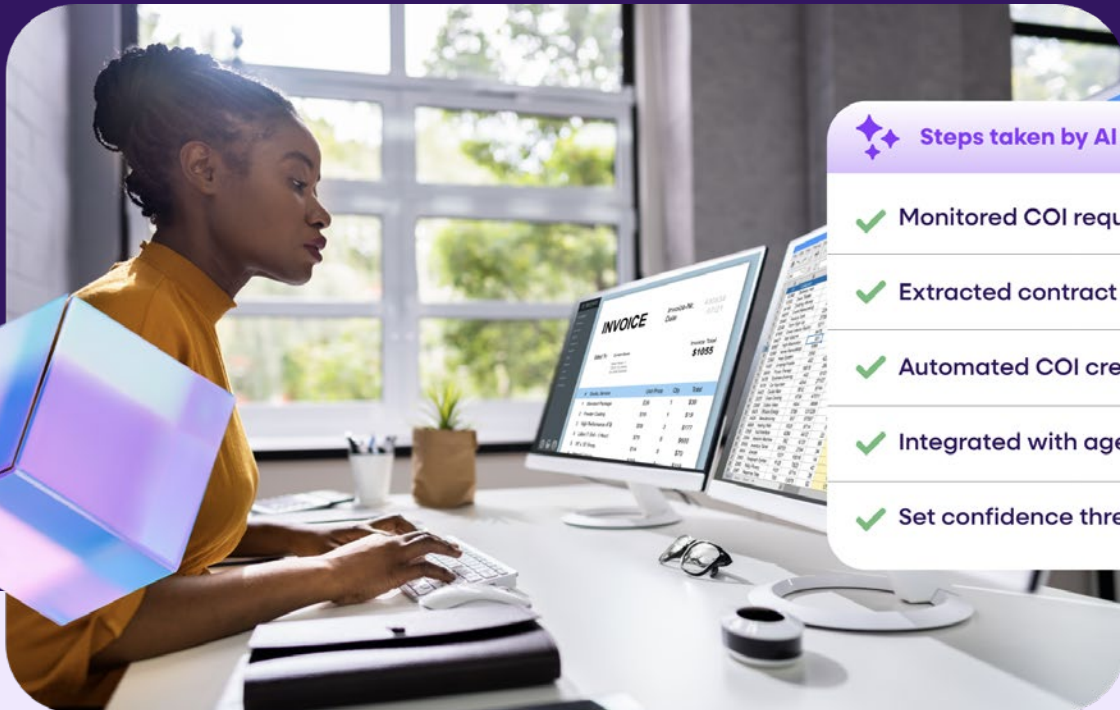


DATA SHEET

Policy Servicing AI Agents



Steps taken by AI Agent

- ✓ Monitored COI requests
- ✓ Extracted contract details
- ✓ Automated COI creation
- ✓ Integrated with agency systems
- ✓ Set confidence thresholds



Learn more at bevaya.ai
Contact us at sales@bevaya.ai
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Request a Demo

Policy Servicing AI Agents

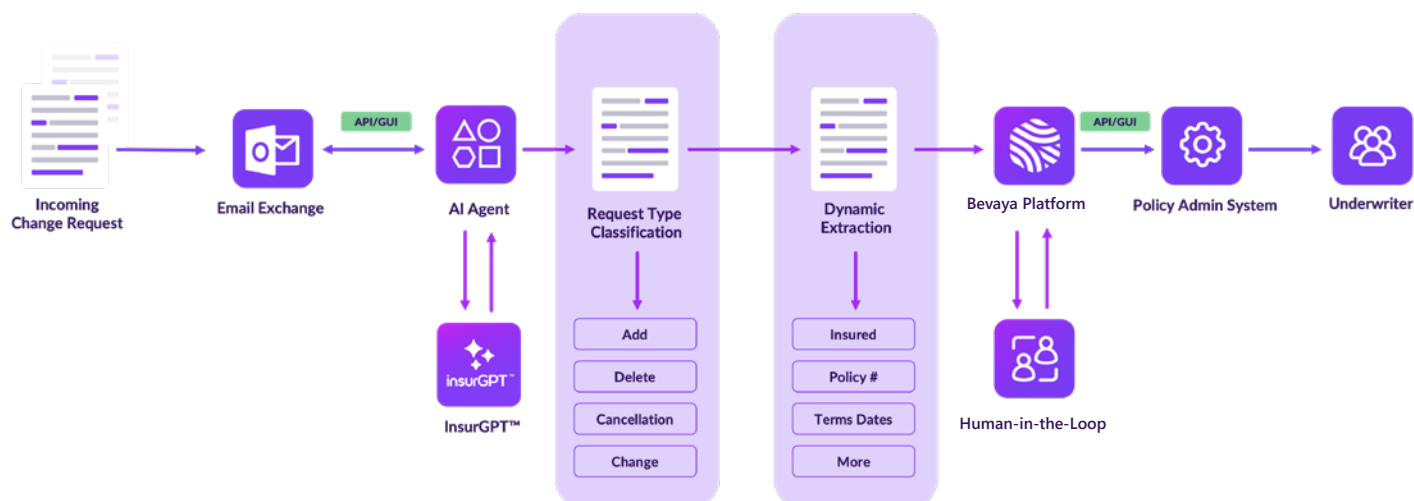
Bevaya's Policy Servicing AI Agents transform operational and policy support activities. These agents automate critical tasks like premium audit analysis, Certificate of Insurance creation, and endorsement requests. They seamlessly integrate with your existing systems, improving operational efficiency, expanding team capacity, and dramatically increasing policyholder satisfaction through rapid turnaround times for all servicing needs.

Bevaya AI Agents think, read, and understand just like people do, possessing the same level of insurance industry expertise as somebody with five to seven years of experience and the skills to manage work and collaborate directly with subject matter experts on your team. Our AI Agents are always on, ultra-secure, and deliver ROI from their first day on the job.

With Bevaya's Policy Servicing AI Agents, you can:

- ✓ Increase productivity and speed
- ✓ Reduce costs and the need for additional staff
- ✓ Add team capacity
- ✓ Improve policyholder and broker satisfaction

Endorsement AI Agent Workflow



Common Claims Use Cases

Bevaya's AI Agents automate activities like data collecting, endorsement requests, and invoice processing by comprehending policy papers and procedures, including COIs and premium audit forms. They easily integrate with your systems to automate procedures, and our patented human-in-the-loop (HITL) methodology guarantees 98%+ accuracy, real-time team collaboration, and ongoing model improvements. Improving policyholder happiness, team capability, and efficiency.

Bevaya AI Agents can help:

Ingesting, analyzing, classifying, indexing and filing documents from portal, email, and mailroom systems

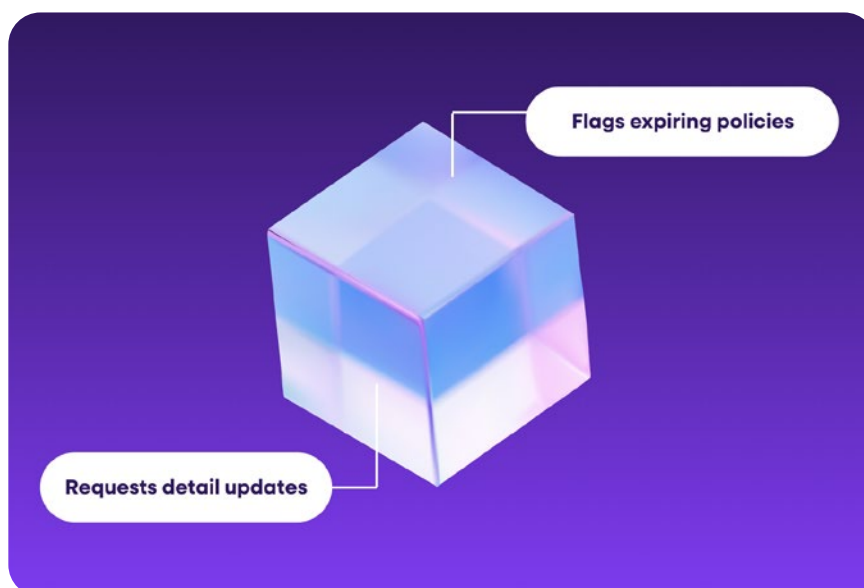
Premium audit requests from brokers and insured, data analysis, data extraction, and data entry

Endorsement requests support for policy changes from emails and portals

Process Certificate of Insurance (COI) request, automates the generation and distribution of COIs

Requests missing data from the broker of policy holder

Invoice handling and payment processing based on customizable rules



Bevaya Claims Use Cases

Endorsement Processing

- Monitor email inboxes for policy change requests
- Classify type of change and line of business
- Extract key data fields dynamically based on type of change requested
- Update policy administration systems to bind the policy changes
- Notify underwriters for premium bearing endorsement changes using customer defined thresholds

Policy Renewal

- Flag expiring policies 60-90 days in advance
- Request needed policy detail updates from brokers and policyholders
- Monitor for new policy documents and details
- Extract newly submitted policy data
- Send alerts to underwriters when policy renewal is ready for review

Certificate of Insurance Creation

- Monitor for incoming Certificate of Insurance (COI) requests and operate 24x7
- Extract coverages, limits, and specific clauses from business contracts
- Automate the creation of COIs using extracted contract details
- Integrate directly with agency management systems like Applied Epic, AMS360, Zywave and HUB International
- Set customizable confidence level thresholds that trigger exceptions and manual review

Premium Audit

- Classify premium audit document types such as carrier premium audit questionnaires, payroll reports, federal and state tax returns, and 1099 information
 - Extract data from premium audit documents including those with structured, semi-structured, and unstructured formats at accuracy level greater than 98%
 - Identify missing premium audit data needed to complete the process
 - Automatically follow up with the insured via email to request missing data
 - Seamless integration with existing audit systems to populate audit data
-

Invoice Payment

- Identify and extract data points such as vendor name, FEIN number, bill date, bill amount, and others
- Process payments based on the payment authority set by customers
- Update diary notes within claims applications such as Guidewire, Duck Creek, InsuranceNow, and more

Sample Supported Document Types

Our turn-key indexing and extraction models are fine-tuned to deliver highly accurate results for the most common claims, servicing and underwriting document types our customer work with daily.



Submission Documents

Loss Runs (multiple carrier versions), Schedules, SOVs, Agent Reports, Census Files, etc.



Medical Records, Bills and Invoices

i.e., Medical Records, Explanation of Benefits, CMS 1500, Medical Authorization, Medical Narrative Report, Medical Cards, Return to Work/Work Status, Patient Referral, UB04, etc.



Claims Correspondence

First Notice of Loss/ First Report of Injury, Claim Analysis, Claims Photos, Domestic Return Receipt, Affidavit, Acknowledgement Letter, etc.



Premium Audit Documents

Carrier Premium Audit Questionnaires, Payroll Reports / Schedules, Federal & State Tax Payroll Tax Returns, 1099 information, COIs for 1099 contractors, etc.



ACORD Forms

Multiple versions and types



Legal Correspondence

Demand Letters, Subpoena, Petition, Complaint, Notice of Lien, Notice of Hearing, Notice of Representation, Invoices, etc.



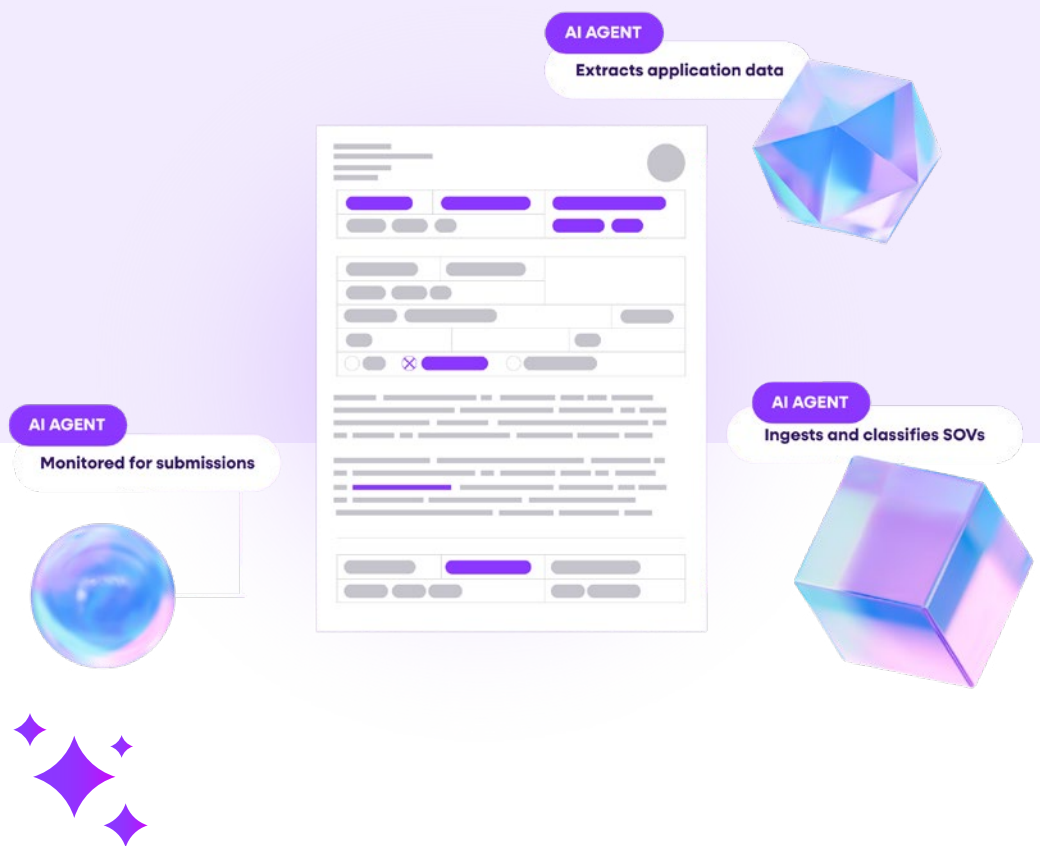
Multiple Reports

Police Reports, Expert Reports, ISO Reports, etc.

Ready to partner with a vendor committed to your success?

Discover how Bevaya can empower your teams with AI and automation.

Schedule a personalized solution demo and see how our platform can accelerate your transformation goals with confidence.



Visit bevaya.ai or contact us at sales@bevaya.ai to learn more.

[Request a Demo](#)