

Renewal Automation Suite



Reduce Turn-around times
Retain Business
Automate Renewal Process

The Fidelis Renewal Automation Suite is a robust application that empowers underwriters with the ability to automate their entire renewal process from start to finish with fully integrated CRM.

The only solution in the marketplace to include extensive Manual and Experience Rating Libraries, it incorporates data in real time and populates the suite with customized data such as risk factors and census information. Built-in algorithms then calculate rate information and can even compare your rates with those of competitors.

- **Renewal Module:** Enable rules based underwriting with a robust rating engine and automate and track proposals.
- **CRM:** Manage your Broker and Group relationships and proposal process

Features:

- Review multiple proposals from a variety of groups and brokers in an easy to use interface
- Integration with CRM and automated proposal generation for sales
- Import capitation information, allowing for "what if" scenarios
- Compare medical plans i.e. PPOs, HMOs, and other ancillary rates against your competition
- Secure access to RFPs, proposals and case management

Benefits:

- Streamlines the entire underwriting and renewal process
- Speed the proposal process, improve response time to your clients and reduce the sales cycle
- Improve productivity and improve your competitive position
- Have a competitive advantage against competitive health plan rates
- Provides confidence of full audit trail