PATRA™

Insurance Processing Services for Employee Benefits
Process Feature: Document Retrieval, Indexing, and Issuance

Hundreds of thousands of Employee Benefits (EB) documents are made available from carrier portals, BenAdmin systems, and agency management systems (AMS) for agencies to retrieve and route each year, particularly during Open Enrollment season. The heavy volume and time consumption to manually log-in to carrier portals and various insurance platforms to retrieve EB documents — leave agencies overwhelmed and with a backlog of critical information needing be retrieved, distributed, and attached appropriately in your agency and document management systems.

The Solution

Patra's insurance processes are designed to easily adapt to the unique workflows needed to manage various types of EB documents. Whether it is a Summary of Benefits & Coverage (SBC) document that needs to be retrieved from a carrier portal and issued to employer groups; or Census to be retrieved from BenAdmin sites and issued to carriers — Patra equips your agency with a team and unified workflow to efficiently retrieve, index and issue critical EB documents.

Why Agencies Choose Patra

☑ **Reduced E&O risk**

☑ **Improved operational efficiency**

☑ **Seamless and secure integration with various carrier portals, BenAdmin, agency and document management systems**

End-to-End Solution

Document Retrieval	Document Indexing	Activity Set-Up	Document Issuance
Patra manages carrier portal, BenAdmin, and AMS log-ins to retrieve critical EB information as soon as it is available.	Patra indexes retrieved documents, naming and filing to your standard naming conventions.	Patra tailors workflows to your operational behaviors in processing EB documents by creating new tasks or activities within your AMS.	Patra delivers flexible workflows enabling your agency to set up who, when and how documents are issued.

Document Processing Services for Employee Benefits

Patra's full suite of document retrieval, indexing and issuance processes improve your agency's operational efficiency; saving your agency time, money and giving your service teams more time to focus on what is most important -- **your customers**. Below are a few of the document processing services Patra offers.

› **Carrier Renewals**

› **Summary of Benefits & Coverage (SBC)**

› **Benefit Summaries**

› **Summary Plan Descriptions (SPD)**

› **Census**

› **Contracts**

> *"The Patra Team has helped to drive efficiencies in our office. These efficiencies have included a reduction of time needed of the team to process enrollments in carrier portals among other things. The extra time has allowed us more time to ensure we're able to meet our company goals in addition to the needs of our clients... and, the quality of their work is exceptional. It's very rare to see an error by the Patra Team.*

Michelle Cisneros
Director of Operations
HUB International

PATRA™

(418) 884-8008 / patracorp.com

To learn more, complete the **Contact Us** form on our website.