Adeptia Automate™

for Health & Life Plan Carrier Switchover

Accelerate New Customer Onboarding with Intelligent Data Automation™

OVERVIEW

Winning new group health or life customers means migrating their data from a competitor's system, and it's rarely ready to use. Census files arrive with unfamiliar structures, plan elections don't map to your benefit tiers, and deductible accumulators come in inconsistent formats with tight processing windows.

Adeptia Automate removes the manual steps and data bottlenecks by intelligently ingesting, normalizing, and validating migration data, transforming messy First-Mile Data™ into clean, standardized inputs for your Benefits Administration System.

TYPICAL DATA FLOWS

Sources: Prior Carrier BAS, Brokers & TPAs, Benefit Technology Platforms, Legacy Systems

Formats: Excel · CSV · Text · PDF

Delivery: API or SFTP into Benefits Administration System

THE ADEPTIA ADVANTAGE *Automate Every Step of the Carrier Switchover Journey*

CAPABILITY	WHAT IT DELIVERS
Intelligent Data Ingestion	Connect to prior carrier systems, broker feeds, and legacy platforms via API, SFTP, or email.
AI Mapping Knowledge Base	Automatically map unfamiliar prior carrier record structures based on your rules.
Plan Matching & Validation	Apply configurable rules to match competitor plans to your benefit tiers and validate accumulator credits.
Reusable Templates	Enable operations teams to set up migrations from other carriers without IT.
End-to-End Visibility	Monitor every step from intake to BAS through a real-time Data Flow Dashboard.
Flexible Deployment	Cloud, hybrid, or on-prem, built for your compliance requirements.

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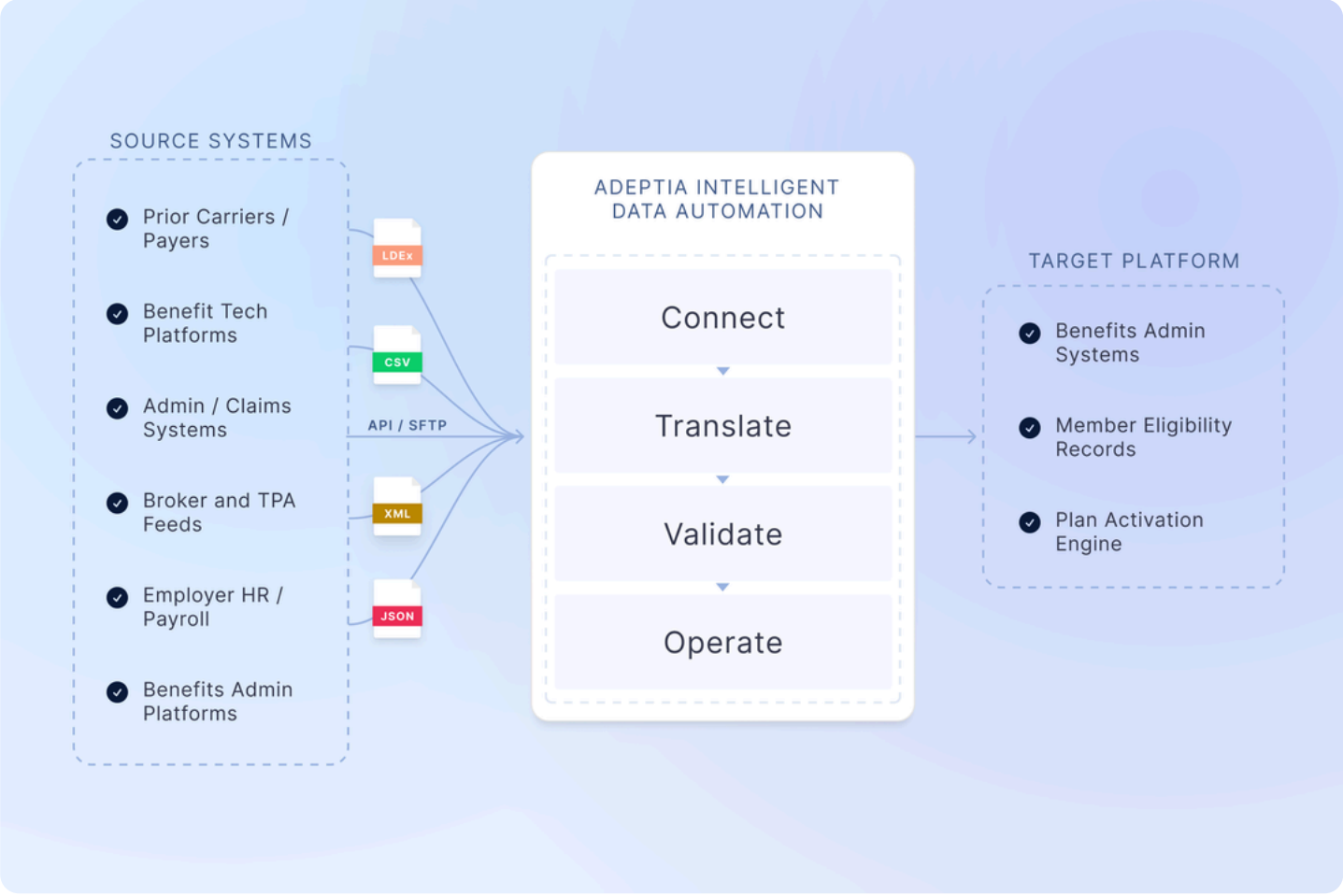
BUSINESS IMPACT *Speed. Accuracy. Scale.*

- **Faster Onboarding:** Cut migration timelines from weeks to hours
- **Cost Savings:** Eliminate manual cleanup and gain back team productivity
- **Time to Value:** Don't lose revenue to slow, manual switchover processes
- **Customer Experience:** Build trust and loyalty from day one with seamless transitions

GET STARTED

Transform how you onboard new customers, with speed, accuracy, and intelligent automation.

See how Adeptia Automate accelerates carrier switchover.



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