TotalRewards Statement | Project Overview

It is important to start a project off with a good understanding of what it entails. Below, we give a brief overview of each milestone in the Total Rewards Statement Project. We hope you find this useful.

Kick-Off Call

Project Kick-Off Call (KOC)

- Review statement features
- Review website and functionality
- Build sample statement
- Establish timeline of project
- Discuss data requirements
- Discuss delivery method of statement

Deliverables

TRS Will Send Project Deliverables

- List of outstanding decisions from KOC
- Next steps
- Sample statement

Branding

Load Images

- Company logo
- Executive signature
- Executive photo
- Custom cover page image

Choose Colors For...

- Headings
- Pie chart
- Bar chart

Choose Print Format

- 2-page Letter
- 4-page Newsletter
- 12-page Booklet
- Custom

Add Content

- Welcome letter
- Footers
- Benefit descriptions
- FAQ
- Survey questions

Collect Data

Data Requirements

- Excel file format (.xls or .xlsx only)
- Employee id number on every file

Data Auditing

- Data is accurate
- Data contains no duplicates
- Data represents correct timeframe

Data Mgmt

Data Management

- Merge, calculate, rearrange for template
- Import data into custom data template
- Upload and audit

Review/Audit

Audit Statement for Data Errors

- Check for alignment of data

  Check for accuracy

**Not available with Option 1 or Professional Edition*

Audit Statement for Formatting Errors

- Overlapping text
- Fuzzy images
- Spelling and grammatical errors
- Colors match company branding guide

Changes

Changes to the Data

Depending on whether TRS or you the client put the data together will determine the best way to make changes. Contact your Account Manager prior to making any edits to the data.

Changes to the Content

You will most likely have changes to the content as well. 95% of the time, you will find that these updates or edits can be made via the admin portal. If you are unsure, feel free to contact your Account Manager.

Final Audit

The Last and Final Audit… (Hopefully)

In most cases it would be too difficult and time consuming to audit every statement, this is why spot checking of groups is helpful. Spot checking the odd cases is usually most productive. For instance, odd cases would be employees that have waived medical, dental or vision coverage, part-timers, employees who received a special bonus or executives. By checking the uncommon occurrences of data, you will be eliminating the possibility of the data being misstated. Using the HR Report to compare totals from original data to totals of final data loaded in program is also useful. Keep in mind this will not work if employees have been deleted since the data was loaded.

Sign-off

Signing Off on the Project

- We require an approval to proceed to "Delivery" whether it is printing the statements, emailing out the login information, or turning on the Single Sign-On capabilities
- We will not proceed without your written approval
- You should expect a confirmation that we have received your approval

Delivery

- TRS can print statements (for a fee) or your company can do so internally
- Use our application to send an email blast with login info or create a one-page letter wtih login information

- Email addresses are required
- No additional cost
- Allows users to access online statement via your company's intranet
- Feature requires additional cost

HR Report

Part 1: Aggregation of Data

Shows totals, averages, participation ratios of all compensations and benefits in an easy to understand format

Part 2: Analytics (online usage)

Shows number of employees who logged on and how many times they logged on

Part 3: Survey/Feedback

Shows the responses to the questions and any additional comments provided by the employee

The End

End of Project Survey and / or Call

- You will receive a 2-3 minute survey in regards to your satisfaction with the project
- Additionally, we can discuss your feedback about the project during a conference call