



# 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)
- Project Launch Date \_\_\_\_\_
- Employee Count \_\_\_\_\_

### Statement Type:

- Online
- Print
- Both

 Cash Compensation Section

**Cash Compensations (10 max)**

- |                          |                                  |                              |
|--------------------------|----------------------------------|------------------------------|
| <input type="checkbox"/> | Annual Salary                    | <i>Annualized or Actual?</i> |
| <input type="checkbox"/> | Annual Earnings/Wages            | _____                        |
| <input type="checkbox"/> | Overtime / Double Time           | _____                        |
| <input type="checkbox"/> | Shift Differential / On-Call Pay | _____                        |
| <input type="checkbox"/> | Annual Bonus                     | _____                        |
| <input type="checkbox"/> | Corporate Bonus                  | _____                        |
| <input type="checkbox"/> | Lump Sum Bonus                   | _____                        |
| <input type="checkbox"/> | Merit Bonus                      | _____                        |
| <input type="checkbox"/> | Sign-On Bonus                    |                              |
| <input type="checkbox"/> | Referral Bonus                   |                              |
| <input type="checkbox"/> | Commission                       |                              |
| <input type="checkbox"/> | Sales Incentive                  |                              |
| <input type="checkbox"/> | Variable Pay                     |                              |
| <input type="checkbox"/> | Stock Awards                     |                              |
| <input type="checkbox"/> | Stock Dividends                  |                              |
| <input type="checkbox"/> | Equity Payout                    |                              |
| <input type="checkbox"/> | Auto Allowance                   |                              |
| <input type="checkbox"/> | Profit Sharing                   |                              |
| <input type="checkbox"/> | Miscellaneous Earnings           |                              |
| <input type="checkbox"/> | _____                            |                              |
| <input type="checkbox"/> | _____                            |                              |
| <input type="checkbox"/> | _____                            |                              |

**Q**

What qualifies as compensation?

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

**A**



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
- \_\_\_\_\_

*Survivor Benefits*

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

*Annualized or Actual?*

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*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
- 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

*Annualized or Actual?*

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Other Valuable  
Benefits Section

**Other Valuable Benefits (6 max)**

- Paid Time Off (PTO)
- Vacation
- Sick Leave
- Personal Leave
- Holidays
- Flex Holidays
- Stock Options/RSUs/PSUs
- Retirement Balance

*Annualized or Actual?*

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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.*

