HEALTH WEALTH CAREER

2018 BENEFIT SURVEY
GOING DIGITAL!

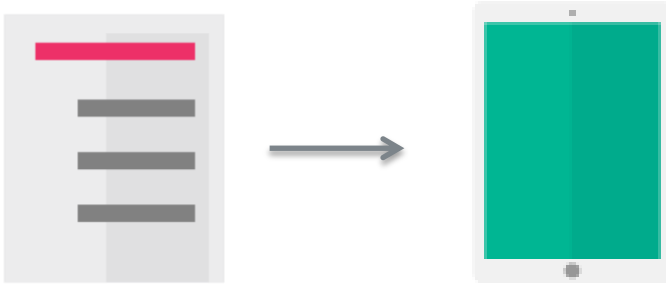
SRI LANKA

MARCH 2018

MAKE TOMORROW, TODAY MERCER

2018 BENEFITS SURVEY
GOING DIGITAL!

WHAT'S CHANGING?



From Excel survey questionnaire to online survey platform

WHAT REMAINS?

- If you have participated in previous years, your data will be pre-filled in the survey
- Excel import/export function is available on online platform

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AGENDA
2018 BENEFITS SURVEY

1. Going Digital – What to expect?
2. What's new in 2018
3. Structure of Questionnaire & Instructions to fill DCK
4. General points of attention
5. Specific points of attention

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GOING DIGITAL – WHAT TO EXPECT?

SECTION-1

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DCK DISTRIBUTION & SUBMISSION

GOING DIGITAL – WHAT TO EXPECT?

- Data Collection Kit (DCK) – shared with client via email on the survey link

  - Client can submit via the new online interactive system OR

  - Client can download excel format by clicking on the *Import/Export* button once they are in the 1st page of survey.

- Further clarifications on DCKs can also be obtained via local Mercer contacts

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YOUR PARTICIPATION MATERIAL ARE READY

GOING DIGITAL – WHAT TO EXPECT?

MERCER MAKE TOMORROW, TODAY

YOUR PARTICIPATION MATERIALS ARE READY!

You may now access your Participation Materials for:

Participation Materials	Submission Deadline
2018 <Country> MBM (Q3)	**April 27, 2018**

The online questionnaire for **2018 <Country> MBM (Q3) Survey** is now available for you to complete.

Please note for those companies with multiple contacts, be aware that you should not use the same link at the same time as it may cause issues when saving the data.

In order to publish the survey results on time, all data must be received by **April 27, 2018**.

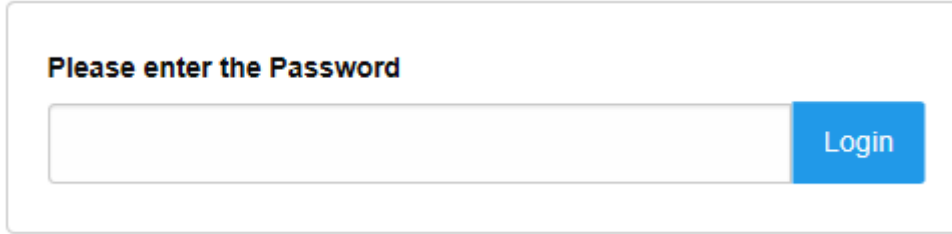
TO ACCESS YOUR QUESTIONNAIRE:

DCK distribution
Client Notification

Password
nmunication to cli

LOGIN PAGE

GOING DIGITAL – WHAT TO EXPECT?



PLEASE NOTE THAT PASSWORD WILL BE SHARED WITH YOU IN A SEPARATE MAILER.

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WELCOME

GOING DIGITAL – WHAT TO EXPECT?

MERCER BENEFITSMONITOR™ Help

Welcome

Sri Lanka - Benefits Survey (BENEFITSMONITOR™)

July 2018

Please read through Definitions Guide and Input instructions Page via (help link) before filling up the survey with your organization's data and employee information. To ensure a high quality report, we encourage you to provide up-to-date and complete information to the best of your knowledge.
For questions or assistance, please contact :

Mercer Contact

Haritha Priyaadarshini T
+91 022 43424521/ +91 9884203746
Haritha.T@mercer.com

Submission Deadline : April 27th 2018

Next

TERMS & CONDITIONS

GOING DIGITAL – WHAT TO EXPECT?

Kindly read through the Terms and Conditions and provide your agreement before the start of survey.

Data Collection Survey - Terms and Conditions

TERMS AND CONDITIONS IN RELATION PARTICIPATION IN THE SURVEY (THE "SURVEY")

IMPORTANT - PLEASE READ THESE TERMS AND CONDITIONS CAREFULLY BEFORE AGREEING TO PARTICIPATE IN THE SURVEY.

THE COPYRIGHT, DATABASE RIGHTS AND ANY OTHER INTELLECTUAL PROPERTY RIGHTS IN THE PROGRAMS AND DATA CONTAINED WITHIN THE SURVEY OR ANY REPORT TOGETHER WITH ANY ITEMS THAT ARE/WERE PROVIDED TO YOU IN CONNECTION WITH THE PRODUCTS OR SERVICES RELATING TO THE SURVEY OR REPORT, ARE AND REMAIN THE PROPERTY OF MERCER AT ALL TIMES. YOU ARE LICENSED TO USE THEM ONLY IF YOU ACCEPT ALL THESE TERMS AND CONDITIONS, AND IN ANY CASE, ONLY TO THE EXTENT SET OUT HEREIN.

BY PROCEEDING TO PARTICIPATE IN THE SURVEY, YOU CONFIRM YOUR ACCEPTANCE OF AND AGREEMENT TO, ON BEHALF OF YOURSELF AND YOUR EMPLOYER, OF ALL THE TERMS AND CONDITIONS AS SET OUT HEREIN ("**AGREEMENT**").

THIS AGREEMENT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN YOU AND MERCER AND IT SUPERSEDES ANY AND ALL PRIOR AGREEMENTS OR REPRESENTATIONS YOU RECEIVED RELATING TO THE SUBJECT MATTER OF THIS AGREEMENT, PROVIDED THAT IF YOU HAVE SIGNED UP FOR, OR SIGN UP FOR, ANY SURVEY MEMBERSHIP/SUBSCRIPTION PURSUANT TO ANY MERCER MEMBERSHIP/SUBSCRIPTION FORM OR OTHERWISE ("MEMBERSHIP/SUBSCRIPTION"), THEN THE RELEVANT MEMBERSHIP/SUBSCRIPTION TERMS AND CONDITIONS SHALL, TO THE EXTENT INCONSISTENT WITH THIS AGREEMENT, PREVAIL.

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COMPANY INFORMATION

GOING DIGITAL – WHAT TO EXPECT?

Company Information

Company Name *

Industry *

Chemical

Activity *

All

Address *

123 Singapore Road #01-01

City

ZIP/Postal Code

123456

Country for which Questionnaire is being filled

Singapore

1. Company Name will need to be filled up.
2. For repeat participants rest of fields pre-populated.
3. Do validate the details and update where necessary.

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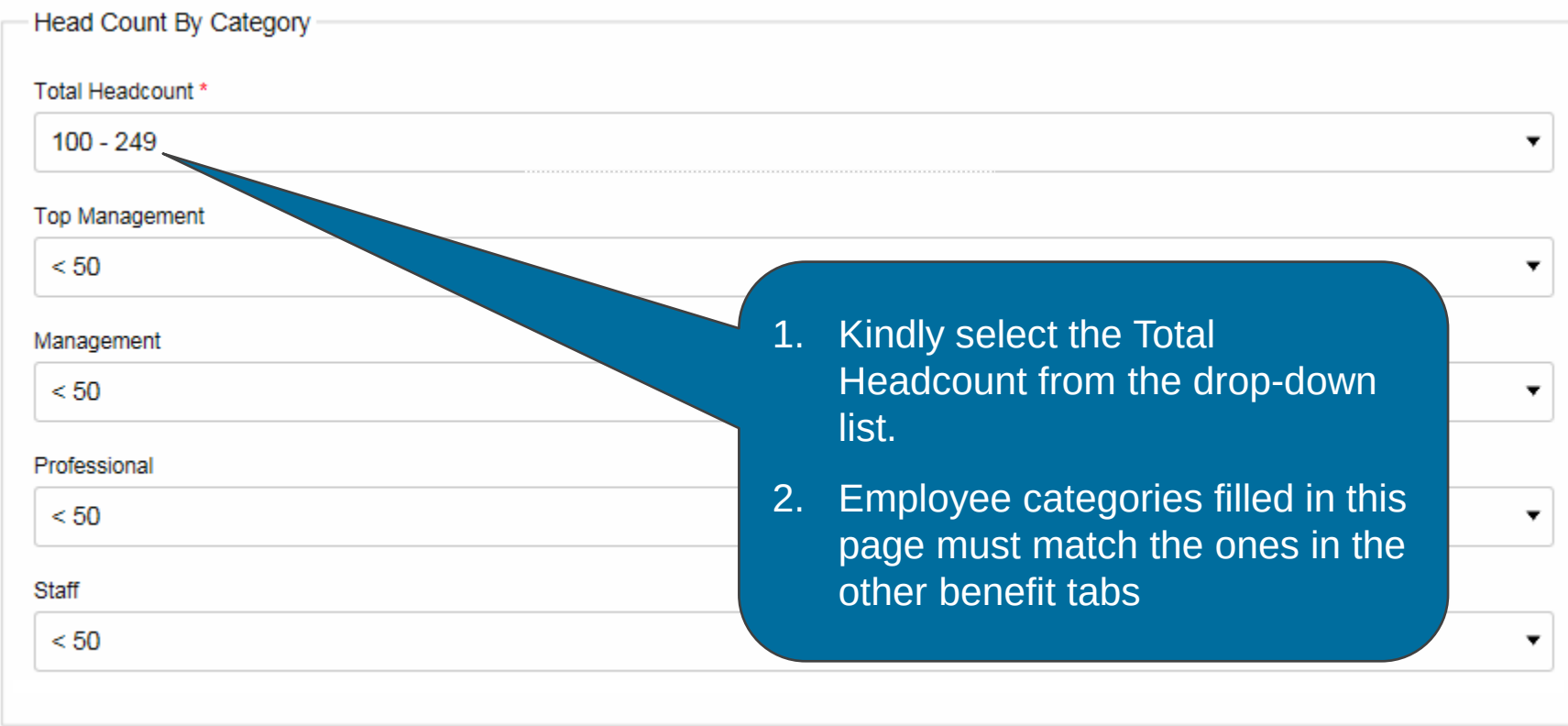
HEAD COUNT BY CATEGORY

GOING DIGITAL – WHAT TO EXPECT?



1. Kindly select the Total Headcount from the drop-down list.
2. Employee categories filled in this page must match the ones in the other benefit tabs

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CONTACT PERSON

GOING DIGITAL – WHAT TO EXPECT?

Contact Person

Name of Person Completing Questionnaire *

Title *

Email *

Telephone *

Fax *

Copy contact person details below

Name of Person to Contact *

Title *

Email *

Telephone *

Fax *

1. Kindly fill up the contact details of the person who is completing the questionnaire.
2. Should the person to contact in case of any questions pertaining to the information provided be different, do provide the details of the person as well. If not, you can click on “Copy contact person details below”.

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SURVEY NAVIGATION

GOING DIGITAL – WHAT TO EXPECT?

Click here to toggle table of contents

Page navigation – click here to go to next or previous page

Click here to launch the "Help" page in a separate window

Table of contents – click to browse through survey sections

MERCER BENEFITSMONITOR™ 1 1 of 29 Import/Export Help Audit Summary Save & Exit

Employment Conditions

Hide Contents

Contents

- Edit Company Data
- Employment Conditions 1
  - Employment Conditions
  - Re-employment of Retiring Employees
- Work Life Harmony Benefits
  - Flexible Working Arrangements
  - Family Support
  - Employee Support / Mental Health
  - Wellness Program
  - Work Life Harmony - Others
- Annual Leave
  - Annual Leave
- Parental Leave
  - Parental Leave
  - Foreign Employees
  - Other Family Care Leaves
- Other Leave Types 5
  - Eligibility for Other Leave Types
  - Sick and Hospitalization Leave
  - Prolonged Medical Leave
  - Miscarriage Leave
  - Volunteerism Leave
  - Sabbatical Leave
  - Study / Exam Leave
- Congratulations & Condolences
  - Congratulations

	Plan 1	Plan 2		
Top Management	○	✓		
Management	○	✓		
Professional	✓	○	○	○
Staff	✓	○	○	○

Employment Conditions

1 What is the number of working days per week in your organization? (Days/Numeric)	5	5		
2 What is the number of working hours per day excluding lunch and tea breaks? (Hours/Numeric)	8	8		
3 Do you have a probation period? (Y or N)	✓	✓	○	○
3.1 Duration of probation period in months: (Months/Numeric)	3	3		
4 Resignation notice period, in weeks, required during probation period: (Weeks/Numeric)	1	4		
5 Resignation notice period, in months, required after probation	1	3		

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EXPORTING TO & IMPORTING FROM EXCEL

GOING DIGITAL – WHAT TO EXPECT?

If required, click here to launch import/ export function

MERCER BENEFITSMONITOR™ 1 1 of 29 Import/Export Help Audit Summary Save & Exit

Employment Conditions

Hide Contents

Contents

- Edit Company Data
- Employment Conditions 1
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  - Family Support
  - Employee Support / Mental Hea
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  - Annual Leave
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  - Parental Leave
  - Foreign Employees
  - Other Family Care Leaves
- Other Leave Types 5
  - Eligibility for Other Leave Types
  - Sick and Hospitalization Leave
  - Prolonged Medical Leave
  - Miscarriage Leave
  - Volunteerism Leave
  - Sabbatical Leave
  - Study / Exam Leave
- Congratulations & Condolences
  - Congratulations

Import / Export Questionnaire

Download Questionnaire:

Step 1: Download the survey as an excel and fill your inputs

Upload Questionnaire: Browse... Upload

Step 2: Browse to select the updated file and click upload *(Note: changes validation checks will apply online after upload)*

organization? (Days/Numeric)

2 What is the number of working hours per day excluding lunch and tea breaks? (Hours/Numeric)

3 Do you have a probation period? (Y or N)

3.1 Duration of probation period in months: (Months/Numeric) 3 3

4 Resignation notice period, in weeks, required during probation period: (Weeks/Numeric) 1 4

5 Resignation notice period, in months, required after probation 1 3

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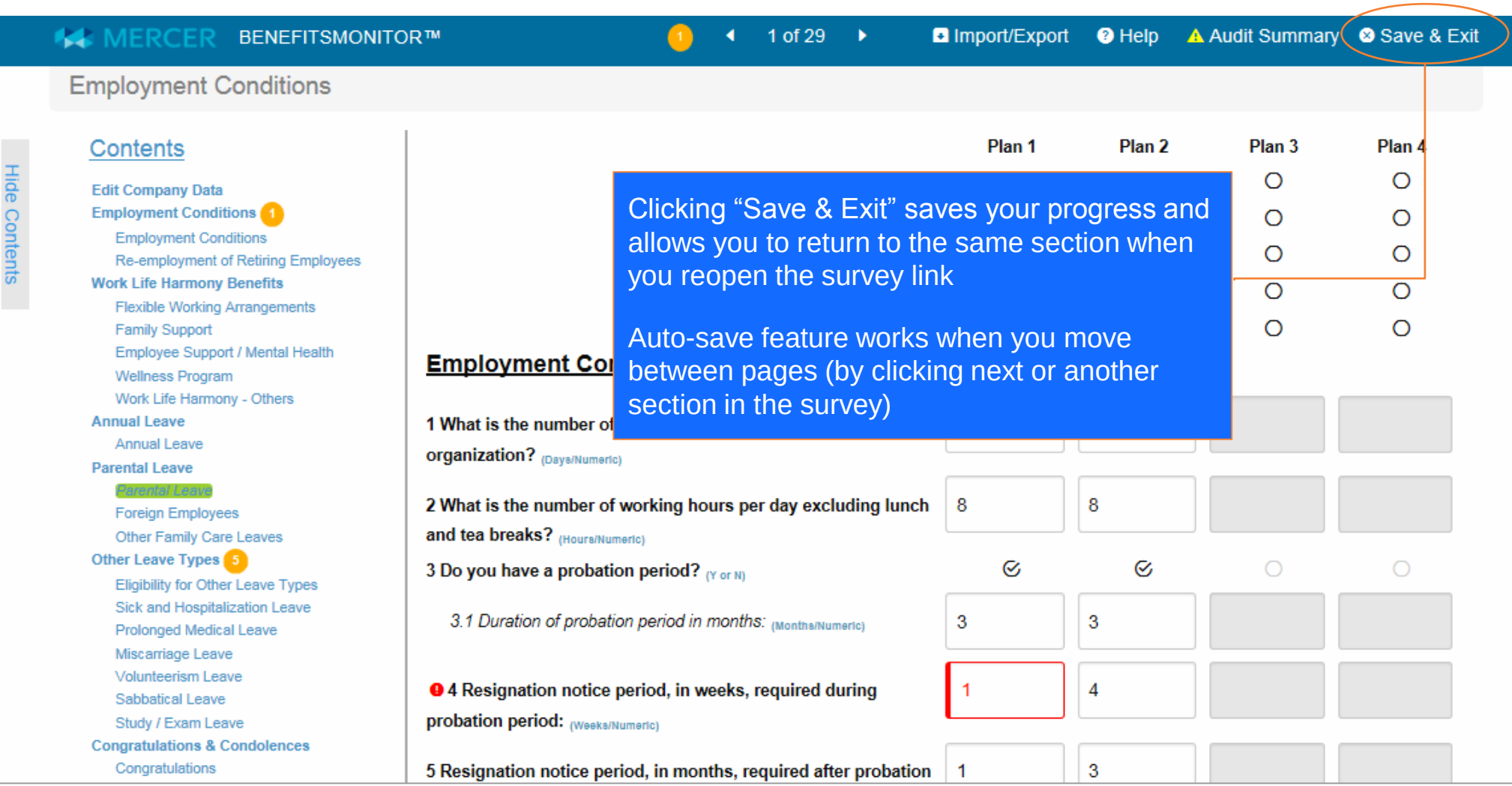
SAVING YOUR PROGRESS

GOING DIGITAL – WHAT TO EXPECT?



Clicking "Save & Exit" saves your progress and allows you to return to the same section when you reopen the survey link

Auto-save feature works when you move between pages (by clicking next or another section in the survey)

ADDRESSING ERRORS (1/2)

GOING DIGITAL – WHAT TO EXPECT?

Page error indicator (orange) – shows the number of errors in this page

Click here to launch the error audit summary *(cont. next page)*

MERCER BENEFITSMONITOR™ 1 1 of 29 Import/Export Help Audit Summary Save & Exit

Employment Conditions

Contents

Edit Company Data
Employment Conditions 1
Employment Conditions
Re-employment of Retiring Employees
Work Life Harmony Benefits
Flexible Working Arrangements
Family Support
Employee Support / Mental Health
Wellness Program
Work Life Harmony - Others
Annual Leave
Annual Leave
Parental Leave
Parental Leave
Foreign Employees
Other Family Care Leaves
Other Leave Types 5
Eligibility for Other Leave Types
Sick and Hospitalization Leave
Prolonged Medical Leave
Miscarriage Leave
Volunteerism Leave
Sabbatical Leave
Study / Exam Leave
Congratulations & Condolences
Congratulations

Hide Contents

Error indicators (orange) in the contents tab shows the number of errors in each tab

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	○	✓	○	○
Management	○	✓	○	○
Professional	✓	○	○	○
Staff	✓	○	○	○

Employment Conditions

	Plan 1	Plan 2	Plan 3	Plan 4
1 What is the number of working days per week in your organization? (Days/Numeric)	5	5		
2 What is the number of working hours per day excluding lunch and tea breaks? (Hours/Numeric)	8	8		
3 Do you have a probation period? (Y or N)	✓	✓		
3.1 Duration of probation period in months: (Months/Numeric)	3	3		
4 Resignation notice period, in weeks, required during probation period: (Weeks/Numeric)	1	4		
5 [illegible] after probation	1	3		

Plan 1: Please provide response in valid range. (Minimum: 2 , Maximum: 12)

Hover your mouse over the question error indicator (red) to view details

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ADDRESSING ERRORS (2/2)

GOING DIGITAL – WHAT TO EXPECT?

Click here to launch the error audit summary

MERCER BENEFITSMONITOR™ 1 1 of 29 Import/Export Help Audit Summary Save & Exit

Employment Conditions

Hide Contents

Content

Edit Compa
Employmen
Employm
Re-empl
Work Life H
Flexible
Family S
Employe
Wellness
Work Life
Annual Leav
Annual L
Parental Lea
Parental
Foreign Employees
Other Family Care Leaves
Miscarriage Leave
Volunteerism Leave
Sabbatical Leave
Study / Exam Leave
Congratulations & Condolences
Congratulations

Audit Summary

System has found following issues in the responses.

Action	Page header	Question Description	Issue Description
4	Employment Conditions	Resignation notice period, in weeks, required during probation period:	Plan 1: Please provide response in valid range. (Minimum: 2 , Maximum: 12)
5.4.5	Other Leave Types	13th to 18th month	Plan 1: Please provide numbers only.
5.4.5	Other Leave Types	13th to 18th month	Plan 1: Please provide response in valid range. (Minimum: 20 , Maximum: 100)

Click here to go to the question in the survey

	Plan 4			
2 What is the number of working hours per day excluding lunch and tea breaks? (Hours/Numeric)	8	8		
3 Do you have a probation period? (Y or N)	✓	✓		
3.1 Duration of probation period in months: (Months/Numeric)	3	3		
4 Resignation notice period, in weeks, required during probation period: (Weeks/Numeric)	1	4		
5 Resignation notice period, in months, required after probation	1	3		

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HOW TO SUBMIT SUBMISSION

GOING DIGITAL – WHAT TO EXPECT?

- Acting Allowance
- **Perquisites** 2
  - Golf Club Membership
  - Recreational Club Membership
  - Professional Club / Association Membership
  - Fitness Club Membership
  - Claw Back Policy
  - Lifestyle Benefit
  - Mobile Devices
  - Parking
  - Discount on Company Products
  - Long-Service Allowance / Award
- **Referral Program** 2
  - Referral Program
- **Locally Hired Foreigners** 2
  - Locally Hired Foreigners
- **Submit**

Click here to Submit the Data

10.1.1 Premium sharing (Y or N)

10.1.2 Claim sharing (Y or N)

10.1.3 Maximum claimable amount (Y or N)

10.1.4 Please elaborate: (Any Response)

10.2 Insurance benefits (Y or N)

10.2.1 Premium sharing (Y or N)

10.2.2 Coverage (Y or N)

10.2.3 Please elaborate: (Any Response)

10.3 Medisave contributions (Y or N)

10.3.1 Please elaborate: (Any Response)

10.4 Annual leave (Y or N)

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IDENTIFYING NEW QUESTIONS

GOING DIGITAL – WHAT TO EXPECT?

MERCER BENEFITSMONITOR™ 1 1 of 29 Import/Export Help Audit Summary Save & Exit

Parental Leave

Hide Contents

Contents

Sections with questions newly added this year are highlighted in green – click to view

Flexible Working Arrangements
Family Support
Employee Support / Mental Health
Wellness Program
Work Life Harmony - Others
Annual Leave
Annual Leave
Parental Leave
Parental Leave
Foreign Employees
Other Family Care Leaves
Other Leave Types 5
Eligibility for Other Leave Types
Sick and Hospitalization Leave
Prolonged Medical Leave
Miscarriage Leave
Volunteerism Leave
Sabbatical Leave
Study / Exam Leave
Congratulations & Condolences
Congratulations

Parental Leave

1 How many days of paid parental leave do you provide for full time employees?

1.1 Maternity Leave combined (weeks) (Weeks/Numeric)	16			
1.2 Maternity Leave before childbirth (weeks) (Weeks/Numeric)				
1.3 Maternity Leave for difficult pregnancy (weeks) (Weeks/Numeric)				
1.4 Paternity Leave (weeks) (Weeks/Numeric)	2			
1.5 Adoption Leave (weeks) (Weeks/Numeric)	4			

Eligibility

2 Is there a minimum period of employment required to be entitled to the parental leave benefit? (Y or N)

2.1 If yes, please provide the number of days required before maternity leave can be taken? (Days/Numeric)

2.2 If yes, please provide the number of days required before paternity leave can be taken (Days/Numeric)

New questions are highlighted in green – please take note to provide your input in the respective plans

BENEFIT SURVEY CYCLE 2018- JULY (Q3)

KEY MILESTONE DATES

Pre-survey meetings to introduce DCKs

4TH April 2018

Clarification of submissions by Mercer

27th May 2018

Data submission deadline

27th Apr 2018

Data release date (BenefitsMonitor)

27th Jul 2018

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BENEFIT SURVEY CYCLE 2018

LOCAL POINTS OF CONTACT

• Australia	Lydia Wright	Lydia.Wright@mercer.com
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• Hong Kong/Macau	Alanis Hon	Alanis.Hon@mercer.com
	Stephanie Law	Stephanie.Law@mercer.com
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• Vietnam	Phan Duy Thien	Phan.duy.thien@talentnet.vn
• Regional	Tan Hua Teck	HuaTeck.Tan@mercer.com

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WHAT'S NEW IN 2018?

SECTION-2

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WHAT'S NEW IN 2018?

DCK UPDATES – SRI LANKA

NO NEW QUESTIONS ADDED IN 2018, ALL QUESTIONS REMAINS SAME AS PREVIOUS CYCLE

STRUCTURE OF QUESTIONNAIRE & INSTRUCTIONS TO FILL DCK

SECTION-3

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STRUCTURE OF QUESTIONNAIRE AND INSTRUCTIONS TO FILL DCK

INPUT INSTRUCTIONS

- Complete the survey as much as possible
  - If you have any doubts/questions on DCK, please contact the local Mercer representative
  - If you do not have a certain benefit do not leave blank, **please fill ‘ ⊗ ’**
  - If you have ‘grand-fathered plans’, do not fill them, provide **only** active plans
  - If you have multiple offerings for a benefit, please provide most common practice
  - If you have a range of amounts for a particular field, please provide the average amount
  - If there are %, fill in only the numerals
- All amounts are in local currency unless stated otherwise
- Do not use company name in comments
- Input only information for local hires and not expatriates or local plus hires

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STRUCTURE OF QUESTIONNAIRE AND INSTRUCTIONS TO FILL DCK

INPUT GUIDE

Input guides are shown in blue at the end of each question

Input Guide	Details	Remarks
Y or N	Input Yes ✓ or No ⊗ when you answer to the questions such as asked whether the policy exists, choose items from the alternatives	・Please ensure to answer to the questions particularly at the start of each section. ・Click once for ✓ = "Yes, and click twice for ⊗ = No
Numeric	Input numeric data such as the number of employees	・Please do not enter 0（If there are no figure to input, please keep the column empty） ・Please do not input unit or comma.
Local Currency	Input the amount provided	・Please input the amount in local currency ・Please do not enter 0（If there are no figure to input, please keep the column empty） ・Please do not input unit or comma.
Fill %	Input data that are necessary to show by percentage	・Please do not enter 0（If there is no figure to input, please keep the column empty） ・Please do not input unit(%) ・Please do not divide the figure as a decimal（e.g. for 60% ：incorrect → 0.6; correct → 60）
Any Response	Input data that are not possible to input by "Y or N" or numeric such as Car model or additional comments.	・If you do not have any comments, please leave it blank ・Limited to 250 characters.

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STRUCTURE OF QUESTIONNAIRE AND INSTRUCTIONS TO FILL DCK

EMPLOYEES' CATEGORIES

- The accommodates for five categories of employee levels:
  - Top Management
  - Management
  - Professional
  - Staff
- Please see the definition of each category in the next page and the definition page of the DCK for reference

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STRUCTURE OF QUESTIONNAIRE AND INSTRUCTIONS TO FILL DCK

EMPLOYEES' CATEGORIES

Employee Category	Definitions
Top Management (Top Mgt)	Employees with roles such as Head of Organization, Function Heads. Head of organization – Has profit and loss responsibility for an entire business. Typically reports to Board of Directors or to a corporate head office. Function head – The senior-most position in the company. These generally include top executives and directors within the company or employees with managerial responsibilities at the top level of a business unit or company. Executives are focused on defining strategy for the company. Typically report to the Head of organization.
Management (Mgt)	Employees with roles such as Sub-Function Head, and Functional Managers. Employees with important supervisory and managerial responsibilities, usually the higher levels within a business unit or company. Management-level employees focus on managing people and implementing policies and strategies to meet the company's objectives. Has managerial responsibility for a department or team. Combines both middle and senior management. Typically reports to an executive.
Professionals (Prof)	Works as a professional in a technical or professional sales or professional non-sales role. Professionals are typically individual contributors without supervisory responsibility, though may provide coaching/mentoring to less experienced staff. Typically holds a university degree or full-trade equivalent. Typically reports to a manager. Exempt staff including Specialists, Professional, or Technical staff who may be supervisors.
Staff (Staff)	Non-Exempt staff, Support staff, or Customer Service Representative. Salaried employees typically in a business support, analyst, administrative or technical role. These are generally employees in a skilled, semi-skilled or unskilled roles without supervisory responsibility. Typically reports to a manager/ supervisor. This level does not require a university degree but may require formal professional training and certification. i.e. Admin Staff, Secretary, Clerk, Engineer (entry)

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GENERAL POINTS OF ATTENTION

SECTION-4

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PERTAINING TO EMPLOYEE PLANS

GENERAL POINTS OF ATTENTION

- If you have the same benefit policy across all employee categories, fill it up in one plan.

	Plan 1	Plan 2
Top Management	✓	○
Management	✓	○
Professional	✓	○
Staff	✓	○

Long Term Incentives

1 Does your organization provide a long term incentive plan? (Y or N)	✓	○

- If you have different benefit policies for different employee categories, please split the employee categories into different plans

	Plan 1	Plan 2
Top Management	✓	○
Management	○	✓
Professional	○	✓
Staff	○	✓

Long Term Incentives

1 Does your organization provide a long term incentive plan? (Y or N)	✓	⊗

Note: You do not need to have the same no. of plans for all benefits

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DCK STRUCTURE

GENERAL POINTS OF ATTENTION

- If you have multiple offerings for a benefit, please provide most common practice
- All amounts are in local currency unless stated otherwise (input guide will indicate)

There are 4 plans found in each section. For most benefits, that is sufficient

There are 4 employee categories depending on the country. It is broadly defined. Unlike Comp, there is no direct PC class correlation.

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	✓			
Management		✓		
Professional		✓		
Staff			✓	

Each question is accompanied by an input Guide. Take note of unit of measurement

Employment Conditions

1 What is the number of working days per week in your organization? (Days/Numeric)	5	5	5	5
2 What is the number of working hours per day excluding lunch and tea breaks? (Hours/Numeric)	8	8	8	8
3 Do you have a probation period? (Y or N)	✓	✓	✓	✓
3.1 Duration of probation period in months: (Months/Numeric)	3	3	3	6
4 Resignation notice period, in weeks, required during probation period: (Weeks/Numeric)	4	4	2	2
5 Resignation notice period, in months, required after probation period: (Months/Numeric)	3	3	1	2

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FLOW OF QUESTIONS

GENERAL POINTS OF ATTENTION

Loans

1 Do you provide loan benefits to your employees? (Y or N)

Tier 1 Header

Car Loan

2 Do you provide Car Loans? (Y or N)

Tier 2 Header

3 Is there a minimum service requirement? (Y or N)

3.1 If yes, please indicate the minimum number of months of service. (Months/Numeric)

Details

4 Car Loan Features

4.1 Maximum loan entitlement/amount (in local currency) (Local Currency)

4.2 Maximum loan entitlement (in number of months salary): (Months/Numeric)

4.3 Other formula used to determine maximum loan amount (please specify): (Any Response)

4.4 Loan is interest free. (Y or N)

4.5 Interest rate is at commercial loan rate. (Y or N)

4.6 Interest rate is subsidized. (Y or N)

4.6.1 Subsidize at a fixed % (e.g. if your organization subsidize 5% interest rate no matter what the market rate is, please choose this option and select 5) (Fill %)

4.6.2 Subsidize a portion of the interest rate (e.g. if your organization pays 60% of the interest and employee pays 40%, please choose this option and report as 60) (Fill %)

4.6.3 Have the employee pay a fixed percentage (if market rate is 5% and you charge employees 2% of loan interest, choose this option and report as 2) (Fill %)

4.6.4 Other method of determining subsidy (specify method and amount): (Any Response)

4.7 Maximum loan period/Tenure (years): (Years/Numeric)

Ensure that 1st tier header questions get filled especially at start of sections.

These are 2nd tier header questions which begin at the start of subsections. These must be filled if your 1st tier header questions is a 'Y'.

If your 2nd tier header question is a 'Y', please fill in the details in all these sections. If it is a 'N', leave it blank

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SPECIFIC POINTS OF ATTENTION

SECTION-5

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Vehicle Benefits Section

EMPLOYEE CATEGORIES USED FOR VEHICLE BENEFITS SECTION

SPECIFIC POINTS OF ATTENTION

- **TOP MANAGEMENT**

Non-Sales	Head of Organisation, Function Heads
Sales	Head of Sales/Marketing

- **MANAGEMENT**

Non-Sales	Senior Management/Sub-Function Heads, Management
Sales	Senior Sales/Marketing Management, Sales/Marketing Management

- **PROFESSIONAL**

Non-Sales	Professionals
Sales	Sales/Marketing Professionals

- **STAFF**

Non-Sales	Others, please specify
Sales	Customer Service Representatives

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VEHICLE BENEFIT

SPECIFIC POINTS OF ATTENTION

Always ensure that all employee categories are separated eg. Plan 1 for Top Mgt etc.

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	✓	○	○	○
Management	○	✓	○	○
Professional	○	○	✓	○
Staff	○	○	○	○

Vehicle Non-Sales

Ensure Q1 is answered with either Y or N.

1 Do you provide vehicle benefits (company car, car allowance, car plan, etc) to your employees? (Y or N)	✓	✓	⊗	
Non Sales - Company Car				
2 Do you provide a company car (either lease or company owned)? (Y or N)	✓	✓		
2.1 Is it company-leased car? (Y or N)	⊗	⊗		
2.1.1 If yes, what is the maximum monthly lease value (excluding taxes)? (Local Currency)				
2.2 Is it company owned car? (Y or N)	✓	✓		
2.2.1 What is the maximum car purchase price eligibility (including taxes)? (Local Currency)	300000	200000		
3 Please specify who are eligible for company car for each plan:				
3.1 Head of organization (e.g. PC58 and above) (Y or N)	✓	○		
3.2 Function heads (e.g. PC58 and above) (Y or N)	✓	○		
3.3 Senior management/Sub-function heads (e.g. PC54-57) (Y or N)	○	✓		
3.4 Management (e.g. PC54-57) (Y or N)	○	✓		
3.5 Professionals (e.g. PC47-53) (Y or N)	○	○		
3.6 Others; please specify: (Any Response)				

If Q1 is a Y, there needs to be an answer for “Do you provide a company car etc” and also “Do you provide a car allowance” as well as for the sub-questions.

The respective positions can only be filled up in the following manner.

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VEHICLE BENEFIT

SPECIFIC POINTS OF ATTENTION

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	✓	○	○	○
Management	○	✓	○	○
Professional	○	○	✓	○
Staff	○	○	○	✓
Vehicle Sales				
1 Do you have sales employee in your current office? (Y or N)	✓	✓	✓	✓
2 Do you provide vehicle benefits (company car, car allowance, etc) to your employees? (Y or N)	✓	✓	✓	✓
Sales - Company Car				
3 Do you provide a company car (either lease or company owned)? (Y or N)	✓	✓	✓	✓
3.1 Is it company-leased car? (Y or N)	✓	✓	✓	✓
3.1.1 If yes, what is the maximum monthly lease value (excluding taxes)? (Local Currency)	3000	2500	2000	1500
3.2 Is it company owned car? (Y or N)	✗	✗	✗	✗
3.2.1 What is the maximum car purchase price eligibility (including taxes)? (Local Currency)				
4 Please specify who are eligible for company car for each plan:				
4.1 Head of sales (e.g. PC58 and above) (Y or N)	✓	○	○	○
4.2 Senior sales management (e.g. PC54-57) (Y or N)	○	✓	○	○
4.3 Sales management (e.g. PC54-57) (Y or N)	○	✓	○	○
4.4 Sales professional (e.g. PC47-53) (Y or N)	○	○	✓	○
4.5 Customer service representatives (e.g. PC46 and below) (Y or N)	○	○	○	✓
4.6 Others; please specify: (Any Response)				

For vehicle benefits, there must be 4 different plans

If Q2 is Y, Qn 3 must be answered.

If Qn 3 is answered Y, then Qn 4 must be answered.

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VEHICLE BENEFIT – SPLITTING THE PLANS

SPECIFIC POINTS OF ATTENTION

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	✓	○	○	○
Management	✓	○	○	○
Professional	○	✓	○	○
Staff	○	✓	○	○

Vehicle Sales

	Plan 1	Plan 2	Plan 3	Plan 4
1 Do you have sales employee in your current office? (Y or N)	✓	✓		
2 Do you provide vehicle benefits (company car, car allowance, etc) to your employees? (Y or N)	✓	✓		
Sales - Company Car				
3 Do you provide a company car (either lease or company owned)? (Y or N)	✓	✓		
3.1 Is it company-leased car? (Y or N)	✓	✓		
3.1.1 If yes, what is the maximum monthly lease value (excluding taxes)? (Local Currency)	3000	2500		
3.2 Is it company owned car? (Y or N)	✗	✗		
3.2.1 What is the maximum car purchase price eligibility (including taxes)? (Local Currency)				
4 Please specify who are eligible for company car for each plan:				
4.1 Head of sales (e.g. PC58 and above) (Y or N)	✓	○		
4.2 Senior sales management (e.g. PC54-57) (Y or N)	✓	○		
4.3 Sales management (e.g. PC54-57) (Y or N)	✓	○		
4.4 Sales professional (e.g. PC47-53) (Y or N)	○	✓		
4.5 Customer service representatives (e.g. PC46 and below) (Y or N)	○	✓		
4.6 Others; please specify: (Any Response)				

The position does not correspond. Plan needs to be split

VEHICLE BENEFIT – RUNNING EXPENSES

SPECIFIC POINTS OF ATTENTION

Running expenses do not include mileage claim. Mileage claim is under allowances section

Vehicle Benefits Section

18 Which car running expenses are covered in addition to the fixed car allowance? (e.g. paid directly or reimbursed by company)

18.1 Registration (Y or N)

18.2 Parking (company car park) (Y or N)

18.3 Parking (business purposes) (Y or N)

18.4 Petrol/ Fuel (Y or N)

18.5 Insurance (Y or N)

18.6 Maintenance & Repairs (Y or N)

18.7 Road toll costs (business purposes) (Y or N)

18.8 Road toll costs (non-business purposes) (Y or N)

18.9 Road Tax (Y or N)

18.10 Others; please specify: (Any Response)

Mileage Claim Policy

Allowances Section

23 Do you reimburse car mileage claims (for employees who are not eligible for car or car allowance)? (Y or N)

23.1 If yes, please specify the rate per kilometer: (Numeric)

23.2 If the mileage claim rate is different per employee level, please specify: (Any Response)

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VEHICLE BENEFIT – RUNNING EXPENSES

SPECIFIC POINTS OF ATTENTION

It is possible that some running car expenses components are included in car allowance while others are covered in addition to the car allowance. Indicate clearly.

17 Which running car expenses are already included in the fixed car allowance?

- 17.1 Registration (Y or N)
- 17.2 Parking (company car park) (Y or N)
- 17.3 Parking (business purposes) (Y or N)
- 17.4 Petrol/ Fuel (Y or N)
- 17.5 Insurance (Y or N)
- 17.6 Maintenance & Repairs (Y or N)
- 17.7 Road toll costs (business purposes) (Y or N)
- 17.8 Road toll costs (non-business purposes) (Y or N)
- 17.9 Road tax (Y or N)
- 17.10 Others; please specify: (Any Response)

18 Which car running expenses are covered in addition to the fixed car allowance? (e.g. paid directly or reimbursed by company)

- 18.1 Registration (Y or N)
- 18.2 Parking (company car park) (Y or N)
- 18.3 Parking (business purposes) (Y or N)
- 18.4 Petrol/ Fuel (Y or N)
- 18.5 Insurance (Y or N)
- 18.6 Maintenance & Repairs (Y or N)
- 18.7 Road toll costs (business purposes) (Y or N)
- 18.8 Road toll costs (non-business purposes) (Y or N)
- 18.9 Road Tax (Y or N)
- 18.10 Others; please specify: (Any Response)

Indicate "Y" or "N" clearly:

components that are already **INCLUDED** in fixed car allowance

vs.

components that are covered **IN ADDITION** to fixed car allowance.

VEHICLE BENEFIT – CASH IN LIEU OF COMPANY CAR

SPECIFIC POINTS OF ATTENTION

This is separate from transportation allowance. Transportation allowance is under allowance tab.

Vehicle Benefits Tab

Non Sales - Cash in lieu of Company Owned Car

13 Does the employee have the alternative of taking cash rather than the car benefit? (Y or N)

Allowances Tab

Transportation / Commute Allowance

21 Do you provide Transportation/Commute benefits? (Y or N)

21.1 Do you provide company transport? (Y or N)

21.2 Do you provide a transportation / commute allowance (between residence and work)? (Y or N)

21.2.1 If yes, what is the transportation amount per month? (Local Currency)

21.3 Do you provide reimbursement for transport claims? (Y or N)

21.3.1 If yes, what is the criteria for reimbursement? (Any Response)

21.3.2 If yes, what is the cap for reimbursement per claim? (Local Currency)

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Other Benefits

LOANS

SPECIFIC POINTS OF ATTENTION

MERCER BENEFITSMONITOR™ 23 of 32 Import/Export Help Audit Summary Save & Exit

Loans

Hide Contents

Contents

- Edit Company Data
- Employment Conditions 4
  - Employment Conditions
- Work Life Harmony Benefits
  - Flexible Working Arrangements
  - Family Support
  - Employee Support / Mental Health
  - Wellness Program
  - Work Life Harmony - Others
- Annual Leave
  - Annual Leave
- Parental Leave
  - Maternity Leave
  - Paternity Leave
  - Adoption Leave
- Other Leave Types 2
  - Sick Leave
  - Unpaid Leave
  - Prolonged Medical Leave
  - Sabbatical Leave
  - Study / Exam Leave
  - Early Off on Traditional Festivals
  - Jury Leave
- Congratulations & Condolences
  - Congratulations
  - Hospitalization
  - Condolences
- End of Service Policies 5
  - Redundancy / Retrenchment
  - Termination
  - Voluntary Resignation
- Travel Benefits 1
  - Travel Insurance
  - Air Travel Policy
  - Travel Expenses
  - Per Diem - Overseas Travel
  - Accomodation - Overseas Travel
- Retirement - Defined Contribution 2
  - Defined Contribution
  - CIRSC

	Plan 1	Plan 2	Plan 3	Plan 4
Top Management	✓	○	○	○
Management	✓	○	○	○
Professional	✓	○	○	
Staff	✓	○	○	○
Direct Labour	✓	○	○	○

Loans

1 Do you provide loan benefits to your employees? (Y or N)	✓	○	○	○
Car Loan				
2 Do you provide Car Loans? (Y or N)	✓	○		
3 Is there a minimum service requirement? (Y or N)	✓	○	○	○
3.1 If yes, please indicate the minimum number of months of service. (Months/Numeric)	11			
4 Car Loan Features				
4.1 Maximum loan entitlement/amount (in local currency) (Local Currency)	11			
4.2 Maximum loan entitlement (in number of months salary): (Months/Numeric)				
4.3 Other formula used to determine maximum loan amount (please specify): (Any Response)				
4.4 Loan is interest free. (Y or N)	○	○	○	○
4.5 Interest rate is at commercial loan rate. (Y or N)	○	○	○	
4.6 Interest rate is subsidized. (Y or N)	✓	○		
4.6.1 Subsidize at a fixed % (e.g. if your organization subsidize 5% interest rate no matter what the market rate is, please choose this option and select 5) (Fill %)	11			
4.6.2 Subsidize a portion of the interest rate (e.g. if your organization pays 60% of the interest and employee pays				

Ensure Q1 is answered

If Q1 is Y, all the header questions for different loans need an answer

Options are Mutually exclusive

This section is made of sub-sections featuring different loans. Ensure the 1st question of each sub-section is answered

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