



Relax This Open Enrollment Season

Ease your operational and staffing challenges.

We know the fourth quarter can be taxing. Make this year the exception.

For many Employee Benefits agencies, the thought of open enrollment approaching is overwhelming. With plans renewing year-end, it's challenging to manage the peak volume to support your clients. Not to mention that your staff is spread thin, putting you at an increased risk of administrative processing errors and exposure to risk.

Make this year different, and outsource your open enrollment processes to Patra to ease your operational and staffing strain. All of Patra's end-to-end solutions are scalable to fit your needs before, during and after open enrollment.

How Patra Can Help You

MARKETING

Census Manipulation

Compile and format all information needed for quoting

Quoting & Proposals

Generate renewal reports, carrier renewal extraction, process quoting and proposal preparation

DATA MANAGEMENT

Data Entry

Check for accuracy and update plan decisions for the new enrollment cycle within your agency management system

ACCOUNTING

Billing Reconciliation

Reconcile invoices against company records

Commission Posting

Post received commissions to agency accounting systems

ENROLLMENT

Eligibility

Manage and process peak volume of adds, terms and changes within carrier portals, ensuring carrier notification and employee coverage

To learn how we can help, contact us today.

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