

Data Template

Last Modified on 10/24/2025 1:35 pm PDT



This step focuses on preparing and managing the information that powers your Total Rewards statements. Organizing, validating, and updating data here ensures a strong foundation for accuracy and consistency throughout the process.

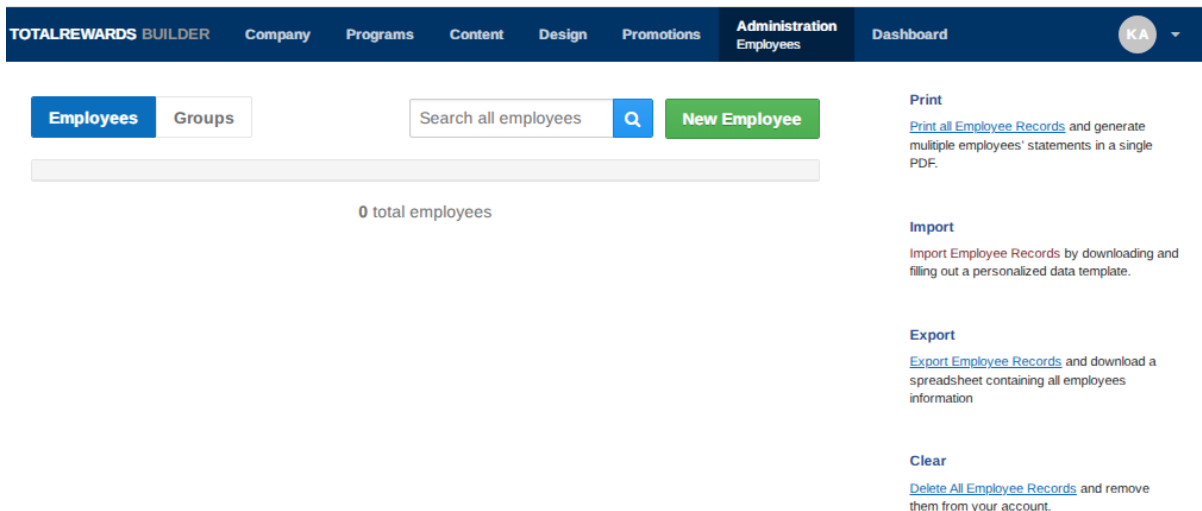
To make this easier, a **downloadable data template** is available. This Excel file is automatically generated based on the programs entered in your portal and includes:

- Cash Compensation
- Benefits
- Estimated Tax Savings
- Other Valuable Benefits

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□ Download the Data Template:

1. Go to **Administration**.
2. Select **Employees** from the dropdown.
3. Click the **Import Employee Records** link.



TOTALREWARDS BUILDER Company Programs Content Design Promotions **Administration Employees** Dashboard KA

Employees Groups Search all employees **New Employee**

0 total employees

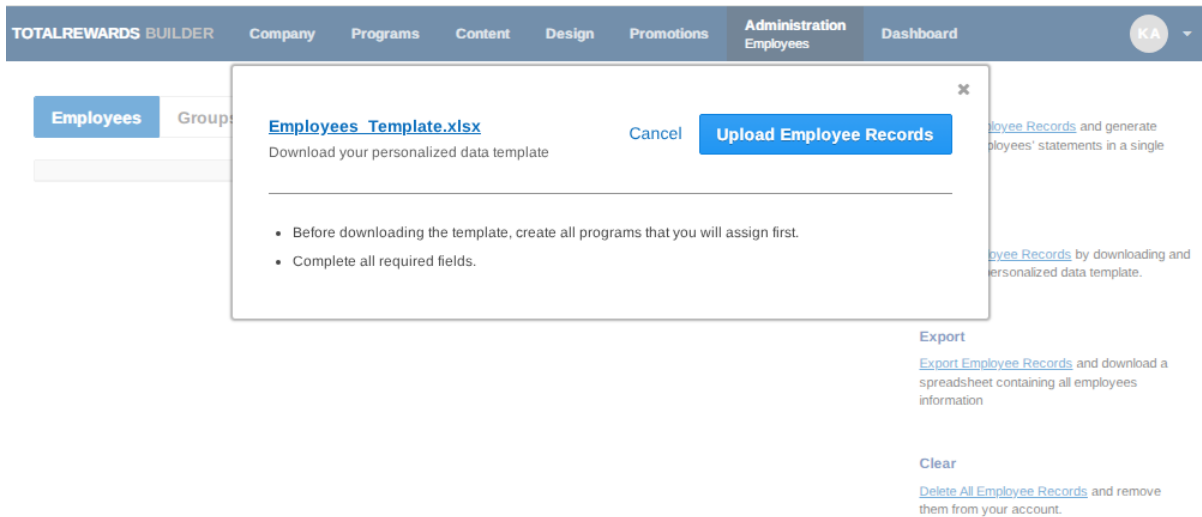
Print
[Print all Employee Records](#) and generate multiple employees' statements in a single PDF.

Import
Import Employee Records by downloading and filling out a personalized data template.

Export
[Export Employee Records](#) and download a spreadsheet containing all employees information

Clear
[Delete All Employee Records](#) and remove them from your account.

4. In the pop-up window, click **Employees_Template.xlsx**.



5. Save the blank template to your computer.
6. Populate the data fields in the template with your employee information.

□ **Note:** Finalize all **Cash Compensation** and **Benefits** programs before downloading the template to ensure the portal matches the template's column headers. Avoid renaming columns, altering the file structure, or deleting columns. If a column is not in use, leave it blank to avoid upload errors.

□ **Quick Steps:** Administration → Employees → Import Employee Records → Employees_Template.xlsx → Save → Populate Data