Adeptia Automate™
for Retirement Benefits Enrollment

Streamline Retirement Enrollment with Intelligent Data Automation™

Retirement benefits enrollment is a critical first step in plan activation and funding yet it's often slowed by fragmented data, inconsistent formats, and manual validation across HRIS platforms, brokers, and third-party administrators.

Adeptia Automate removes these bottlenecks by intelligently ingesting, normalizing, and validating enrollment data from every source and format — delivering clean, record-ready inputs directly to your record-keeping systems.

The result: faster enrollment, reduced manual effort, earlier revenue recognition and accelerated time to value.

TYPICAL DATA FLOWS

Sources: HRIS & Payroll Systems · Brokers · Third-Party Administrators (TPAs) · Other Financial Institutions

Formats: CSV · Excel · JSON · PDF · Text · API · SFTP · Email

Delivery: Record-Keeping Systems (via API or SFTP)

THE ADEPTIA ADVANTAGE *Automate Every Step of the Retirement Enrollment Process*

CAPABILITY	WHAT IT DELIVERS
Intelligent Data Ingestion	Seamlessly collect employee, payroll, and plan-selection data from HRIS, Payroll systems, Brokers, and TPAs via API, SFTP, or email.
AI-Powered Mapping	Automatically standardize inconsistent enrollment inputs against your defined target data model and mapping rules.
Enrollment Workflow Template	Pre-built workflow to define sources, validate enrollment data, route errors, and deliver outputs to record-keeping systems.
Validation Engine	Apply configurable Global, Plan-Level, and Target validation rules to ensure accuracy, completeness, and consistency.
Reusable Templates	Enable operations teams to onboard new plan sponsors quickly — without custom code or IT dependency.
End-to-End Visibility	Monitor every step of the enrollment process using the Data Flow Dashboard — from intake through delivery.
Flexible Deployment	Deploy on-prem, self-hosted, or hybrid to meet security, compliance, and data-governance requirements

©2026 Adeptia. All rights reserved. | adeptia.com

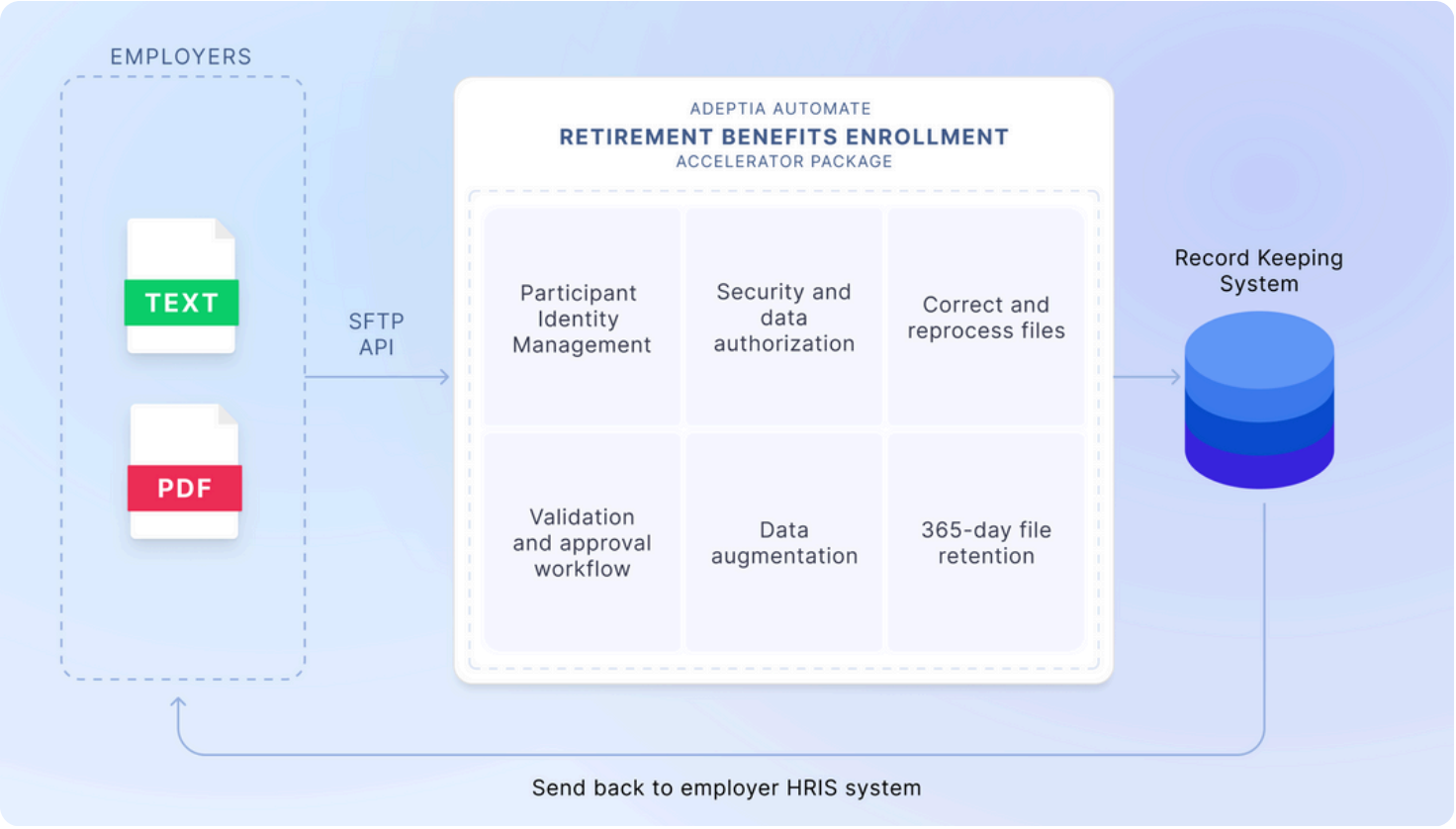
Adeptia Automate™ for Retirement Benefits Enrollment

BUSINESS IMPACT *Speed. Accuracy. Scale.*

- **Faster Enrollment:** Reduce processing cycles from weeks to hours.
- **Cost Savings:** Eliminate manual rework and reclaim months of operational team time.
- **Improved Data Quality:** Normalize enrollment records before they reach core systems.
- **Accelerated Time to Value:** Capitalize on recurring contributions faster.
- **Better Customer Experience:** Faster, more accurate enrollment for plan sponsors and participants.

GET STARTED

Transform your retirement benefits enrollment processes with Adeptia Automate's intelligent data automation™



©2026 Adeptia. All rights reserved. | adeptia.com

ADEPTIA