


Insurance Processing Simplified

Simple, flexible solution to maximize your small to mid-sized organization's profitability

Patra Assist is uniquely developed for small to mid-sized insurance retail brokers to improve service delivery and reduce operating costs.

Our scalable solution is designed to grow with your business -- arming your service team with dedicated customer service representatives (CSRs) that streamline insurance processes and transactional functions to reduce staff strain and elevate the customer experience.

 *Procedures, workflows, and a dedicated trainer is a must. I am truly amazed how quickly our Patra Assist team learned the Agency Management System and our procedures. The team continues to show enthusiasm every day while learning new processes. We are working on expanding this program to our other profit centers as soon as possible.*

Dianna Philipp
General Manager – Morris & Reynolds

Solution Offerings & Program Flexibility

- ✓ Dedicated CSRs to standardize insurance processes
- ✓ Support and coverage within your agency operating hours
- ✓ Fixed pricing to easily manage agency cash flow
- ✓ Customizable training by your agency, tailored to your operational needs
- ✓ Seamless adoption of your agency management systems, IT configuration and workflows
- ✓ Recruitment, hiring and HR administration facilitated by Patra

Around the clock services to meet your processing needs.

CSRs operate as extension of your team to assist with operational needs. Providing processing support, CSRs operate within your agency hours, management systems, communication platforms and workflows.

Policy Management	Accounting	New Business
<p>Renewal Support</p> <ul style="list-style-type: none"> > Application updates/submission > Data requests > Proposal submission <p>Endorsement Processing</p> <ul style="list-style-type: none"> > Process/issue endorsement requests <p>Certificate Processing</p> <ul style="list-style-type: none"> > Generate/issue certificates > Manage holder lists <p>Policy Checking</p> <ul style="list-style-type: none"> > Check policies for discrepancies 	<p>Direct Bill</p> <ul style="list-style-type: none"> > Enter and reconcile DB commissions <p>Billing and Payments</p> <ul style="list-style-type: none"> > Process invoices for agency and direct billed policies <p>Notice of Cancellation</p> <ul style="list-style-type: none"> > Investigate, send notice and follow ups <p>Commission Entry</p> <ul style="list-style-type: none"> > Enter and reconcile producer commission and splits <p>Agency Billed</p> <ul style="list-style-type: none"> > Invoicing, post premiums and payments 	<p>Gather Data</p> <ul style="list-style-type: none"> > Loss runs, certificate holders, data schedules <p>Send to Market</p> <ul style="list-style-type: none"> > Create submission or enter to carrier sites <p>Prepare Proposal</p> <ul style="list-style-type: none"> > Using agency template and standards <p>Request to Bind</p> <ul style="list-style-type: none"> > On carrier sites or through underwriting <p>Welcome to Agency</p> <ul style="list-style-type: none"> > Send policy packets and welcome material

Use Case

The Problem

\$8M agency in New Jersey lost two Account Managers in the last two years and can't find qualified replacements.

Increase workload is putting a strain on current staff.



The Solution: Patra Assist

Patra was able to take on repetitive tasks not requiring customer interaction or coverage interpretation.

50% reduction in New Business Processing time allowed agency account managers to support extra producers.



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To learn more, complete the [Contact Us](#) form on our website.