JDi Data Claims Manager®

Pricing Proposal For

Trindel Insurance Fund

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August 20, 2014

Lisa Mitchell
Trindel Insurance Fund
P.O. Box 2069
Weaverville, CA. 96093

Dear Lisa,

JDi Data, Inc. (JDi) is pleased to provide Trindel Insurance Fund with a pricing proposal for JDi's Claims Manager®. Trindel has identified a need to streamline its claims management processes and has evaluated Claims Manager® to determine if it meets those needs. Following several calls and web demos, JDi has prepared a proposal package to not only meet, but exceed, Trindel needs.

JDi's staff takes a team approach to provide a consolidated solution to effectively manage, communicate and proactively service the needs of our clients. Our team is completely dedicated to developing, implementing and maintaining our proprietary software solutions; including our claims management related software modules. Our firm's focus on the implementation, integration and upgrades of our proprietary software platform for both public and private sector groups allows us insights into the needs of our customers that other organizations simply do not have.

Our proposed software solution, **Claims Manager®,** was developed internally and is maintained by the JDi staff. Claims Manager® is a complete solution that handles the full spectrum of claims management from first notice of loss to statutory reporting. Claims Manager® has powerful note and diary tools, integration with Microsoft Outlook, and a document depository to create an efficient work environment for the user. The report library and ad-hoc reporting capabilities empower users to produce the insight necessary for management. Our software is designed to be comprehensive and scalable, as required by your business needs, and our proposal includes comprehensive support to ensure that all aspects of our solution are configured to meet your needs.

The following proposal includes pricing for implementation/deployment as well as annual fees. In addition, our implementation/deployment process for Trindel, the JDi service model, our training philosophy, and screen shots of sample reports are outlined. Furthermore, I will highlight any enhancements to the system that have recently been released.

Sincerely,

Michael Del Fierro

Michael Del Fierro
Account Development Specialist

JDi Data

Why JDi Data?

Who Are We?
JDi Data Corporation
http://jdidata.com/
Clients: 150+

What do we do?
Provide software solutions, including claims and risk management software.

Products proposed
Claims Manager®

Who is using JDi Claims Manager®?

- Missouri Professional Mutual
- City of Albany, Ga
- Pacific Claims
- Choctow Nation
- Washington Suburban Sanitation Commission
- City of Daytona Beach

Why choose JDi?

- Proven track record of success across the insurance industry
- Intuitive user platform and completely configurable workflow
- Great functional fit
- Zero failed implementations
- Continual product reinvestment
- SaaS support

Who are JDi's partners?

- CompIQ-Xerox-ACS
- Gould & Lamb
- Company Nurse

For more than 30 years JDi Data Corporation has developed innovative software solutions to help manage complex claims data for clients of all sizes. As a proven leading technology solution provider and developer we specialize in standard and customized insurance management software solutions that streamline the work processes of our clients. Our decades of involvement in the insurance/risk management industry have helped us build a strong repository of knowledge, analysis, data gathering, and solutions development that lead to significant real-world savings for our customers. For the last 30 years, JDi Data has serviced clients across the insurance industry and launched proprietary software solutions.

Our **mission** is to actively pursue and innovate intuitive solutions with **creativity** and a **passion** to exceed your expectations and help resolve your processing pain. We do that by **listening** to your needs and **responding** with comprehensive insurance software that fits and improves how you do business.

Our flat organizational structure lends itself to corporate synergies that lead to significantly enhanced service levels for our customers. Our software solutions are completely customizable, and during our initial deployment process, our experienced Project Management Team will work through the project scope in order to ensure that our initial deployment leads to a seamless solution for you.

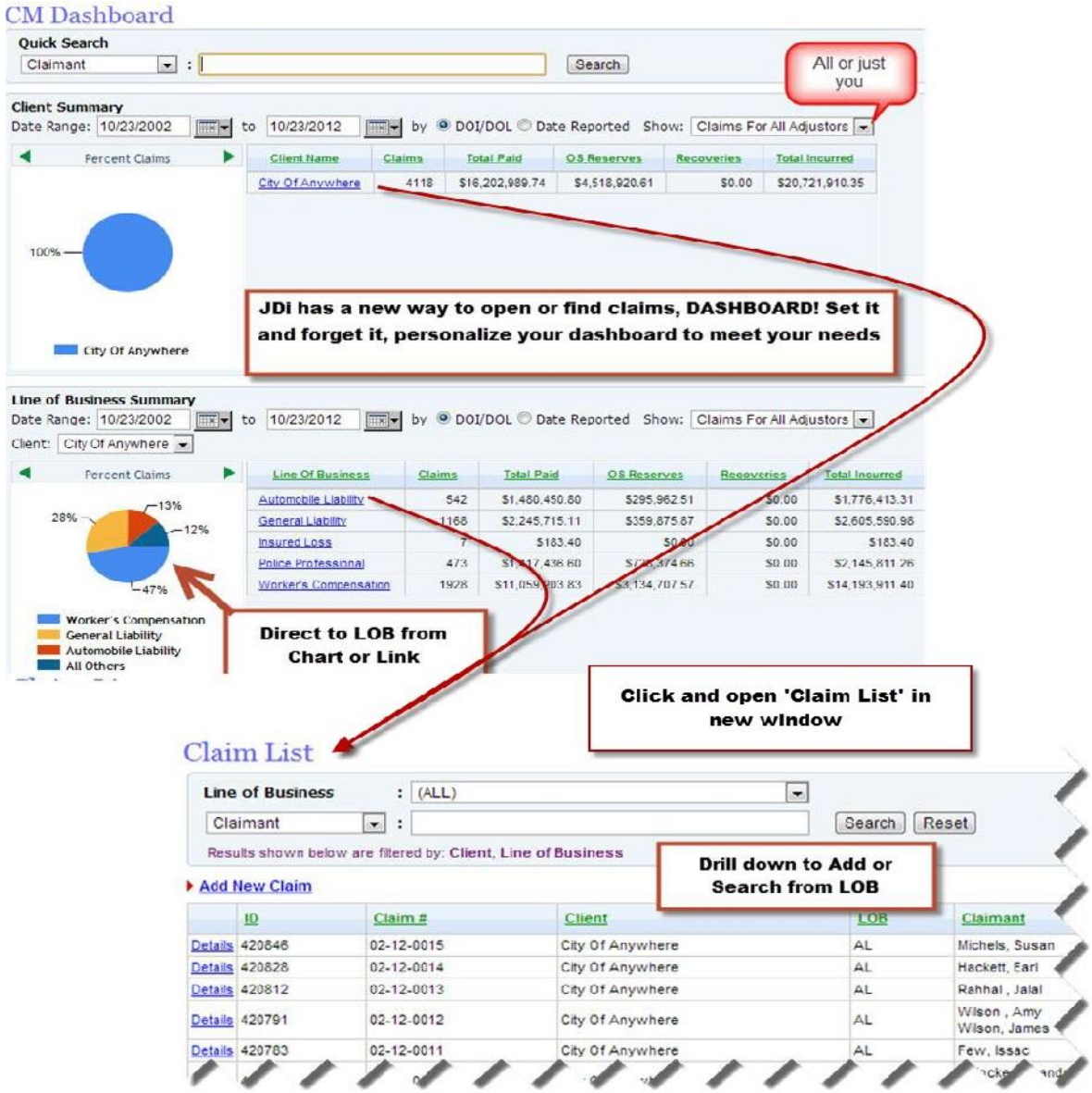
We pride ourselves on carefully **listening** to the unique needs of our customers to see how we can continue to evolve our solutions to simplify their administrative efforts. Our software solutions are industry-leading and our SaaS based business approach ensures our customer support is even better. Our team listens and proactively looks for ways to simplify the workflow processes for our clients.

Claims Manager® - Version 4.0 Enhancements

JDi listens to the needs and requests of clients, as well as the trends within the industry, to continually improve Claims Manager®. The following are a few of the enhancements recently released to JDi's Claims Manager®.

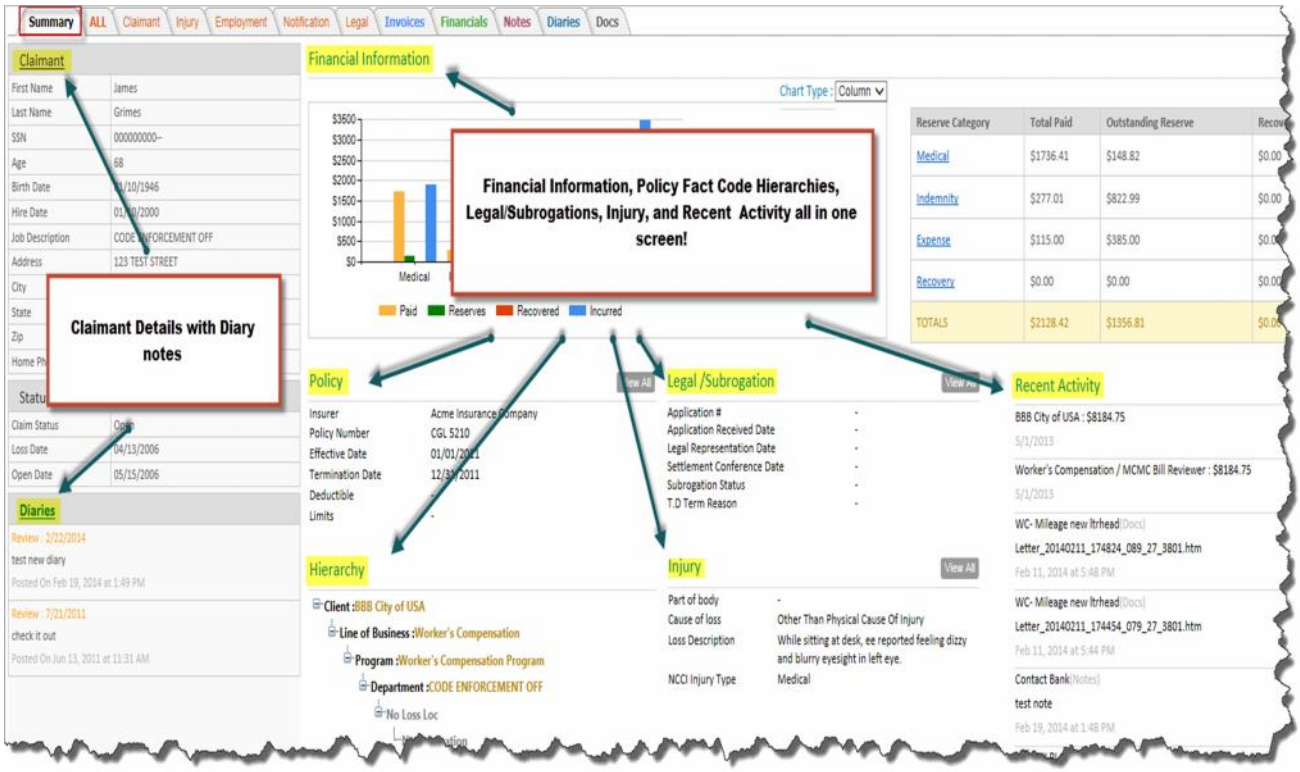
Adjuster Summary

Claims Manager's® optic lens dashboard now includes an adjuster summary. The summary provides a snapshot of the user's pending and stale diaries as well as additional metrics. Managers will have the capability to look at a summary for all their adjusters. In addition, you can view each line of business for multiple clients.



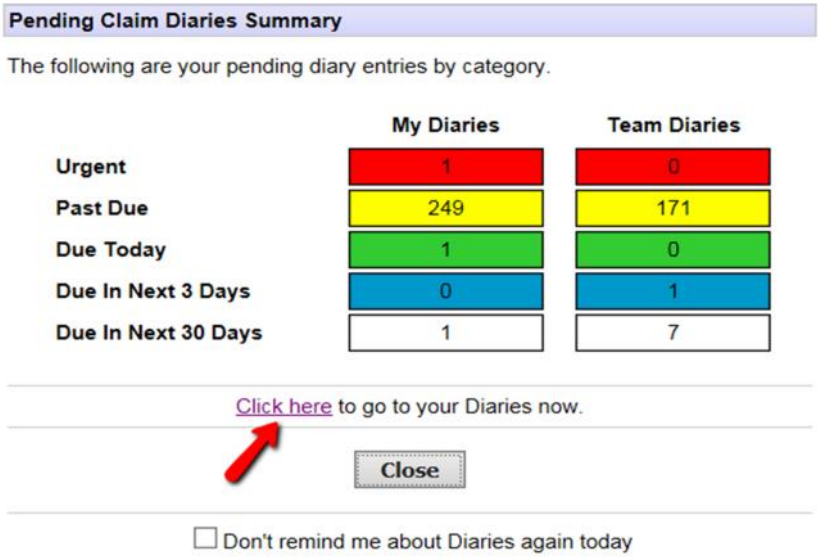
Claims Summary Screen

A Claim Summary has been added to the Claim Detail screen to provide a synopsis, complete with graphics, of the claim. Once a claim has been set up, there is little need to review the data entry screens unless change is required. Most subsequent activity consists of reviewing with the capability to drill down into specific details. The navigational features incorporated into the claim summary screen are superior and provide an instant overview with the ability to open additional screens to work multiple segments of the claim. Claims Manager® also provides the opportunity to run multiple instances of the software providing the ability to have claims open and working concurrently.



Enhanced Diary Functionality

Many users leverage the diary functionality of Claims Manager® as their to-do list.

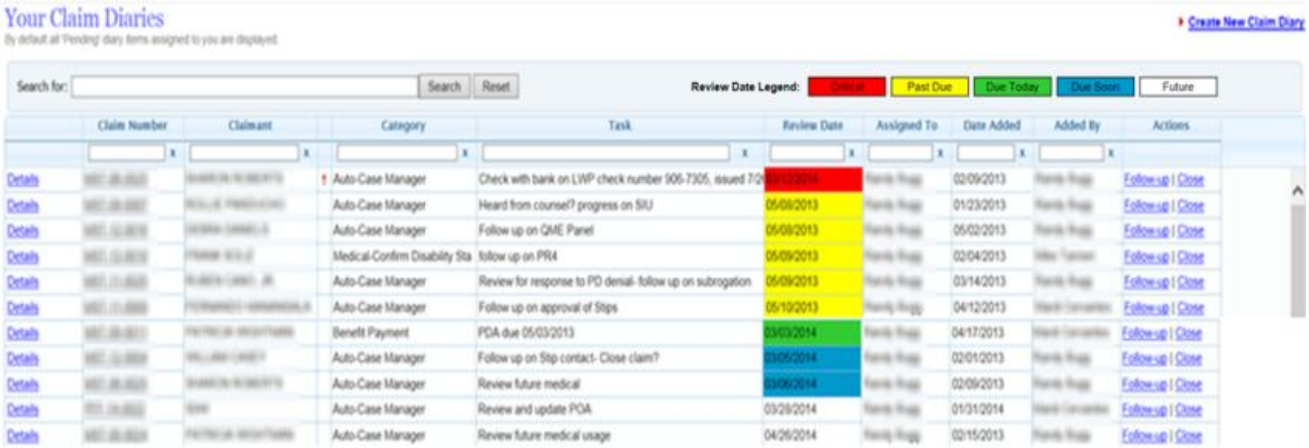


Upon **login**, the user is presented with a summary of their pending diaries. If you are a Supervisor, the **Pending Claims Diaries Summary** window will display not only your diaries but also the diaries of those who report to you.

The diaries are color coded by category. Once in **the Pending Claim Diaries Summary** window, the user can choose to [**Close**] the window, check the box to not bring up the window again today, or use the **Click here** hyperlink to view the details.

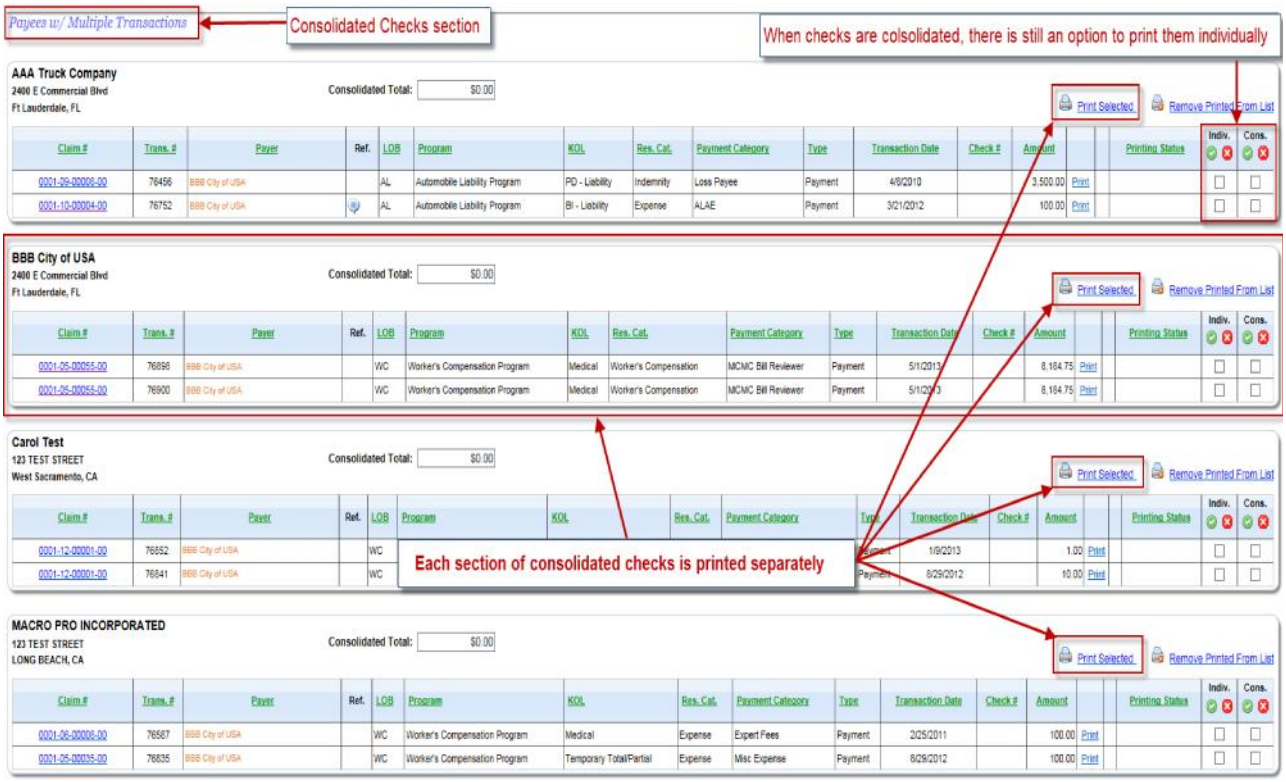
Your Claim Diaries screen displays diaries assigned to you (or one of your subordinates) in the same order as the diary summary window. **Your Claim Diaries** screen can serve as the user's "to-do" list for a given time period – eliminating the need to periodically run a **Diary Report**.

Note: Color coded **Review Date** legend is displayed in header.



Consolidated Check Printing

Users with defined access rights are now able to automatically consolidate checks to the same payee for a given client.



The **Remittance Advice** document shows the number of payments that were consolidated and line-items for each individual payment:

Consolidated Check Remittance

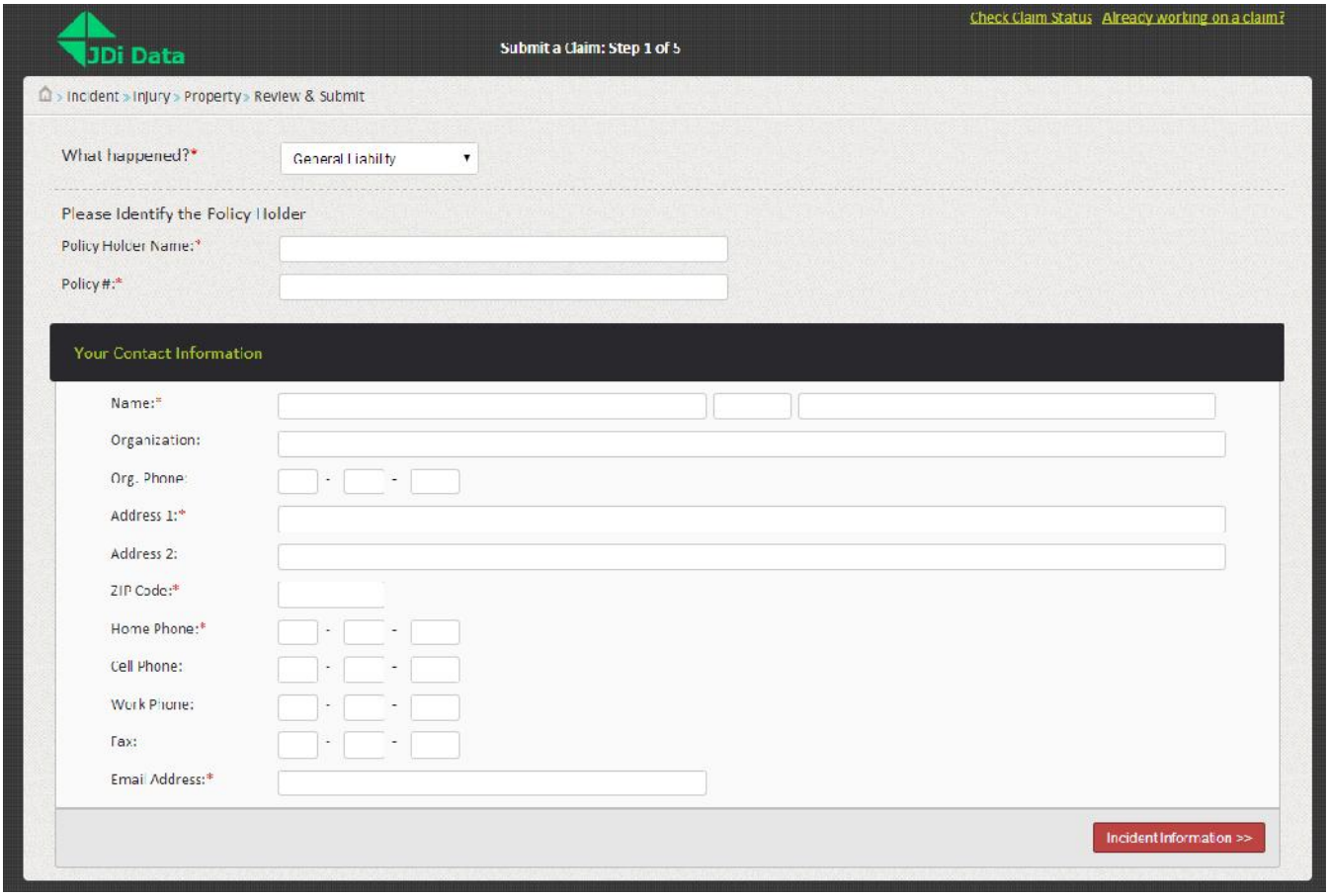
Payer: BBB City of USA
Payee: AAA Truck Company
Address: 2400 E Commercial Blvd
Ft Lauderdale, FL

Check Number: 26777
Check Date: 9/24/2012
Check Amount: $3,600.00

Claim Number	Transaction ID	Type	Trans Date	Trans Amount
0001-09-00008-00	76456	Loss Payee	4/8/2010	$3,500.00
0001-10-00004-00	76752	ALAE	3/21/2012	$100.00
Transaction Count: 2				**Total: $3,600.00**

FNOL Portal

A First Notice of Loss Interface is available to track incidents, export them to Claims Manager®, and thus allow for internal adjusters to keep them as incidents or convert them to claims.



JDi Data

Proposed Solution – Claims Manager® - Pricing

The table below has broken down pricing for all phases of implementation and annual fees.

Summary of Costs			
Annual Licensing		**One time Set up**	
Description	**Cost**	**Description**	**Cost**
5 Seat Licenses* (client hosted)	$36,000	Implementation/Deployment	$10,000
Interface Maintenance	$2,000	Data Conversion ***	$15,000
EDI Reporting (per transaction, CA)*	$1.00	Data Cleanup/Merge Contacts	$2,500
Medicare Reporting**	$1,000	Interface: Sage Accounting	$5,000
AccessADoc (Document Management)	$1,000	Interface: ISO ClaimSearch	$5,000
• SAAS Support/Maintenance	**Included**	Interface: Definit Bill Review	$1,000
• Upgrades		Set up: First Notice of Loss Portal (CA 5020)	$2,500
• Training		Set up: EDI Reporting California	$1,000
• Help Desk		Set up: Medicare111 Reporting (per RRE#)	$1,000
• Warranty		Set up: Microsoft Plugins	Included
• Microsoft Plugins		AccessADoc (Document Management)	Included
Total Annual Costs (EDI not included)	**$40,000**	**Total One Time Costs****	**$43,000**
*** Most EDI's are one per claim**			
**** Medicare Reporting annual flat rate of $1,000 OR on an as needed basis at client hourly rate of $125.00**			
***** Not to exceed amount**			
Additional custom work at client hourly rate of $125.00			

Optional Services

This proposal outlines a pricing proposal specific to the current needs of Trindel. At JDi, we know your business is always changing. Those changes may require additional work from JDi. For that reason many of our clients find it beneficial to provide pricing for additional services in our proposals.

Optional Pricing	Cost
Deployment	$5000-$20,000,00
Data Conversion	$5000-$35,000,00
Data Cleanup if required	$5000-$10,000,00
Merge Duplicate Contacts	$1000-$5000.00
Interface With HR	$5000-$10,000.00
Interface With Accounting	$5000-$10,000.00
Interface With ISO	$5000-$10,000.00
Interface With most Others	$5000-$10,000.00
QuickBooks SDK Interface	$1000-$5000.00
Import from TPA interfaces	$5000-$10,000.00
EDI State Workers Comp (set up Charge)	$1000-$2500.00
Medicare 111 reporting (set up charge)	$1,000.00
Interface with bill review (set up charge)	$1,000.00
Interface with pharmacy	$1,000.00
Customization Requests	
If enhancement requests have global industry impact they will normally be performed "No Charge" without limitations. If client specific customization a quote issued. No charge for consultation	
Chargeable Enhancements	
Custom interfaces	$5-$10,000.00
Client Network administration duties	$125.00 hr
Client Interface support requests	$125.00 hr
Non Client hourly rate	$185.00 hr

JDi Service and Support Model

JDi utilizes a SaaS (software as a service) approach. JDi clients do not have to worry about going over their budget for upgrades, consultation on report building, training a new user, or fine tuning the system to meet your needs. Annual license contracts with JDi include the following:

LICENSING FEE INCLUDES
Software User Licenses
Upgrades as released
Business Intelligence Analysis
Maintenance
Support
Training
Helpdesk
User Manual
Warranty
Consultation and SaaS Support
Most Enhancement Requests

Training

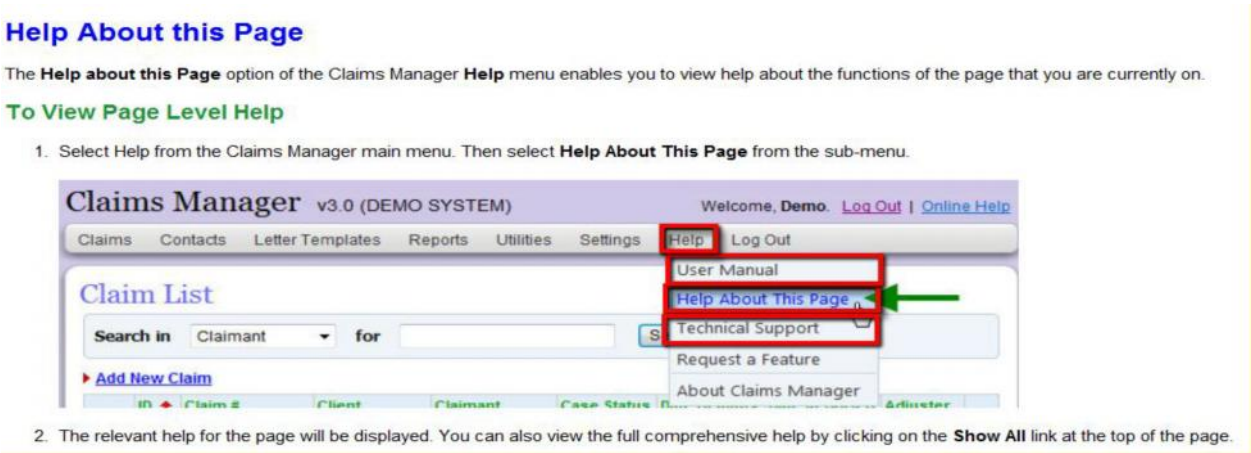
JDi creates a personalized training program set up for all users, managers and administrators incrementally over 2-3 months during deployment. In addition, approximately two days of onsite group training is provided prior to going live. Training doesn't stop after Claims Manager® is up and running. We host training via webinars, both at the request of the client and prior to the release of system updates (if changes to the user interface have been made). JDi also hosts user groups to gather feedback on user experience for future consideration into development.

Technical Support

- Normal business hours are 8:00 AM-8:00 PM EST
- 24/7 at no extra cost.
- Downtime takes top priority and is immediately addressed. Hot fixes are developed and implemented, as needed. Downtime is scheduled at least one week ahead of time unless there is an urgent requirement. Upgrades and releases are provided on a regular basis, typically quarterly.
- Releases and upgrades are part of our maintenance agreement requiring no client intervention, and all clients are notified ahead of time in preparation for updates.
- If security restrictions prohibit automatic installations, Client requirements override.
- Support is unlimited

User support

- Claims Manager® web pages each contain a free form help page for claims manual access.
- Online user manual, get help specific to the page they are viewing
- Contact JDi Data for assistance. Please see sample screen shot below.



Implementation Strategy Overview

JDi's approach emphasizes constructive dialogue with our clients to arrive at sensible, sustainable, long-term solutions. One of our core strengths revolves around the ability to understand client's business processes and needs and customize our software solution to meet these needs. Our tried and tested deployment process is integral to both the immediate and ongoing success of our software solution. Our phased process includes:

- **Initiation and Planning** – our assigned Account Team will meet with the client's key decision makers and will work through all components of the project scope;
- **System Configuration** – JDi will work with you to customize our solution to meet your specific needs;
- **Transition** - a controlled, iterative process to migrate your data to our system. We analyze data pre-migration and check its quality and validity at several points throughout the process;
- **Team Readiness** - we introduce the client to their data in the new software environment and initiate the training process.
- **Performance** – once all other phases are complete, we will review all processes and configurations with the client's team to ensure the full benefits of our solution are deployed and configured correctly.

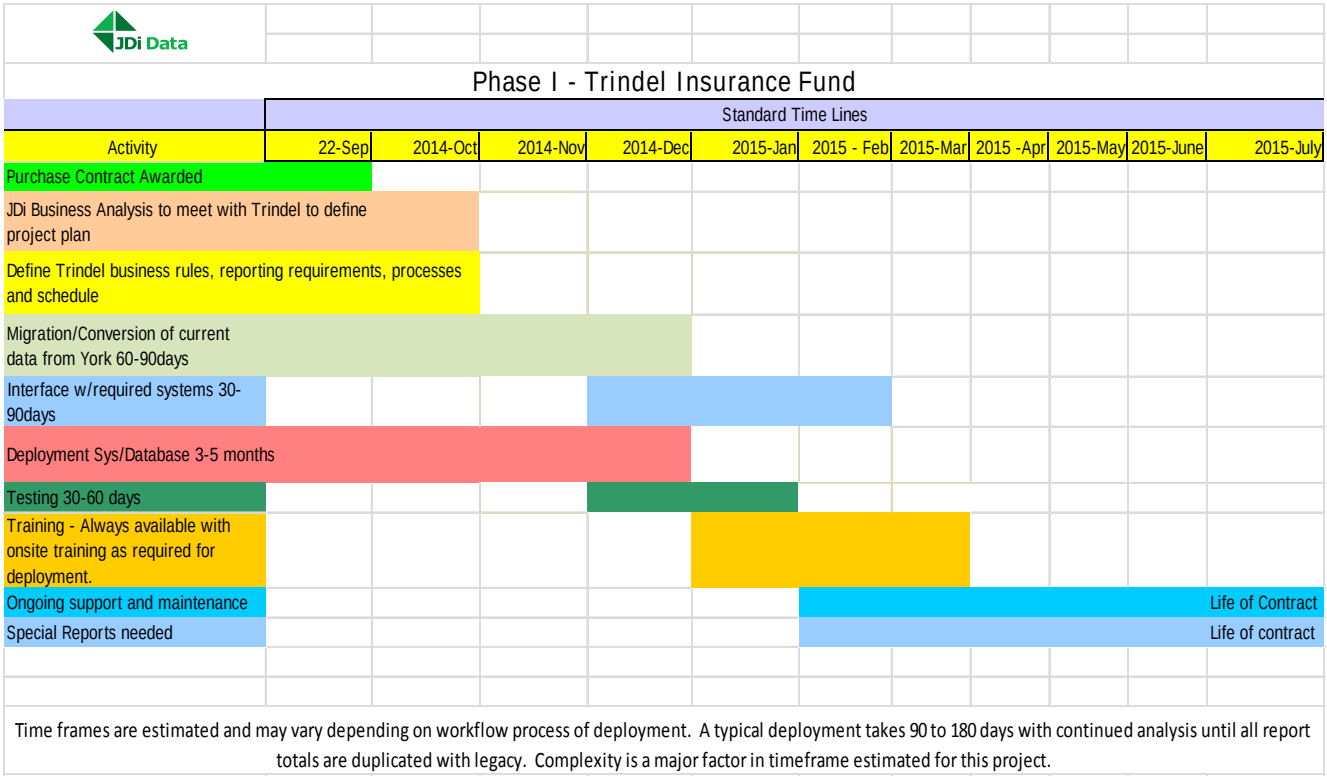
JDi maintains a proven track record of successful implementation and user experience, along with a tradition of hard work and innovation in assisting clients in streamlining their claims administration.

Our solution offers the sophistication and flexibility to support the unique, dynamic requirements of our varied clients. Our solution will maximize your control over critical policies and processes – and provides visibility into the summary information as well as the detailed information necessary to effectively utilize risk management programs. Our team has considerable experience creating data interfaces with authorized third party vendors and we can customize our solution to maximize efficient communication to these parties. This ability to develop interfaces with third party vendors leads to significant administrative efficiencies for our clients.

The result: More productivity throughout the claims life cycle.

Sample Implementation Timeline

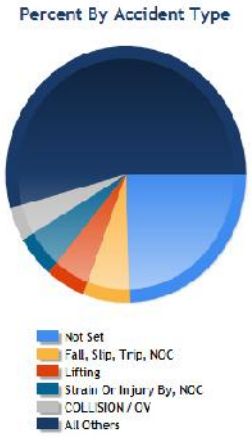
The chart below represents the standard timeline for deployment. JDi's goal is to have the system deployed within 3-5 months of contract execution. Of course, each project is different, and after JDi's initial planning phase, a more firm timeline is established.

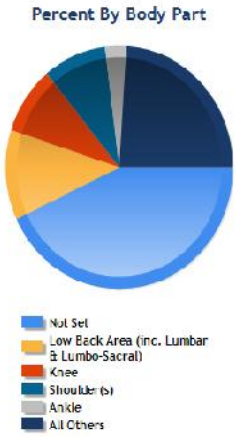


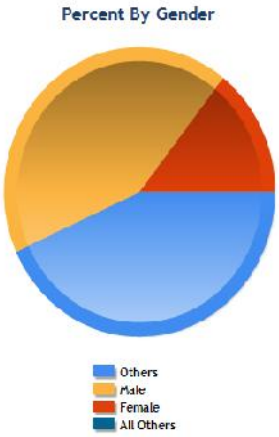
Reporting

Claims Manager's® reporting catalogue contains over 50 canned reports and can produce a variety of charts and graphs (see graphics below). Adding the option of MicroStrategy reporting allows for advanced graphing and charting capabilities.

Trending Reports







Loss Run Report

JDi Data

Loss Run Report
Date Opened: earliest - 7/31/2013
Loss run period: transaction dates 7/1/2013 - 7/31/2013
Totals valued as of: transaction date 7/31/2013
Show status as of: 7/31/2013
Client: City of USA
Line of Business: Automobile Liability

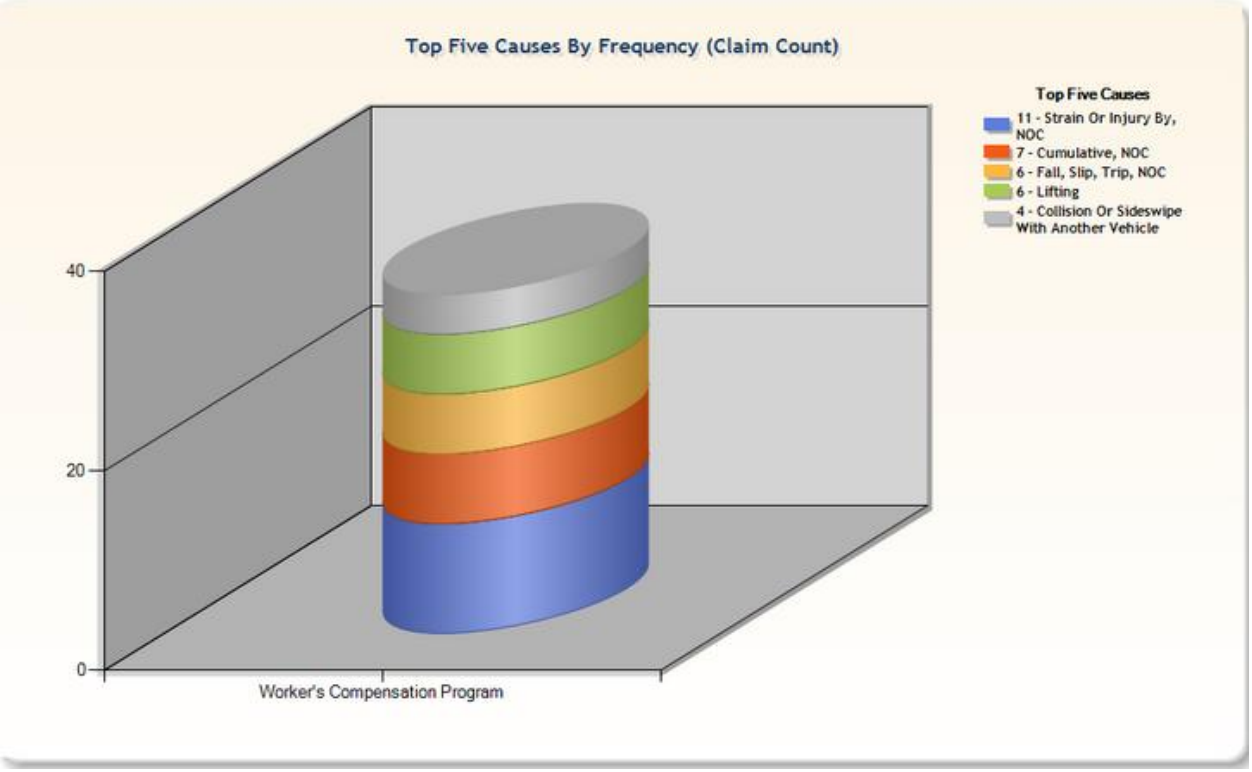
Print Date: 8/22/2013
Report Start: 7/1/2013
Report End: 7/31/2013
Run By: Bill Sileo

☐ Show Financial Summary Only. Hide Claim Details.

Total Incurred: $ 35,611.00 Total Paid: $ 26,911.00 Total Reserve: $ 10,100.00 Total Recovered: $ 1,400.00 Count: 5

							Payments					Reserves				
							Indemnity		Expense							
Claim Number	Claimant(s)	Adjuster	Date of Incident	Date Reported	Incident Description	Status as of Date	Total	Period	Total	Period	Total Paid	Indemnity	Expense	Total	Total Recovery	Total Incurred
0001-09-00008-00	Glenda Goodwitch	demo demodemo	03/30/2010	04/08/2010	The claimant was stopped to make a right turn at an intersection. Police Officer Billy Bookem ran into the rear of the claimant's car. No physical injuries reported.	Closed	$ 3,501.00	$ 0.00	$ 130.00	$ 0.00	$ 3,631.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 3,631.00
0001-12-00002-00	Joe Test, Mary Test, Sandra Test	Bill Sileo	11/14/2012	12/19/2012	Auto accident with whiplash	Open	$ 500.00	$ 0.00	$ 81.00	$ 0.00	$ 581.00	$ 1,500.00	$ 500.00	$ 2,000.00	$ 0.00	$ 2,581.00
0001-10-00004-00	Joe Test, Medea Bovier, Sam Smungus	James DeRosa	10/06/2010	01/12/2011	Officer Claunch was making a left turn from Peninsula onto Silver Beach when she was hit by the claimant who was traveling southbound on Peninsula.	ReOpened	$ 7,400.00	$ 0.00	$ 15,299.00	$ 0.00	$ 22,699.00	$ 700.00	$ 700.00	$ 1,400.00	$ 1,400.00	$ 22,699.00
0001-09-00010-00	Mike Mauser	demo demodemo	02/03/2010	04/08/2010	Claimant's car smashed by a vehicle that was being pursued by police.	Open	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 5,000.00	$ 200.00	$ 5,200.00	$ 0.00	$ 5,200.00
0001-09-00006-00	Tommy Toyota	demo demodemo	04/02/2010	04/08/2010	Accelerator on City truck got stuck and truck hit claimant's vehicle.	Open	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 1,000.00	$ 500.00	$ 1,500.00	$ 0.00	$ 1,500.00
						Total:	$ 11,401.00	$ 0.00	$ 15,510.00	$ 0.00	$ 26,911.00	$ 8,200.00	$ 1,900.00	$ 10,100.00	$ 1,400.00	$ 35,611.00

Top 5 Causes Report



Appendix A-JDi Deployment

At JDi, our clients are our number one priority, and our experienced implementation team will work with key members of your team to solve your key challenges, and complement your organization. Our consultants will help you get the job done correctly, on-time, and on budget. During the implementation period, we work side by side with client managers, IT, accounting and department heads. Our Project Management Team will explore processes, business rules, workflow and other considerations that are essential for a successful deployment and ongoing administration platform.

Deployment Phases:

During the **Initiation and Planning** phases, we'll facilitate a meeting with your key decision makers and a project kick-off with your staff. Detailed planning will cover such things as processes, business rules, workflow and other considerations that are essential for a successful deployment and ongoing administration platform.

During the **Configuration** phase, we'll work with you to customize our system to meet your specific needs. The Configuration phase generally includes the following steps:

1. Installing database and program.
2. Performing data conversion
3. Documenting current workflow and identifying best practices
   i. Developing relationship with IT management and assisting with hardware environment decisions.
   ii. Accounting personnel and compliance personnel are all consulted to identify individual departmental and company or extraneous industry requirements.
   iii. Interviewing adjusters for "hands on" understanding of their expectations

During the **Transition** phase, we use a controlled, iterative process to migrate your data to our system. We analyze data pre-migration and check its quality and validity at several points throughout.

During the Team **Readiness** phase, we introduce the client to their data in new software environment and initiate the training process.

During the **Performance** phase, all your data has been migrated and your staff members will begin using your new system to administer plans. Processes are reviewed and refined to ensure the full benefits of our system are deployed to help you increase efficiency and satisfaction.