PATRA™

Process Feature: Document Retrieval, Indexing, and Issuance

Hundreds of thousands of policy documents are made available from carrier websites and agency management systems (AMS) for agencies to retrieve and route each year. The heavy volume and time consumption to manually log-in to carrier websites and various insurance platforms to access policy documents leave agencies overwhelmed. This creates a backlog of critical policy information needing to 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 policy documents. Whether its a Notice of Cancellation (NOC) that needs to be retrieved from a carrier website and issued to an insured; or pulled Loss Runs report to attach in a proposal – Patra equips your agency with a team and unified workflow to efficiently retrieve, index and issue critical policy documents.

Why Agencies Choose Patra

- ☑ **Reduced E&O risk**

- ☑ **Improved operational efficiency**

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

End-to-End Solution

Document Retrieval	Document Indexing	Activity Set-Up	Document Issuance
Patra manages carrier website and AMS log-ins to retrieve critical policy 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 policy 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

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.

› **Audits**

› **Claims**

› **Communication Logs**

› **Policies**

› **Endorsements**

› **Loss Runs**

› **Invoices**

› **Notices of Cancellation**

› **Reinstatements**

› **Non-Renewals**

› **Renewal Notices**

❝ *The Patra Corporation has developed an outstanding reputation in the industry. They help to reduce time spent on repetitive tasks and/or projects which we all know, 'time is money' and happier clients too. Having the additional time has allowed my team to focus more on servicing the day-to-day requests of our clients and their employees. This is a top priority in our world!*

Michelle Cisneros
Director of Operations
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PATRA™

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