PATRA™ & CAA
Combined Agents of America

TECHNOLOGY-ENABLED INSURANCE OUTSOURCING

Solutions that Support and Propel Employee Benefits Processing

As a dedicated strategic partner to your business, Patra engages in every aspect of the entire renewal cycle, so you experience maximized efficiency and profitability throughout the year. Whether your ramping up for open enrollment, in the thick of it, or wrapping up — it's likely your Employee Benefits teams are inundated with high volume insurance processing, limiting capacity to service your customers.

Patra simplifies agency operations, alleviating staff workload, optimizing small account management, and enhancing service efficiency. Patra leverages its combination of highly-trained processing executives and cutting-edge technology, empowering you to excel in a fiercely competitive market.

ACCELERATE GROWTH

Patra pushes the limits of today's insurance technology offerings by applying our industry-leading, tech-enabled approach -- a combination of Patra's patent-pending, proprietary artificial intelligence (AI), machine learning (ML) and human-in-the-loop expertise -- to prioritize accuracy and accelerate processing while reducing E&O exposure and eliminating backlog.

SIMPLIFY EMPLOYEE BENEFITS PROCESSING

Patra eliminates the burden of peak volume processing during pre-renewal, renewal, post-renewal, and ongoing benefits management. From spreadsheeting to eligibility management, we've designed a service delivery model that seamlessly and securely integrates a team of EB processing experts to work as an extension of your team, processing critical Employee Benefits functions.

PRE-RENEWAL

Allow Patra to take on taxing manual processes to increase staff capacity to focus on higher revenue-generating tasks. We don't just push paper. Our team is highly trained to analyze and interpret complex data and paperwork, such as proposals.

RENEWAL

Patra has extensive experience with many of the most prominent HRIS solutions. We can enter data into the system, prepare employee portals for open enrollment, and also manage adds, changes, and applications.

POST-RENEWAL

Patra can provide support across a multitude of tasks such as commission posting, commission audits, dependent verifications, benefits administration, billing and eligibility audits. We also offer billing reconciliation, comparing carrier invoices to your Employee Navigator system to ensure the two are in agreement.

ONGOING CLIENT MANAGEMENT

Simplify your client management processes by letting Patra handle monthly commission postings. Whether uploading or manual entry into your agency management or commission system, we process according to your deadlines.

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EMPLOYEE BENEFITS SERVICES OVERVIEW

Policy Lifecycle Support				
New Business / Marketing Services	Enrollment Services	Post-renewal Services	Client Management Services	Compliance Services
• Census Population • RFP Preparation • Online Quoting • Spreadsheeting • Carrier Renewal Extraction	• Open Enrollment • Eligibility Processing • BenAdmin Builds/ Renewals • Enrollment Confirmations • Carrier Integrations	• Ongoing Eligibility • Enrollment Audits • AMS Updates • Claims Experience Reporting • Commission Posting	• Data Entry • COBRA • Compliance • Commission Posting • Small Group Management • Bordereau Transfers • Document Retrieval o Renewals, NOCs, Late Payment Notices	• Annual Legal Notices • WRAP Documents • ACA Reporting • COBRA

A DATA-DRIVEN, STRATEGIC ADVISOR

Growth starts with a winning strategy, and Patra's strategic advisory approach is designed to help you achieve business success. As an advisory partner who knows insurance, Patra leverages data-driven insights to identify operational gaps, optimize workflows, and integrate new technologies to boost your business performance. Whether during discovery, implementation, or an active partnership, Patra applies six sigma and business process consulting to continually identify process and service improvements, deploy best practices, and provide industry expertise across the entire policy lifecycle.

STRATEGIC GROWTH

Patra begins with an evaluation of your operational infrastructure to identify and implement actionable strategies for improved ROI.

SCALABILITY

Patra identifies and implements the right technological solutions to increase operational capacity to improve your insureds' experience.

PROCESS OPTIMIZATION

By analyzing existing workflows, Patra identifies process gaps and develops implementation-ready designs for optimal efficiency.

DATA-DRIVEN REPORTING

Through Patra's data intelligence, we provide KPI reports, processing trends, production volumes, and more to guide strategic business decisions.

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