PATRA™

EASY ROAD THROUGH THE EB LIFECYCLE

START HERE WITH PATRA

PRE-RENEWAL

1

- Census Population
- RFP Preparation
- Online Quoting
- Spreadsheeting
- Carrier Renewal Extraction

RENEWAL

2

- Open Enrollment
- Eligibility Processing
- BenAdmin Builds/Renewals
- Enrollment Confirmations
- Carrier Integrations

OPEN ENROLLMENT

3

- Ongoing Eligibility
- Enrollment Audits
- AMS Updates
- Claims Experience Reporting
- Commission Posting

POST-ENROLLMENT

4

- Data Entry
- COBRA
- Compliance
- Commission Posting
- Small Group Management
- Bordereau Transfers
- Document Retrieval
  - Renewals
  - NOCs
  - Late Payment Notices

ONGOING MANAGEMENT

5

- Annual Legal Notices
- WRAP Documents
- ACA Reporting
- COBRA

and so much more!

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