

# INSURANCE PROCESSING

## Employee Benefits

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



**PATRA**<sup>™</sup>  
OnDemand

**OnDemand, end-to-end insurance processing services to ensure maximum efficiency and profitability throughout the year.**

As a true partner to your business, Patra engages in every aspect of the employee benefits policy lifecycle. From submission management, policy servicing, renewal and claims services, to accounting and compliance support, organizations are quickly able to recognize optimized efficiency and profitability when Patra is the chosen partner for:

- › Eligibility Management,
- › Software Management,
- › Auditing,
- › Billing Reconciliation, and
- › Data Entry Services.

Our OnDemand Employee Benefits services, deliver a true, start-to-finish, solution for the entire renewal cycle, so you experience maximized efficiency and profitability throughout the year.

Our tech-enabled services change the way you manage and do business.

- ⚙ **AMS Updates**
- ⚙ **BenAdmin Updates**
- ⚙ **Compliance & Licensing**
- ⚙ **Data Entry**
- ⚙ **Direct Bill Posting**
- ⚙ **Direct Bill Reconciliation**
- ⚙ **Eligibility Updates**
- ⚙ **Online Quoting**
- ⚙ **Spreadsheets**



Organizations focused on **GROWTH**, choose **Patra** as their processing partner.

## PATRA'S SERVICE SOLUTIONS ALLOW YOU TO FOCUS ON TASKS THAT DRIVE REVENUE

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Patra pushes the limits of today's insurance technology offerings by applying our industry-leading, tech-enabled approach -- a combination of Patra's patent-pending, proprietary artificial intelligence (AI), machine learning (ML) and human-in-the-loop expertise -- to prioritize accuracy and accelerate processing while reducing E&O exposure and eliminating backlog.

With a true, start-to-finish solution for your policy administration functions, each process combines into a unified workflow which improves operational efficiency, elevates your customer's experience, and raises your bottom line.

### **Meet Deadlines**

Patra's ability to simultaneously handle multiple services 24/7 supports faster turnaround times and drives higher customer satisfaction.

### **Save Time**

With flexible and scalable capacity, we can take on a single process or a multitude, and each combines into a unified workflow engine that continually improves operational efficiency.

### **Focus on Growth**

We handle the back-office work while your team focuses on new customer acquisition and dedicated attention to existing customers.

### **Reduce Expenses**

As Patra levels your workloads by taking on areas of overflow and backlog, you will reduce overtime expenses and extra hours.

# Tech-enabled Solutions for Each Phase of the EB Insurance Lifecycle

**Patra’s trained and managed processing executives along with a dedicated Patra US-based Client Consultant, deliver operational efficiencies to support your focus on driving growth, profitability, and value to your customers. Our “OnDemand” model means you only pay for the hours spent processing your work – not for training, reporting, PTO or breaks.**

Policy Lifecycle Support				Administrative Support	
Sales/ Submission Management	Policy Servicing	Renewal Services	Claims Services	Accounting Services	Compliance Services
AMS Updates	Eligibility Ben Admin Updates Enrollment Confirmations Data Entry	Census Population RFP Preparation Online Quoting Carrier Renewal Extraction Spreadsheets – Ren/Alt	Claims Experience Spreadsheets – Claims Data Data Entry – Claims Data	Direct Bill Reconciliation Direct Bill Posting Commission Posting	Compliance & Licensing Surplus Lines Filing Document Retrieval Indexing Data Entry

## Backed by the Power of the Patra Shield



- ☑ **Indemnity Protection**  
 Errors and omission (E&O) liability assumption provided for the work that Patra process executives manage.
- ☑ **Global Network**  
 Our global network of multiple processing centers in India and the Philippines enables us to load-balance processing volume to meet your SLAs.
- ☑ **Business Continuity & Disaster Recovery**  
 Patra maintains a comprehensive and audited Business Continuity and Disaster Recovery Plan.
- ☑ **SOC2 Compliant**  
 Ensures the safety and privacy of your data.



Higher **customer satisfaction**, driven by **improved service**, and faster **processing times**, drives **PROFIT** through increased customer retention.

## A COMPREHENSIVE SUITE OF SOLUTIONS FOR YOUR BUSINESS NEEDS

From tech-enabled back-office processing teams, to dedicated experts performing staffing assistant services, to Patra account managers servicing a book of small business on your behalf, to complete management of your virtual print and mail room, Patra has the solutions that help you drive growth, profitability, and value.

### The Customer Experience

**We deliver a customer centric experience truly invested in your success. Leveraging innovative technology and our industry expertise, we help move your business forward.**

#### Foundation for Success

Patra's experienced solutions consultants and onboarding specialists make it easy for your team to identify and adopt the best tech-enabled solutions that will accelerate your path to ROI.

#### Channeling Partnership Success

Once onboarded, we partner you with a tailored service team to ensure you're getting the most out of our service(s) and achieving your goals.

#### Unifying Systems and Workflows

Patra's proven integration process prioritizes data security with minimal disruption. We are an extension of your team, delivering a white label customer experience.

#### Quantifying Success

Patra empowers you to make data-driven and strategic business decisions by providing data analytics and KPI performance metrics through RPA, Hybrid Cloud, and ML.

