Unicorn HRO

Total Compensation Statements

Table of Contents

Overview

Your employees may not be aware of the financial commitment your company makes toward their heath and welfare, income protection, retirement and work/life programs. These personalized statements will highlight the monetary value of your company's benefits program and the impact it has on each employee's total compensation. Total Compensation Statements are a tool toward achieving these goals:

- Reinforce the full value and impact of your organization's benefit plans
- Improve morale
- Increase productivity
- Help retain top employees

Features of the Total Compensation Statements include:

- Cover letter with company logo
- Wages section
- Health and Welfare section
- Employee Taxes section
- Retirement Plans section
- Flexing Spending Account section
- Health Savings Account section
- Paid Time Off section
- Additional Benefits section
- Pie chart showing the percentages of the employee's total compensation

These statements can be printed and/or made available in Employee Self Service. There is also a function in Manager Services for an administrator to print a statement for an employee. A sample statement is shown on the last two pages of this document.

iCON Implementation of Total Compensation Statements

The following steps are performed in **i**CON Manager Services to provide Total Compensation Statements to your employees:

- Set up the format(s) for the Total Compensation Statements.
- Run the Total Compensation Report to test the format. You may adjust the set-up and re-run the report as many times as needed until the statement has the desired look. Employees will not see these statements while you are only producing the reports. You may define unlimited formats, depending on the type of statements you wish to give various employee populations.
- Once you have finalized the set-up of the statements, you may generate either or both of the following:
    1) A report that may be printed and given to employees
    2) PDF files that employees may view in Employee Self Service, or that administrators may view in Manager Services
- If you wish to allow users of Manager Services to view employees' statements, grant Function Security to the Total Compensation Statement. The system requires that the user has Salary Inquiry authority or greater in order to view employees' statements. Keep in mind that benefit cost data, tax amounts and retirement plan data may be shown on the statements; limit access to this function accordingly.
- If you wish to allow employees to view their statements in Employee Self Service, define the date range in Benefit Enrollment Defaults when the statements may be viewed. Set up Employee Security access to the Total Compensation Statement.

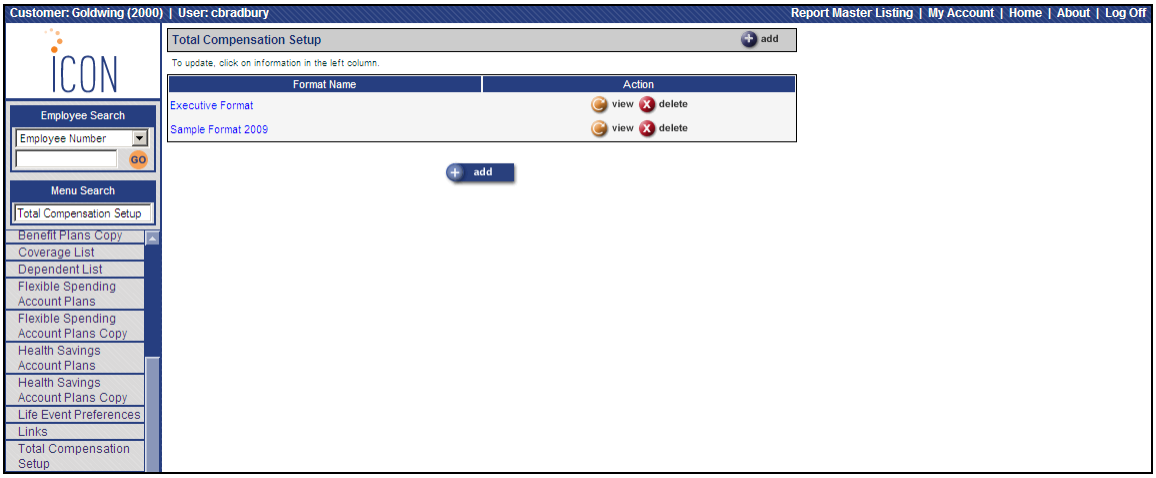
Setting Up Total Compensation Statement Formats

Total Compensation Setup

In order to create Total Compensation Statements, you must first define a format in Total Compensation Setup. The format determines which sections of the statement will be included, the order in which they will be presented, and the date ranges for certain amounts. It also stores the text of the optional cover letter that appears on the first page of the statement, as well as any text that you wish to display in each section of the statement.

You may define as many formats as you wish. When producing the statements, the system will ask which format you wish to use.

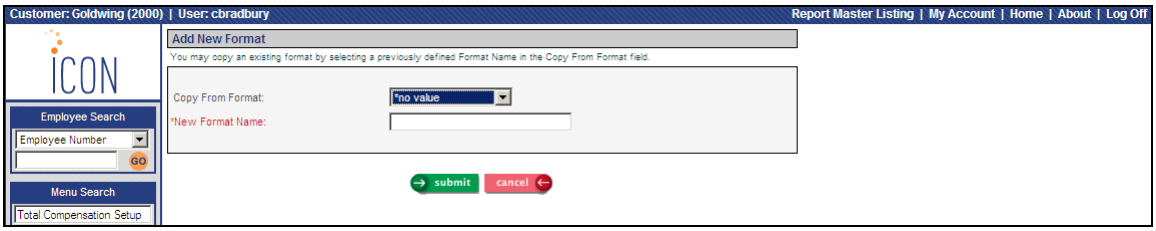
Shown here is an example of the Total Compensation Setup function.



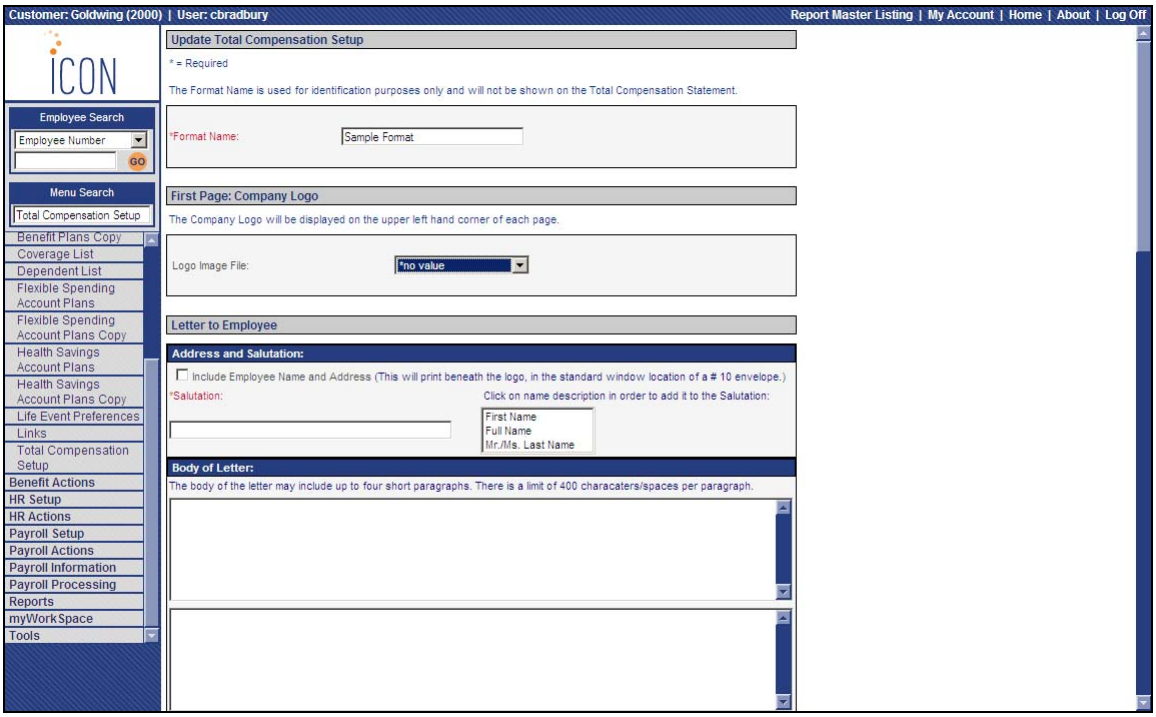
Defining The Format

Click Add to set up a new format. Enter the New Format Name. It is recommended that you describe the format as fully as possible so that it can be easily recognized when creating the statements. You may wish to include the year of the data that the statement will contain. The Format Name can be changed later if needed.

Once you have defined formats, you will be able to select one of them from the Copy From Format drop down list. By doing so, you can eliminate a lot of the set-up work for new formats.



Once you have clicked Submit, a page similar to the following will appear.



Cover Letter

When you create the Total Compensation Statements, you may include a cover letter if you wish. Define the elements of the cover letter in this section of Total Compensation Setup.

If you want to include a Logo in the upper left corner of each page, and/or a signature at the end of the cover letter, send the files in BMP format to the iCON Support Line at iCONSupport@UnicornHRO.com. The images will be loaded onto the secure server.

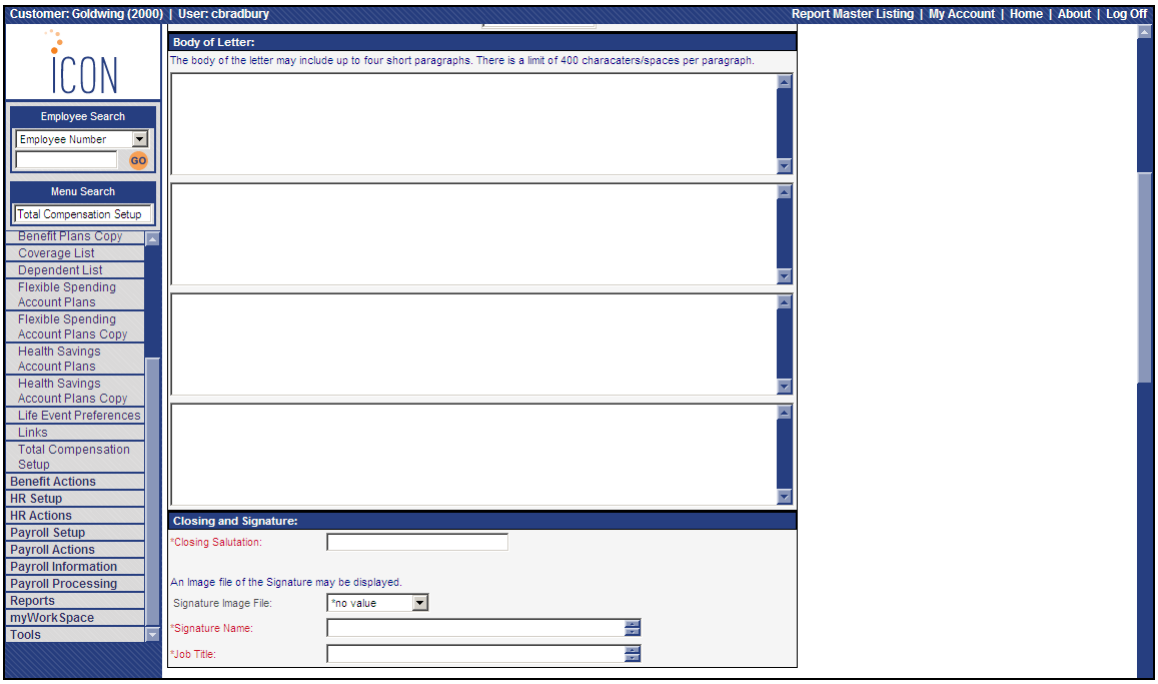
The available fields that can be included in the cover letter, which is the first page of the statement, are:

- **Logo Image File:** If you have sent your logo file(s) to UnicornHRO, select the one that is to print in the upper left corner of each page of this format.
- **Include Employee Name and Address:** Select this checkbox if you wish to include the employee name, street address, street address line two, city, state and zip code beneath the logo area of the cover letter. If you select this checkbox, this information will print in the window area for a standard #10 envelope so that the statement may be mailed if desired. If you do not select this checkbox, only the employee name will print.

- **Salutation:** Enter the salutation that you wish to print above the body of the letter. If you wish to insert a part of the employee's name, click on it in the right-hand window when the cursor is at the appropriate place. Below are sample salutations:

Salutation Field	Sample
Dear 'First Name',	Dear Mary,
Dear 'Full Name', (If a Second Last Name exists, the statement prints the Last Name, dash, and Second Last Name.)	Dear Mary Smith, Or Dear Mary Smith-Jones,
Dear 'Mr./Ms. Last Name', (The statement prints Mr. or Ms., based on the employee's Gender in the Demographics record.)	Dear Ms. Smith, Or Dear Ms. Smith-Jones,

- **Body of Letter:** You may include up to 4 paragraphs of text in the cover letter. Each paragraph may contain up to 4 lines, and approximately 400 characters and spaces. A message will appear if you enter more than the allowable number of characters and spaces.



- **Closing Salutation:** Enter the closing words that will print above the signature area, such as "Sincerely," or "Yours Truly," (without the quotes). Remember to enter the comma after the salutation.
- **Signature Image File:** If you have provided a signature file to UnicornHRO, the name of the file will appear in the drop-down list. Select the signature file that you wish to use with this statement. A signature file is not required.
- **Signature Name:** Enter the name of the person who is signing the letter (whether there is a signature file or not).
- **Job Title:** Enter the job title of the person who is signing the letter.

Sample Letter

Below is a sample cover letter. The set-up entries for this letter are shown on the next two pages.

Sunshine Homes Construction, LLC

Julia Mancuso
3389 Reno Dr.
Squaw Valley, CA 90302

Dear Ms. Mancuso,

I am pleased to present you with your personalized Total Compensation Summary. As an employer, our goal is to provide our hardworking, dedicated employees with a comprehensive and competitive total compensation package that rewards your commitment to our mission and helps us attract and retain the highest caliber of talent.

This statement was prepared to provide you with a snapshop of your total compensation as of June 30, 2009. We encourage you to read this information carefully and to discuss it with your family so they are aware of the benefits provided to them as well. It is our hope that your benefits package will provide added security for you and your family members.

With the current economic situation, our sales have not been as high as expected. However, we are doing significantly better than our competitors. We continue to offer our clients the highest quality products and services. We are proud of our entire team and we look forward to the coming year, with its challenges and victories.

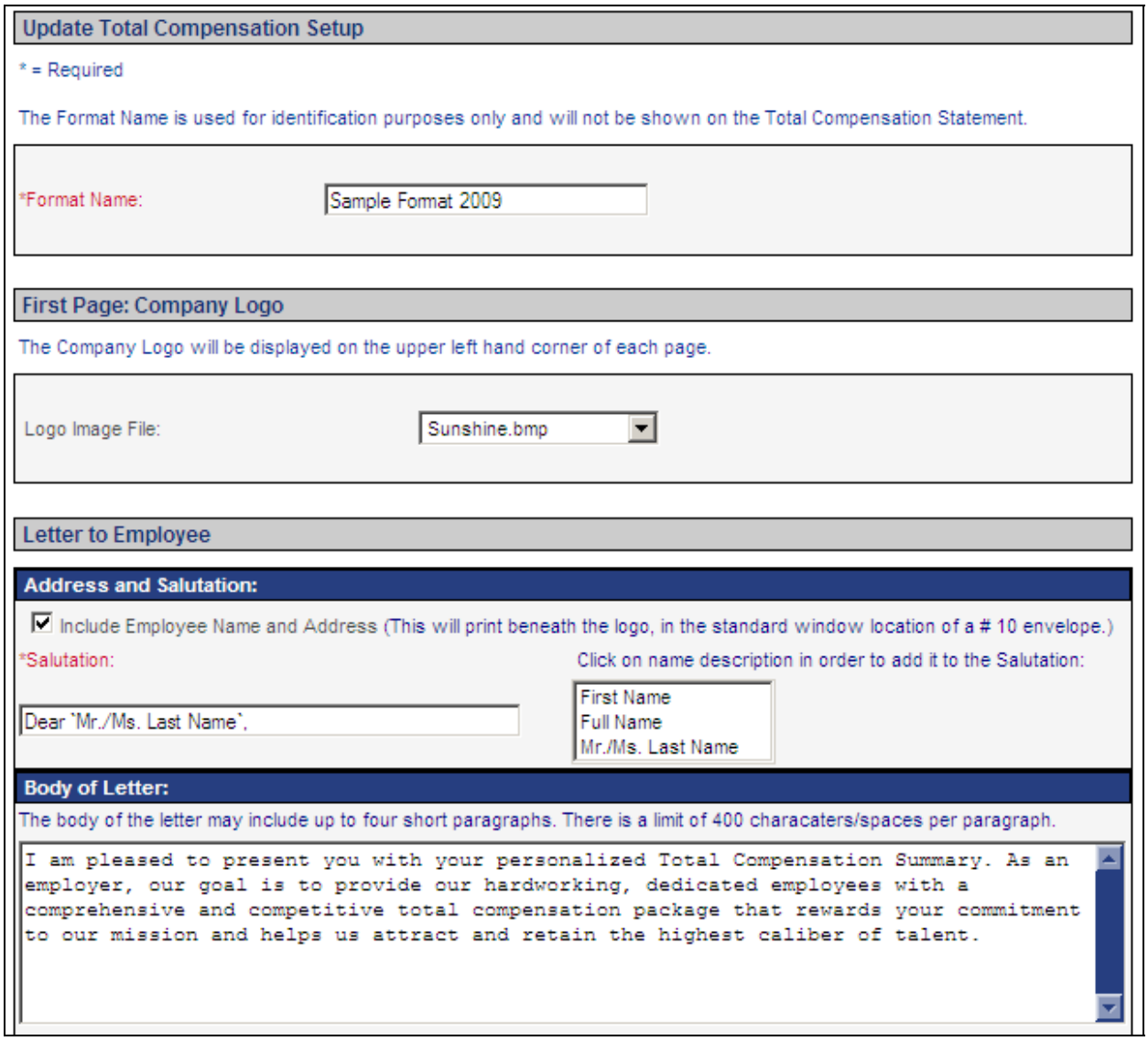
Your Benefits Department is available from 9:00 to 4:00 Eastern, Monday through Friday, to answer any questions that you may have about this statement. They will be happy to give you more details on any of the information that is presented in this statement. Thank you for your continued contribution to the company's success.

Sincerely,

John T. Smith

John T. Smith
President and CEO

The set-up for the sample cover letter is as follows:



Update Total Compensation Setup

* = Required

The Format Name is used for identification purposes only and will not be shown on the Total Compensation Statement.

*Format Name: Sample Format 2009

First Page: Company Logo

The Company Logo will be displayed on the upper left hand corner of each page.

Logo Image File: Sunshine.bmp

Letter to Employee

Address and Salutation:

☑ Include Employee Name and Address (This will print beneath the logo, in the standard window location of a # 10 envelope.)

*Salutation: Dear `Mr./Ms. Last Name`,

Click on name description in order to add it to the Salutation:

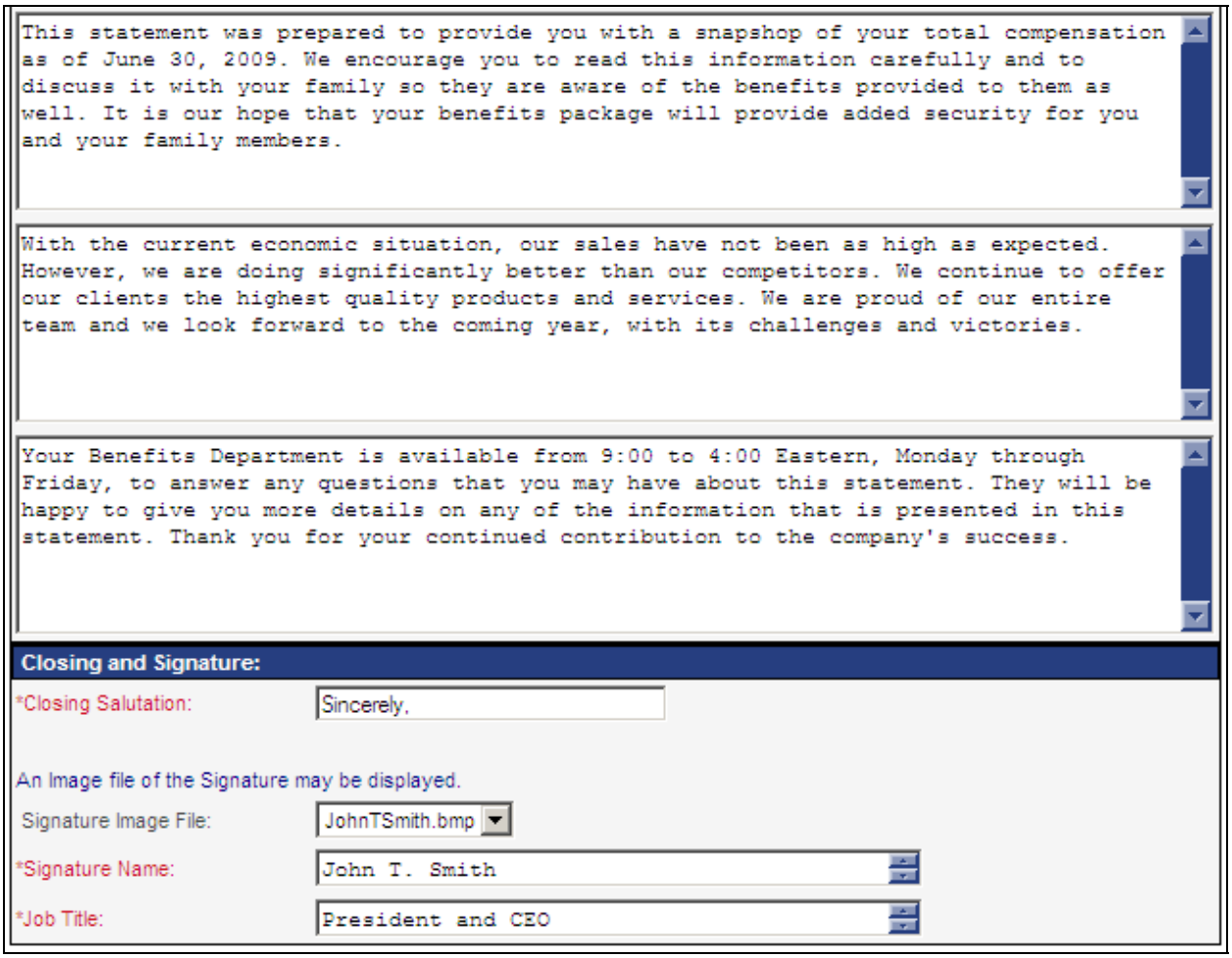
First Name
Full Name
Mr./Ms. Last Name

Body of Letter:

The body of the letter may include up to four short paragraphs. There is a limit of 400 characaters/spaces per paragraph.

I am pleased to present you with your personalized Total Compensation Summary. As an employer, our goal is to provide our hardworking, dedicated employees with a comprehensive and competitive total compensation package that rewards your commitment to our mission and helps us attract and retain the highest caliber of talent.

The set-up for the sample cover letter continues here.



This statement was prepared to provide you with a snapshop of your total compensation as of June 30, 2009. We encourage you to read this information carefully and to discuss it with your family so they are aware of the benefits provided to them as well. It is our hope that your benefits package will provide added security for you and your family members.

With the current economic situation, our sales have not been as high as expected. However, we are doing significantly better than our competitors. We continue to offer our clients the highest quality products and services. We are proud of our entire team and we look forward to the coming year, with its challenges and victories.

Your Benefits Department is available from 9:00 to 4:00 Eastern, Monday through Friday, to answer any questions that you may have about this statement. They will be happy to give you more details on any of the information that is presented in this statement. Thank you for your continued contribution to the company's success.

Closing and Signature:

*Closing Salutation: Sincerely,

An Image file of the Signature may be displayed.

Signature Image File: JohnTSmith.bmp

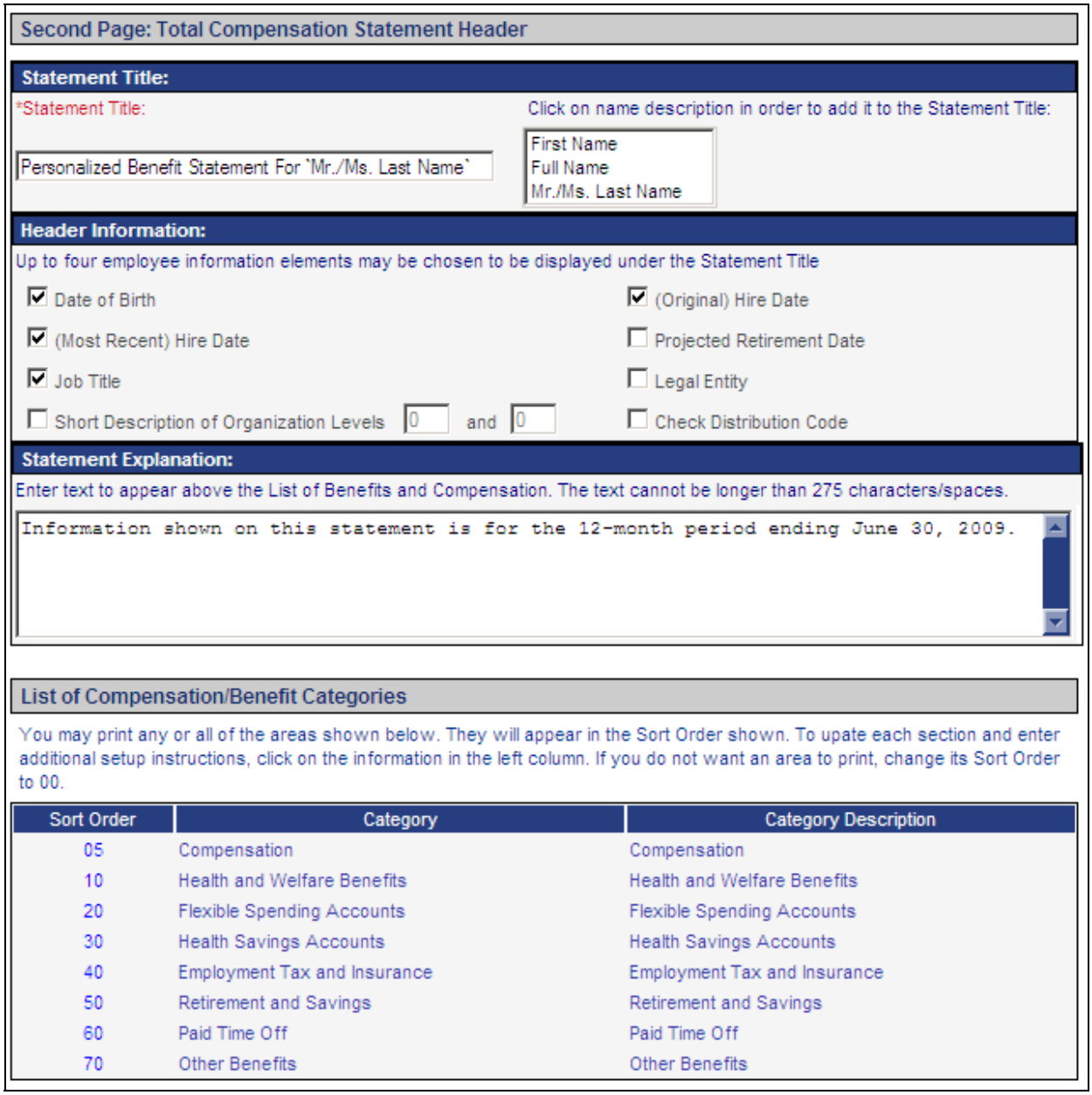
*Signature Name: John T. Smith

*Job Title: President and CEO

You may wish to save your format at various times, since there is a lot of information and you would not want to lose any of it by inadvertently clicking Cancel or selecting another function.

Statement Header Information

You are now ready to define what will print in the statement itself. For the set-up shown below, see the example on the next page.



Second Page: Total Compensation Statement Header

Statement Title:

*Statement Title:

Personalized Benefit Statement For `Mr./Ms. Last Name`

Click on name description in order to add it to the Statement Title:

First Name
Full Name
Mr./Ms. Last Name

Header Information:

Up to four employee information elements may be chosen to be displayed under the Statement Title

- [x] Date of Birth
- [x] (Original) Hire Date
- [x] (Most Recent) Hire Date
- [ ] Projected Retirement Date
- [x] Job Title
- [ ] Legal Entity
- [ ] Short Description of Organization Levels 0 and 0
- [ ] Check Distribution Code

Statement Explanation:

Enter text to appear above the List of Benefits and Compensation. The text cannot be longer than 275 characters/spaces.

Information shown on this statement is for the 12-month period ending June 30, 2009.

List of Compensation/Benefit Categories

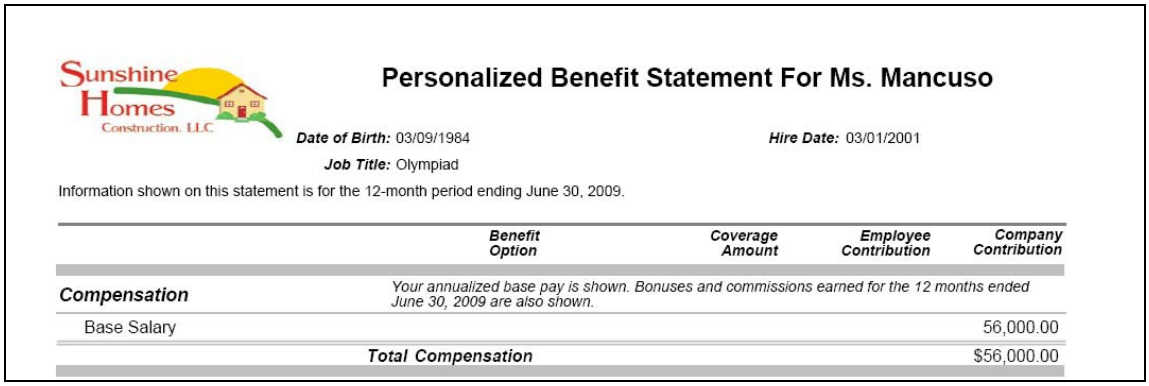
You may print any or all of the areas shown below. They will appear in the Sort Order shown. To upate each section and enter additional setup instructions, click on the information in the left column. If you do not want an area to print, change its Sort Order to 00.

Sort Order	Category	Category Description
05	Compensation	Compensation
10	Health and Welfare Benefits	Health and Welfare Benefits
20	Flexible Spending Accounts	Flexible Spending Accounts
30	Health Savings Accounts	Health Savings Accounts
40	Employment Tax and Insurance	Employment Tax and Insurance
50	Retirement and Savings	Retirement and Savings
60	Paid Time Off	Paid Time Off
70	Other Benefits	Other Benefits

- **Statement Title:** Enter the heading that will appear on each page of the statement other than the cover letter. It will be shown to the right of your company logo. Based on the amount of data you choose to include in the statement, and the employee's participation in those benefits, the statement could be 2, 3, 4 or 5 pages. The Statement Title will appear at the top of each page. You may include all of part of the employee's name in the Statement Title. If you chose Last Name and the employee also has a Second Last Name, the statement will print both with a dash in between, such as Smith-Jones. If you choose the Mr./Ms. Last Name option, the system will print Mr. or Ms. depending on the employee's Gender in the Demographics function.

- **Header Information:** Beneath the Statement Title, you may print up to four Header fields. The fields you select will print on the statement in the following order: left to right, top to bottom.
    - If you select Organization Levels, enter one or two organization levels. If you enter two levels, the descriptions will be separated with a slash, such as: Organization: Atlanta / Accounting.
    - If you select both the Most Recent Hire Date and Original Hire Date, and the employee's dates are the same, only one "Hire Date" field will print.
    - If you select Check Distribution Code, the system will sort the statements by this value, and then alphabetically by employee name. If you do not select Check Distribution Code, the statements will sort by employee name.
- **Statement Explanation:** You may include a Statement Explanation beneath the Header fields. It is recommended that you give as much information as needed to fully explain the statement to employees, so that they do not contact your Human Resources or Benefits departments with unnecessary questions. Besides the Statement Explanation field, there are text fields available in each section where you may give employees even more information to help them interpret the statements.

A sample header section is shown below.



Sunshine Homes Construction, LLC

Personalized Benefit Statement For Ms. Mancuso

Date of Birth: 03/09/1984 ***Hire Date:*** 03/01/2001

Job Title: Olympiad

Information shown on this statement is for the 12-month period ending June 30, 2009.

	Benefit Option	Coverage Amount	Employee Contribution	Company Contribution
Compensation	*Your annualized base pay is shown. Bonuses and commissions earned for the 12 months ended June 30, 2009 are also shown.*			
Base Salary				56,000.00
	Total Compensation			$56,000.00

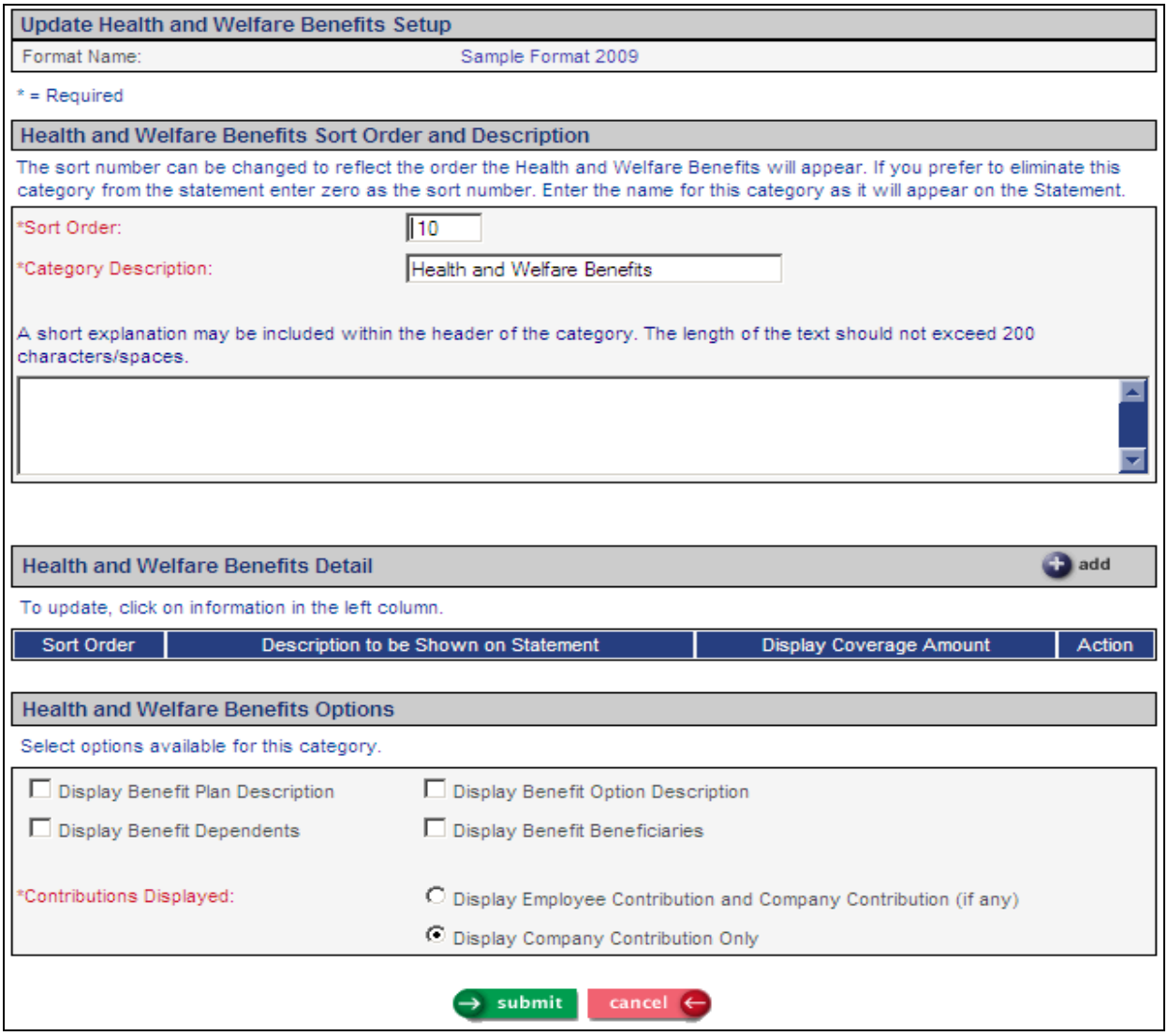
Setting Up Compensation and Benefit Categories

The "List of Compensation/Benefit Categories" section shows the available categories that can be included on the statement. Click on the Sort Order for the category you wish to work with. If you do not want to include a particular section, change the Sort Order to zero. Each of the following categories is described here in detail.

Health and Welfare	Flexible Spending Accounts
Health Savings Accounts	Employment Tax and Insurance
Retirement and Savings	Paid Time Off
Other Benefits	Compensation

Health and Welfare

This section determines how the employee's benefit enrollments are displayed on the statement.



If you wish to change the location of the Health and Welfare section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Health and Welfare section in the statement, enter zero in the Sort Order field.

In the Health and Welfare Benefits Options section, select the checkboxes that correspond to the information that you wish to present to employees. This will be in addition to the Benefit Category, such as Medical or Dental.

Click on the Add button to select the Coverage Categories that will be included on the statement. The values in the Benefit Categories common object will appear, as shown in this example:

Select Health and Welfare Benefits

Format Name: Sample Format 2009

Click checkboxes to select benefit categories that you wish to include.

Select All Unselect All

Select	Sort Order	Description to be Shown on Statement	Short Description	Show Coverage Amount
☐	000	Optional Life	Optional Life	yes
☐	001	Basic Life Insurance	Basic Life	no
☐	002	Dental	Dental	no
☐	003	Medical	Medical	no
☐	004	Vision Care	Vision Care	no
☐	030	Life Insurance	Life Insurance	yes
☐	999	Dependent Care	Dependent Care	no
☐	999	Disability	Disability	no
☐	999	Dependent Life Coverage	Dependent Life	yes
☐	999	Dependent Medical Care	Dependent Med.	no
☐	999	Legal Services	Group Legal	no
☐	999	Pension Catagory	Pension	no
☐	999	Spousal Life Insurance	Spousal Life	no
☐	999	Supplemental Life Ins.	Suppl. Life Ins	yes

submit cancel

You may click Select All or click on individual categories. Click on Submit after you have made your selections.

The system will display the categories you have chosen. You may change the Sort Order in which the categories will be shown, as well as the Description to be Shown on Statement. You may also determine whether or not to display coverage amounts for each category, as applicable. If you select this checkbox and you also print dependent information, any dependent coverage amounts will be included. The values in the Display Coverage Amount column default from the Benefit Category common object, so these checkboxes will show how your system is currently set up to display coverage amounts on the Benefit Statement.

Update Health and Welfare Benefits Detail Information

Format Name: Sample Format 2009

Change Sort Order and/or Description.

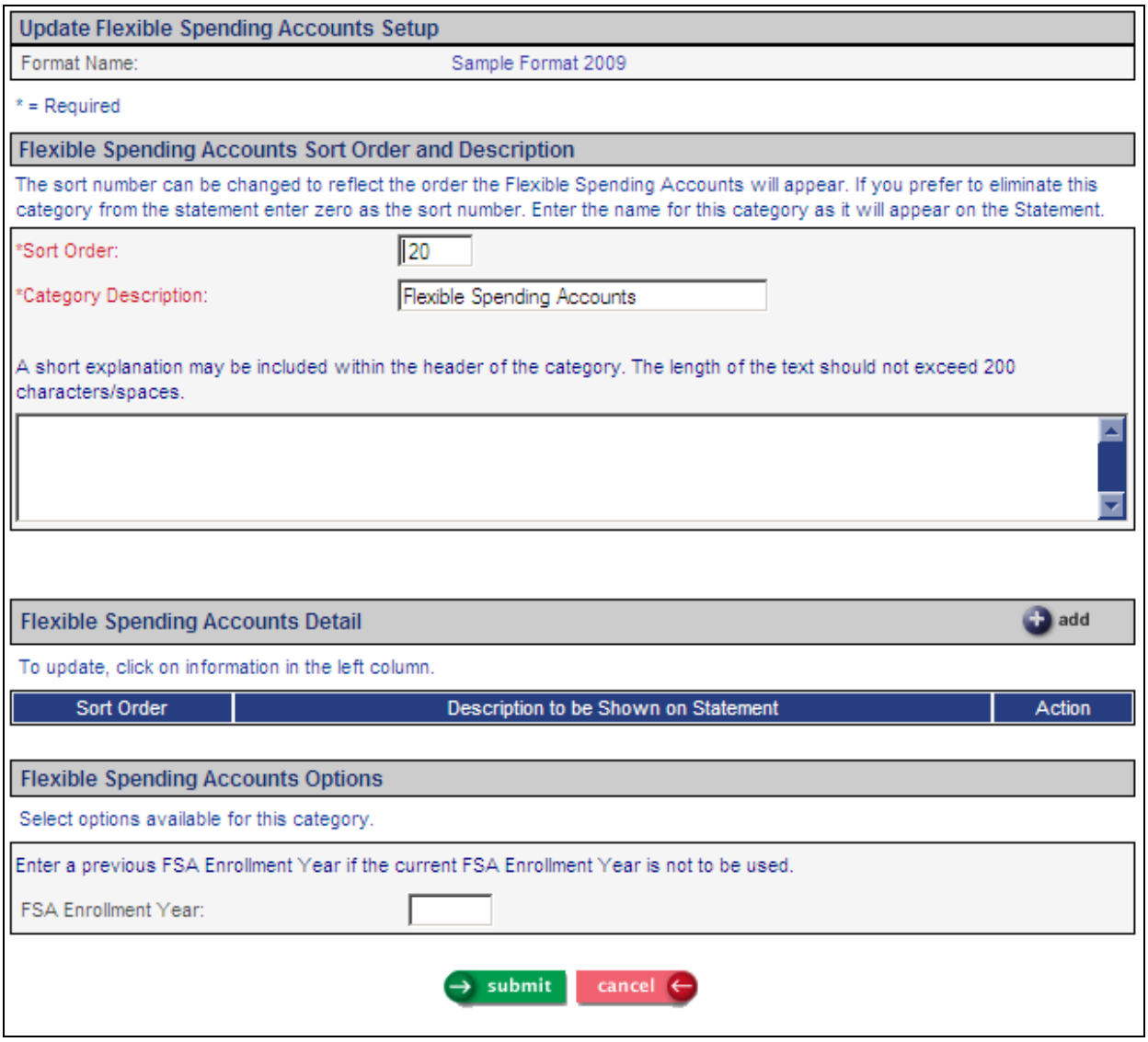
Sort Order	Short Description	Description to be Shown on Statement	Display Coverage Amount
000	Optional Life	Optional Life	☑
001	Basic Life	Basic Life Insurance	☐
002	Dental	Dental	☐
003	Medical	Medical	☐
004	Vision Care	Vision Care	☐
030	Life Insurance	Life Insurance	☑
999	Dependent Care	Dependent Care	☐
999	Disability	Disability	☐
999	Dependent Life	Dependent Life Coverage	☑
999	Dependent Med.	Dependent Medical Care	☐
999	Group Legal	Legal Services	☐
999	Spousal Life	Spousal Life Insurance	☐
999	Suppl. Life Ins	Supplemental Life Ins.	☑

submit cancel

Click Submit to save the list of benefit categories. The Health and Welfare Benefits Setup page will then be displayed. Click Submit to save your settings.

Flexible Spending Accounts

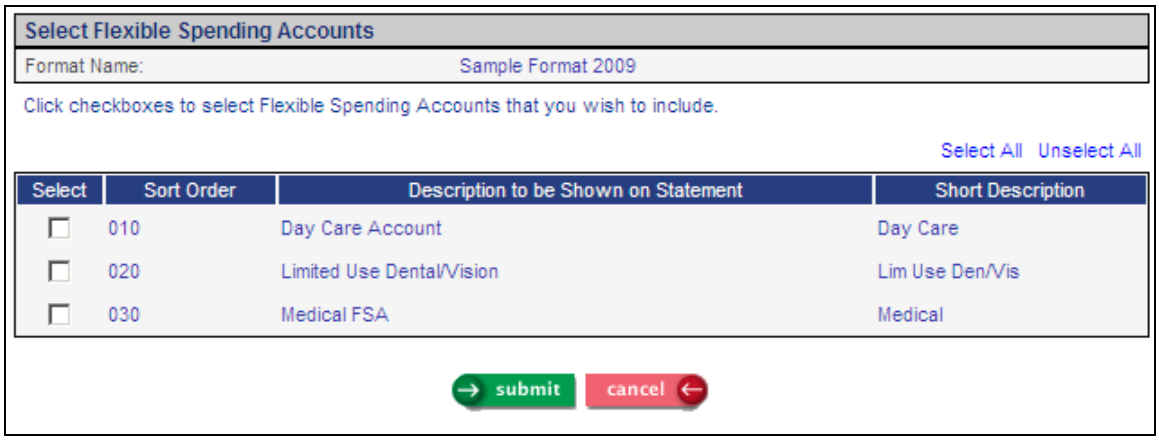
This section determines how the employee's Flexible Spending Accounts are displayed on the statement. This section will only be shown if the employee has selected a contribution for one or more FSA.



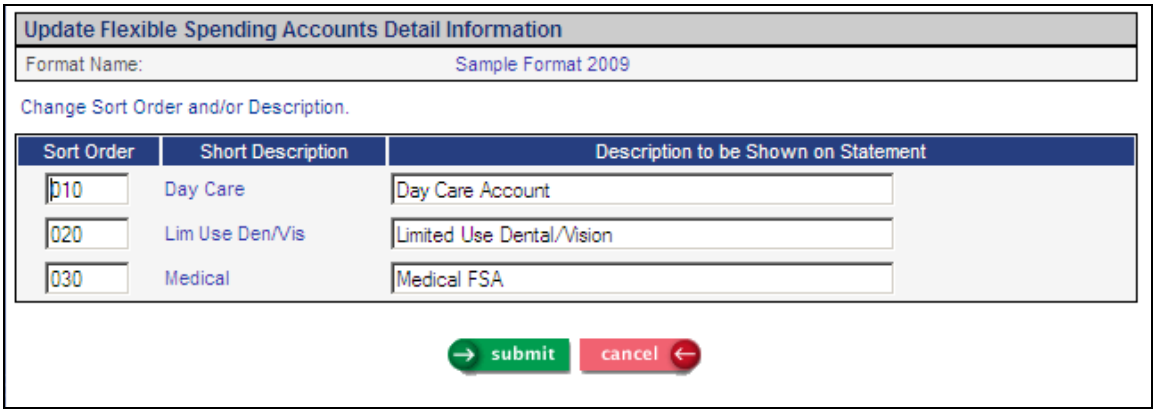
If you wish to change the location of the Flexible Spending Accounts section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Flexible Spending Accounts section in the statement, enter zero in the Sort Order field.

In the Flexible Spending Accounts Options section, enter an FSA Enrollment Year if you wish to display the employee's planned contributions from a year other than the current year. Otherwise, leave this field blank.

Click on the Add button to select the Flexible Spending Accounts that will be included on the statement. The values in the Flexible Spending Accounts common object will appear, as shown in this example:



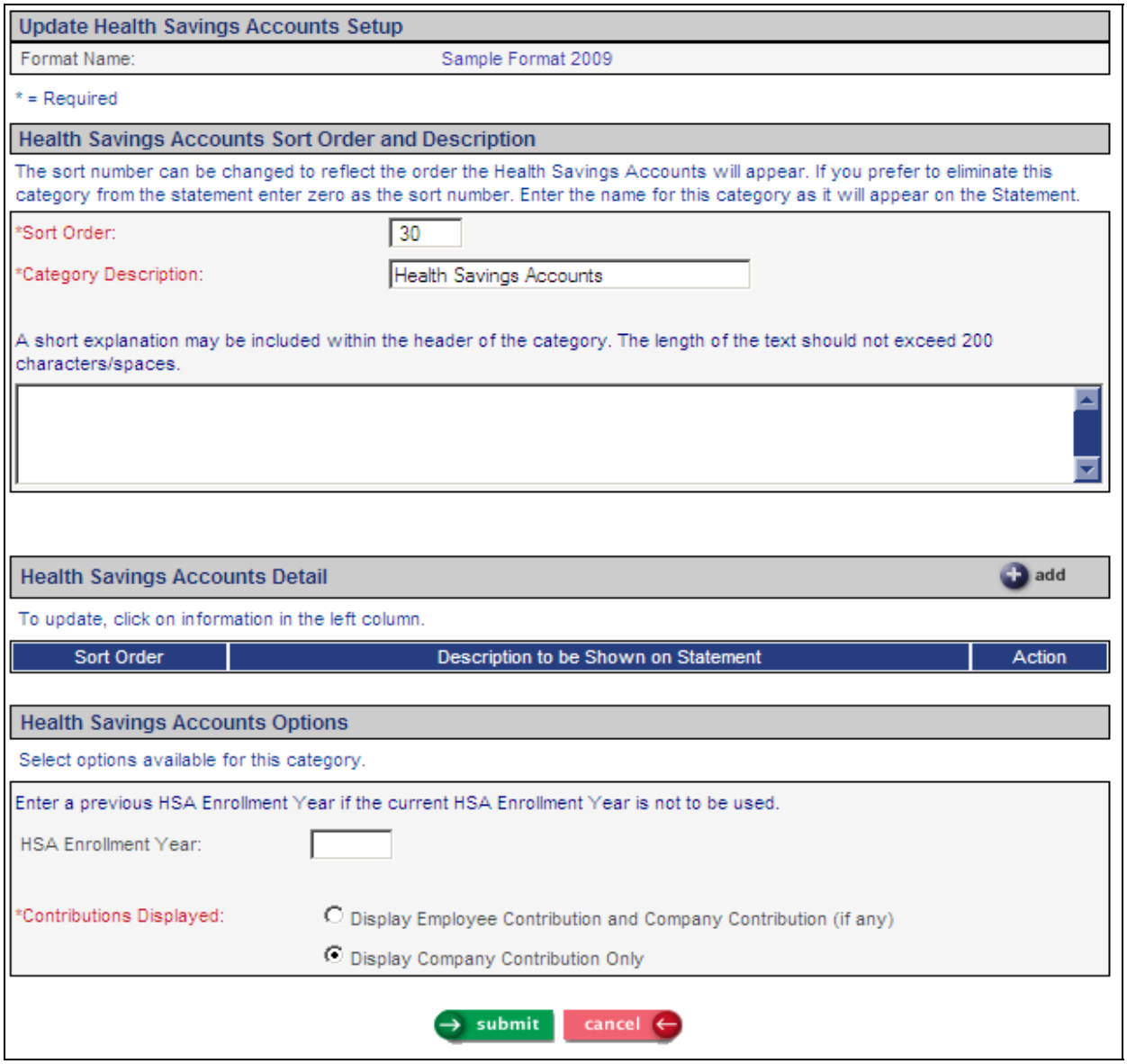
You may click Select All or click on individual FSAs. Click on Submit after you have made your selections. The system will display the FSAs you have chosen. You may change the Sort Order in which the FSAs will be shown, as well as the Description to be Shown on Statement.



Click Submit to save the list of FSAs. The Flexible Spending Accounts Setup page will then be displayed. Click Submit to save your settings.

Health Savings Accounts

This section determines how the employee's Health Savings Accounts are displayed on the statement. This section will only be shown if the employee has selected one or more HSA.

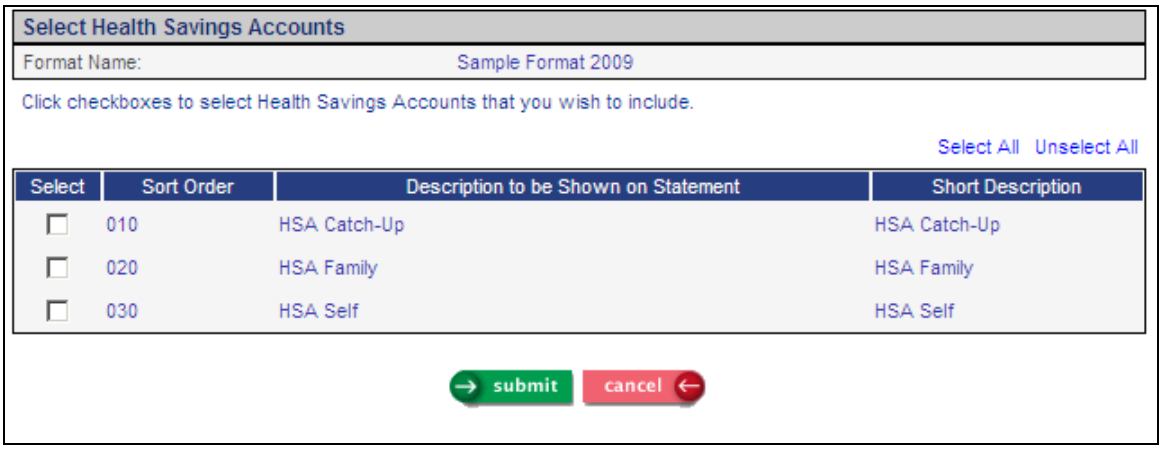


If you wish to change the location of the Health Savings Accounts section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Health Savings Accounts section in the statement, enter zero in the Sort Order field.

In the Health Savings Accounts Options section, enter an HSA Enrollment Year if you wish to display the employee's planned contributions from a year other than the current year. Otherwise, leave this field blank.

Select whether you wish the employee and company contribution to be displayed, or only the company contribution.

Click on the Add button to select the Health Savings Accounts that will be included on the statement. The values in the Health Savings Accounts common object will appear, as shown in this example:

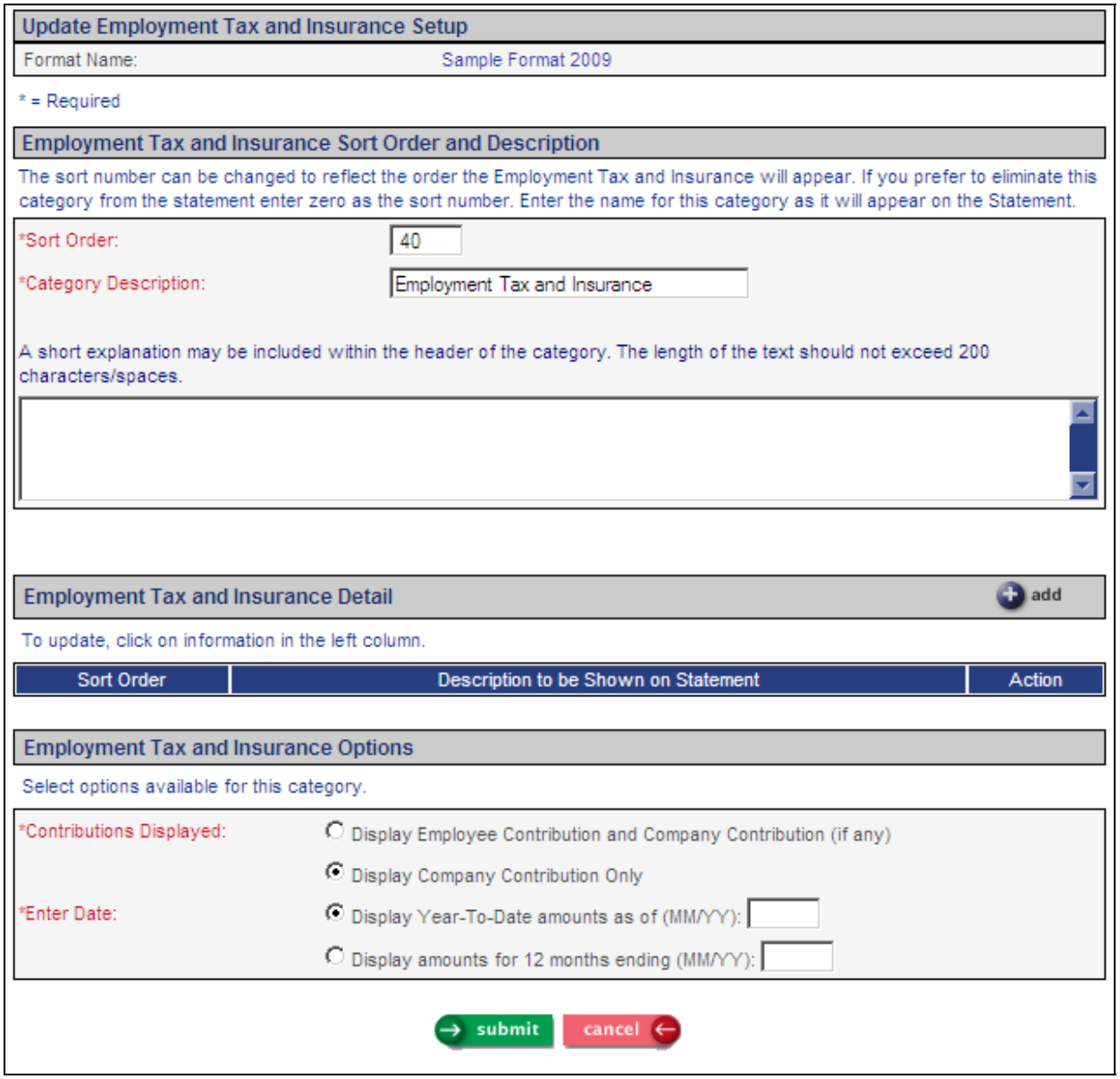


You may click Select All or click on individual HSAs. Click on Submit after you have made your selections. The system will display the HSAs you have chosen. You may change the Sort Order in which the HSAs will be shown, as well as the Description to be Shown on Statement.

Click Submit to save the list of HSAs. The Health Savings Accounts Setup page will then be displayed. Click Submit to save your settings.

Employment Tax and Insurance

This section determines how federal and state tax amounts are displayed on the statement.



If you wish to change the location of the Employment Tax and Insurance section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Employment Tax and Insurance section in the statement, enter zero in the Sort Order field.

In the Employment Tax and Insurance Options section, select whether you wish to display the employee and company contributions, or if you only wish to display what the company has paid.

If you wish to display the year-to-date amounts as of a certain date, enter that date next to the first radio button. If you wish to display amounts for a certain 12-month period, enter the ending date next to the second radio button. The system will get the amounts from Tax Accumulators for the date range you selected.

Click on the Add button to select the federal and state taxes that will be included on the statement. The values in Federal Tax Types and State Tax Types that have an employer tax rate will appear, as shown in this example:

Select Employment Tax and Insurance

Format Name: Sample Format 2009

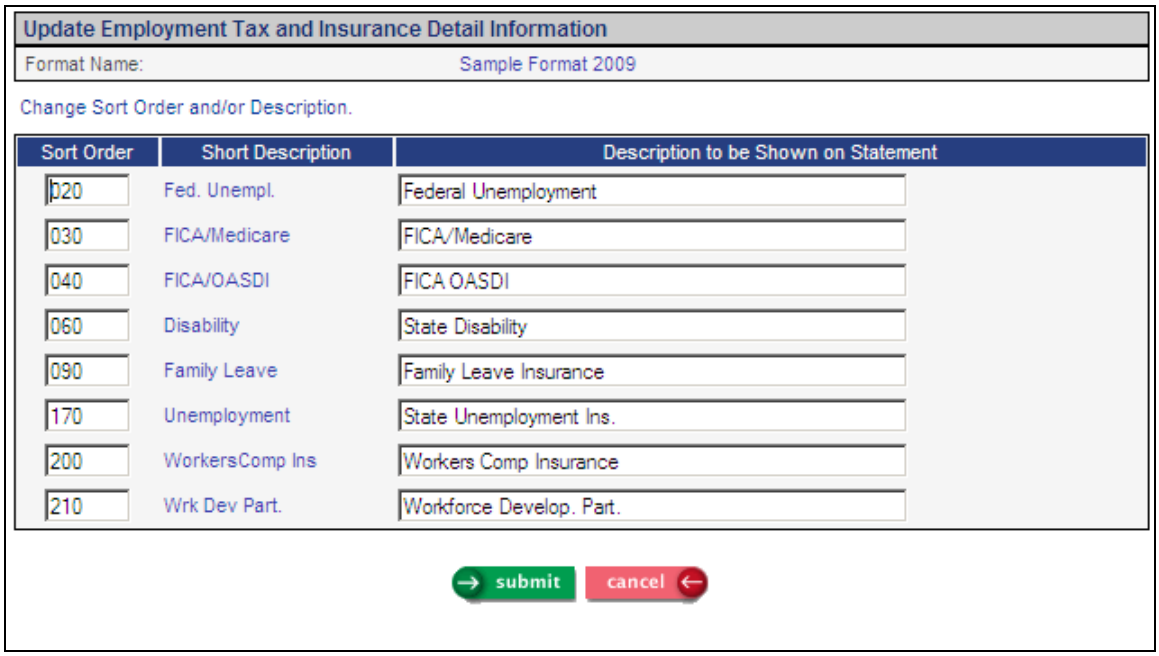
Click checkboxes to select federal and state tax types that you wish to include.

Select All Unselect All

Select	Sort Order	Description to be Shown on Statement	Short Description
☐	020	Federal Unemployment	Fed. Unempl.
☐	030	FICA/Medicare	FICA/Medicare
☐	040	FICA OASDI	FICA/OASDI
☐	060	State Disability	Disability
☐	070	Employment/Training Tax	Employ/Training
☐	080	Nevada Excise Tax	Excise Tax
☐	090	Family Leave Insurance	Family Leave
☐	100	KY Rural Economic Dev Fee	KREDA Fee
☐	110	Metro Commuter Trans Mob.	MCTMT
☐	120	Medical (MA)	Medical (MA)
☐	130	Old Fund Liability Tax	Old Fund Lia.
☐	140	State Ind. Insurance Fund	St Ind Ins Fund
☐	150	ST Med Aid Fd 50% Match	ST Md Aid 50%
☐	160	Suppl. Pension Fd 50% ER	ST Sup Pn Fd 50
☐	170	State Unemployment Ins.	Unemployment
☐	180	Workers Compensation	Workers Comp.
☐	190	Workers Comp Admin Fee	WorkersComp Fee
☐	200	Workers Comp Insurance	WorkersComp Ins
☐	210	Workforce Develop. Part.	Wrk Dev Part.

submit cancel

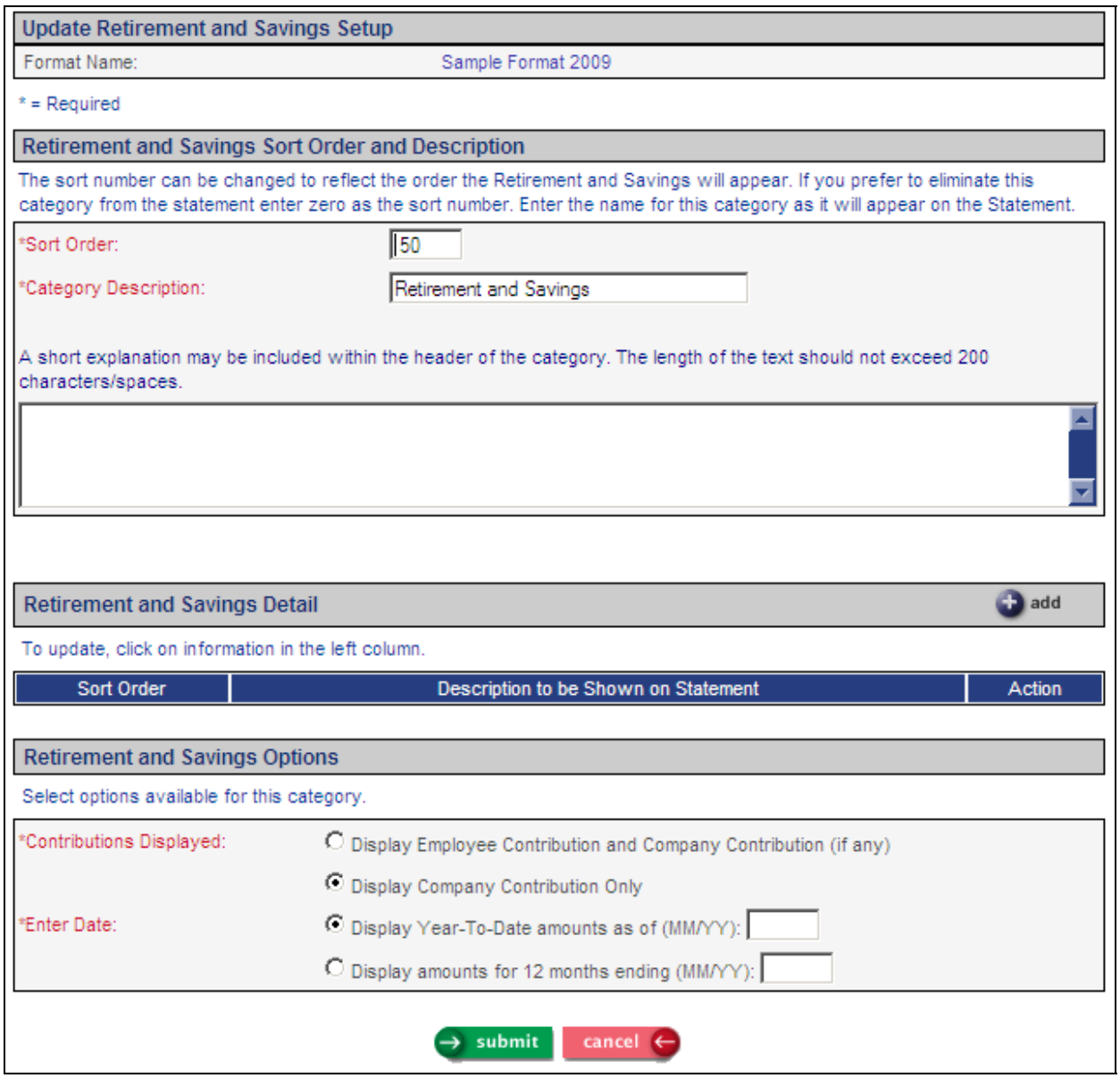
You may click Select All or click on individual tax types. Click on Submit after you have made your selections. The system will display the tax types you have chosen. You may change the Sort Order in which the tax types will be shown, as well as the Description to be Shown on Statement.



Click Submit to save the list of tax types. The Employment Tax and Insurance Setup page will then be displayed. Click Submit to save your settings.

Retirement and Savings

This section determines how the employee's retirement-related deduction amounts are displayed on the statement.

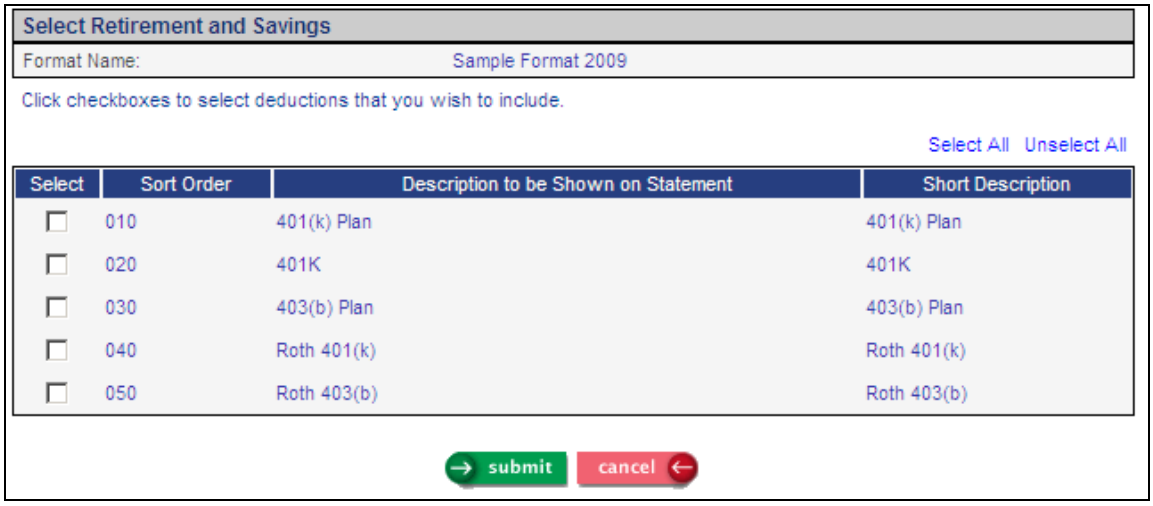


If you wish to change the location of the Retirement and Savings section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Retirement and Savings section in the statement, enter zero in the Sort Order field.

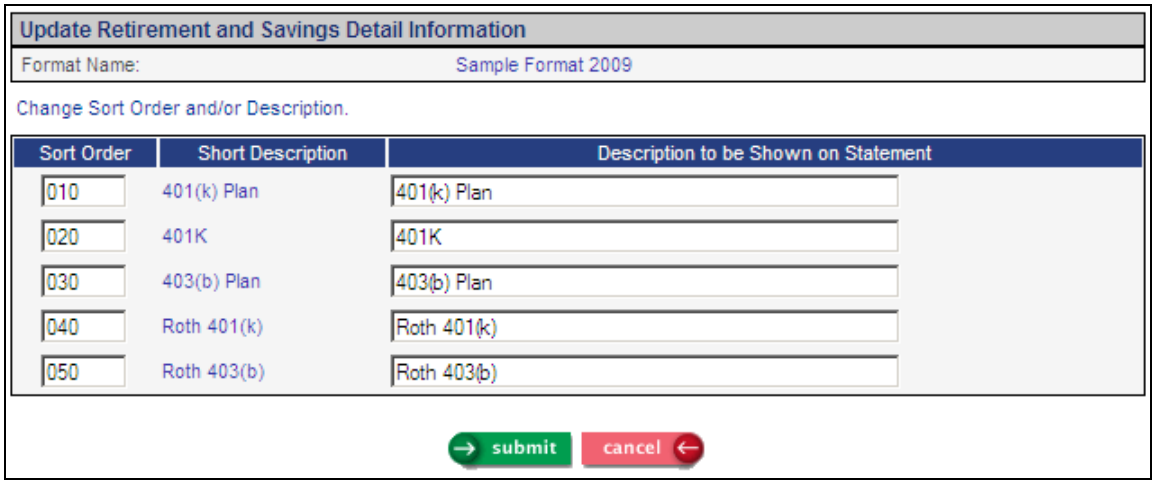
In the Retirement and Savings Options section, select whether you wish to display the employee and company contributions, or if you only wish to display what the company has contributed.

If you wish to display the year-to-date amounts as of a certain date, enter that date next to the first radio button. If you wish to display amounts for a certain 12-month period, enter the ending date next to the second radio button.

Click on the Add button to select the amounts that will be included on the statement. The values from the Payroll Deductions common object that have been defined as “Retirement Plan” will appear, as shown in this example:



You may click Select All or click on individual deductions. Click on Submit after you have made your selections. The system will display the deductions you have chosen. You may change the Sort Order in which the deductions will be shown, as well as the Description to be Shown on Statement.



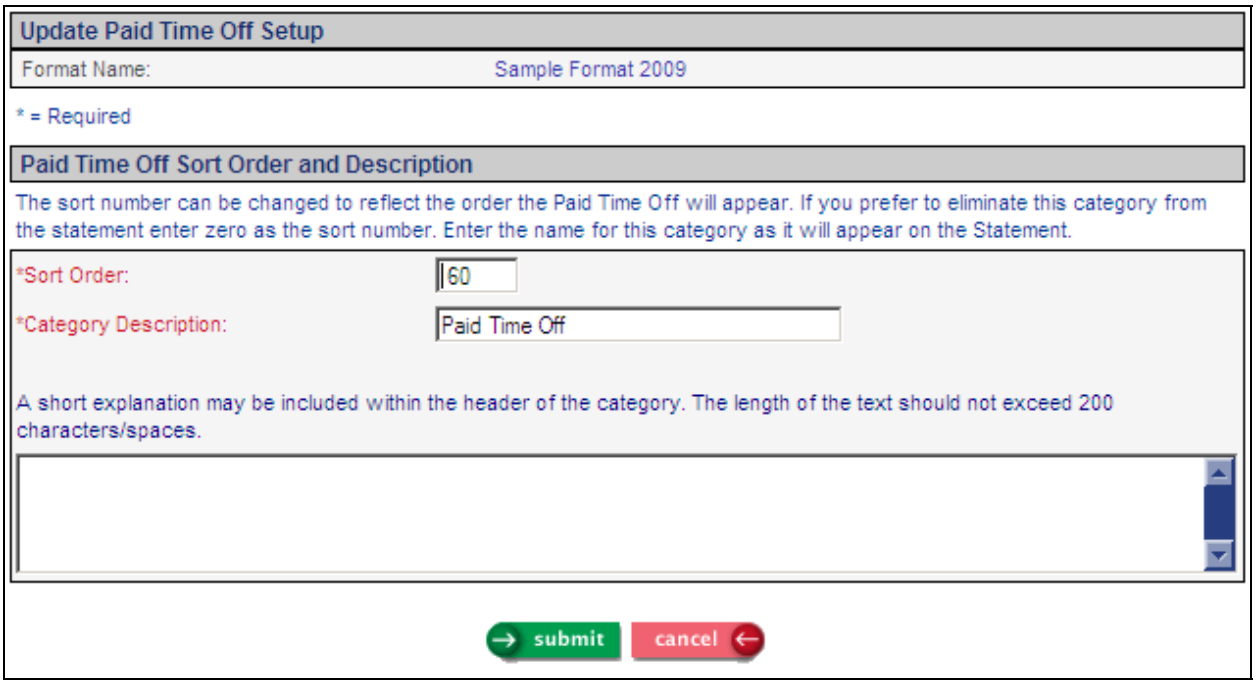
Click Submit to save the list of deductions. The Retirement and Savings Setup page will then be displayed. Click Submit to save your settings.

Paid Time Off

This section will print the employee's Hours Accrued from the Paid Time Off function as of the Effective Date you enter when you submit the Total Compensation Report. Since the accrued hours may not be the full year's accrual, carefully evaluate whether this section should be included on the Total Compensation Statement. For example, if your Paid Time Off policies accrue a certain number of hours per pay period, or accrue per hours worked, the amount shown on the statement will not show the true total that the employee accrues for the year. In this scenario you may wish to omit the Paid Time Off section.

For each Paid Time Off that is shown on the statement, the system will multiply the Hours Accrued times the employee's base hourly wage and show the amount. The Paid Time Off amounts will be totaled and shown in this section, but will not be included in the employee's Total Compensation amount, since these amounts would typically be included in the employee's annualized salary that is shown in the Compensation section. You may wish to explain this in the text field for this category.

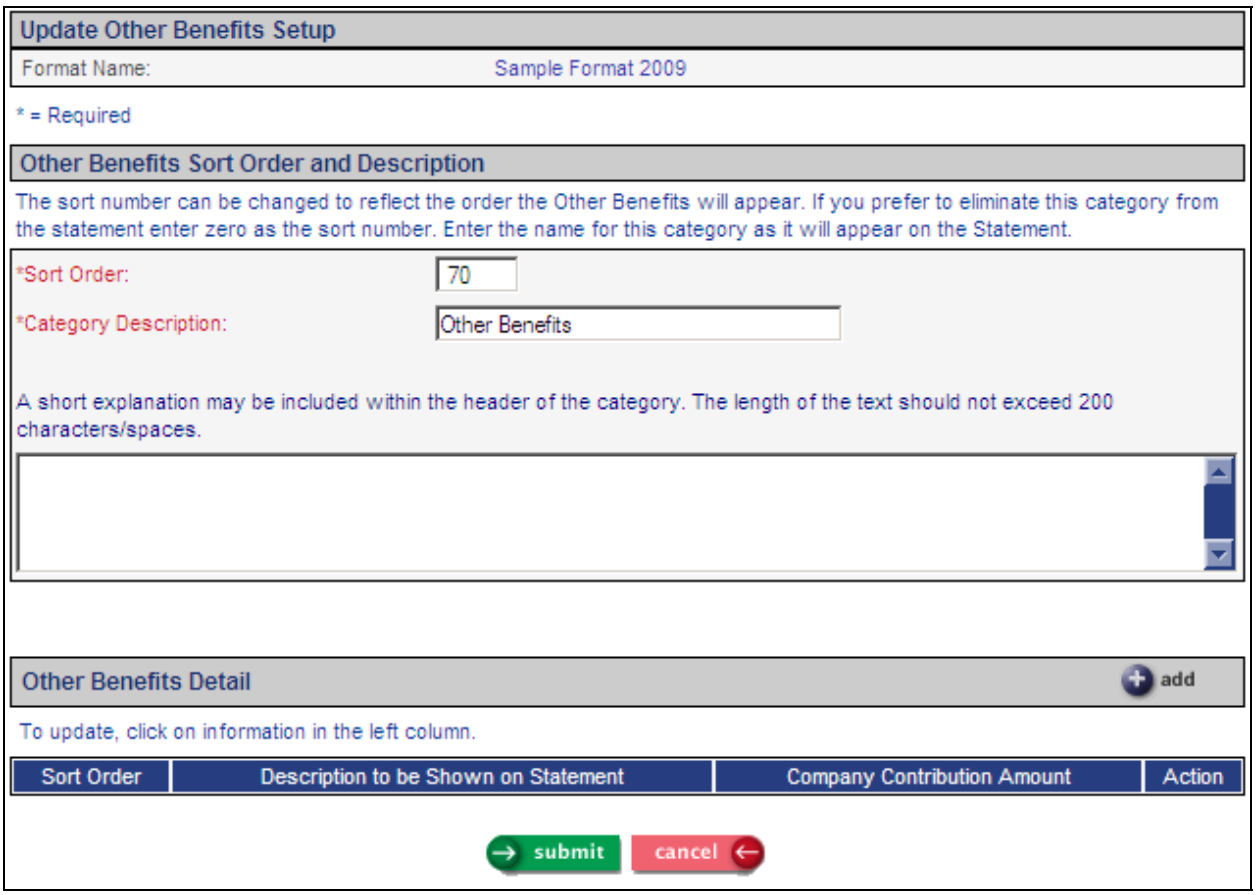
If you decide to include the Paid Time Off section, we recommend that you explain what is being shown, as well as refer employees to their paychecks (if you print hours balances there) to view their up-to-date Paid Time Off balances. The plans that are defined as "Print on Check" in the Entitlement Policies function will appear on the Total Compensation Statement if the employee has Hours Accrued greater than zero.



If you wish to change the location of the Paid Time Off section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Paid Time Off section in the statement, enter zero in the Sort Order field.

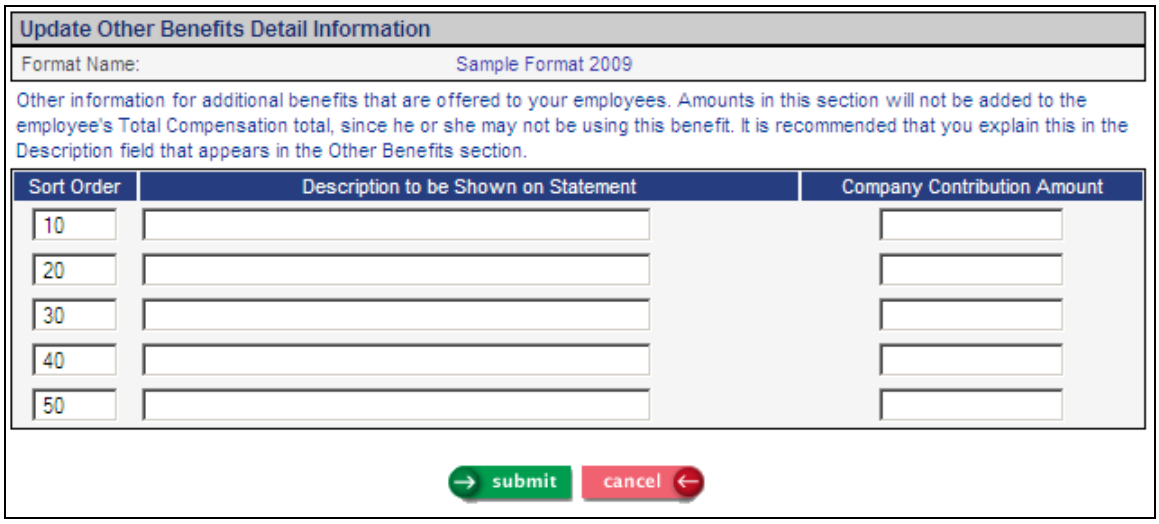
Other Benefits

If you offer benefits to your employees other than those described in the previous sections, you may wish to include them here. You may include a description and a dollar amount, or just the description. It is recommended that you include an explanation in this section, since not all employees may be eligible to take advantage of these benefits. Any amounts that you enter in this section will be totaled but not included in the employee's Total Compensation, since he or she may not be using these benefits. You may wish to explain this also in the text field.



If you wish to change the location of the Other Benefits section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information. If you do not wish to include the Other Benefits section in the statement, enter zero in the Sort Order field.

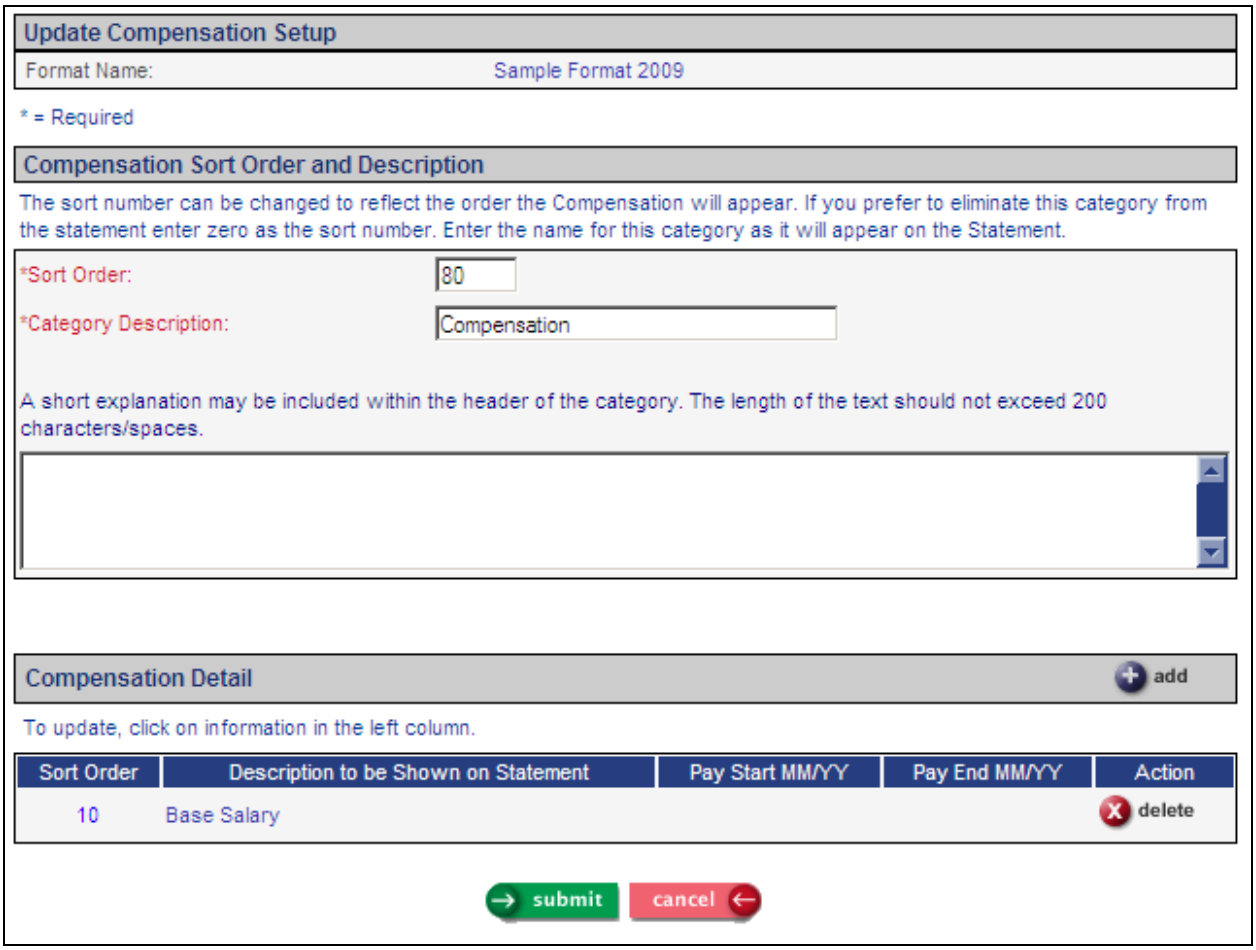
Click on the Add button to enter the other benefits that will be included on the statement. You may enter up to five benefits. You may also enter the amount the company contributes to each benefit.



Click on Submit after you have entered the benefit information. The Other Benefits Setup page will then be displayed. Click Submit to save your settings.

Compensation

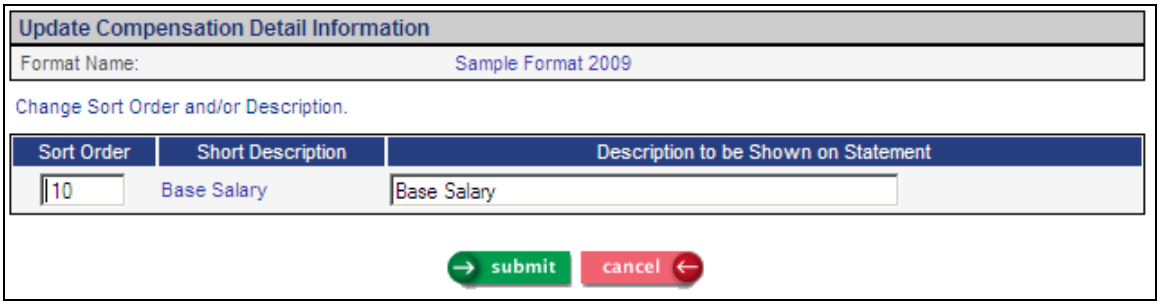
This section determines how the employee's compensation is displayed on the statement. You may show the employee's annualized base pay, selected pay types for a specified date range (such as bonuses or commissions), or both.



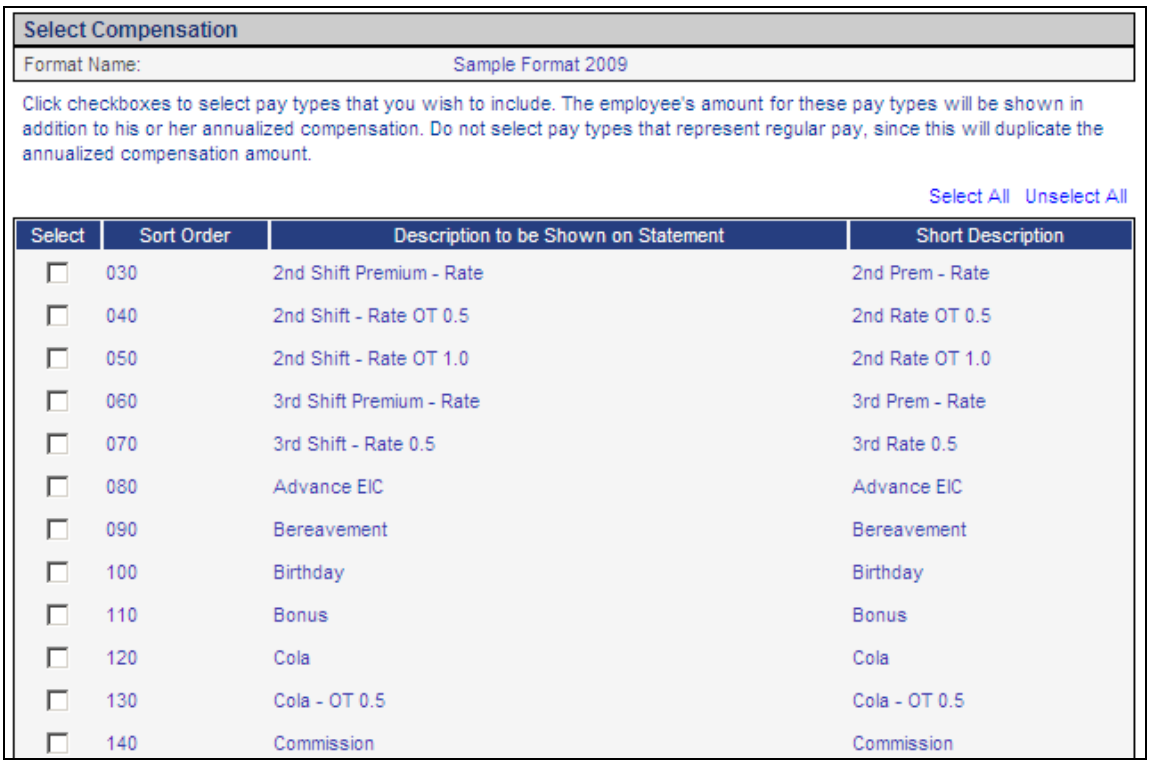
If you wish to change the location of the Compensation section, change the Sort Order so that it appears in the correct place among the other categories. You may change the Category Description if you wish. You may enter an explanation of this section if you feel that employees may need more information.

In the Compensation Detail section, an entry for Base Salary appears. This represents the employee's annualized base pay. If you choose to show the Base Salary on the Total Compensation Statement, the system will get the employee's Compensation Method that is in effect as of the Effective Date that you enter. Based on that Compensation Method, it will get the compensation rate as of the Effective Date. The system will annualize that amount.

You may change the description of Base Salary by clicking on the Sort Order, bringing you to the following page:

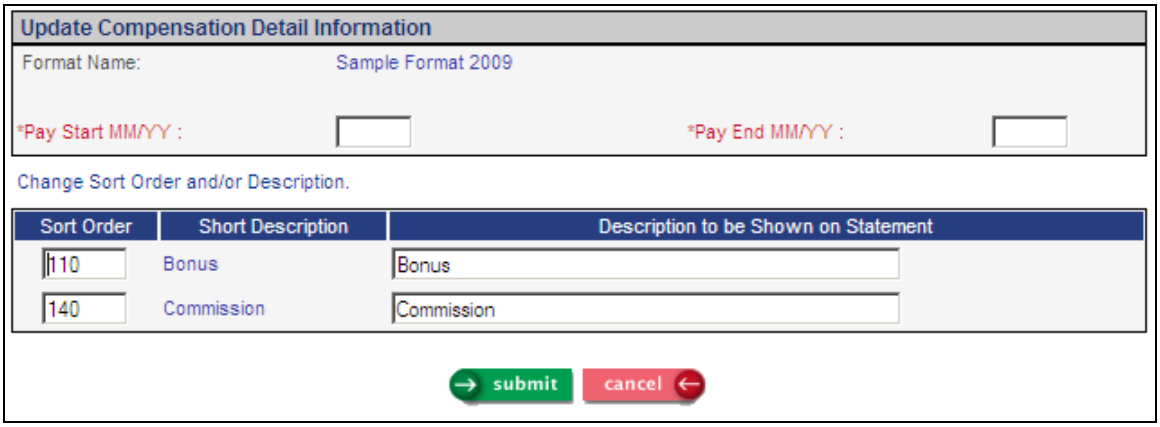


Click on the Add button to select additional pay types to be shown in the Compensation section of the statement. The values from the Pay Codes common object will appear, as shown in this example:



Important Note: *If you will be printing the Base Salary on the statements, do not select any pay types that are included in the employee's annualized base pay, since that would duplicate those amounts. For example, under most circumstances you would not select Vacation and Sick pay, since that is already included in the base pay amount.*

Click on Submit after you have made your selections. The system will display the pay types you have chosen. You may change the Sort Order in which the pay types will be shown, as well as the Description to be Shown on Statement. Enter the starting and ending month and year. The system will get the amounts from Pay Distribution and show the total on the statement.



Click Submit to save the list of pay types. The Compensation Setup page will then be displayed. Click Submit to save your settings.

At this point it would be a good idea to save the settings you have made thus far. Click on the Submit button at the bottom of the page, and then access the format you are working with. If you need to make any changes to the benefit and compensation sections, click on the Sort Order value to update the information.

Closing Statement and Pie Chart

You are now ready to enter information that will appear at the end of the statement. Here you may include information about additional benefits that you offer to your employees. Text that you enter in the Closing Statement will appear above the pie chart that shows the percentages of the employee's compensation components. You may enter up to approximately 515 characters and spaces.

You may enter information in the Chart Explanation field. This will appear to the left of the pie chart. This should be used to give the employee more information about the chart or the information that is shown there. Note that the percentages may not total exactly 100% due to rounding. You may wish to explain this to employees. The total could be plus or minus .1%. The Chart Explanation field will accept up to approximately 350 characters and spaces. Click Submit to save your changes.

The pie chart is constructed as follows:

The Total Compensation Statement adds up all of the employer contribution subtotal amounts from the following sections:

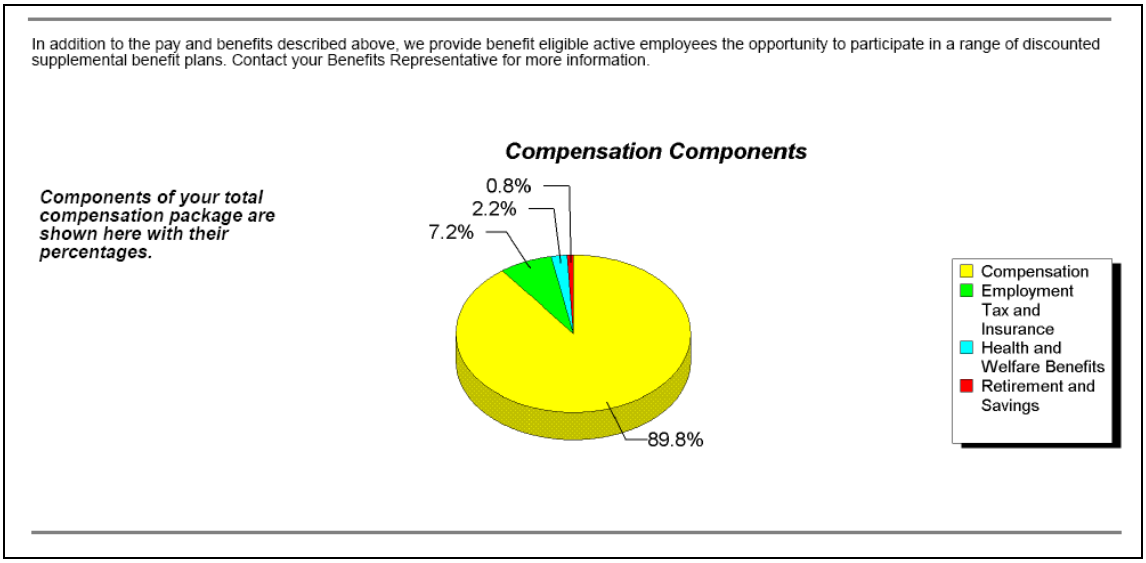
- Health and Welfare
- Health Savings Accounts
- Employment Tax and Insurance
- Retirement Plans
- Compensation

Based on that total, the system calculates the percentage that each amount represents of the total. The first pie slice will start at 12:00. The pie slices are sorted in alphabetic order of the Category Descriptions that you have entered in Total Compensation Setup.

The first pie slice will be yellow, followed by green, blue, red and magenta.

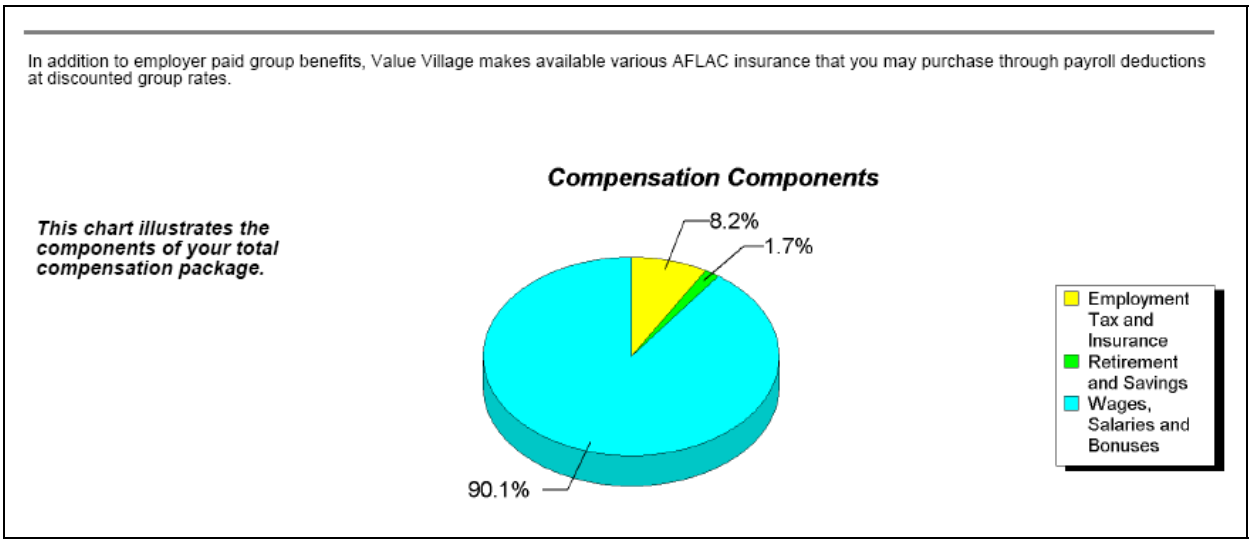
The legend will be shown to the right of the pie chart, showing the colors that appear in the pie chart and the category corresponding to each one. The Category Descriptions will be shown. Only the colors that appear in the pie chart will be shown in the legend. As in the example below, if an employee has amounts in four of the areas shown above, and they are sorted in the following order, they will appear as:

Compensation	Yellow
Employment Tax and Insurance	Green
Health and Welfare Benefits	Blue
Retirement and Savings	Red



Using another format as an example, where the sort order and descriptions of the categories are different, an employee only has amounts in Employment Tax and Insurance, Retirement Savings and Wages. The pie chart colors will be as follows:

Employment Tax and Insurance	Yellow
Retirement and Savings	Green
Wages, Salaries and Bonuses	Blue



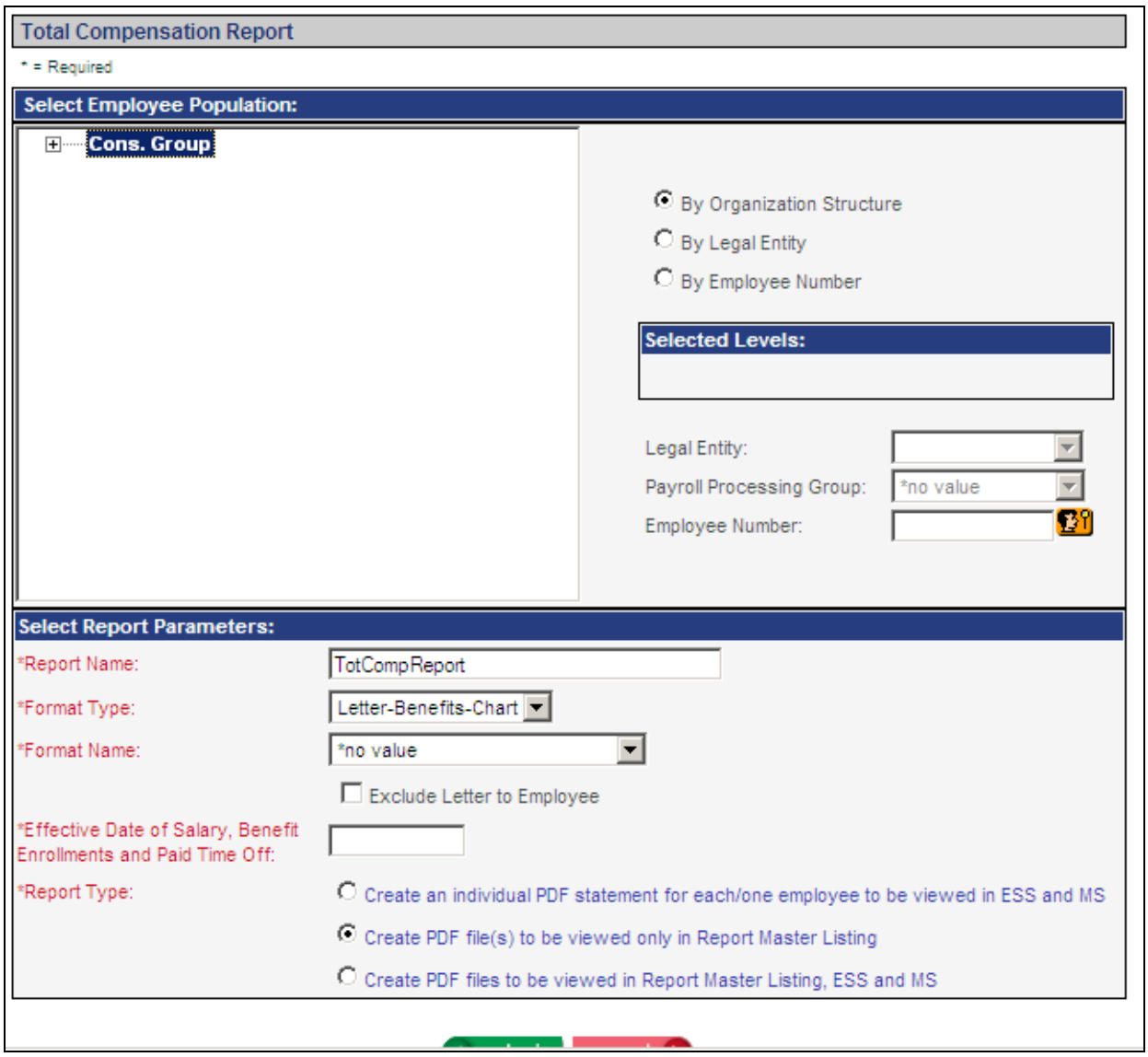
For this reason, it is recommended that you do not refer to any particular colors in the Chart Explanation field, since they will be different based on your employees' participation in these areas.

As you have seen, the Total Compensation Setup contains a lot of information, much of it date-specific. It is recommended that you include either the year or a reference date in the Format Name. By doing so, you will know which dates the system will use when you select the Format Name in the Total Compensation Report function. You may change the Format Name by going to the Update page.

Testing Your Total Compensation Statement Format

Creating The Total Compensation Report

Once you have defined a Format Name in the Total Compensation Setup function, you may create a report to verify that the statement layout is correct. Only you will be able to view this report, and it can be re-run as often as needed before generating the final statements for employees.



Access the Total Compensation Report function and enter information as follows:

- **Select Employee Population:** Select an organization level, legal entity/pay group or employee number.
- **Report Name:** To make this report identifiable in Report Master Listing, you may wish to include your report parameters, such as “TCR ABC Company”, “TCR Department 123”, “TCR Employee 1000”, etc.
- **Format Type:** Currently, the only available Format Type is “Letter-Benefits-Chart”. UnicornHRO may add more Format Types in the future.
- **Format Name:** Select the Format Name that you wish to use. This list contains the entries from Total Compensation Setup.
- **Exclude Letter To Employee:** If you wish to include the cover letter, leave this checkbox blank. If you only wish to produce the compensation statement without the cover letter, select this checkbox.
- **Effective Date of Salary, Benefit Enrollments and Paid Time Off:** Enter the Effective Date that the system will use to get the employee’s information from the following functions:
    - Compensation Methods and Salary Change
    - Benefit Enrollment
    - Paid Time Off
- **Report Type:** While you are in the testing phase, select the “Create PDF file(s) to be viewed only in Report Master Listing”. By doing so, only you will be able to see the report. After you have made any necessary adjustments to the format and re-run the report, you may select one of the options to produce the individual employees’ PDF files. These are the PDFs that employees can see in the Total Compensation Statement function in Employee Self Service during the viewable time period specified in Benefit Enrollment Defaults. If you allow any Manager Services users to view these PDFs in the Total Compensation Statement function in Manager Services, the PDFs will be viewable regardless of the viewable time period, but a message will indicate whether or not they are currently in the Employee Self Service viewable period.

Important Note: *As a safeguard to prevent anyone from producing “test” statements that are viewable by employees, the system will not allow you to produce Employee Self Service PDFs during the viewable period. A message will appear if you attempt to do this and you will not be allowed to submit the job.*

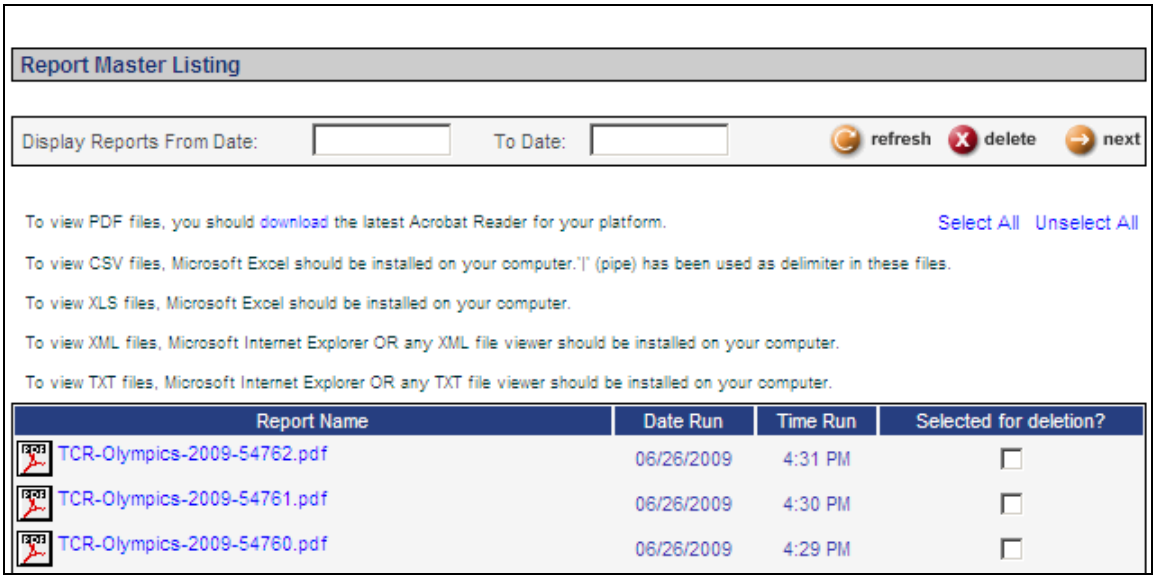
Fine Tuning the Total Compensation Report

When the Total Compensation Report job has completed, view it in Report Master Listing. There may be some changes needed so that all information is presented as you wish it to be shown. Below are considerations and helpful hints.

More than one entry in Report Master Listing may be produced. Because some employees may have more information than others, you may have statements that have 2 pages, 3 pages, 4 pages or 5 pages. Separate reports will be produced, one for each page layout. You may see separate Report Master Listing entries for the following:

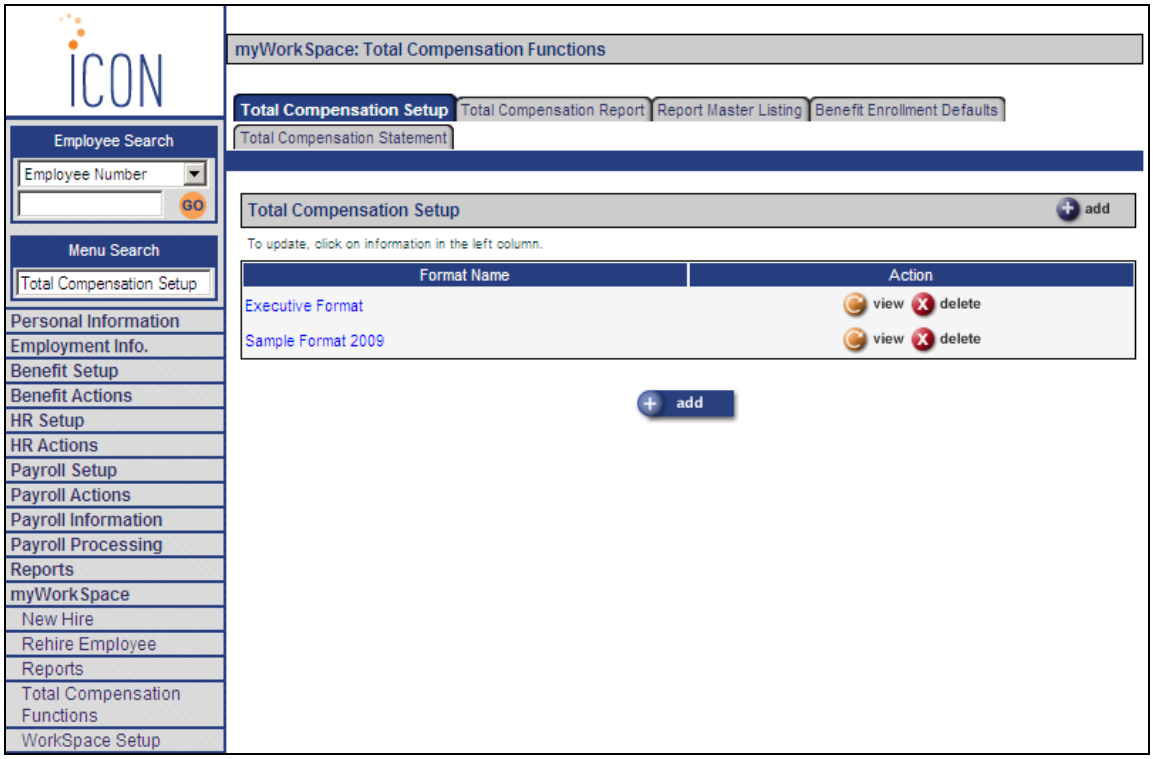
- 2 pages (or 1 page if you selected to not include the cover letter)
- 3 pages, where the 3rd page contains only the pie chart (or 2 pages with no cover letter)
- 3 pages, where the 3rd page contains data and the pie chart (or 2 pages with no cover letter)
- 4 pages, where the 4th page contains only the pie chart (or 3 pages with no cover letter)
- 4 pages, where the 4th page contains data and the pie chart (or 3 pages with no cover letter)
- 5 pages, where the 5th page contains only the pie chart (or 4 pages with no cover letter)

Here is an example of a job that produced 3 separate entries in Report Master Listing. They all have the Report Name that was entered when the job was submitted, in addition to a unique job number. This will let you know how many pages the longest statement will have. If you want to restrict statements to a certain number of pages, reduce the amount of data that is shown for the selected Format Name.



Set up a myWorkSpace with the Total Compensation functions. While you are adjusting the format of the Total Compensation Statement, you may find it helpful to set up a myWorkSpace with all of the functions related to Total Compensation Statements. This will group them all together for future reference, as well as give you quick access to the three functions that you will be working with while fine tuning the statement:

- Total Compensation Setup: adjust the format
- Total Compensation Report: run the report
- Report Master Listing: view the results



While you are making formatting changes, run the Total Compensation Report for a small employee population. You may wish to run the Total Compensation Report for a single employee while you are setting up the text and categories. Once you have these areas finalized, run the report for the entire population to make sure the statements appear as desired.

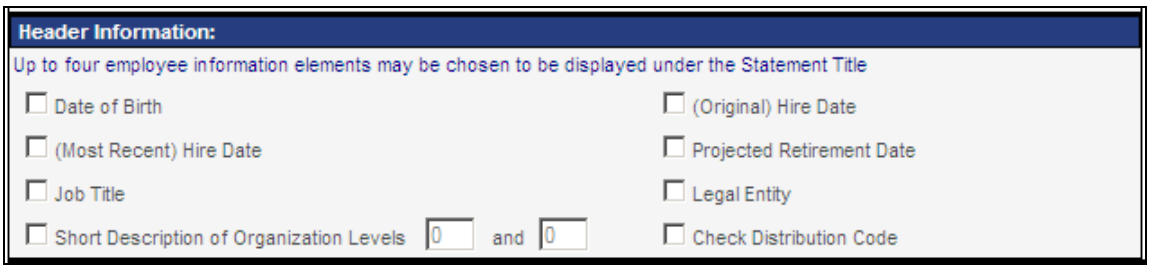
Anticipate employees' questions. As you review the statements, think of the questions your employees may ask, and try to add explanations within the available Text fields.

Check spelling and grammar. Make sure you check and double check the text that is entered in the Total Compensation Setup function. It does not include a spell checker or grammar checker!

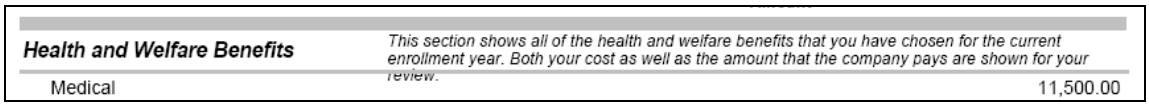
Review spacing on the cover letter. The paragraphs on the cover letter are set up with fixed spacing. They will have uniform spacing if they all have the same number of lines. There can be up to 4 lines per paragraph.

Header fields may overlap if there is too much data. If you select the Company in the header Information section, and the company name is long, and the second field in the same line is also long, the data may overlap as shown in this example.

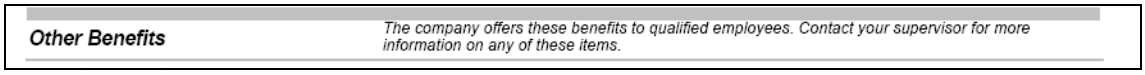
To prevent this from happening, you may wish to consider printing Organization Level 2 instead of the Company Name. Or, select header fields so that Company is the second field to be printed instead of the third field. The program will print the selected fields from left to right, top to bottom.



Limit Category Text to two lines. You are limited to approximately 200 characters and spaces at the top of each category. Due to where the line breaks occur, the text may carry over to 3 lines, which crosses the rule below the category heading as shown in this example.



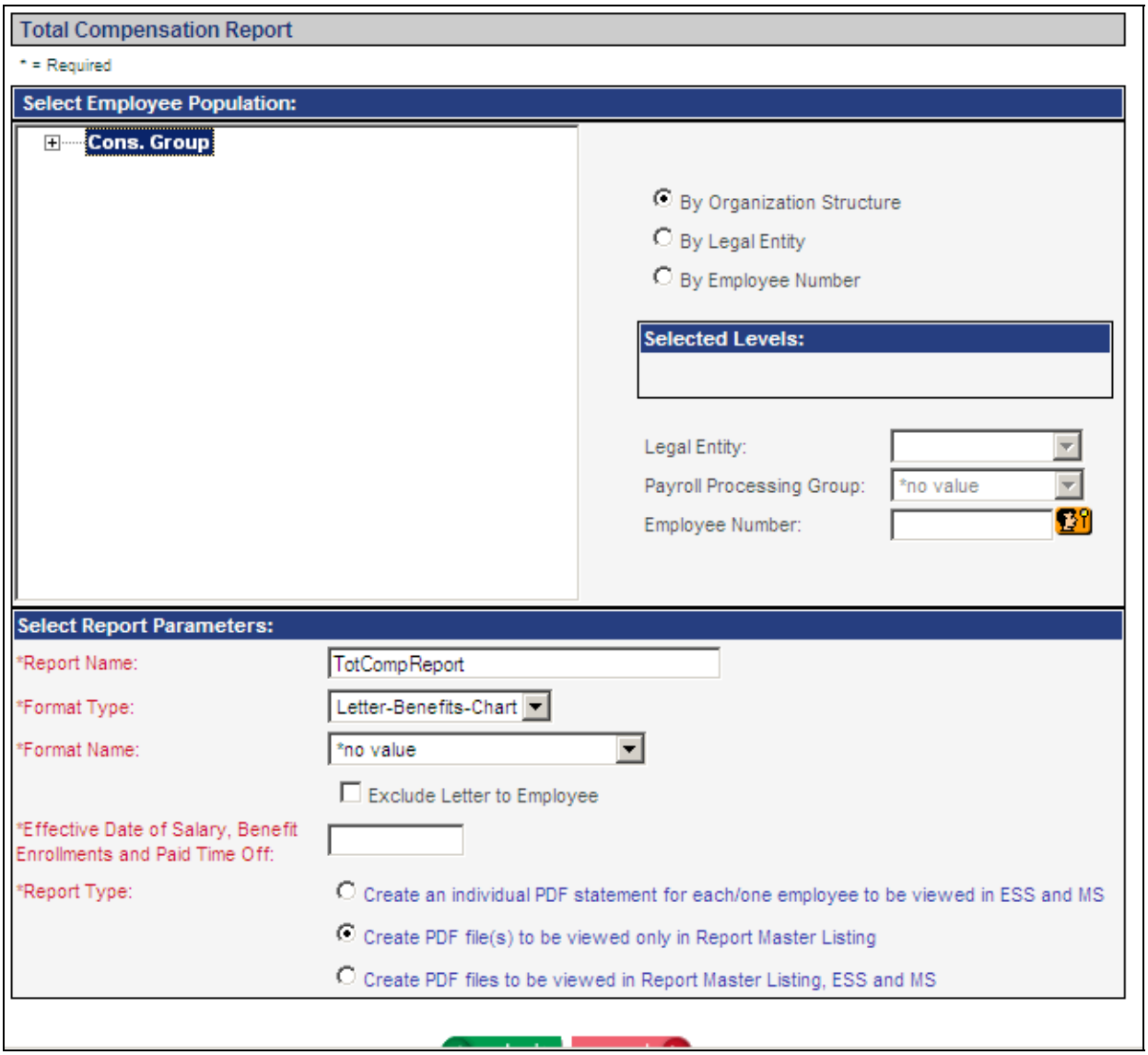
If possible, limit the text to 2 lines, as shown in this example:



Creating the Total Compensation Statements

Total Compensation Report

When you have finished testing the set-up of the format(s) you wish to use, it is recommended that you run the Total Compensation Report for all employees and review them. When the final format is ready, go to the Total Compensation Report function. If you do not need to recreate the report, select the first radio button called “Create an individual PDF statement for each/one employee to be viewed in ESS and MS.” If you want to create the report as well as the PDF statements, select the third radio button called “Create PDF files to be viewed in Report Master Listing, ESS and MS.”

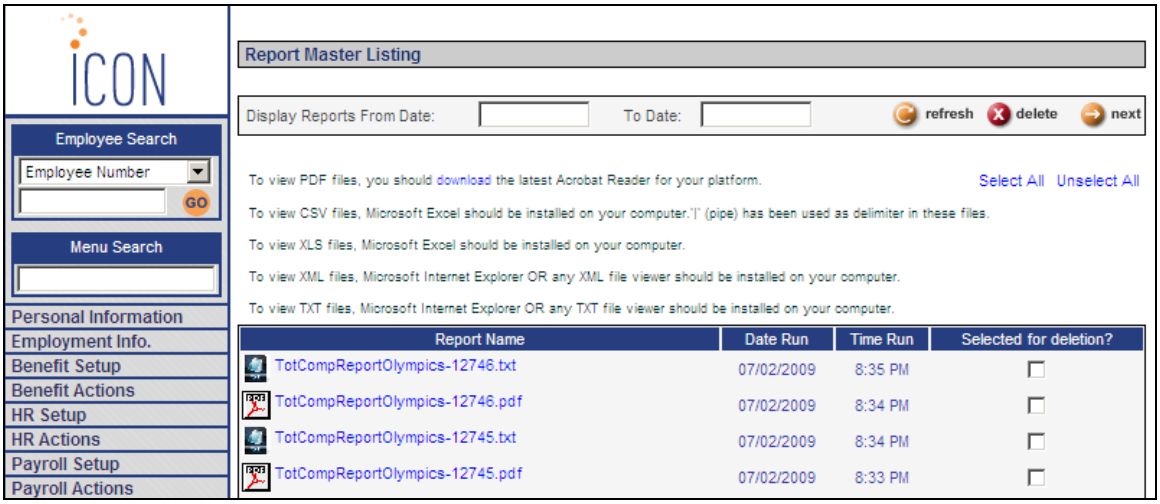


Note that only one PDF file is stored per employee. When you generate PDFs, any existing PDFs for the selected employee population will be overwritten.

PDFs can only be created during the non-viewable period for Employee Self Service. This is to prevent “test” PDFs from inadvertently being generated and overwriting employees’ “live” statements. You may run the report at any time, but PDFs cannot be created during the viewable time frame.

Due to the system resources required to produce PDFs with graphics for each employee, during the hours from 7 a.m. to 8 p.m. (Eastern) Monday through Friday the system will only create PDFs if you have selected an employee population with 20 or fewer employees. PDF jobs with more than 20 employees will be held until 8 p.m. and then will be automatically run. Reports can be run at any time.

When you create the PDFs, the system will create one report for each page style, along with a TXT file showing which employees were included. In the example below, the system created job 12745 with a 2-page format and the corresponding TXT file showing which employees were included. It also created job 12746 with a 3-page format and the corresponding TXT file.



Below is a sample TXT file showing the employees included in the corresponding PDF file:

```
Total Compensation Statement - Employee File Generation Log

300 - Kristen Clark: FILE CREATION OK
302 - Kristina Koznick: FILE CREATION OK
303 - Sarah Schwartz: FILE CREATION OK
305 - Joanna Mendes: FILE CREATION OK
313 - Scott Macartney: FILE CREATION OK
324 - Sandra Morrison: FILE CREATION OK
330 - Mary Jones: FILE CREATION OK
405 - Albert Tuipulotu: FILE CREATION OK
420 - Tony Smith: FILE CREATION OK
```

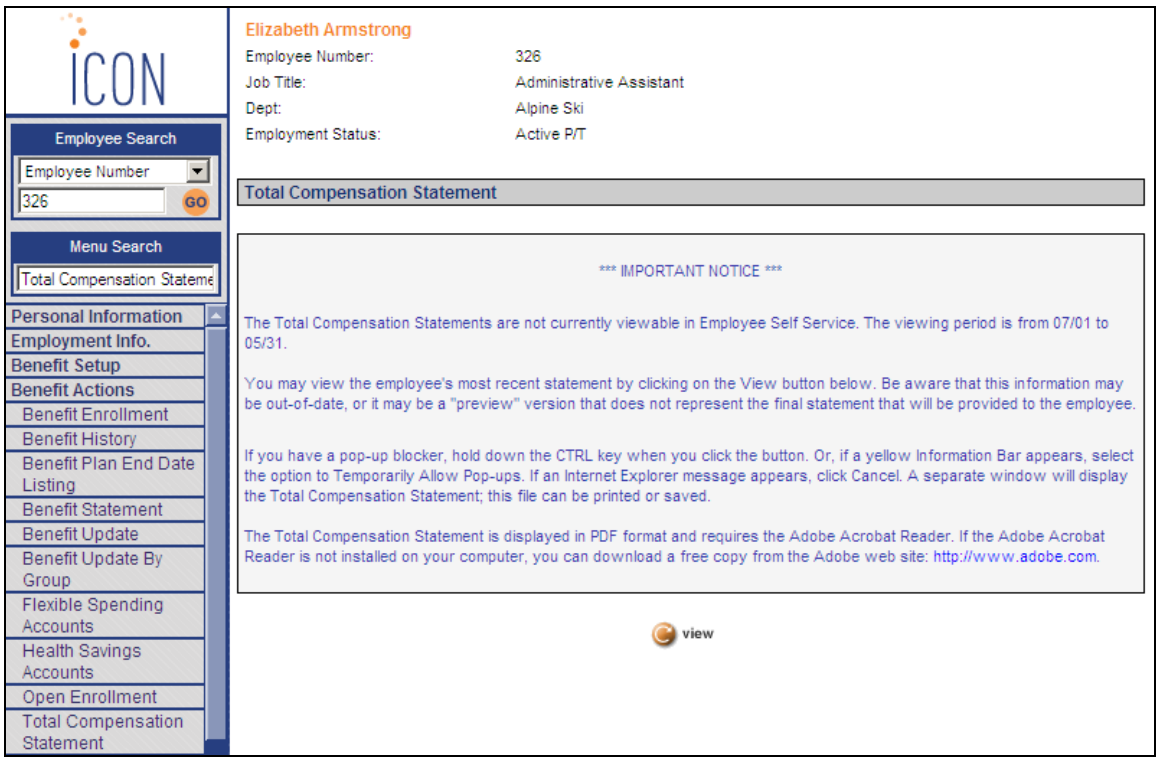
Viewing Total Compensation Statements in Manager Services

Function Security

To allow certain users to view an employee's Total Compensation Statement, grant Function Security to the Total Compensation Statement. The user must have at least Salary Inquiry authority in order to view an employee's statement. Keep in mind that in addition to compensation, the statement displays benefit and tax information. Only grant authority to those users who should be allowed to view this type of information.

Total Compensation Statements

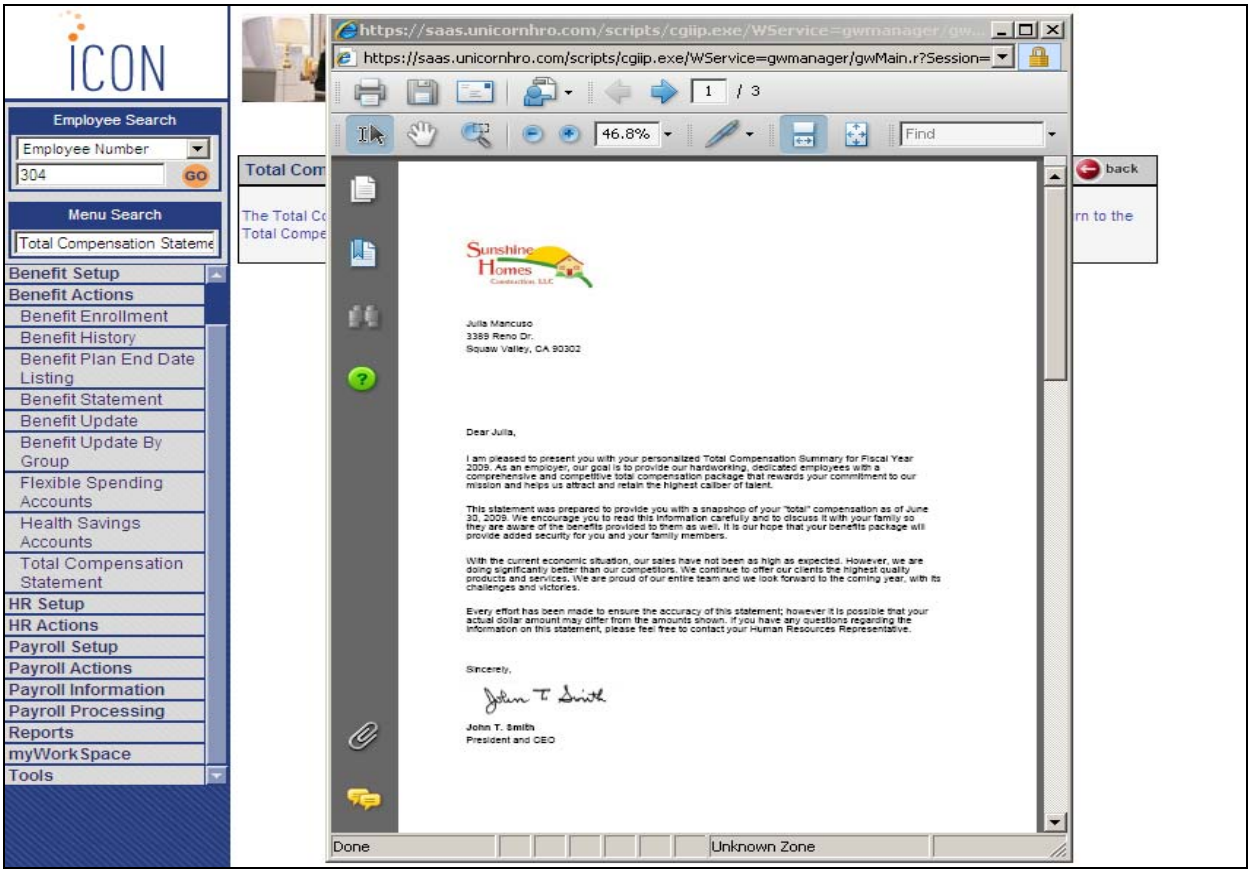
When the user first accesses this function, instructions are given, including what to do if a pop-up blocker is in effect. If the user accesses this function and it is not in the Employee Self Service viewable time frame, a message will appear, as shown in the first paragraph in the notice below. This will alert the user that employees should not yet be given a copy of the statement, as the final version may not have been produced.



If no PDF exists for the selected employee, a message will indicate this to the user.

If a PDF has been generated for the selected employee, a page such as the following will appear.

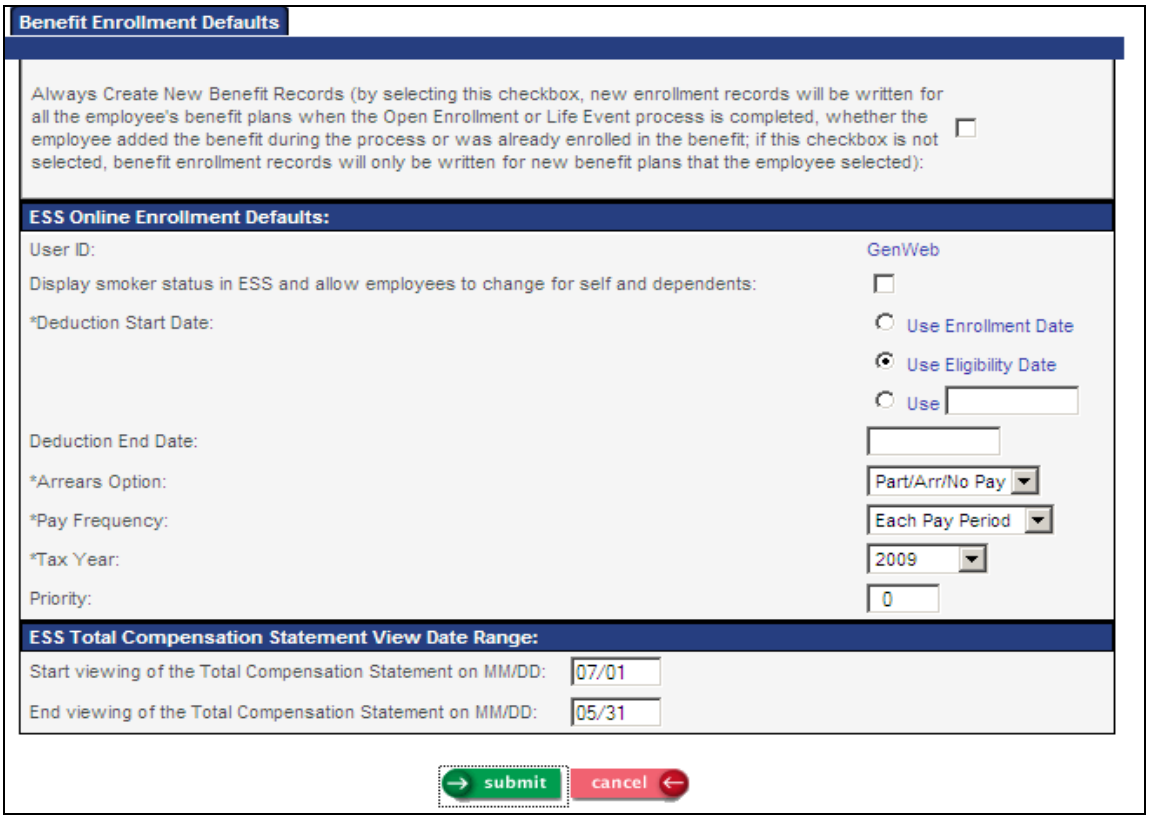
When the user clicks on the View button, a separate window will appear showing the PDF file.



Viewing Total Compensation Statements in Employee Self Service

Benefit Enrollment Defaults

When the PDFs for employees have been created and you are ready to grant access to them in Employee Self Service, go to the Benefit Enrollment Defaults function. Enter the start and end month and day in the ESS Total Compensation Statement View Date Range. In the example below, employees will be able to view the statements from July 1 of one year through May 31 of the next year.



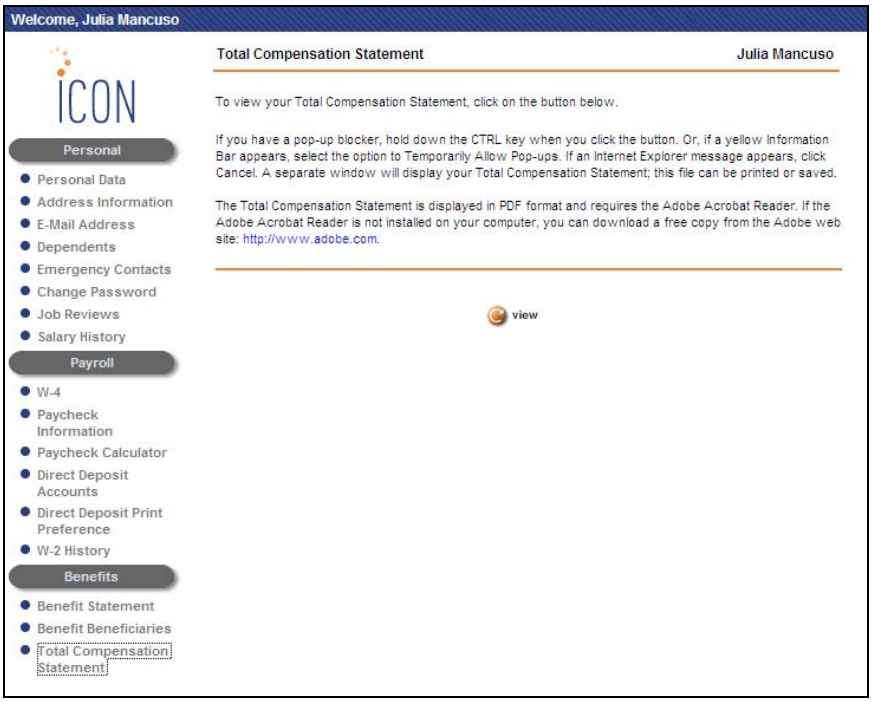
Employee Security

To allow your employees to view the Total Compensation Statements in Employee Self Service, access the Employee Security function in Manager Services and select the Total Compensation Statement function. This will cause the Total Compensation Statement to appear in the Benefits menu in Employee Self Service.

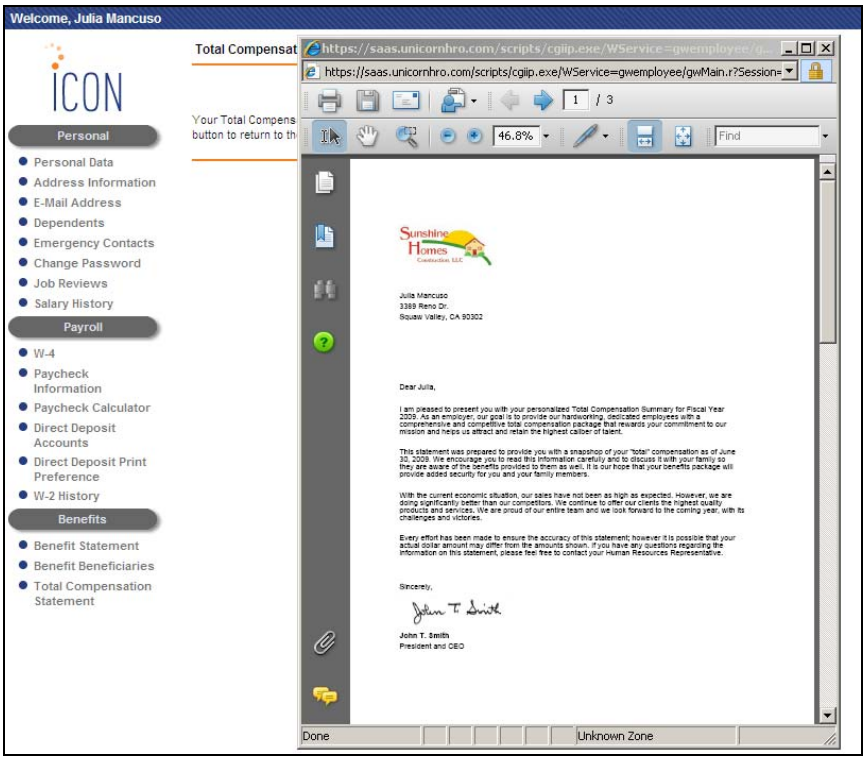
For employees to be able to view their statements, Employee Security for this function must exist, ***and*** today's date must be in the "viewable" date range set up in Benefit Enrollment Defaults.

Total Compensation Statement

When Employee Security exists for the Total Compensation Statement function, and today's date is in the viewable date range, the Total Compensation Statement will appear in the Employee Self Service menu. When the employee selects this function, instructions will be shown, including what to do if a pop-up blocker exists.



When the employee clicks on the View button, a separate window appears with the PDF file.



Sample Statement

Sunshine Homes Construction LLC

Personalized Benefit Statement For Ms. Mancuso

Date of Birth: 03/09/1984 ***Hire Date:*** 03/01/2001

Job Title: Olympiad

Information shown on this statement is for the 12-month period ending June 30, 2009.

	Benefit Option	Coverage Amount	Employee Contribution	Company Contribution
Compensation	*Your annualized base pay is shown. Bonuses and commissions earned for the 12 months ended June 30, 2009 are also shown.*			
Base Salary				56,000.00
Bonus				3,000.00
	Total Compensation			$59,000.00
Health and Welfare Benefits	*You are enrolled in the following benefits. Your contribution as well as the company's contribution are shown.*			
Medical - Medical Coverage	Employee + One		3,600.00	7,200.00
Life Insurance - Life Insurance	Main Plan	112,000.00		161.28
	Total Health and Welfare Benefits		$3,600.00	$7,361.28
Employment Tax and Insurance	*The company pays the following taxes and insurance on your behalf.*			
Federal Unemployment				56.00
FICA/Medicare				626.56
FICA OASDI				2,679.07
State Unemployment Insurance				1,335.00
	Total Employment Tax and Insurance			$4,696.63
Retirement and Savings	*The company contributed the following amounts to your retirement account(s) for the 12 months ended June 30, 2009.*			
401(k) Plan			3,000.00	1,500.00
	Total Retirement and Savings		$3,000.00	$1,500.00
Paid Time Off	*Paid time off is designed to help all employees achieve a healthy work/life balance. Your accrued hours as of June 30, 2009 are shown. Refer to your pay stub for your current balances.*			
Personal Hours: 32.000		861.54		
Sick Time Hours: 40.000		1,076.92		
Vacation Hours: 120.000		3,230.77		
	Total Paid Time Off	$5,169.23		
Other Benefits	*The company offers these benefits to qualified employees. Contact your supervisor for more information on any of these items.*			
Tuition Assistance		5,250.00		
Adoption Benefits		5,000.00		
	Total Other Benefits	$10,250.00		
TOTAL COMPENSATION				**$72,557.91**

Personalized Benefit Statement For Ms. Mancuso

Hire Date: 03/01/2001 ***Job Title:*** Olympiad

In addition to the pay and benefits described above, we provide benefit eligible active employees the opportunity to participate in a range of discounted supplemental benefit plans. Contact your Benefits Representative for more information.

Compensation Components

Components of your total compensation package are shown here with their percentages.