

# **Getting Started**

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Getting started is simple when you follow the TotalRewards Builder workflow. Each step builds on the last, helping you move from initial setup to employee-ready statements.

For your first project, complete the steps in sequence to save time and minimize revisions.

Here's an overview of the workflow:

## Planning

- Decide statement type (e.g., retrospective or current)
- Review or create sample statement
- Set up admins
- Update statement settings

### Programs

- Identify programs to include
- Define cash compensation (salary, wages, annual bonus)
- Define benefits (medical, dental, vision, insurance) and estimated tax savings
- Define other valuable benefits (PTO, holiday pay, sick time)

#### **□Design**

- Create or edit welcome letter, intros/footers, and add footnotes
- Define non-cash content pages (Health, Income Protection, Retirement, and Other Benefits)
- Add images (executive photo, logo, page content, printed statement)
- Choose chart styles

#### Data Integrity

- Download the data template
- · Collect and organize employee data
- Map and upload data
- · Conduct final review



# **Engagement**

- Edit employee emails
- Send communications and survey
- Monitor statement access
- Review results