

# Patra Agency Advantage

OnDemand insurance processing and tech-enabled solutions that drive profitability and new customer acquisition across the industry.

**PATRA**<sup>™</sup>  
OnDemand

## Patra at a Glance

**650** Active Clients  
Helping agencies across the United States and Canada, we have the experience you need.

**16** Years' Experience  
Service delivery for P&C CL and PL including certificate processing, policy checking, data entry, and more.

**13** Awards  
INC 5000 six years running; Best Insurance Tech Provider; Top US Insurance Workplace, to name a few.

## PROPERTY & CASUALTY

Powering the full scope of front- and back-office processes through every stage of the policy lifecycle.



Reasonable, minimum monthly hours commitment reduces agency overtime



Need more hours? OnDemand model supports overages – only pay for what is needed over and above minimums



Focused attention to your unique processing needs with reasonable turnaround times



Benefit from Patra's best practice standard operating procedures and workflows for each service selected



Free your team's valuable time to meet with clients and prospects while also increasing employee morale



All services are protected under Patra's E&O and Patra Shield security standards

## Patra Agency Advantage

### Program Requirements:

- ✓ Maximum 2 Services Contracted for a 12-month period\*
- ✓ Maximum 75 Hours Per Month - Unused hours cannot be carried over / 900 hours annually
- ✓ Any hours over and above 75 hours/month to be invoiced at our standard, hourly rate
- ✓ AMS Requirements - Must be Epic, AMS 360 or Sagitta
- ✓ Licensing Requirements - Minimum 2 AMS licenses (paid by agency) and assumes shared logins
- ✓ Must be able to support a remote access environment
- ✓ All services adhere to Patra standard workflows and turnaround times

## Service & Pricing

### The Services You Need at an Affordable Price



- > Certificates
  - 24-hour - On Demand Request
  - 48-hour - Renewal Request
  - 2-hour - Rush Request (10% of monthly volume limit)
- > Policy Checking
  - 15 Business Days
- > Endorsement Processing
  - 3 Business Days
- > Direct Bill Posting
  - 3 Business Days
- > Document Retrieval
  - 24-hours
  - \$2,500 one-time implementation fee
  - \$1,250 monthly, flat rate service fee
  - Minimum 12-month contract
  - Max 75 hours per month
  - Hours over 75/month billed at Patra's standard, hourly rate

\*Initial two services require 12-month contractual commitment. Other services contracted above maximum of two, will be billed at the standard hourly rate.

