PATRA™

Hundreds of thousands of policy-related documents are made available through various insurance platforms and websites for Wholesalers, MGAs, and Carriers to retrieve and route each year. The heavy volume and time required to manually access these documents likely leaves your staff overwhelmed and with a backlog of critical policy information needing be retrieved, distributed, and attached appropriately in policy and document management systems.

The Solution

Patra can efficiently retrieve, index and issue critical policy related documents for you. Patra's insurance processes are designed to easily adapt to the unique workflows needed to manage various types of documents. Whether its a Notice of Cancellation (NOC) that needs to be retrieved and sent to a broker; or pulled Loss Runs report to attach in a client file.

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

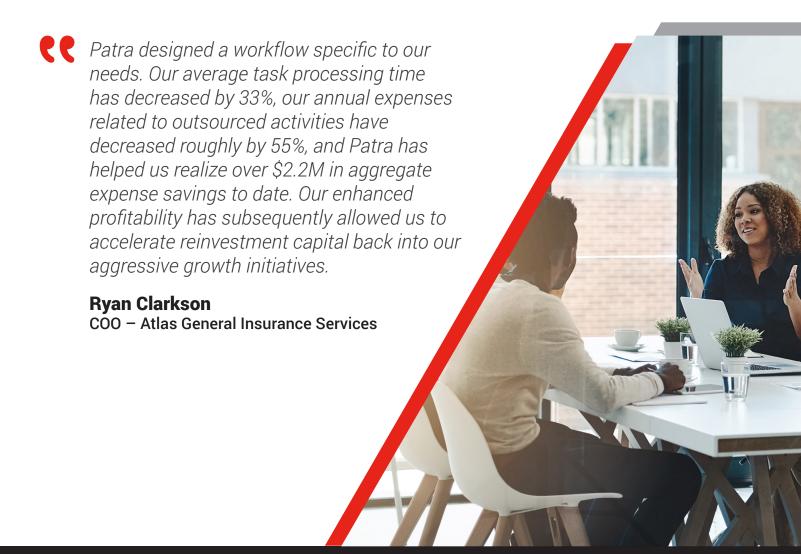| Document Retrieval	Document Indexing	Activity Set-Up	Document Issuance
Patra retrieves critical policy document from various websites and insurance platforms as soon as they become available.	**Patra indexes retrieved documents, naming and filing to your standard naming conventions.**	**Patra tailors workflows to your operational behaviors in processing policy documents by creating new tasks or activities within your policy and document management systems**.	**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 operational efficiency; saving you 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

> *Patra designed a workflow specific to our needs. Our average task processing time has decreased by 33%, our annual expenses related to outsourced activities have decreased roughly by 55%, and Patra has helped us realize over $2.2M in aggregate expense savings to date. Our enhanced profitability has subsequently allowed us to accelerate reinvestment capital back into our aggressive growth initiatives.*

Ryan Clarkson
COO – Atlas General Insurance Services

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