



PATRATM

Virtual Assistant for Employee Benefits

When your team needs more bandwidth, Patra delivers it. Patra Virtual Assistants provide dedicated support when and where it's needed most, helping employee benefits teams navigate seasonal workload spikes, maintain service levels, and stay focused on the client experience, not back-office administrative tasks.

AN INTRODUCTION TO



Virtual Assistant

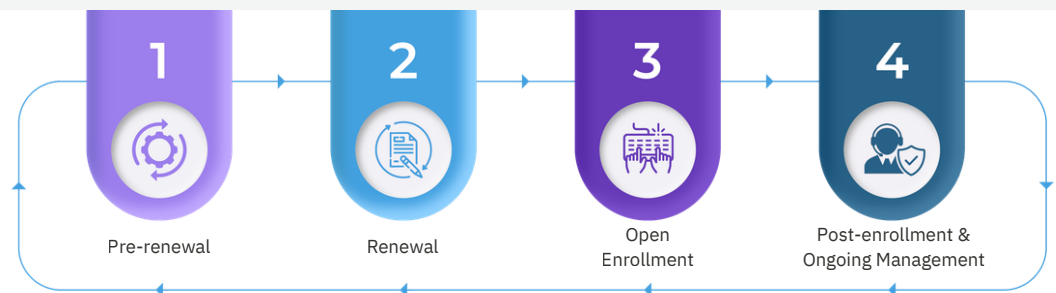
PATRA'S PHILOSOPHY

With our highly skilled Virtual Assistants (VAs), you immediately lower the burden of overhead costs without sacrificing the quality of your employee benefits service and support.

With Patra's VAs, you can extend your employee benefits team without the administrative or HR costs of hiring full-time staff. Our dedicated VAs seamlessly integrate into your environment, aligning with your workflows, systems, communication platforms, and client service standards.

Based in Metro Manila, Philippines, Patra's VAs complete extensive insurance-industry training and earn their **Patra Virtual Assistant Certification™** from **Patra University** – giving you EB-ready talent from day one.

THE EMPLOYEE BENEFITS LIFECYCLE



HOW PATRA VAs SUPPORT YOUR EB OPERATIONS

From renewals and open enrollment to ongoing service and eligibility management, Patra Virtual Assistants provide operational support across the entire EB policy lifecycle, helping your team stay ahead of demand.

Policy Lifecycle Support				Administrative Support	
New / Renewal Marketing Services	Enrollment Services	Benefit Technology Services	Claims Services	Accounting Services	Compliance Services
• Renewal Retrieval • RFP Preparation • Census Audit • Online Quoting • Email Quoting • Spreadsheets • AMS Updates • File Audits • BOR Processing • Policy Checking	• Eligibility • ID Card Requests • Census Preparation • Enrollment Confirmations • Eligibility Audit • Benefit Guides	• New Case Builds • Renewal Changes • Open Enrollment Set-Up • Data Exchange Assistance	• Claim Report Retrieval • Report Delivery • Claims Analysis – Spreadsheets • Claims Resolution	• Direct Bill Reconciliation • Direct Bill Posting • Commission Posting	• Notice Delivery • Legal Notices • ACA Reporting • Wrap Documents • Plan Doc Retrieval



THE PATRA ENGAGEMENT PROCESS

Getting started with Patra is straightforward. We manage the entire process from recruitment through ongoing management.



SCALE FOR THE SEASONS THAT MATTER MOST

In employee benefits, every season brings a different set of demands. Patra’s Seasonal VA program is a six-month capacity solution designed to provide dedicated support during peak workload periods.

With full-time, temporary virtual assistants, organizations can increase capacity, maintain service levels, and navigate seasonal fluctuations without adding permanent headcount. At the end of the six-month engagement, organizations can choose to conclude the program or extend support based on their evolving business needs.

The examples below highlight common ways brokers and general agents leverage Seasonal VAs during two of the busiest periods in the employee benefits calendar.

Q4 — Renewal Marketing and Open Enrollment Support

October – December

- RFP preparation and marketing
- Quoting and comparison spreadsheets
- Proposal and presentation support
- New group setup and platform onboarding
- Renewal and open enrollment setup configuration
- Open enrollment election processing
- Benefit guides and employee communication support
- Carrier follow-up and issue resolution
- New group submittals and BOR processing
- High-volume eligibility enrollments & changes
- Employee Navigator plan builds & readiness checks
- Carrier submission coordination
- OE communications support
- Overflow processing — no blackouts

Q1 — Post-Open Enrollment Administrative & Compliance Support

January – March

- Post-enrollment cleanup and corrections
- Benefits administration platform support
- Eligibility updates and maintenance
- AMS policy updates and file audits
- Plan document retrieval and organization
- Bill reconciliation audits
- Annual legal notices
- ACA reporting
- EDI file feed setup and initial validation
- Data exchange assistance and discrepancy reporting

Contract for Q4, Q1, or both — with the same certified talent, seamless integration, and Patra-managed HR and infrastructure as a year-round VA.



WHY AGENCIES PARTNER WITH PATRA FOR EB

- Extend your EB team’s capacity without adding headcount
- Insurance-trained VAs certified through Patra University™
- Scale capacity during peak open enrollment and renewal seasons
- Fits seamlessly into your existing workflows, systems, and service model.
- Reduce overhead and administrative burden
- SOC 2 Type 2 & ISO 27001:2022 certified — your data is protected

WHAT SETS PATRA'S VAs APART?

Every Patra VA earns their Patra Virtual Assistant Certification™ through Patra University before supporting your team. The curriculum is purpose-built for the insurance industry:

Orientation & Intro to Insurance	Fundamentals of Insurance	US Business Etiquette	Professional Communication	Technology & Software
- Insurance BPO industry overview - Remote work cultures & best practices - Role of the VA in agency operations	- Insurance principles & terminology - Types of insurance, policies & coverage - EB-specific agency operations	- Client expectations & deliverables - Time management & scheduling - Introduction to US business practices	- Effective email & telephone skills - Conflict resolution techniques - Cross-cultural communication	- MS Office fundamentals - Zoom & virtual meeting hosting - Insurance CRM & AMS systems

For More Information Contact:



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PATRA'S ASSURANCES FOR DATA PROTECTION & SECURITY

Your client data is protected at every level. Patra's security framework is purpose-built for insurance operations:



SOC 2 Type 2 & ISO/IEC
27001:2022 certified



AES256 encryption via
VPN connection



Functionality limited to Patra
environment only



No admin rights; USB storage &
print disabled



Single Sign-On, Data Loss
Prevention & SIEM



Hard drive storage with AES256
encryption



Multi-region processing centers
for continuity



Audited Business Continuity &
Recovery Plans



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