PATRA™

Process Feature: Policy Checking
Patra's technology-enabled solution.

There's nothing more important to your agency, your insured, and your E&O carrier than being certain that policies have been checked efficiently and accurately A seemingly small error in data entry can cause big headaches if not caught and corrected on a timely basis. Policies often sit unchecked on an account managers desk for 30, 60 or 90 days.

With hundreds of thousands of policies checked annually, Patra is a trusted partner delivering exceptional policy checking results for top rated insurance brokers across the US.

Our proven workflow methodology prioritizes accuracy and accelerated processing – reducing E&O exposure and eliminating backlog.

With Patra, your agency is equipped with a dedicated service team and adaptive workflow designed to securely integrate with your agency management system, retrieve sourced documents for policy comparison, complete and deliver checklists with flagged policy discrepancies.
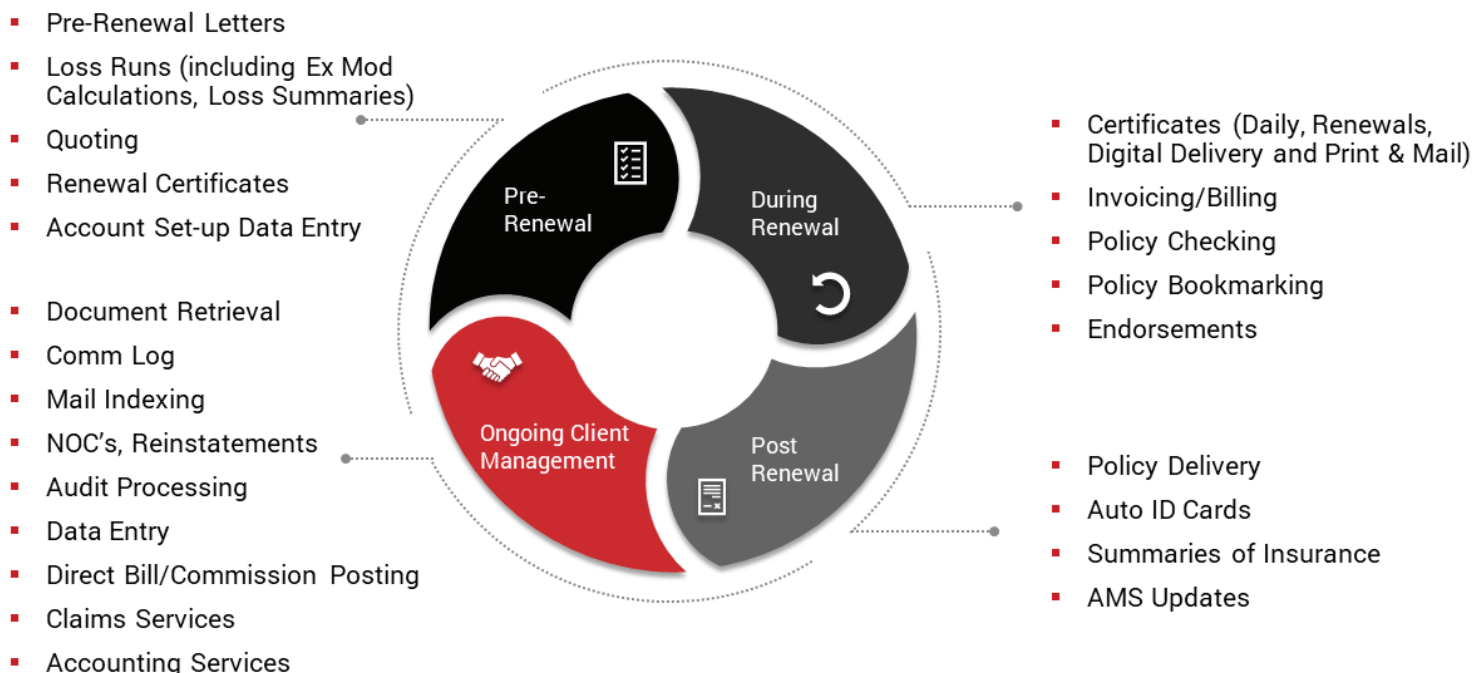
Reasons Why Agencies Choose Patra for Policy Fact Checking

☑ **Frees AM time to focus on more urgent, client-focused issues**

☑ **Reduces risk exposure due to more accurate and thorough fact checking**

☑ **Enables faster turnaround of a document/policy**

Sample Policy Checking Workflow

Policy Received	Indexing*	Policy Checking	Policy Review*	Delivery*
› U.S. mail › Email › Document Retrieval	› Policy named and filed per naming convention › Routed to Patra	› **Review and compare policy information against agency mgmt system & other docs** › **Complete agency specific checklist** › **Return checklist to AM**	› Review policy coverage › Correct system and/or request endorsements from carrier	› Deliver policy to insured

Can be sourced to Patra

A Solution for Every Part of the P&C Policy Cycle

- Pre-Renewal Letters
- Loss Runs (including Ex Mod Calculations, Loss Summaries)
- Quoting
- Renewal Certificates
- Account Set-up Data Entry

- Document Retrieval
- Comm Log
- Mail Indexing
- NOC's, Reinstatements
- Audit Processing
- Data Entry
- Direct Bill/Commission Posting
- Claims Services
- Accounting Services

Pre-Renewal

During Renewal

Ongoing Client Management

Post Renewal

- Certificates (Daily, Renewals, Digital Delivery and Print & Mail)
- Invoicing/Billing
- Policy Checking
- Policy Bookmarking
- Endorsements

- Policy Delivery
- Auto ID Cards
- Summaries of Insurance
- AMS Updates

> *By engaging with Patra OnDemand we now have clean and accurate workflow, job aid, and process documentation, we have a three-week reduction in backlog, over 50% reduction in processing time, and improved overall accuracy. Patra now handles approximately 90% of our processing load, allowing us to focus more time on selling and servicing our clients.*

Bradley Botts, MPM, PMP
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HUB International

PATRA™

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