

For Health Compass to prepare an “**Eligibility Report**” showing total annual tax savings for your organization and the amount of monthly tax savings available for each eligible employee to use toward the purchase of supplemental benefits, **the following data is required and must be generated using your payroll software:**

- 1) Provide **payroll reports from the eight (8) most recent payroll periods**
 - The ***Payroll Register*** or ***Payroll Journal*** report typically captures most of the required data

- 2) Use the checklist below to determine if any required data is missing from the payroll reports. If so (often federal & state filing status + allowances), create an additional report to include the missing data.
 - The ***Payroll Details*** report typically captures this data

Payroll Checklist:

- Name
- Salary or Hourly
- If Salary; what is Salary Amount
- If Hourly; what is Hourly Rate
- Average # of Hours Worked per Pay Period
- Filing Status for State
- Allowances for State
- Additional Withholdings for State
- Filing Status for Federal
- Allowances for Federal
- Additional Withholdings for Federal
- Work State
- Pre-Tax Health Insurance/Medical/Insurance
- Pre-Tax Retirement
- Any Other Pre-tax Deductions
- Post Tax Retirement
- Any Other Post Tax Deductions