



BENEFIT TECHNOLOGY FOR THE INSURANCE INDUSTRY

Designed to optimize operations within benefits administration platforms

Patra has developed a cutting-edge Benefits Technology Services with flexible financial models that can meet the needs of the insurance industry, paving the way for new standards in service excellence.

Designed to optimize operations within benefits administration platforms, Patra offers a comprehensive range of case build services, including new group builds, annual renewal changes, open enrollment setup, data migrations, data exchange requests, EDI connectivity, and notifications support.

INDUSTRY KNOWLEDGE

Patra has proven itself to be a trusted leader in technology-enabled insurance outsourcing services for more than 20 years. Patra's specialized employee benefits team of 500+ employees brings deep industry knowledge, including:

- Extensive benefits administration experience
- Comprehensive Benefit Administration System expertise
- Proven process optimization capabilities
- Ongoing professional development
- Industry best practice implementation

SIMPLIFY EMPLOYEE BENEFITS PROCESSING

Patra's advancements leverage proprietary best practices and a globally integrated hybrid model, minimizing agency involvement. In today's rapidly evolving benefits landscape, the adoption of tech-enabled solutions for case builds is not just an operational upgrade, it's a time saving business advantage.



CASE BUILDS

Whether it's a basic build or a complex build with dynamic class structures, Patra can complete system setup, configuration and data import for your clients' employee benefit plans in a variety of benefits administration (BenAdmin) platforms.



RENEWALS AND CHANGES

Managing the renewals and changes for your book of business can be challenging. While you focus on your clients, Patra can make all the necessary updates timely and accurately.



OPEN ENROLLMENT SETUP

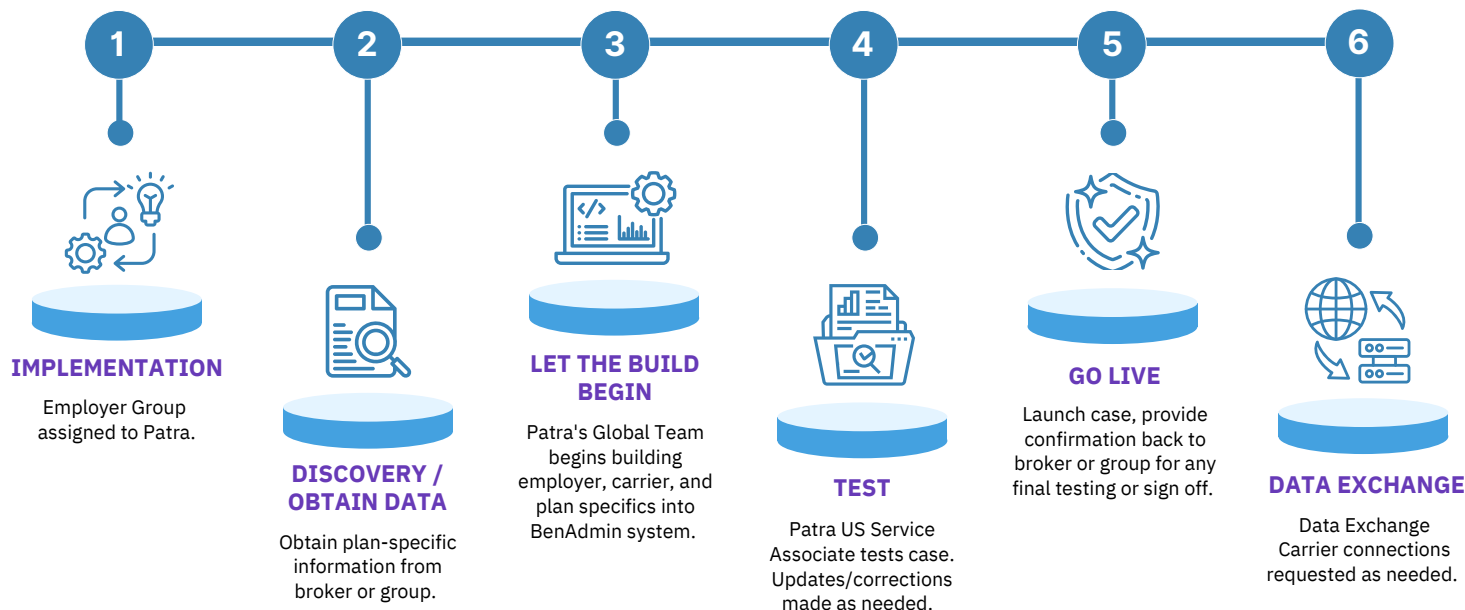
Let Patra review and enter benefit plan changes, set up a communication strategy, download new documentation for employee education, and ensure the enrollment system is fully tested and ready to go live, making your open enrollment seamless.



DATA EXCHANGE & MORE

If you are looking to request a data exchange, need assistance setting up ACA measurements, or even guidance to customize your clients' needs within their BenAdmin system, Patra's team of experts are here to help.

EFFORTLESSLY SMOOTH PROCESS



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 and improve your clients' 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.

