



## DATASHEET · EMPLOYEE BENEFITS

# Employee benefits work peaks. Your headcount *does not have to*.

Patra places insurance-trained virtual assistants (VAs) inside your employee benefits operation. They work in your systems, to your workflows, and to your client service standards, across the full EB lifecycle — pre-renewal, renewal, open enrollment, and ongoing management. You direct the work. We carry recruitment, training, equipment, HR, and the office behind them.

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## THE PROBLEM

### Seasonal demand, permanent cost

Renewals, open enrollment, eligibility updates, and compliance deadlines arrive on the same calendar every year — and they arrive together.

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### Demand is seasonal, headcount is not

Peak periods need more hands than the rest of the year does. A permanent hire solves the peak and carries cost through the trough.

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### Service levels absorb the pressure

When volume spikes, response times stretch and client service is the first thing to give.

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### Senior people end up processing

Account managers spend enrollment season on eligibility updates, carrier follow-up, and file audits instead of client relationships.

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## WHAT PATRA DOES

### You manage the work, *not the employment*

Your virtual assistant works to your process, in your systems, under your direction, across the EB lifecycle. We handle recruitment, training, equipment, HR, and office support — so what you manage is the work, not the employment.

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## **Across the full lifecycle**

Pre-renewal, renewal, open enrollment, and post-enrollment management. Support does not stop when enrollment closes.

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## **Seven service areas**

New and renewal marketing, enrollment, claims, accounting, compliance, benefit technology, and administrative support.

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## **Year-round or seasonal**

Engage a full-time assistant, or a six-month seasonal assistant for Q4, Q1, or both, with the same certified talent and Patra-managed HR and infrastructure.

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## **We carry the employment**

Recruitment, profiling, pre-screening, equipment setup, the training platform, HR, and office infrastructure are Patra's responsibility.

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## **SEASONAL SUPPORT IN PRACTICE**

# **Two peaks, staffed to the calendar**

Seasonal support in practice

Two peaks, staffed to the calendar

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## **Q4 • OCTOBER TO DECEMBER**

### **Renewal marketing and open enrollment**

RFP preparation, quoting and comparison spreadsheets, proposal and presentation support, new group setup and platform onboarding, renewal and open enrollment configuration, election processing, benefit guides and employee communications, carrier follow-up, and issue resolution.

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## **Q1 • JANUARY TO MARCH**

### **Post-enrollment administration and compliance**

New group submittals and BOR processing, high-volume eligibility enrollments and changes, plan builds and readiness checks, carrier submission coordination, post-enrollment cleanup, bill reconciliation audits, annual legal notices, ACA reporting, EDI file feed setup, and validation.

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## **THROUGHOUT**

### **Overflow processing**

No blackouts during peak periods.

## WHY PATRA

# Certified before they *touch your book*

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### Certification before deployment

Every assistant earns Patra Virtual Assistant Certification™ through Patra University before supporting your team, covering insurance principles and terminology, types of insurance and coverage, and EB-specific agency operations.

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### Built for the EB calendar

The seasonal program is designed around Q4 renewal marketing and open enrollment, and Q1 post-enrollment administration and compliance.

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### No enrollment blackouts

Overflow processing continues through peak periods rather than queuing behind them.

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### Fits your existing model

Assistants work in your workflows, systems, communication platforms, and service standards rather than running a parallel process.

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### Certified security controls

SOC 2 Type 2 and ISO/IEC 27001:2022 certified, with functionality limited to the Patra environment.

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## HOW TO START

# Six steps to a working assistant

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### 01 Identify needs

Our advisory team meets with you to determine the role details and skills needed to support your EB operations.

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### 02 Recruit talent

We manage the full recruitment process, including candidate profiling, saving you time and expense.

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### 03 Interview talent

We work on your behalf, interviewing and pre-screening qualified EB-ready candidates for your review.

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#### **04 Onboarding**

We oversee all technology and equipment setup.

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#### **05 Training**

We provide the training platform so you can connect with your assistant and begin workflow-specific training.

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#### **06 Management**

We manage HR, the office environment, and infrastructure, so you focus entirely on the work.

### **SECURITY AND CONTINUITY**

## **Your data, *protected***

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#### **Certified controls**

SOC 2 Type 2 and ISO/IEC 27001:2022 certified.

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#### **Secure access**

AES256 encryption via VPN connection. Functionality limited to the Patra environment only. No administrator rights; USB storage and printing disabled.

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#### **Data protection**

Single sign-on, data loss prevention, and SIEM. Hard drive storage with AES256 encryption.

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#### **Operational resilience**

Multi-region processing centers for continuity, with audited business continuity and recovery plans.