



## 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.

CLIENT REQUIREMENT

ATLAS SERVICE

### Template

You share brand assets and plan details. Atlas 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.

### Data

You upload data files. Atlas reviews and processes 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 template.
- 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.

### Testing

You review the accuracy of your programmed 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.

### Delivery

Atlas delivers your statements to you and your employees.

### Print

*Expect 3-4 business days for statements to be printed 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 Package

*PDF Packages of generated statements delivered in 2 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.)