Getting Started

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Getting Started with TotalRewards Builder - A Process Overview

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The process for designing, delivering and measuring the success of your TotalRewards project involves 7 key steps. When creating your first TotalRewards project, follow these steps in order to avoid re-work.

This knowledgebase provides detailed instructions on each step along with some video tutorials to help you through the process.

Planning:

- Define the type of statement you want to create (e.g. retrospective or current)
- Configure who the administrative users will be
- Configure the company profile

Program Names:

- Define the cash compensation programs (e.g. salary, wages, annual bonus)
- Define the benefit programs (e.g. medical, dental, disability insurance, etc.)
- Define pay programs that offer pre-tax savings
- Define other valuable benefit programs (e.g. PTO, holiday pay, sick time, etc.)

Content Changes:

- Create a welcome letter
- Edit text for introductions and footers
- Add footnotes
- Define Content Pages for non-cash compensation programs (e.g. Health & Wellness, Retirement & Financial Security, Additional Benefits & Perks)
- Add language to describe programs

Branding:

- Upload DBA Logo
- Define charts and graph styles
- Select Images for printed statements

Data Management:

- Download a data template
- Collect & organize employee data
- Map & enter employee data into data template
- Upload data template

Statement Audit:

- Final review of employee data

Promotions:

- Create email template to invite employees to view total rewards statement
- Send invitation to employees to view total rewards statement

Success Measurements:

- View which employees have accessed their total rewards statement