

## HANDS-ON SESSIONS

### **Beginner Views and Reporting**

#### **RMIS**

This is the perfect session for anyone new to views and reporting in Origami or for anyone who is already familiar with these topics but wants to brush up on the basics. In this session, we will cover reporting concepts and terminology, building, saving and exporting a view, reports module overview, creating a new report, and interactive options. We will also give an overview of standard templates that will highlight popular templates.

### **Beginner Views and Reporting**

#### **Claims and Policy Administration**

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### **Advanced Reporting**

#### **RMIS**

Are you eager to take a deeper dive into reporting in Origami? Would you like to learn how to build reports on your own? In this session we'll cover all of that and more! You'll learn about the difference between building a custom ad-hoc report and a custom template, how to build a custom ad-hoc report, and how to build a custom report template.

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### **Administrative Workflow Configuration**

#### **RMIS**

In this session we will discuss templates – including email, note and task templates as well as mail merge templates. We will also go over custom data validations, custom alerts, data entry events and notification triggers, and how to check for bounced emails. An ideal session for system administrators who desire to meet the ever-changing needs of their user base.

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### **Administrative Workflow Configuration**

#### **Policy Administration and Billing**

In this session we will discuss templates – including email, note and task templates as well as mail merge templates and policy packets. We will also go over custom data validations, custom alerts, data entry events and notification triggers, and how to check for bounced emails. An ideal session for system administrators who desire to meet the ever-changing needs of their user base.

### **Dashboard Basics: Navigation, Standard Widgets, Dashboard Building & Scheduling**

#### **RMIS**

Strong basics are a key to dashboard mastery! This session is ideal for both beginners and anyone looking to brush up on the essentials. We will cover dashboard navigation, an overview of standard widgets, editing existing widgets, and advanced searches and views. We will also go over territory and location dashboards and exporting, scheduling, and distribution.

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### **Advanced Dashboards: Deep Dive into Standard Widgets and Building Custom Widgets** *RMIS*

If you are already familiar with dashboards, but looking for more advanced features, tips and tricks, this is the perfect session for you. In this session we'll cover lesser known standard widgets, custom widget basics, building custom widgets, configuring global filters, and more!

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### **Beginner Forms & User Management** *RMIS*

New to forms and user management in Origami? Look no further! In this session, we'll go over all the basics you'll need to get started. Topics will include adding custom fields, configuring code tables and dependencies, user management, and basic user security.

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### **Advanced Form Configuration** *RMIS*

Are you already familiar with form configuration and want to learn more? Then this is the session for you! This session will cover form snippets, HTML, and advanced form attributes such as formulas, toggles and IFs, grid panels, and more! We will also go over some new form features such as form change history and previewing forms.

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## HANDS-ON SESSIONS

### **How to Build Safety Audits & Inspections from Scratch** *Environment, Health & Safety, RMIS*

Are you tired of using generic safety audits and inspection forms that don't quite fit your organization's unique needs? Join us for a hands-on training session where you'll learn how to build custom safety audits and inspection forms from scratch, or tailor existing forms to better suit your requirements. Our experts will guide you through the process, covering topics such as question types, toggling, scoring, moving an audit to mobile, and leveraging corrective actions. By the end of the session, you'll have the knowledge and skills to design and implement safety audits and inspections that can help you gather the information you need to prevent incidents and injuries.

### **Streamlining Safety Programs with Automated Workflows & Notifications** *Environment, Health & Safety*

In this hands-on training session, you'll learn how to drive efficiency in your safety programs by automating your incident reporting, investigations, audits, and inspections processes. Our experts will guide you through the setup of custom workflows, data entry events, notifications, and email communications to streamline your safety processes and reduce manual, repetitive tasks and ensure that important safety items are never missed. Join us to learn how to save time and increase the effectiveness of your safety programs through automation.

### **Patient Safety Reporting for Healthcare Organizations** *Healthcare*

Did you know you can build your own ad-hoc reports for patient safety within Origami? Learn how to analyze your data and create custom reports in this hands-on session for organizations focused on patient safety.

### **Transform Your GRC Data Through Dashboards & Reports**

#### *Governance, Risk & Compliance*

This session is designed to showcase dashboards and reporting that enhance your everyday decision making. During this session, presenters will demonstrate standard charts and reports, as well as vertical and use-case specific examples from clients.



## GENERAL SESSIONS

### Don't Ride Solo – Unsilo! Using Origami to Connect Critical Data and Move Ahead

*Designed For: System Administrators*

As an Origami system administrator, you are often asked to deliver creative solutions to complex problems in your organization. During this session, we'll discuss how to best uncover the needs of your organization, generate buy-in, and elevate your presence as the system administrator by providing creative solutions through Origami. Additionally, we'll outline the breadth of Origami and bring in client use cases of organizations utilizing Origami across their organization and discuss how they defined and achieved success.

### Journey to Integrated Risk Management

*Designed For: Risk Managers/Directors, Enterprise Risk Managers/Directors, Safety Managers/Directors*

The session will explore the evolving landscape of risk management and highlight the need for a more integrated approach that considers various risks holistically. Attendees will leave the session with an understanding of IRM and its benefits, as well as practical tools and techniques to consider as you begin your IRM journey.

### Risk Pools and Reinsurance

*Designed For: Underwriters, Policy Administrators*

Origami's platform features offer advanced tools and strategies for mitigating financial erosion, including premiums, deductibles, and reinsurance for risk pools. In this session, our speakers will explore these features and discuss how to gain greater control, improve underwriting processes, and enhance overall financial performance.

### Origami Best Practices for Workers' Comp Claims Administration

*Designed For: Claims Managers, IT Administrators*

Workers' compensation insurance administration can be a complex and time-consuming process, especially when managing multiple data sources and processes. With the right tools and strategies, however, organizations can streamline operations and improve productivity. Our speakers will discuss standard integrations and configuration that can be used to automate processes and streamline workflows, resulting in faster claims processing and improved efficiency for Workers' Compensation insurers.

### Origami Implementation Panel: Building a Successful Partnership

*Designed For: Underwriters, Policy Administrators, Claims Managers, IT Administrators*

Successful implementation doesn't happen by accident. As they say, success is where preparation and opportunity meet. This panel, made of representatives from Origami and established customers Inspirien and American Equity Underwriters, will explore the various factors that have led to successful partnerships. Our panel will discuss everything from the types of subject matter experts (SMEs) needed, the approach to building solid business requirements, and even project management tips for managing each team's expectations. Attendees will have the opportunity to ask questions and become prepared for their next system enhancement go-live date.

### Streamlining Insurance Claims Management through Workflow Automation

*Designed For: Claims Managers, IT Administrators*

By implementing automation workflows, organizations can significantly reduce their operational costs and enhance the customer experience. This session will focus on best practices for claims workflow automation using Origami, the benefits of rule-based medical billing, and effective notification triggers for efficient claims management. Our speakers will showcase real-world examples of successful automation implementations and discuss the challenges and opportunities of streamlining claims management processes, resulting in faster claim adjudication, higher accuracy, and improved customer satisfaction.

### Dialing in Claims Efficiency: Harnessing AI, Predictive Analytics, and Machine Learning

*Designed For: Claims Managers, IT Administrators*

AI, predictive analytics, and machine learning are revolutionizing claims management, enabling Origami customers to streamline operations, reduce loss adjustment expense, and improve customer satisfaction. In this session, we will discuss novel use cases and provide insights into implementing these technologies. We'll also discuss emerging trends and future developments that will set up attendees with a clear roadmap for staying competitive and opportunistic amidst enormous technological change.

## GENERAL SESSIONS

### Maximizing Insurance Claims Integrations Within the Origami Platform

*Designed For: Claims Managers, IT Administrators*

Origami offers a strong set of tools and integrations for managing insurance claims, including ecosystem integrations with medical billing and pharmacies, accounting, banking, ClaimSearch, direct to carrier, and more. In this session, we will showcase the benefits of these integrations, highlight client use cases, and provide insights into how to maximize their value using the Origami platform.

### How Origami is Streamlining Bureau-Based Content Management

*Designed For: Underwriters, Policy Administrators*

Learn about Origami's bureau content management solution – a centralized database of commercial lines bureau content in which Origami implements and distributes circular updates in near real-time. Attendees will be introduced to the workflow of a policy accessing the repository; the versioning system used to manage, adopt, and distribute the content; and how business-specific deviations can be integrated with repository content.

### Streamlining Underwriting Data Collection and Renewal Negotiations with Origami

*Designed For: Underwriters, Policy Administrators*

In today's challenging market conditions, it's more important than ever to have a streamlined underwriting process that allows you more time to focus on the key aspects of program renewal negotiations. Origami offers an innovative approach to automating the collection, updating, and preparation of critical underwriting data, so you can spend more time discussing renewals with your customers.

### Powerful Integrations for Policy & Billing Clients

*Designed For: Underwriters, Policy Administrators, IT Administrators*

Origami offers more than 700 proven integration templates for the most essential ecosystem providers, making connecting with your data and service partners easier than ever. In this session, we highlight a few beneficial integrations that current clients already use for streamlining processes and ensuring data accuracy.

### Origami Billing: Overview, Recent Enhancements, and What's Next

*Designed For: Underwriters, Policy Administrators*

Get the most out of billing functionality in Origami. Join us for a general overview of the solution's features and capabilities. We'll review new enhancements that were released over the past year, including account billing, exposure-level billing, and agency bill enhancements. We'll also look ahead at what's on the roadmap for the months ahead.

### Empowering EHS Managers to Proactively Reduce Risk

*Designed For: Safety Directors/Managers/Users*

Join us for an engaging session on how Origami's fully integrated EHS Suite, including safety management, process safety management, environmental and regulatory compliance, chemical management, and occupational health, can support a culture of safety and empower EHS managers to take proactive measures to reduce risk. We will explore the importance of integrated risk management in EHS and provide examples of how our recent enhancements can help identify trends and proactively mitigate hazards to reduce incidents and injuries. See demos of our enhancements to key features such as investigations, safety meetings, JSA, LOTO, and SDS, and get a deep dive into our EHS Suite offerings. Join us to learn how our latest EHS offerings can support your proactive risk reduction efforts.

### Proactive Policies & Programs

*Designed For: Risk Managers/Directors*

During this session, we'll show you the best way to leverage policies and programs, as well as provide a view of all capabilities. Understand how to keep tabs on premiums and financials to streamline your renewal process and maximize your RMIS usage.

### Creating a Culture of Safety with Mobile Apps for Audits & Inspections

*Designed For: Safety Directors/Managers/Users, Risk Directors/Managers/Users, Loss Control Professionals*

This session will explore how mobile apps can help create a culture of safety in organizations. Attendees will learn about how mobile apps can improve communication, increase transparency, and foster a proactive approach to safety management. The session will also cover a demo of the key features of effective mobile apps including audits and inspections.

## GENERAL SESSIONS

### New Features Spotlight: Regulatory Compliance

*Designed For: Safety Directors/Managers/Users, Compliance Managers/Directors/Users*

Join us for an informative session on how Origami Risk's partnership with STP ComplianceEHS can help you stay on top of your compliance obligations. In this session, we will focus on how imported reliable and up-to-date regulatory content can help you eliminate manual tasks and processes. Our Origami and STP experts will demonstrate imported legal registers and audit content, illustrating how the partnership can allow you to easily access regulatory content, stay up-to-date with changes, and ensure that you are always in compliance. Join us to learn how Origami Risk and STP can streamline your compliance efforts, free up valuable resources, and minimize risk.

### Process Improvement: A Toolkit for Safety and Quality Professionals

*Designed For: Safety Directors/Managers/Users, Patient Safety Managers/Directors, Quality Managers, Employee Health*

This conference session will provide safety and quality professionals across industries, including healthcare, with a look at Origami's toolkit of process improvement and quality improvement tools to help identify and address patient, safety, health, environment, and quality issues. We will explore a variety of tools, including:

1. **Root Cause Analysis (RCA):** A structured approach to identify the underlying causes of adverse events and develop corrective action plans. This includes a variety of models and tools including: Fishbone Diagrams, 5-Whys, 8D, and A3s.
2. **Failure Modes and Effects Analysis (FMEA):** A proactive risk assessment tool that analyzes potential failure points in a process and identifies ways to mitigate those risks.

### Bridging the Gap: Implementation to Program Evolution

*Designed For: GRC Post-Implementation: Project Coordinator, Project Sponsor, SMEs, & Stakeholders*

You've implemented Origami... now what? During this session, we'll take a look at best practices for introducing new process to your organization's GRC program, such as KRIs, controls and residual scores, and multi-assessor. Additionally, we'll consider client use cases of what worked well post-implementation, how they introduced these new processes to the organization, and how they achieved organizational support.

### Collaboration at Its Best: Uniting Risk, Safety, and Claims Teams for Better Results

*Designed For: Safety Directors/Managers/Users, Risk Managers/Directors/Users, Enterprise Risk Managers/Directors*

Join us for an engaging session on the power of collaboration between risk, safety, and claims teams. In today's complex business environment, it's more important than ever to work together to reduce costs and keep employees safe. In the first half of the session, we'll explore the benefits of partnering across these teams and how it can lead to reduced incidents, injuries, and total cost of risk. In the latter half of the session, we'll dive into examples of how Origami Risk's platform enables seamless collaboration across teams. We will walk through the lifecycle of an event: as it is reported as an incident, becomes a claim, and initiates investigations for root cause analysis (RCA) and corrective actions (CAPA) in an effort to increase safety and reduce costs.

### GRC New Features Spotlight & Connections Across the Organization

*Designed For: Enterprise Risk Managers/Directors, Business Continuity Managers, Vendor Risk Managers, Compliance Managers/Directors, Users that Manage Corporate Policies*

Whether you have implemented pieces of the GRC solution from Origami Risk or just considered expanded capabilities – this session is for you. During this session, we'll take a look at the new and upcoming features of GRC and note connections from across the risk, safety, and compliance organizations. Discussions will include highlights of Corporate Policy & Procedure Management, Vendor Risk Management, Business Continuity Management, and more.

### Streamline Clinical Peer Reviews with Management Technology

*Designed For: Quality Managers, Patient Safety Managers/Directors, Employee Health, Healthcare Industry Professionals*

This session will demonstrate how software applications can streamline the clinical peer review process, making it more efficient and effective for users to manage their peer review cases from inception to completion. Attendees will learn how to use technology to conduct thorough peer reviews, document findings, implement corrective actions, and monitor performance improvement plans.



## GENERAL SESSIONS

### Do More with TCOR: Getting Started

*Designed For: Risk Managers/Directors*

In this session, we'll define TCOR and its current state – covering the benefits and potential barriers to adoption. This interactive session is intended to guide your journey by providing potential next steps and best practices. We'll show you how to get started, what your peers are considering, and how to develop your organization's TCOR story.

### Streamlined Collection Process Leads to Greater Insights

*Designed For: Risk Managers/Directors*

The values collection process is key to getting the data you need to determine risks and exposures accurately. With improved tools to help you manage the end-to-end values collection process, Origami Risk helps you spend less time collecting and aggregating data and more time managing risks and gaining insights. In this session, you'll see some of Origami's new and improved values collection features and find out how some clients are leveraging them throughout their organizations.

### Incident Review for Healthcare Professionals

*Designed For: Patient Safety Managers/Directors, Risk Managers*

Incidents are imperative to investigate when they occur in order to document facts and identify areas for improvement. However, incident investigations have the potential to become incredibly cumbersome when many different departments are involved and processes aren't clearly outlined. Join us for an overview of the Origami Incident Review process where you will learn best practices for fulfilling review assignments, workflow notifications, and dashboard analytics.

### Harnessing the Power of EDI in Workers' Compensation Claims Management

*Designed For: Claims Managers, IT Administrators*

Origami Risk's Electronic Data Interchange (EDI) can play an essential role in helping customers with efficient, accurate, and timely reporting. In this session, we will delve into the significance of the workers' compensation EDI process and showcase how it can make for seamless FROI and SROI reporting and provide useful insights through powerful dashboards. Our presenters will give an overview of EDI, discuss the standards and formats involved, highlight the benefits of automated data exchange, review upcoming enhancements, and show how companies are able to save on outsourcing costs by managing the process in-house.

### Portals Providing Real-Time Results

*Designed For: Risk Managers/Directors*

Intake portals are integral to organizations - providing a single-source of truth by capturing data directly from the source. During this session, we'll cover the use cases for portals, gaining buy-in across the organization, and utilizing related features such as grant access, QR codes, and more. Additionally, we'll dive into client examples of major portals and their impact on the organization. Overcome data entry and import and work in a better way.

# ELEVATE 2023

ORIGAMI RISK USER CONFERENCE  
ORLANDO, FL >> OCTOBER 2 - 5

## EARN CONTINUING EDUCATION CREDITS

Our 2023 User Conference is accredited by the CEU Institute to provide continuing education certificates for the following licenses:

- **Risk Managers\***
- **Safety Managers\*\***
  - ASP Associate Safety Professional
  - CSP Certified Safety Professional
  - SMS Safety Management Specialist

To receive your certificates, we will provide Attendance Tracking Forms that will be available at the conference registration desk. During the conference, you can mark the sessions you attended and receive hours for those designated session. The form will include an attestation that you will need to sign before you hand in your forms at the end of the conference. After they are collected by our team, Origami will return them to the CEU Institute. Additionally, we will have a link available after the conference to fill out in the event you are unable to use the tracking form.

After the CEU Institute receives the forms, they will calculate the hours for each attendee based on the sessions you attended. You will be sent a Certificate of Attendance with the hours listed and the certification type.

\* Applicable to all sessions

\*\* Applicable to most sessions, pending review and assignment of hours - specific licenses listed below)