Upload and View Statements

Last Modified on 04/15/2021 4:11 pm PDT



How do we generate statements from a data template?

Once the data template is populated we are able to go back into TotalRewards Builder to upload the template. Once statements are generated we have the option to export the records, view online and print PDF versions as well as delete and clear records.

Import Data Template

Go to Administration

Select Employees in the drop-down

Click Upload Employees Records link

Job will be processing when you see

If **upload** is successful, you will see the list of all employees that you've uploaded and click **Dismiss**

View Statements

Once an upload is successful all the employee records will display on the page

View button for online statement

Print button for PDF/print version.

Download Batch Print (PDF) Files:

To download PDF/print statement in single file, click **Print all Employees Records**

Pop-up window appears, select and click the best print option for you

Click Print Employee Records button, which will automatically turn blue.

A counter will appear showing that records are being prepared

Click **Download** link to save PDF.