



TotalRewards Statement | Data Checklist

Fill out this worksheet and submit it along with your company's branding guide (if available), company logo and executive signature. This will act as a guide to help you pull the right data for the right timeframe.

Data Options



Time Frame

- Retrospective/Look-back: capture data from last calendar or fiscal year
- Current: annualize data from a point in time



Employee Groups

- New hires
- Benefit eligible only
- Exclude part-timer
- Exclude retirees

Data Elements



Basic Information

Basic Employee Information

- Employee ID (EID)
- Full Name
- Full Address (needed if mailing)
- Email Address (needed if using
- Email Promotion Module
- Delivery Method
- Employee Direct (USPS)
- Client Direct: Billing -Client or TRS



Additional Information

Additional Employee /Company Information

- Base Salary and/or Hourly Rate
- Date of Birth
- Date of Hire (Seniority Date)
- Employee Count _____

Statement Type:

- Online
- Print
- Both



Cash Compensation Section

Cash Compensations (10 max)

- Annual Salary *Look-back or Projected?*
- Annual Earnings/Wages _____
- Overtime / Double Time _____
- Shift Differential / On-Call Pay _____
- Annual Bonus _____
- Corporate Bonus _____
- Lump Sum Bonus _____
- Merit Bonus _____
- Sign-On Bonus
- Referral Bonus
- Commission
- Sales Incentive
- Variable Pay
- Stock Awards
- Stock Dividends
- Equity Payout
- Auto Allowance
- Profit Sharing
- Miscellaneous Earnings
- _____
- _____
- _____



What qualifies as compensation?

Generally, if the employee pays income taxes on it, then it should be considered a cash compensation.



 Benefits Section

Benefits (20 Max)

Healthcare

- Medical Insurance
- Health Savings Account
- Dental Insurance
- Vision Insurance
- FSA Healthcare
- FSA Dependent Care
- Employee Assistance Program

Other

- Tuition Reimbursement
- Auto Allowance
- Gym Subsidy
- Parking/Transit Subsidy

Look-back or Projected?

Survivor Benefits

- Life Insurance
- AD&D Insurance
- Business Travel Accident Ins
- Supplemental Employee Life Ins
- Supplemental Spouse Life Ins
- Supplemental Child Life Ins

Income Protection

- Short-Term Disability
- Long-Term Disability
- Workers' Compensation
- State Unemployment Ins
- Federal Unemployment Ins

Retirement

- 401(k)/403(b) Retirement Plan
- Pension
- Social Security
- Medicare



Should I include employee paid benefits as well?

Not showing them may discount the fact that employees do pay a portion of their benefits.





Estimated Tax Savings Section

Estimated Tax Savings (8 max)

Medical Insurance	<i>Look-back or Projected?</i>
Health Savings Account	_____
Dental Insurance	_____
Vision Insurance	_____
FSA Healthcare	_____
FSA Dependent Care	_____
401(k)/403(b) Retirement Plan	_____
457(b) Deferred Compensation	_____
Section 132 Commuter	
Gym Subsidy	
Parking/Transit Subsidy	



Other Valuable Benefits Section

Other Valuable Benefits (6 max)

Paid Time Off (PTO)	<i>Actual or Annualized?</i>
Vacation	_____
Sick Leave	_____
Personal Leave	_____
<input type="checkbox"/> Holidays	_____
<input type="checkbox"/> Flex Holidays	_____
<input type="checkbox"/> Stock Options/RSUs/PSUs	_____
Retirement Balance	_____



Why should I include the Estimated Tax Savings section?

This section shows the value of paying for benefits or contributing to retirement with pre-tax dollars.



Should I show the number of days and the value, too?

You can show either or both. Showing the value really highlights the dollars paid in time off benefits.




 Content Sections

Commonly Used Content Sections

- Health
- Income Protection
- Financial
- Work/Life Balance
- Other Benefits

Additional Content Sections

- Professional Development
- Performance Recognition

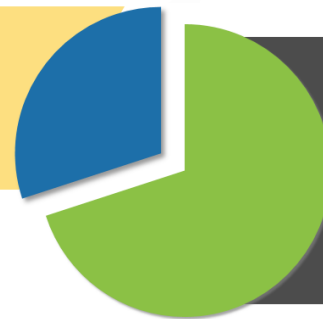
 Content Section Assignment

Same Content for All Employees

Content Specific to Employee Group

 Employment Landscape

Only 30% of Today's Job Seekers are Motivated by Money



70% Focus on Other Factors

- Career path
- Work-life balance
- Benefits
- Flexibility
- Meaningfulness
- Purpose
- Co-workers/Manager

Q | What should I include in content sections?

Additional information about company values and benefits beyond their dollar value.

A

Q | Why should I use content sections?

Quality content will increase employee engagement and satisfaction

A