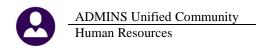
The AUC HR Module includes the ability to produce a Benefit Statement Report. This statement will give the employee "at a glance" all of the components that comprise the total package of their compensation.

This document will illustrate how to set up the codes needed to make this a meaningful, helpful source of information for your employees.

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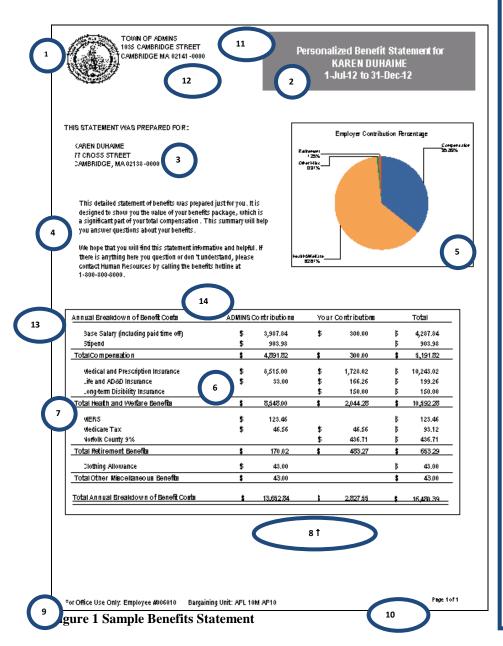
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1. WHAT WILL SHOW ON THE BENEFIT STATEMENT?

Below is a sample image of the benefit statement. The numbered sections allow you to match the source of the data with the location on the report. A two-page example appears on the last page of this document.

1.1. What is the Source of the Data?



- 1. Seal and address from the Form Control Screen on page 8.
- 2. Date range entered when running the report.
- Name and address from the employee record based on the employee number.
- 4. Letter message as entered in the Form Control Screen on page 8.
- 5. Pie Chart showing % of each print category.
- Data grouped on the values entered in the Category table. Includes Pay Code, Cost Codes and Bargaining Unit records.
- Descriptions as entered in the Print Section table. Each category is assigned to a print section.
- Values taken from the employees' check history for the date range and Bargaining Unit Benefit Statement Screen on page 6.
- Employee # and bargaining unit to make it easy to research and answer employee questions.
- Since there is no limit to the number of benefit categories, each report will show Page # of #.
- 11. Statement Title from the Forms Control Screen on page 8
- 12. Municipality Name & Address from the Forms Control Screen on page 8.
- 13. Benefit Column Title from the Forms Control Screen on page 8.
- 14. This is the label for the employer contribution column.

See section **2.2 Form Control Screen–Benefit Statement** for additional information on the source of the form layout for numbers 1, 4 and 11 through 13.

1.2. Who Will Receive a Statement?

Only active employees in the selected bargaining unit(s) will receive the benefit statements. If the employee held two positions in the bargaining unit during that period, the data are consolidated on one statement. If the employee held positions in more than one bargaining unit, only the **Active** position data is provided.

1.3. What Do You Need Before You Begin?

Write out the message you wish to convey on every benefit statement.

Then, determine which:

- Pay codes,
- Cost codes,
- Additional benefits and costs that are not currently in the cost code table or pay code table, and
- Bargaining Units

will print on the benefits statements.

Lastly, do you have a color printer available for printing the benefit statements or will you be printing on a black and white printer?

2. BENEFIT STATEMENTS STEPS MENU

To begin, select **Human Resources Special Processing Benefit Statements**. Create the Benefit Statement via this convenient steps menu, which allows the HR staff to customize the various report sections.

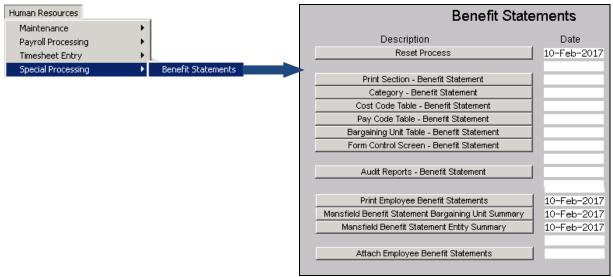


Figure 2 Benefit Statements Steps Menu

2.1. Populate Tables

2.1.1. Print Section

First, populate the Print Section, where you enter the descriptions and Pie Chart labels for the various categories of compensation. To add a category, click on 4 Add New.

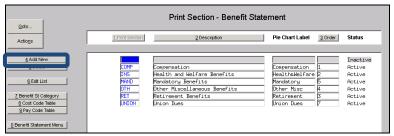
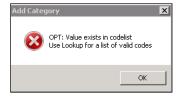




Figure 3 Print Section - Benefit Statement

Type in the name of a new category and then click on the OK button. If you attempt to add a category that already exists, this message appears:



If the category is valid, continue by entering a long description for use in the table and a short description (no more than 14 characters) for the pie chart label. You may edit the two description fields any time you wish to make a change.

2.1.2. Category-Benefit Statement

Next, click on Category - Benefit Statement in the steps menu or click on Print Section screen. The following screen listing all of your Benefit categories will appear – the categories shown are amassed from the Cost Code and Pay Code tables. Associate each category that you want to print on the benefits statement with the Human Resources Pay Codes and Cost Codes. To do so, assign each row a Print Section Category to group similar types of compensation.

Notice in the screen image below that **BASE, COMPT, COURT, and DETAIL** have all been assigned the Compensation **(COMP)** print category. This controls which group the category will be listed with and subtotalled on when printing the Benefit Statement. To add a new Category, click on 4Add New . If you attempt to add a category that already exists, a message will appear to notify you that the value already exists in the list of codes. (Ordinarily new categories would be added in the respective Pay Code or Cost Code table.)

If no print category is assigned in this screen, the category will not print on the Benefit Statement.

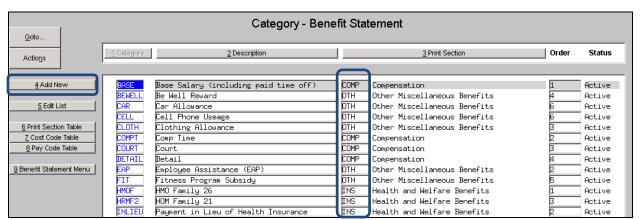


Figure 4 Category–Benefit Statement

2.1.3. Cost Code Table-Benefit Statement

Populate the Cost Code Table for the Benefit Statements. It is easiest to fill in this table if it is sorted by Pay Check Category. Enter data only for the categories on cost codes that you want to print on the benefit statement. If the benefit category is not assigned, the payroll information for the cost code will not appear on the benefit statement. If a cost code uses a category code that is **not assigned to a print section**, an error will appear on the audit reports and the Benefit Statements will not print until the error is corrected.



Figure 5 Cost Code Table-Benefit Statement

2.1.4. Pay Code Table-Benefit Statement

Assign the Benefit Categories to each Pay Code. It is easiest to fill in this table when it is sorted by Pay Check Category. Enter data only for the benefit categories on pay codes that you want to print on the benefit statement. If the benefit category is not assigned, the payroll information for the pay code will not appear on the benefit statement.



If a pay code is using a category code **not assigned to a print section**, an error will appear on the audit reports and the Benefit Statements will not print until the error is corrected.

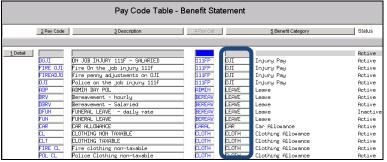
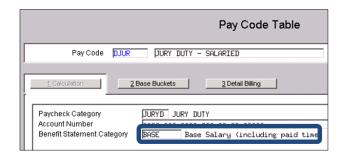
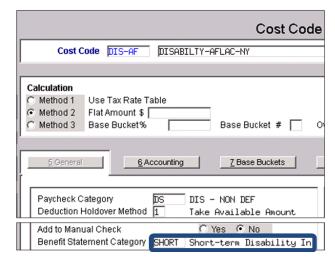


Figure 6 Pay Code Table-Benefit Statement

2.1.5. Alternate Method to Associate Benefit Statement Categories

The images below show another method to enter the Benefit Statement Category in the Pay Code and Cost Code Tables. Enter data in either the summary screens shown above or the detail screens below. Use the lookup to select from the available benefit categories in the detail screens.



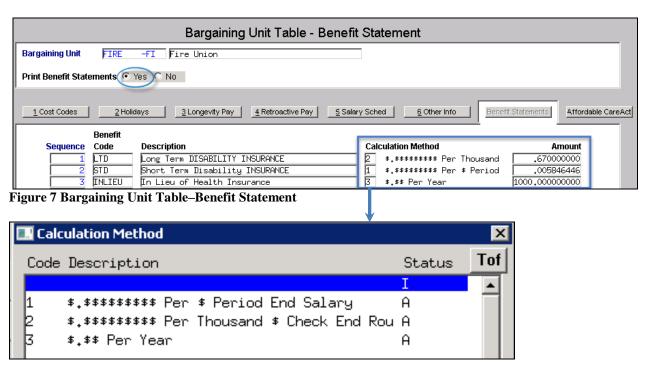


2.1.6. Bargaining Unit Table-Benefit Statement

This screen is for any benefit not in the cost code or pay code table (for benefits not managed through payroll). Assign your site—specific benefits for each bargaining unit in this screen. Click on **Add New**, type a benefit statement category or select one from the lookup. Enter the description and select the calculation method.

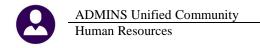


Only bargaining units that have the "Print Benefit Statements" set to yes will be available for benefit statements. Be sure to check the "Yes" radio button in the Print Benefit Statement selection shown below before you attempt to add any benefits to this screen.



There are three calculation methods available on the lookup; methods one and two allow up to nine digits after the decimal:

- 1. \$.\$\$\$\$\$\$\$ Per \$ Period End Salary the employee's annual salary based on the period ending date entered in the print statement step is multiplied by the amount
- 2. \$.\$\$\$\$\$\$\$ Per Thousand \$ Check End Rounded the employee's annual salary based on the period ending date entered in the print statement step is divided by 1000 and rounded to the nearest thousand then multiplied by the amount
- 3. \$.\$\$ Per Year the amount entered will appear on the benefit statement



2.2. Form Control Screen-Benefit Statement

This screen controls the "boilerplate" that prints on every statement issued. Customize this table with text specific to your municipality, such as the seal, address and the message you wish to convey. You may change this text at any time as appropriate. If any fields are blank on this screen, for example, the seal file field, then no seal will print on the benefit statement.

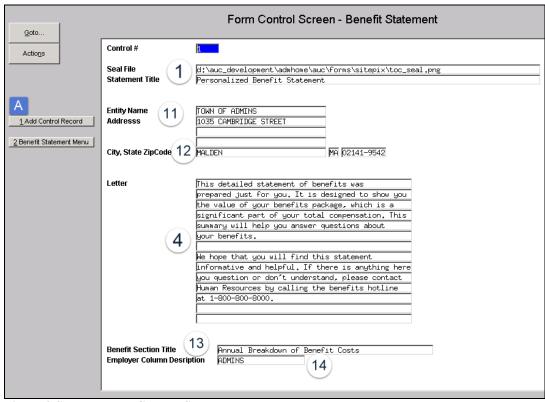
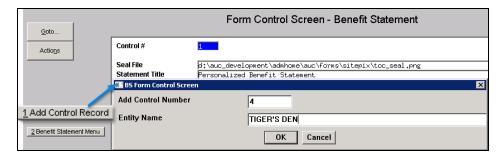


Figure 8 Sample Form Control Screen

See 1.1 What is the Source of the Data? to see where each section appears on the Benefit Statement.

2.2.1. Form Control Optional Override

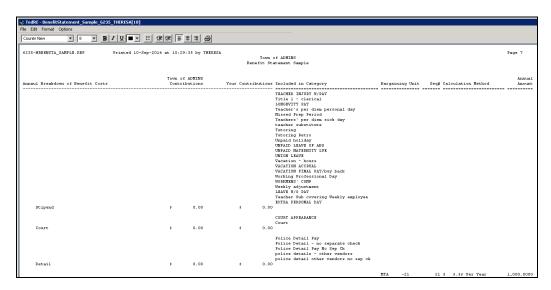
To allow for ease of data entry, a **Control Record** may be added to customize the boilerplate for each entity. All items in the screen shown in Figure 8 may be edited.



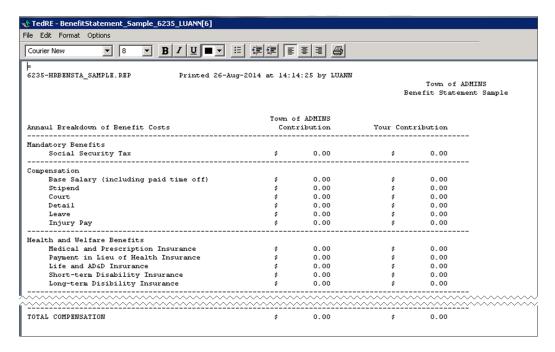
2.3. Audit Reports-Benefit Statement

Verify your data entry by running the Benefit Statement Audit Reports. The system will issue six reports.

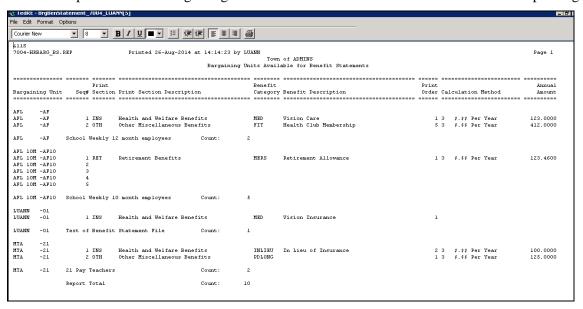
The first report will list each benefit category, in order specified on the screen, and all of the different items to be included in each category.



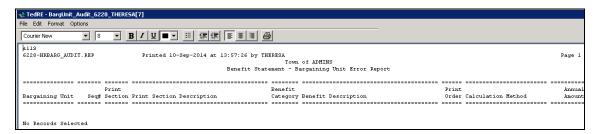
The second report is a sample of how the data will appear on the final report – a preview of how the data will be grouped.

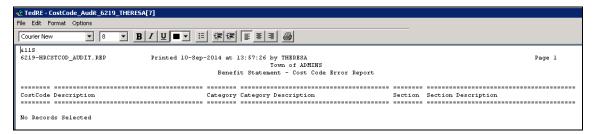


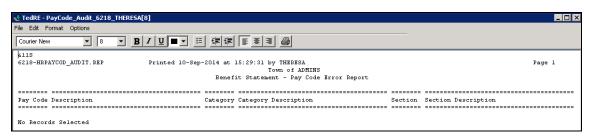
The third report shows the bargaining units for which benefit statements are available for printing.

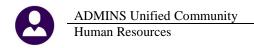


The last three are error reports. If errors exist on the Bargaining Unit, Cost Code or Pay Code tables, the errors will appear on these reports. If the message "No Records Selected" appears, the tables are error-free.



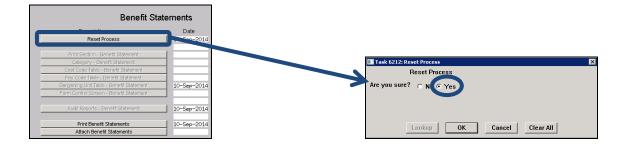






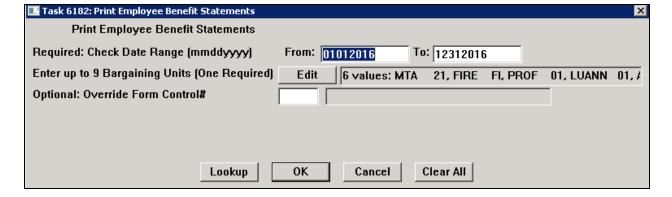
Review each of the audit reports for accuracy of data and grammar or spelling errors or missing print section codes. If a pay code or cost code is using a category code that is not assigned to a print section, an error will appear on the audit reports and the Benefit Statements will not print until the error is corrected.

Now is the time to make any corrections to the tables, as once you print the Benefit Statements, the tables will not be available for editing until you **Reset** the entire process. If that is necessary, you may click on Reset Process (be sure to select the Yes radio button) and edit only the tables that need changes – the other tables will remain as is.



Print Employee Benefit Statements 2.4.

Enter the **Date Range** and select a single bargaining unit (or multiple if the bargaining units contain fewer than ten employees). Enter the **Form Control #** and click on **[OK]**.



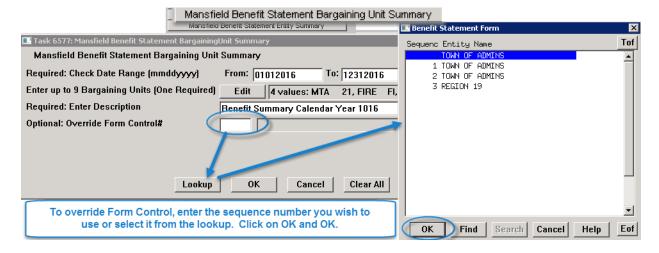


TIME SAVER

Running the report for each Bargaining Unit individually is faster than running the report for everyone at once.

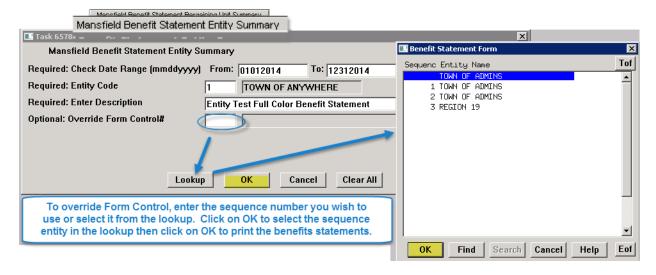
2.5. Mansfield Benefit Statement Bargaining Unit Summary:

Enter the date range, all bargaining units that should be grouped together for one statement and the description that should appear on the statement. Optionally select an entity name to override the default.



2.6. Mansfield Benefit Statement Entity Unit Summary:

Enter the date range, the entity and the description that should appear on the statement. Optionally select an entity name to override the default.

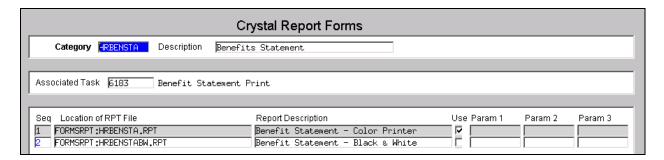


For Benefit Statement Purposes, any number of "Entities" may be established and do not necessarily correlate with entities existing in the GL Entity table.

2.6.1. Color or Black & White Printing Options

There are two options available for the benefit statements, depending on the printers available at your location. The first is a benefit statement with the pie chart printed in color. The second option allows you to print the statement with the pie chart printed in black and white patterns. If you select the color option for printing on a black and white printer, the pie chart will not have enough contrast and will not present the data in an easy to understand format. Printing the black and white version on a color printer will work properly.

The **System** Printer Setup Crystal Report Forms table identifies which form is selected and is initially set up by your ADMINS installer. If you need to make a change in the future, both forms are available for your use and you may choose the other form. If you cannot access the screen, contact support@admins.com for assistance.

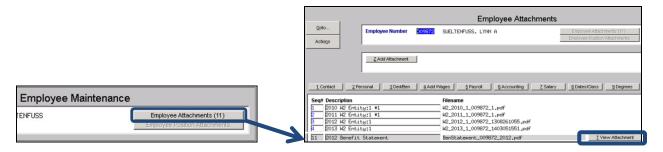


2.7. Attach Benefit Statements

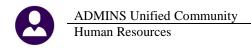
The final step in the process is to attach the Benefit Statements to the employees' records. Once this step is complete, you may view the attachment from the Employee Maintenance Screen.

2.7.1. View the Attachments

The Benefit Statements are attached to the Employee record, not the Position Record. Select **Human Resources**Maintenance Employee Maintenance and click on the Employee Attachments Button. Select the Benefit Statement you wish to view and click on 7 View Attachment.



The benefit statement will appear in the .pdf reader. This example shows a two-page statement.



2.7.2. Two Page Benefit Statement

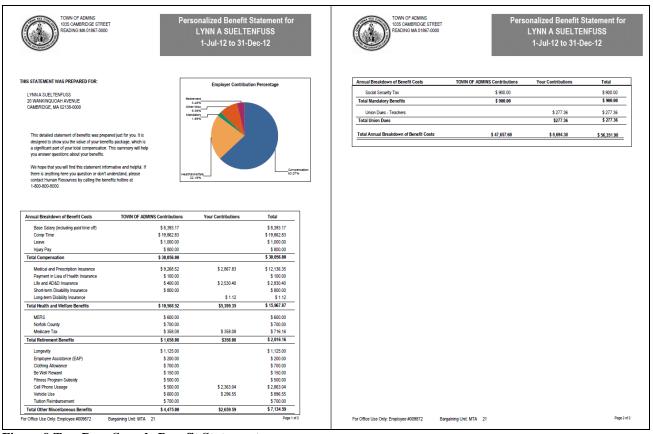


Figure 9 Two Page Sample Benefit Statement