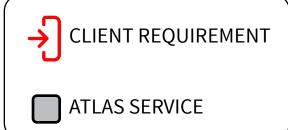


#### **Statement Project Roadmap**

v3 revised 3/19/24

To get started with Atlas please ask us questions, request a same-day quote, or request project kickoff resources.

All statement types, including Total Compensation, Enrollment Confirmation, Bonus Award, Annual Performance, and Pay Transparency Statements, follow the four project phases: Template, Data, Testing, and Delivery.



## You share brand assets and plan details. Atlas **Template** drafts your custom statement template. It can take 2-3 weeks to develop your statement template together. Pick a Model - Choose a statement model and/or describe your message, content, chart, and other project needs. **Shared Project Tools** - We create a shared project timeline and send upload instructions and requests for plan information and brand assets. **Send Plan Details** - You provide us with plan information by uploading reference documents like SPDs and plan letters. Send Brand Assets - You send us your logo, colors and brand requirements, plus other images like signatures, graphics and stock photos. **Draft Content, Charts and Design - We prepare a first** draft template with sample text using the supplied information and assets. **Review Content, Charts and Design** - You review the draft template and give us your text edits, changes and design notes. **Statement Template Download** - We apply your changes and work with you to finalize the template. You can download mock statements for your records.

## You upload data files. Altas reviews and processes Data your data to program your statement template. It can take Atlas 1-2 weeks to review your data and program your statements. **Data Requirements** - We send you a list of data requirements and instructions given your custom Upload your Data - You prepare and send us your data (most formats accepted, unlimited files). We can guide you in exporting and collecting data on request. Validate and Review Data - We check your data for accuracy, completeness, and consistency with our validation and review process. Resolve Data Questions - We ask data questions and apply your corrections. **Prepare Data for Merge** - We convert your data to the right text formats, round values, and calculate chart fields. **Quality Assurance** - We perform quality and accuracy checks on your data to ensure that there are no errors or inconsistencies in the calculations shown on each statement. **Program Statements** - We merge data fields to your custom template and program your statements. **Data Set Download** - We deliver the prepared data set for your records.

# You review the accuracy of your programmed **Testing** statements and approve for production. It can take 1-2 weeks for you to review the test statements and approve for production. **Test Record Selection** - We choose a representative set of records in your data to use for testing. Generate Test Statements - We produce PDF test statements using your programmed template. Review and Approve Test Statements - You review the test statements to your satisfaction and give us approval to proceed with the programmed template. Pick Delivery Options - You confirm how you want to receive your statements with print, mail, ship, and PDF Package delivery options. Pay Invoice - We calculate project fees and send an invoice. Our fees include all postage, estimated shipping, asset and license costs. We accept most forms of payment. *If mailing to homes:* **Upload Address Data -** Send us your most recent address data for your employees. National Change of Address (NCOA) Service Correct Street and City spelling • Add Zip+4 zip codes Standardize abbreviations Format addresses to meet USPS standards Determine if moved and provide new postal address (within 18 months) **Remove Terminated Records** - Take terminated employees out of the statement set at any time, before or after we print.

### Atlas delivers your statements to you and Delivery your employees. Expect 3-4 business days for statements to be printed Print and mailed or shipped. Generate Print-Ready Statements - We generate your full set of statements as print-ready files using your custom template and data. **Print and Postpress Services** - Individual statements are printed, folded and inserted into security envelopes. Mail Statements to Homes - Statements mailed to employees via USPS first class mail. **Ship Statements to Offices** - Statements shipped to your office(s), inserted into envelopes, sorted as requested. PDF Packages of generated PDF statements delivered in 2 Package business days. **Generate Individual PDF Statements** - We generate your full set of statements as individual PDFs using your custom template and data. PDF Package Download - We package your individual PDFs for download: Move into named subfolders with PDFs grouped by manager, department, location, etc. • Rename individual PDFs by name, ID, date, etc. Encrypt individual PDFs with unique passwords by name, ID, location, etc. • Zip folders to reduce file size and improve security Excel Index File - We deliver an Excel index file that contains information to locate, identify and access each individual PDF statement (file name, employee name, ID, folder path, password, etc.)