



ADDENDUM NO.: 1

**INVITATION TO NEGOTIATE NO.: 20-0023
INTEGRATED VENDOR INVOICE SUBMISSION SOFTWARE
11/13/2020**

Citizens Property Insurance Corporation (Citizens) hereby formally amends the above referenced solicitation. The purpose of this Addendum is to answer questions received from Vendor(s) prior to the deadline in Paragraph 1.8, Calendar of Events.

ANSWERS TO QUESTIONS:

1. What services are you looking to solve for?

- Contents?
- Aerial Imagery?
- Engineers?
- Ladder Assist?
- Water Mitigation?
- IAs?
- Etc?

Answer: Through this ITN, Citizens is looking for a vendor invoicing solution to be used by Independent Adjusters and the various other claim service providers that Citizens utilizes. Citizens is particularly focused on an invoicing solution for its Adjusting Firm Invoices; however, Citizens is also seeking to use the solution for other claims service providers on an ad hoc basis such as for drone vendors or engineering firms.

2. Are you able to divulge what specific vendors you are currently using and therefore will look to back into the invoice software?

Answer: Citizens does not currently have a solution / software that it uses to provide these services. The awarded Vendor will not be required to transfer historic invoice information into its solution.

3. Total volume of invoices per year that you will plan to back into the invoice software?

Answer: Per Section 2.1 of the ITN, Citizens processes approximately five thousand (5,000) monthly Invoices for its non-catastrophe related Claims. Invoice volume can exceed fifty thousand (50,000) when Citizens is responding to a large catastrophe. However, as stated in answer to question #2 above, the awarded Vendor will not be required to transfer historic invoice information into its solution.

4. In the Attachment F – Price Sheet, is the weighted 1st year mandatory?

Answer: Yes, the weight given in the Price Sheet for the 1st year allows Citizens to better evaluate the cost of implementation as part of the cost of ownership.

5. What is the source/program of the single sign-on?

Answer: Citizens uses both a “home grown” authentication system and Azure active directory but the system should be able to integrate with the federated authentication and other Identity and Access Management products based on SAML 2.0.

6. Do you have a payment portal? If no, how are you processing payments?

Answer: Citizens does have a payment portal; however, the awarded Vendor's solution will not be required to integrate with that system.

7. How many people will be submitting invoices? And are they all internal users?

Answer: Our non-catastrophe volume currently would necessitate approximately 600 users submitting Invoices. In a catastrophe event, that number could exceed approximately 5,000 users. For both non-catastrophe and catastrophe, these users would be external to Citizens operating through one of our vendors. These external users include contracted Adjusting Firms and their Independent Adjusters, and other Citizens' service providers on an ad hoc basis.

8. How many customers will use the new solution and in what capacity?

Answer: Same answer as #7 above in terms of volume and users. As far as how they would leverage the software, the anticipation is that all these external users would utilize the software to create, submit, and track their Invoices.

9. How many internal users will use the new solution and in what capacity?

Answer: Citizens anticipates utilizing up to 100 internal users to view, validate and generate reports in order to make payments against the Invoices. This number could certainly increase or decrease depending upon the functionality of the new solution.

10. Page 12, D5 – What are the ‘other required Citizens systems’?

Answer: The primary systems are XactAnalysis (Xactware) and ClaimCenter (Guidewire). However, there may be opportunities to pass data to systems that would not be part of the initial implementation. For example, Citizens has a “home-grown” vendor credentialing/administration system and Alfresco document storage system that Citizens may want to integrate with the awarded solution at some point. We want to know the proposed solution's ability to integrate through common protocols to show the ability to integrate in the future.

11. What are the top three pain points for the user of the current system in place?

Answer: Citizens does not currently have a solution / software that it uses to provide these services.

12. Are there value propositions that the team has in mind for a new solution and if so, please list?

Answer: Citizens is seeking to automate invoicing processes for contracted Adjusting Firms

and their Independent Adjusters, and for other service providers on an ad hoc basis. This includes automation features for Invoice submission, review, and approval. The intent is to reduce or eliminate the need for manual invoicing as described in Section 2.1 of the ITN. Unlike the invoicing templates currently manually completed by our vendors, this solution will provide automation, tracking and reconciliation abilities.

- 13.** How many stakeholders will be on the evaluation committee and what positions do they hold within the organization?

Answer: Citizens has not named the evaluation committee at this time. This procurement will follow Florida Statute that requires the evaluation committees include at least three persons who collectively have experience and knowledge in the relevant program areas and service requirements.

- 14.** What is the approximate budget for this project?

Answer: Citizens does not have a specific budget for this project. Citizens is hoping to reduce or eliminate manual invoicing and provide automation, tracking and reconciliation abilities, with a return on investment within the first two years of the contract for Citizens to consider it a success.

- 15.** What platform/software is Xactware?

Answer: Xactware is a suite of software owned by Verisk. This Xactware solution suite is used at Citizens to manage the process of inspecting/estimating property damage for our claims and the assignment of work related to this process. XactAnalysis is the main hub which assigns work and retrieves data from their property damage estimation software called Xactimate. The solution would need experience integrating with XactAnalysis to ensure the data and work assignments can be validated against the Invoice. In addition, the assumption is any integration between Verisk/Xactware would be managed between the vendor and Verisk/Xactware.

- 16.** Approximately how many designated users will need the ability to fully configure and maintain invoice templates?

Answer: Citizens anticipates this number to be no greater than 10 users.

- 17.** Please list all "other systems used by Citizens" that the system will need to integrate with and what platform/software they are.

Answer: Please see answer to question #10 above.

- 18.** Approximately how many business rules are embedded in the existing Excel template?

Answer: We have 2 primary excel templates currently used by our independent adjusters:

- A Claim Fee Schedule Invoice that incorporates about 15-20 business rules*
- An Adjuster Daily Rate Invoice that incorporates about 15-20 business rules*

We have about 30 excel templates for the other types of vendor's Invoices (Ad Hoc

*Invoices), each with 2-3 embedded business rules.
So approximately 150 business rules in total.*

19. Is the intention to replace the Excel templates with the new solution? Or an integration with the Excel templates?

Answer: Yes, the new solution is intended to streamline our current process and replace the excel templates.

20. Approximately how many designated users (broken out by user type if possible) will need access to approve and/or modify invoices? Designated users: Independent Adjusters, Adjusting Firms; other service provider users; data analysts; user administrators; other designated parties.

Answer: While Citizens does not know what the designated user structure will be for the approval or modification of invoices for each firm, we would anticipate up to 25 firms using the system on a daily basis, and up to 50 firms in a catastrophe event. In addition, please see answers to questions #7, #8, and #9 above.

FAILURE TO FILE A PROTEST WITHIN THE TIME PRESCRIBED IN SECTION 627.351 (6)(e), F.S., CONSTITUTES A WAIVER OF PROCEEDINGS. SEE SECTION 4, GENERAL CONDITIONS, WITHIN THE SOLICITATION DOCUMENT FOR DETAILS REGARDING HOW AND WHERE TO FILE A PROTEST.