



Relax This Open Enrollment Season

Maintain your competitive advantage *and* maximize profitability with Patra's Employee Benefits services.

We know the fourth quarter can be taxing. Make this year the exception.

More than ever, insurance organizations are held to a higher standard and forced to offer additional services to remain competitive in the market. Instead of straining staff or managing the complexities of hiring new employees – ***let Patra help you maintain a competitive advantage and support the peak volumes during open enrollment season.***

Patra's seasoned Employee Benefits professionals help you seamlessly integrate insurance processing and client servicing solutions scalable to your volume and business needs throughout the year - ***allowing you to maximize profitability and deliver the highest quality of customer service.***

How Patra Can Help You

- > Insurance Processing
- > Small Group Account Management
- > Contact Center Support

“ Our inside service team spent a lot of time on back-office items (i.e., eligibility changes/open enrollment changes, special projects, billing audits) and less time on client facing activities. Patra became a part of the solution by partnering with our inside service team. We shifted key back office items to Patra which enabled our team to focus on customer relationships by reducing the number of day-to-day back office tasks. We are thrilled to be working with such a great team behind us!

— HUB International South Region



Patra's Employee Benefits Services

Insurance Processing

Manage peak volume with Patra.

AUDITS

Billing Reconciliation

Reconcile invoices against company records

Renewal Audits

Quality assurance to ensure renewals are completed (estimated revenue accuracy, proper documents attached, compliance notifications issued)

Peer Reviews

Quality assurance for data entry tasks

Benefit Admin System Audits

Quality assurance prior to opening the site to employees for open enrollment

MARKETING

Census Manipulation

Compile and format all information needed for quoting

Quoting & Proposals

Generate renewal reports, carrier renewal extraction, process quoting and proposal preparation

ACCOUNTING

Commission Posting

Post received commissions to business accounting systems

ENROLLMENT

Eligibility

Manage and process peak volume of adds, terms and changes within carrier portals, ensuring carrier notification and employee coverage

PRINT & MAIL SERVICES

Compliance documents, benefit guides and more

DATA & DOCUMENT MANAGEMENT

Data Entry

Check for accuracy and update plan decisions for the new enrollment cycle within your agency management system

Benefit Admin Buildout and Renewals

Census upload, data entry and quality assurance

Document Retrieval

Renewals, Summaries of Benefits and Coverage, claims reports

Small Group Account Management

Manage small groups more efficiently with Patra.

Patra provides dedicated account management and processing experts to manage and grow your existing book(s) of small group accounts and incoming leads. Seamlessly integrating with your CRM and adopting your servicing workflows, we operate as extension of your team - *delivering comprehensive account management services, assisting in accounting rounding and day to day account support.*

Contact Center Support

Deliver exceptional customer service with Patra.

Patra provides a team of dedicated Employee Benefits agents to deliver exceptional customer experience and call center services scalable and tailored to your operational needs.

- › Benefits Administration Software support
- › Carrier Support
- › Claims Advocacy
- › Benefits Support

