



County of El Dorado

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March 27, 2023

TO: Honorable Board of Supervisors

FROM: Tiffany Schmid 
Tiffany A Schmid (Mar 28, 2023 08:47 PDT)
Acting Chief Administrative Officer

SUBJECT: Retroactive Amendment II to Agreement #4527 with Ebix Inc., Board Item 23-0630

The purpose of this memorandum is to provide an explanation for the retroactive Amendment II to Agreement #4527 with Ebix Inc.

In January 2016, El Dorado County contracted with the California State Association of Counties (CSAC) Excess Insurance Authority (EIA) for Ebix insurance certificate services under Agreement #448. During this time, the EIA would invoice the County directly on behalf of Ebix for the services provided, and we would pay the EIA. In January 2020, Agreement #4527 was established between the County and Ebix for insurance certificate tracking. The contractual relationship between the County and Ebix allows for Ebix to invoice the County directly, removing the EIA from this process. Since El Dorado County is a member of the Joint Powers Authority (JPA), we receive the same pricing as offered the EIA.

Agreement #4527 is a perpetual contract, however, we are obligated to the EIA for pricing. On February 14, 2023, Ebix provided the County with a new Master Services Agreement (MSA) reflecting new rates effective as of January 1, 2023. The new MSA between Ebix and PRISM (previously known as the CSAC EIA) was fully executed as of November 9, 2022 and requires the County to amend Agreement 4527 to recognize PRISM and include the updated rates provided.

CAO Central Fiscal received the Amendment request from Procurement and Contracts on February 21, 2023, at which point, it was looked into whether the Amendment needed to be processed as retroactive back to January 1, 2023, since Agreement #4527 with Ebix is perpetual. On March 1, 2023, Ebix confirmed the new rates are effective as of January 1, 2023 per the new MSA, Section 3.4., which states: *Any Member with an existing agreement with a renewal date after 1/1/2023 will be subject to the costs indicated in Exhibit B, "Cost of Services & Billing", upon renewal of their agreement.*

Procurement and Contracts confirmed the rates being retroactive back to January 1, 2023. At this time, the Amendment request was finalized and sent to Procurement and Contracts for processing.

Amendment II is currently in process and will be taken to the Board on item 23-0630. Without this agreement in place, the Risk Management Division would not be able to accurately track insurance certificates for the County.

Thank you for your consideration.



Memo -Retroactive Amd II Agreement 4527 Ebix Inc

Final Audit Report

2023-03-28

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