PATRA™

Case builds, renewals, and open enrollment setup pull your team into the BenAdmin system when they should be with clients. Patra does the configuration work.

What it is

Our benefit technology services cover the work that happens inside benefits administration platforms: new group builds, annual renewal changes, open enrollment setup, data migrations, data exchange requests, EDI connectivity, and notifications support. A specialized employee benefits team does the configuration in your clients' BenAdmin systems. The service is for retail agencies and brokers administering employee benefits books across multiple platforms.

The problem

Benefits platform work has to be done, and it lands on people who were hired for something else.

Builds are technical

A basic build and a complex build with variable class structures take the same specialist knowledge, and the complex ones take it for longer.

Renewals and changes never stop

Keeping a whole book current is continuous work, and it competes directly with client time.

Open enrollment has a fixed date

The system has to be assessed and live before the window opens. There is no version of that deadline that moves.

What Patra does

We take the configuration work inside benefits administration platforms, from initial setup through the annual cycle.

- **Case builds**

  Whether it is a basic build or a complex build with variable class structures, Patra completes system setup, configuration, and data import for your clients' employee benefit plans across a range of BenAdmin platforms.

- **Renewals and changes**

  We make the necessary updates on time and accurately so managing the book does not compete with serving it.

- **Open enrollment setup**

  We review and enters benefit plan changes, sets up a communication strategy, downloads new documentation for employee education, and assesses the enrollment system before it goes live.

- **Data exchange and more**

  Data exchange requests, ACA measurement setup, and guidance on customizing a client's BenAdmin configuration.

Why Patra

- **A team built for this work**

  More than 500 people on Patra's specialized employee benefits team, with extensive benefits administration experience and expertise across BenAdmin systems.

- **Two decades in insurance operations**

  Patra has worked in technology-enabled insurance operations for more than 20 years.

- **Built by one team, assessed by another**

  Our global team performs the build. A US-based service associate tests the case and makes corrections before it goes back for sign-off.

- **Platform range rather than platform preference**

  We work across benefits administration platforms rather than steering clients toward one.

- **Ongoing professional development**

  The team is kept current on platforms and practice, not trained once at onboarding.

Proof: scale

500+
people on Patra's specialized employee benefits team

20 yrs
of proprietary insurance processing data

25M+
transactions processed per year

99.5%
accuracy with expert validation

800+
workflows powering the platform

How to start

01 Assignment

The employer group is assigned to Patra.
Output: a named case and an owner.

02 Discovery

We obtain plan-specific information from the broker or group.
Output: the plan data needed to build.

03 Build

Our global team builds employer, carrier, and plan specifics into the BenAdmin system.
Output: a configured case.

04 Test

A Patra US service associate assesses the case and makes updates and corrections.
Output: a tested case with corrections applied.

05 Go live

The case launches, with confirmation back to the broker or group for final testing or sign-off.
Output: a live case and a sign-off.

06 Data exchange

Carrier connections are requested as needed.
Output: established carrier connections.

Security and continuity

Certified compliance

Patra maintains SOC 2 Type 2 compliance and ISO/IEC 27001:2022 certification, aligning data protection practices with global standards for security, availability, and confidentiality. Regular independent audits validate controls.

Secure processing centers

Patra operates multiple processing centers in India and the Philippines under direct operational control, purpose-built for data protection and supporting load balancing during volume spikes or continuity events.

Technical safeguards

AES256 encryption for data at rest and in transit, encrypted GVPN connectivity, Active Directory authentication, and SIEM-based logging and alerting. Data loss prevention and single sign-on are enforced, administrative privileges are restricted, and USB storage is disabled.

Business continuity

Audited business continuity and disaster recovery programs, including a Business Continuity Plan, Disaster Recovery Plan, and Security Incident Response Plan, support operational resilience through disruption.

How many hours will your team spend inside BenAdmin systems this open enrollment?

TALK TO PATRA ABOUT TAKING THE BUILD WORK OFF THE CALENDAR.

PATRA™

207 Town Center Blvd Building A, Suite 100 El Dorado Hills, CA 95762

(415) 884-8008

info@patracorp.com

www.patracorp.com