TotalRewards Software

TotalRewards Statement

Playbook

Getting Started with TotalRewards

Starting your TotalRewards project is as easy. Follow these five simple steps, and we will guide you through each one to create your TotalRewards statement:

1. Kick Off Call and Timeline
2. Branding and Content
3. Data Management
4. Statement Audit
5. Launch (Online or Print)

Kick Off Call

Schedule a call with your designated Customer Success Manager to walk you through the portal and review the initial look and feel of your statement. During this call, we will discuss:

- An introduction to the TotalRewards project
- The project timeline and milestones
- Initial branding and content ideas
- Finalize Compensation and Benefits Programs
- Next steps after the call

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Timeline

The typical timeline for a first-year domestic project is 6 to 8 weeks from start to finish:

2 - 3 weeks: DATA COLLECTION – Company data such as employee details, total compensation, and benefits are compiled for statements. During this time branding (logo, colors, images, welcome letters, content– introductions, footers, and footnotes), communications, Single-Sign On (if needed), domain verification, and IP address addition is set up.

1 week: DATA MANAGEMENT – In this stage, we map and upload your data to the system. We ensure data files match program names on the statement, arrange data for audit elements, and perform high level audit.

2 - 3 weeks: DATA AUDITING – We recommend a minimum of 2 weeks for data auditing to ensure accuracy. This includes updating data or formatting as needed and obtaining your final approval. This is also when you sign off on the finalized data.

1 week: LAUNCH COMMUNICATION ROLL OUT or PRINT – This is the distribution of emails that advise on statements, grant employee access online, send reminders, launch surveys for feedback, and/or print and mail statements. This occurs after the data has been finalized and approved by you.

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Branding and Content

Branding is configurable to your company's. Confirm whether we should use our initial branding or if you will provide:

Primary color: Provide HTML color code or send your branding guide

Logo: Send a logo with a transparent background in PNG JPEG or GIF format

Executive photo and signature: From the signer of the welcome letter

Banner image: The images located at the top of each page of the online statement on select Themes

Side image: Images found on the side of each page of the online statement and/or in the welcome page of the print/PDF version.

Content: Review the Content tab – "Welcome Letter", "Introductions and Footers", "Footnotes" if any and "Facts/Disclaimer" tabs on your site and provide your content in a word document.

Email Template: Review the Pre-Launch, Go Live and Reminder emails and send any necessary changes.

Survey Template: Review the default survey email and recommended questions and indicate any changes needed. Acceptable types of questions include Scale (1 – 5) and Yes or No format.

Data Management

Process where we ensure data files sent are correctly aligned with the program names in the statement, map to data template and upload data for audit elements. Our data requirements:

- Provide a roster of all employees who will receive a statement.
- Data should be in Excel format with a unique numeric employee ID (not SSN) consistent across files.
- Send data files via our secure data portal or advise on preferred method

Once data has been received, we will merge all your separate data files using unique EID, annualize specified values and upload data into the application, conduct high-level audit and provide best practices auditing form for your reference and final sign off.

Statement Audit

This stage in the project implementation process is critical for ensuring data accuracy, compliance, and overall project success.

Once we reach the data auditing phase, we will provide documents outlining best practices, auditing procedures, and key points to look for. Signed Audit Approval Form upon audit completion is required prior to statement launch, any data revisions after final approval may incur additional fees.

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Launch

In this final step, the TotalRewards statements are distributed to employees according to your preferred delivery method. This phase ensures that every employee receives their TotalRewards statement in the format that best suits your organization's needs. There are two types of statements.

- **Secure Online Statement** – Employees view their statement via the application through their unique link or via Single Sign On if configured.

- **Printable PDF Statement** – Printed and mailed, can be done in-house, or managed by TRS, which we will print and mail directly to the client's address or the employee's physical address.