

Insurance Processing for Employee Benefits

The potential to do more.

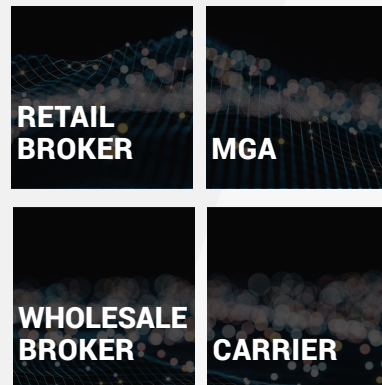
Patra delivers reduced risk, lower costs and streamlined integration without limitations of scalability and capacity by providing agencies specialized, process-specific options and standardized workflows. Free your account management staff to spend more time growing the business and building customer relationships and less time on administrative tasks.

 *By engaging with Patra OnDemand we now have clean and accurate workflow, job aid, and process documentation, we have a three-week reduction in backlog, over 50% reduction in processing time, and improved overall accuracy. Patra now handles approximately 90% of our processing load, allowing us to focus more time on selling and servicing our clients.*

Bradley J. Botts, MPM, PMP
Senior Vice President, Projects & Technology –
HUB International

- ✓ Dedicated team
- ✓ Increase top-line revenue
- ✓ Standardize workflows
- ✓ Reduce agency staff workload
- ✓ Improve process efficiency
- ✓ Improve client relations
- ✓ 24-hour coverage
- ✓ Reduce risk

Markets Served



Around the clock services to meet your processing needs.

With Patra OnDemand, you will only pay for the hours spent processing your work – no surprises, hourly minimums or upfront fees. Below are a few of the services that Patra offers to benefits brokers.

Eligibility Management

- › Enrollments, terminations and changes
- › Ben admin system build out
- › EDI set up
- › COBRA notifications
- › Carrier billing reconciliation

Renewal & Marketing

- › Renewal report generation
- › Carrier renewal extraction
- › Quoting & proposals
- › Pre-renewal communications

Benefits Communications and Fulfillment

- › Summary & form downloads
- › Disclosure population
- › Open enrollment communications
- › Wrap documents

Data Entry

- › AMS updates
- › Renewal/marketing proposals
- › Acquisition integration
- › Experience reports

Accounting & Billing

- › Direct bill invoicing & reconciliation
- › Commission posting
- › Expense report tracking

Patra OnDemand at a Glance

400K

Eligibility Transactions
Processed

30%

of Top 100 Agencies
are Customers

2.2M

Hours of
Agency Time Saved

280+

Partner
Relationships

200+

Licensed
Agents

2,605

INC 500
Ranking

PATRA[™]

1107 Investment Blvd. Suite 100
El Dorado Hills, CA 95762
(415) 884-8008 | www.patracorp.com

**It's that simple. Get the ball rolling by reaching out to Patra
business development team at sales@patracorp.com**