

**Attachment A**  
**Statement of Work – Claims Management System**

**SCOPE:**

The DC Office of Risk Management (DCORM) is in search of a claims management system. The new system must be able to manage the Tort Liability claims that are submitted and processed by DCORM. The proposed system must be available for commercial use; user friendly; have standard and custom reporting, reserving; automatic and manual diaries as well as claims manipulation by a variety of standard tort liability fields. Additionally, the system must be able to accommodate the management of safety data and certificates of insurance to maximize usefulness and cost effectiveness to DCORM.

**BACKGROUND:**

The District of Columbia Office of Risk Management (DCORM) operates within the executive branch of the District of Columbia with direct oversight by the City Administrator. DCORM became an official agency in the District of Columbia government structure in fiscal year 2003 with a mission to provide risk identification, analyses, control and financing direction, guidance and support to District agencies and the public to minimize the total cost of risk.

DCORM through the Risk Financing Division has direct oversight for claims filed against the District. The Claims Bureau manages the adjudication process for property, liability and disability compensation (workers compensation) claims.

DCORM property and liability claims are the responsibility of in-house staff. They conduct investigations and make liability determinations and settlements prior to lawsuits being filed. The Settlements and Judgments Fund (S&J Fund) is used to provide the fiscal resources to settle claims and lawsuits and pay judgments in most types of civil cases filed against the District. If a lawsuit is filed, the resolution of suit claims fall under the Office of the Attorney General. Nonetheless, DCORM makes all final decisions about the use of the S&J Fund. Caseloads for the past few years have averaged approximately 2,500 new claims.

**REQUIREMENTS:**

The Contractor shall provide a Proposed System which meets the following requirements:

- ISO search integrated into the system
- 30 day review template - 30 days from date claim assigned review of claim for handling
- 45 day review template – 45 days from date assigned claim reviewed for written notification that the investigation remains incomplete and the reasons.

- Review of claims with No Activity –review claims with no activity for 30 days
- Review Claims with No Reserves Set – reserves no set
- Suit Response –90 days from date of suit
- Document all adjusting activity
- Distinguish adjuster notes from supervisor/management notes
- Track diary dates and diary activity
- Automatic supervisor notifications of overdue diaries
- Track statute of limitation
- Track claimant type
- Ability to define/modify claim types
- Track all attorneys (plaintiff and defense) involved in litigation, with contact information.
- List multiple treating physicians
- List multiple witnesses, with contact information.
- Reconcile incident reports with claims
- Track vehicle accident by Tag and Vehicle ID#
- Claims entered by Organizational Hierarchy
- At least 8 Hierarchy levels available
- Quick query reports
- Report by adjuster
- Report by incident/event location
- Report by claim type
- Report by change in reserves and claim status
- Report by reserve type
- Report data can be graphed
- Reports can be scheduled to run and get emailed automatically
- Allow reserve limits by user id
- Allow reserve limits by groups
- Web based
- Client/Server
- Individual user login accounts
- Security applied by user
- Security available by group
- Pre-populated field for ease of data entry
- Ability to rename field on screens
- Email from within the system to external emails
- Automatic conversion of Incident into a claim
- Maintain claim number if converted from an Incident
- Allow multiple claimants on same claim
- Less than 3 screens to setup initial claim
- Claim search by number/name/Social Security Number/loss date
- Allows attachments saved with claim - pictures, video, audio recordings
- Workflow management available
- Form letters available for use/modification/creation

- OSHA module available
- Certificate of Insurance module available
- Onsite Training of up to 8 DCORM Tort staff once the software is installed and prior to 9/30/08
- Yearly Maintenance / Upgrade services/Service agreement