

# INSURANCE PROCESSING

## Property & Casualty

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



**PATRA**<sup>™</sup>  
OnDemand

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

As a true partner to your business, Patra engages in every aspect of the property and casualty lifecycle. From new business, policy servicing, renewal and claims, to accounting and compliance support, Patra's proprietary technology coupled with its tech-enabled best-practices processing workflows,

- › Improve efficiency,
- › Increase productivity, and
- › Grow top-line revenue.

As a dedicated service provider, everything we do, we do to empower you to focus on what you do best -- bring value to customers, manage risk and provide peace of mind to policyholders.

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

- ⚙ **Clearance**
- ⚙ **Claims**
- ⚙ **Data Entry**
- ⚙ **Direct Bill Posting**
- ⚙ **Endorsement Processing**
- ⚙ **Indexing**
- ⚙ **Loss Runs**
- ⚙ **Policy Issuance**
- ⚙ **Submissions**



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

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

---

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 P&C Insurance Lifecycle

**Patra's trained and managed processing executives along with a dedicated Patra US based Client Consultant, collaborate with your organization on best practices and operational efficiencies to support your focus on driving growth, profitability, and customer satisfaction.**

Policy Lifecycle Support				Administrative Support	
Sales/ Submission Management	Policy Servicing	Renewal Services	Claims Services	Accounting Services	Compliance Services
Clearance Submissions Submission Triage Binds Indexing Risk Evals Doc Retrieval Ex Mods Inspection Ordering Data Entry	Policy Issuance Endorsement Policy Administration Doc Retrieval Submissions Submission Triage Binds Indexing Risk Evals Doc Retrieval Ex Mods Inspection Ordering Data Entry	Renewal Prep Rating / Quoting Loss Runs Doc Retrieval Indexing Risk Evals Data Entry	Claims Loss Runs Indexing Data Entry	Compliance & Licensing Surplus Lines Filing Document Retrieval Indexing Data Entry	Direct Bill Posting / Reconciliation Invoicing Indexing Payment Processing / PatraPay 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.

