

PATRA™

AGENCY ADVANTAGE

OnDemand insurance processing and technology-enabled solutions that drive profitability and new customer acquisition across the industry.

PATRA AT A GLANCE



800

Active Clients

Helping agencies across the United States and Canada, we have the experience you need.



20

Years Experience

Service delivery for P&C CL and PL including certificate processing, policy checking, data entry, and more.



20+

Awards

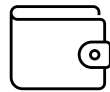
INC 5000 seven years running; Best Insurance Tech Provider; Top US Insurance Workplace, just to name a few.

PROPERTY & CASUALTY

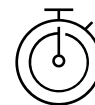
Powering the full scope of front- and back-office processes through every stage of the policy lifecycle.



Reasonable, minimum monthly hours commitment reduces agency overtime



Need more hours? OnDemand model supports overages – only pay for what is needed over and above minimums



Focused attention to your unique processing needs with reasonable turnaround times



Benefit from Patra's best practice standard operating procedures and workflows for each service selected



Free your team's valuable time to meet with clients and prospects while also increasing employee morale



All services are protected under Patra's E&O and Patra Shield security standards

PATRA AGENCY ADVANTAGE

PROGRAM REQUIREMENTS

- ✓ Maximum 2 Services - Contracted for a 12-month period*
- ✓ Maximum 75 Hours Per Month - Unused hours cannot be carried over / 900 hours annually
- ✓ Any hours over and above 75 hours/month to be invoiced at Patra's standard, hourly rate
- ✓ AMS Requirements - Must be Epic, AMS 360 or Sagitta
- ✓ Licensing Requirements - Minimum 2 AM licenses (paid by agency) and assumes shared logins
- ✓ Must be able to support a remote access environment
- ✓ All services adhere to Patra standard workflows and turnaround times

**Initial two services require 12-month contractual commitment. Other services contracted above maximum of two, will be billed at the standard hourly rate*

PRICING & TURN-AROUND TIMES

The Services You Need at an Affordable Price

- \$2,500 one-time implementation fee
- \$1,300 monthly, flat rate service fee
- Minimum 12-month contract
- Max 75 hours per month
- Hours over 75/month billed at Patra's standard, hourly rate

Turn-around Times

Certificates	Policy Checking	Endorsement Processing	Direct Bill Posting	Document Retrieval
<ul style="list-style-type: none"> ✓ 24-hour - On Demand Request ✓ 48-hour - Renewal Request ✓ 2-hour - Rush Request (10% of monthly volume limit) 	✓ 15 Business Days	✓ 3 Business Days	✓ 3 Business Days	✓ 24 Hours



PATRA™

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