

Claims Service Provider Selection Process Criteria for Evaluation of Finalist Presentations

Demonstrates Clear Understanding of (Client Name) Business – The presentation should demonstrate the CSP's clear and detailed understanding of the various businesses of (CLIENT NAME) and what experience the TPA has in managing claims of similar companies.

Staffing, Experience and Stability – Presentation should address the CSP's approach to complying with (CLIENT NAME)'s requirements for dedicated/designated claims staff, experience levels, coverage expertise, and maximum caseloads for adjusters and supervisors handling (CLIENT NAME)'s files.

Account Management – How will the CSP comply with (CLIENT NAME)'s requirement that an Account Manager be given authority within the CSP to take all necessary steps to meet (CLIENT NAME)'s expectations and resolve any performance issues and conflicts? The presentation should demonstrate CSP's Senior Management commitment to the success of (CLIENT NAME)'s program.

Reserving, Claim Authority Consultation and Communications Presentation should address CSP actions to ensure the adjusters will comply with (CLIENT NAME)'s requirements for reserving, claim authority consultations and required external communication (i.e. excess carrier) on a timely basis. The CSP should discuss reserving philosophy and practices, as well as internal quality control measures and actions in place to ensure that quality standards are consistently met.

Supervisory and Quality Control – Presentation should address supervisor responsibilities, case loads, diary requirements, and approval authorities for all claim types and reserves. The CSP should clearly define the role and responsibilities of the supervisor in the quality control program of the company, and what programs the CSP has in place to manage quality of services. Define the process for reporting results of service quality to (CLIENT NAME)'s and the frequency of these reports.

Information Systems – Reporting and Controls – Presentation should address in detail the CSP's RMIS system, how client access is achieved, what reporting capabilities exist (ad hoc and standard reports) and the quality control standards to assure that data is correct and secure. The CSP should demonstrate how data is used in the quality control programs. No RMIS demo at this time.

Transition Plan - The CSP should outline a detailed transition plan. The transition plan must demonstrate how the CSP will have the required staffing in place, comply with all necessary jurisdictional licensing requirements, and incorporate all necessary data from the insurance carriers and or the current administrator. The CSP should address performance guarantees (gain sharing/pain sharing) specifically tied to the transition plan.

Key Differentiators – Presentation should address what differentiating qualities the CSP possesses that make them the best partner for (CLIENT NAME). What separates the CSP from their competition? Do these qualities align with (CLIENT NAME)'s needs?