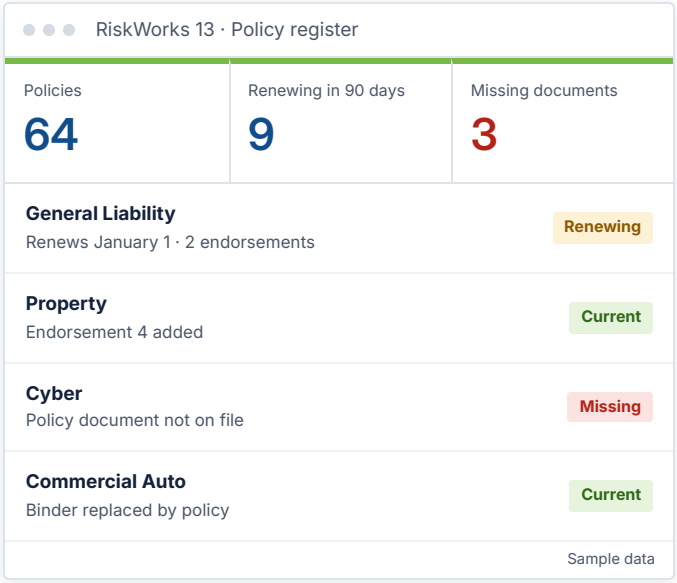
RISK AND INSURANCE · RM.POLICIES

Policy Management

Insurance policy management

Every policy, binder and endorsement in one register, read in by AI, with renewal dates, documents and approvals attached.



The problem

Policy details live in broker emails and PDFs, so nobody has one current view of what is insured, with which carrier and on what terms. Each renewal runs by email between broker, carriers and business units, and when an old claim surfaces, the expired policy is in someone's personal folder.

WHERE IT HITS YOUR TOTAL COST OF RISK



Premiums 32%
Not directly affected.

Retained losses 62%
Coverage nobody can find can't respond. A current register sends each claim to the right policy.

Cost to manage risk 6%
In this example, documenting coverage takes about 650 staff hours a year, roughly $47,000.

Typical split from the Exigis Risk Diagnostic's example, a public agency with a $1.2 billion budget. Take the diagnostic to see your own.

How it works

1. **Documents received**
2. **AI fills in the policy record**
3. **Reviewed and approved**
4. **Feeds certificates and renewals**

Who uses it

Risk and insurance managers, the teams that issue certificates, and finance teams that need policy terms and renewal dates.

Why Exigis

- Independent, privately owned and a certified minority business enterprise (MBE), since 2002
- SOC 2 Type II audited controls; no offshore staff
- Software plus Exigis specialists, at the service level you choose
- Clients include IBM, Pfizer, Mars, Honda, the Port Authority of New York and New Jersey, MTA and San Francisco International Airport

24	150,000+	11 years	4–8 weeks	95.8%
years running risk and insurance programs	insurance documents processed a year	our average client relationship	typical rollout, kickoff to go-live	customer retention

What it does

AI-assisted policy intake

Upload policies, binders, endorsements and quotes in any format. AI reads them and fills in the policy record (carrier, policy number, dates, limits, deductibles, premiums) for your team to confirm.

Policy register

Every policy, binder and endorsement with its key terms: limits, deductibles, exclusions, premiums and fees.

Renewal exercises

Run the annual renewal by program, coverage line and policy, with assignments, reminders and escalations, and quotes, authorizations and approvals captured along the way.

The source for certificates

The register feeds Certificate Issuance, so every certificate reflects current policies and renewals trigger reissue automatically.

Searchable archive

Expired policies and their documents stay searchable, so the right policy turns up when an old claim surfaces.

Full record and reporting

Every action and message is logged, and ad-hoc reports give real-time policy, process and performance data.

Questions

How do policies get into RiskWorks?

Upload the documents and AI-assisted intake fills in each policy record for your team to confirm. You can also import from a spreadsheet or enter policies directly.

Can we find the policy behind an old claim?

Yes. Expired policies and their documents stay in a searchable archive, with the endorsements that applied at the time.

Can business units see their own coverage?

Yes. Access is set by role, so each business unit sees the policies that apply to it.

Built on RiskWorks

Every application shares one platform, so adding a process means configuring an application, not buying another system.

Workflows · Business rules · Hierarchies · Role-based access · Documents and notices · Dashboards and reporting · Audit trail · RiskWorksAPI · AI document reading

Connected and supported

Integrations: Workday, Oracle, SAP Ariba, JD Edwards, PeopleSoft and MRI, and any other system through RiskWorksAPI.

Support: a single point of contact for your program, with live chat, email and phone support for your users and your third parties.

Security: SOC 2 Type II, named users only, and your data is never used to train outside AI models.

Start with the free Risk Diagnostic

your approximate total cost of risk, compared with your industry, then review it with an Exigis analyst at no cost.

exigis.com/risk-diagnostic

or call (800) 928-1963