


THE EASY ROAD THROUGH THE EB LIFECYCLE


START HERE WITH PATRA **1**

MARKETING/ RENEWALS

- Census Population
 - RFP Preparation
 - Online Quoting
 - Spreadsheets
 - Carrier Renewal Extraction
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2

ENROLLMENT

- Open Enrollment Eligibility Processing
 - BenAdmin Builds/Renewals
 - Carrier Integration
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3

POST-RENEWAL

- Ongoing Eligibility
 - Enrollment Audits
 - AMS Updates
 - Claims Experience Reporting
 - Commission Posting
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4

CLIENT MANAGEMENT

- Data Entry
 - COBRA
 - Compliance
 - Commission Posting
 - Small Group Management
 - Bordereau Transfers
 - Document Retrieval
 - Renewals
 - NOCs
 - Late Payment Notices
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5

COMPLIANCE

- Annual Legal Notices
 - WRAP Documents
 - ACA Reporting
 - COBRA
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and so much more!