risk Management's involvement in the contracting process and not intended to represent every situation.

Please initiate this process for every solicitation that will result in a contract being generated at least ten business days prior to providing the RFP/RFQ/RFB documents to Finance, or at least ten business days prior to soliciting proposals from vendors if using an informal solicitation method.

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

Email OCARiskMgmt@newportbeachca.gov with Part 1 of the Insurance Request Worksheet completed. Please include the Scope of Services and any prior contracts for similar services (if available).



*Please allow at least 10 business days for review.

Risk Management will return the Insurance Worksheet (Part 2 will be completed) with the Insurance Exhibit.



RFP/RFQ/RFB

Insert the Insurance Exhibit into the RFP/RFQ/RFB.



Informal Solicitation Method

Provide the insurance requirements to the contractors/consultants that proposals are being solicited from.

Prior to selecting the contractor/consultant, ensure they can meet the requirements in the Insurance Exhibit from Risk Management.

If the contractor/consultant has requested insurance exceptions, please complete the Insurance Exception Request Form and email to OCARiskMgmt@newportbeachca.gov.

If the contractor/consultant's insurance has any Self-Insured Retentions (SIRs), email OCARiskMgmt@newportbeachca.gov for further direction.

Please allow additional time for Risk Management to evaluate the request or provide instructions for the SIRs.



Once a contractor/consultant has been selected, email OCARiskMgmt@newportbeachca.gov with Part 3 of the Insurance Request Worksheet completed.



Risk Management will create the Ebix account, and will return the Insurance Worksheet (Part 4 will be completed) with the Ebix account information.



Collaborate with the vendor and Ebix to gain compliance.



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

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.