Heartland

Online Payroll Client User Guide

Rev. 9/22/23

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Thank you for choosing Heartland Payroll Solutions!

To log into your payroll account, visit: www.HeartlandPayroll.com

The security of your data is important to us! Please reach out to your Payroll Support Team if you have any questions.

Client Security Features

Login Credentials

Please don't share your email address and password. We can set up multiple users on your account for added security.

Reset Password or Set Up access for the first time

- Select the *Forgot Your Password* link on the login screen.
- A verification code will then be sent to your email address.
- Enter the code and complete the Multi-Factor Authentication verification.

Notifications via Email

- *Payroll Submission*: Reminder to process your payroll
- *Payroll Notification*: Notification that a payroll has been processed
- *Direct Deposit Change Notification*: Alert of direct deposit changes

Authorization when Contacting Heartland

We will ask you to confirm your Client ID, Authorization PIN, and the Last 4 digits of the FEIN to verify identity over the phone.

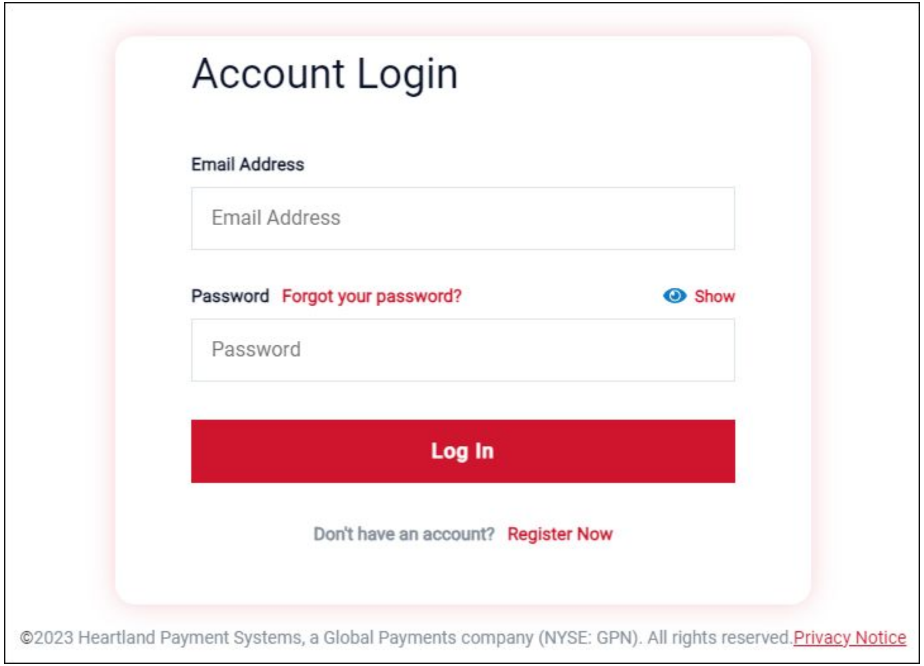
Accessing the Heartland Payroll System | Go to www.HeartlandPayroll.com, and log in with your email address and password.

Registration Link Expired?
Select ***Forgot your password***. Once your email has been registered, you can finalize your access even if the link expired!

Heartland Payroll Links to Bookmark:

Employer/Admin: www.HeartlandPayroll.com

Employee Portal: m.HeartlandCheckView.com

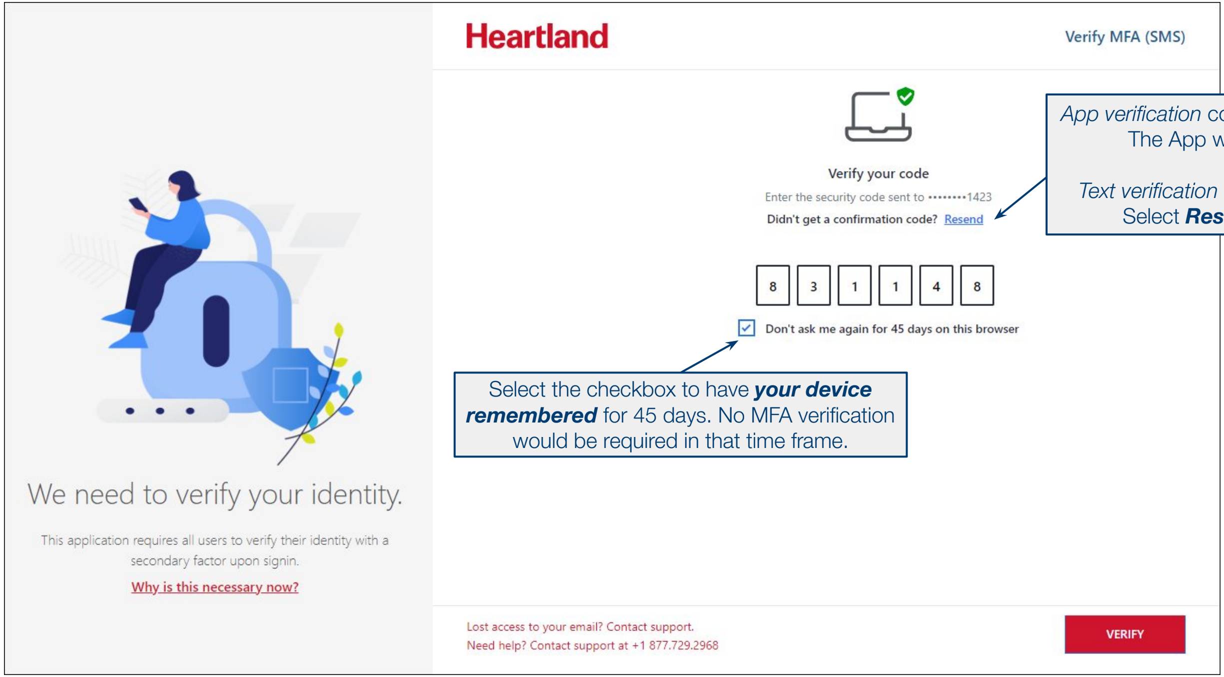


Multi-Factor Authentication (MFA) | MFA is an additional layer of security included in the setup process of your access to the Heartland Payroll System.

What is Multi-Factor Authentication (MFA)?
Multi-Factor Authentication requires you to verify your identity when logging in to ensure that you, and only you, can access your account.

What are the authentication method options?

1. Text message (SMS) to your mobile phone
2. Authenticator app installed on your device



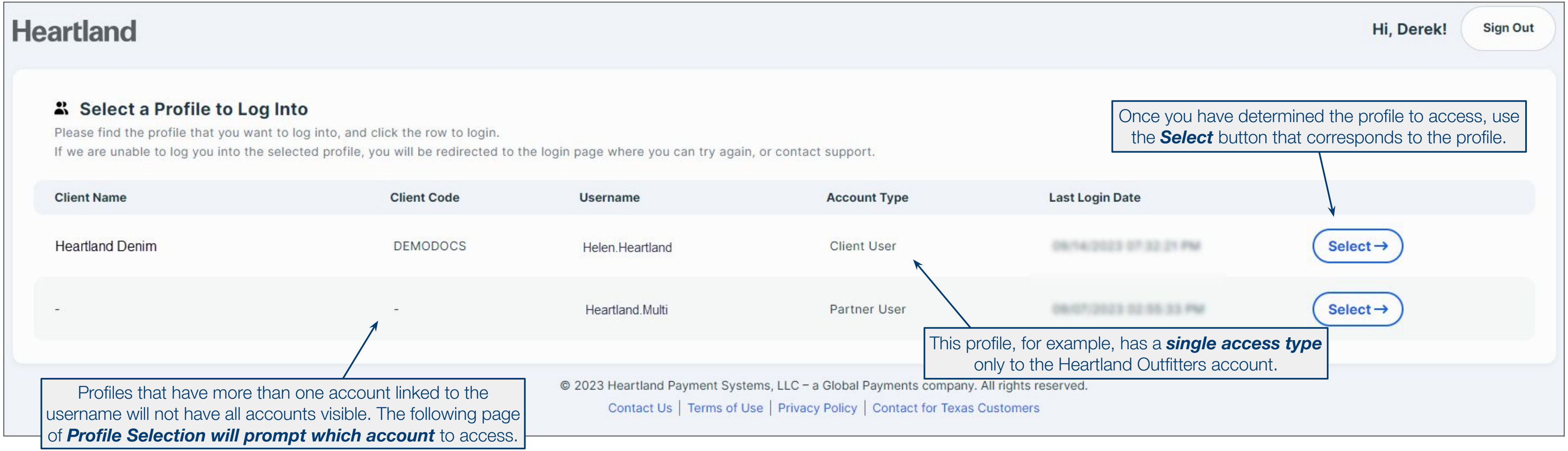
App verification codes ***refresh*** every ***30 seconds.*** The App will refresh ***automatically*.**

Text verification codes ***expire*** after ***5 minutes.*** Select ***Resend*** for a new SMS code.

Select the checkbox to have ***your device remembered*** for 45 days. No MFA verification would be required in that time frame.

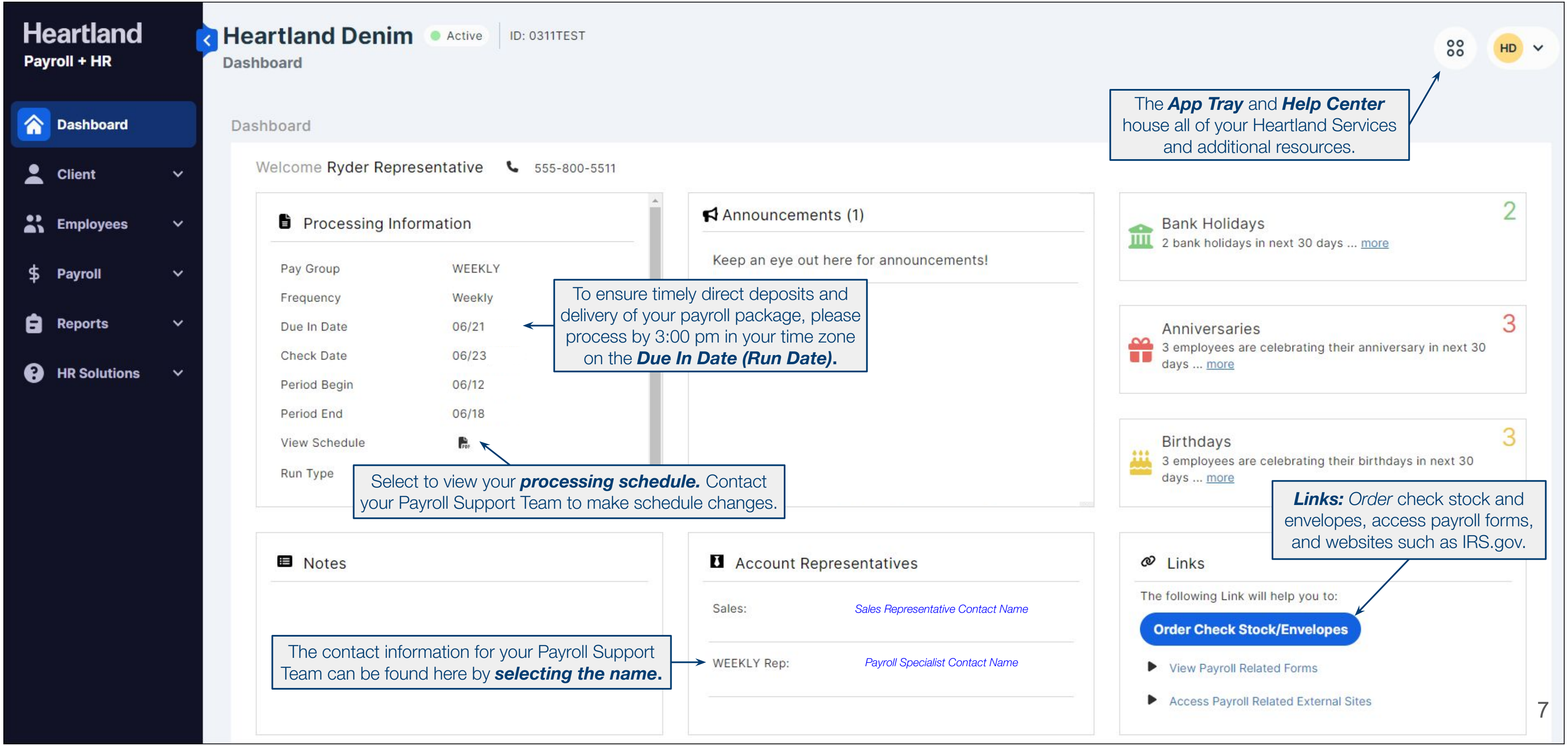
Profile Selection |

Client users may have access to multiple accounts or user types. If you are ***not prompted*** to select a Profile, you have a single access type and will not need to change between profiles.

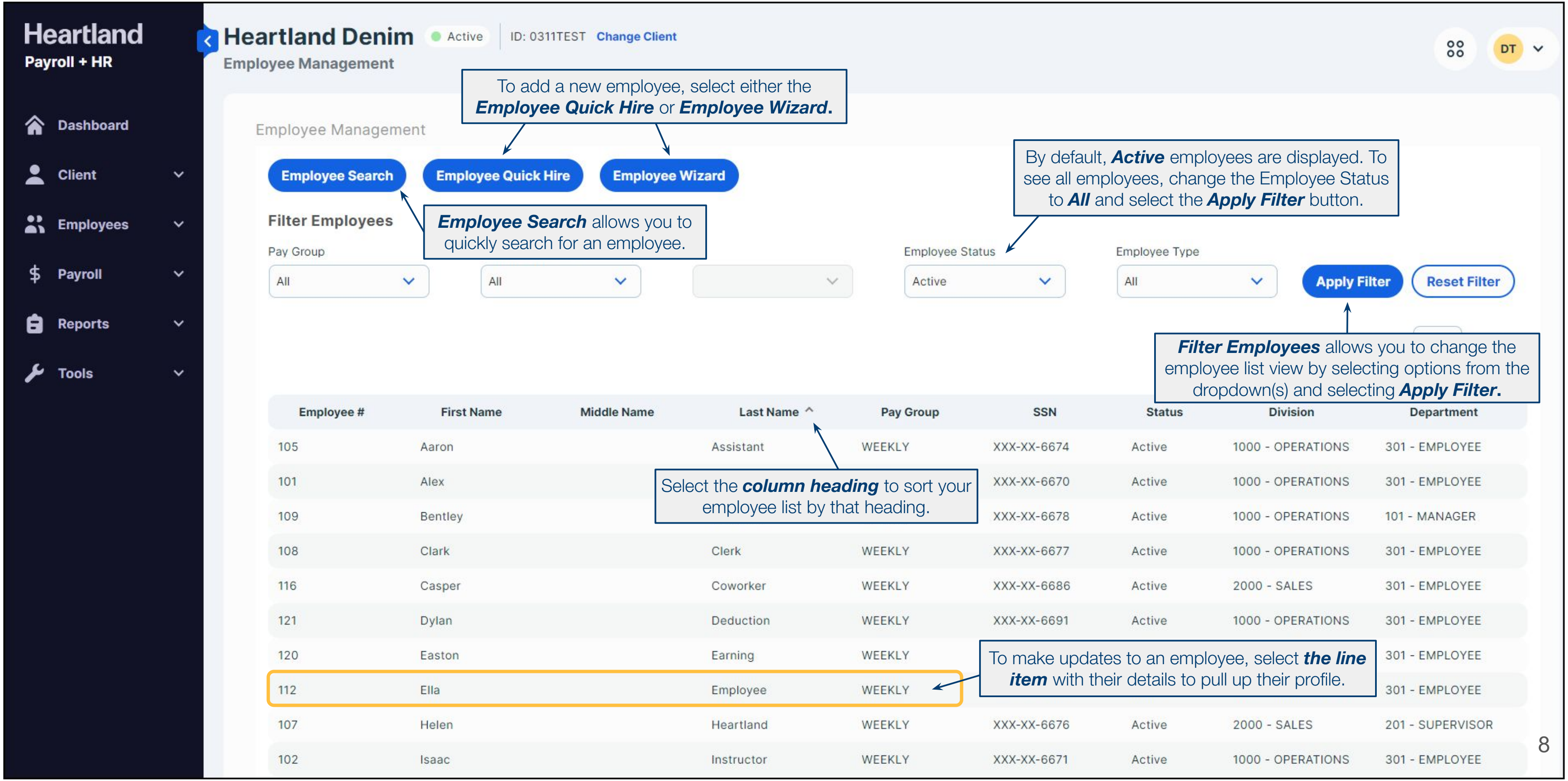


*We offer **customized access to our system**: single client access, multi-client access, view-only data, payroll entry only, or reports only access. Contact your Payroll Support Team to discuss user access types and restrictions.*

Dashboard | Upcoming processing information, announcements, important dates, and links to helpful payroll information are found here. You can use the App Tray to navigate to your other Heartland Services.



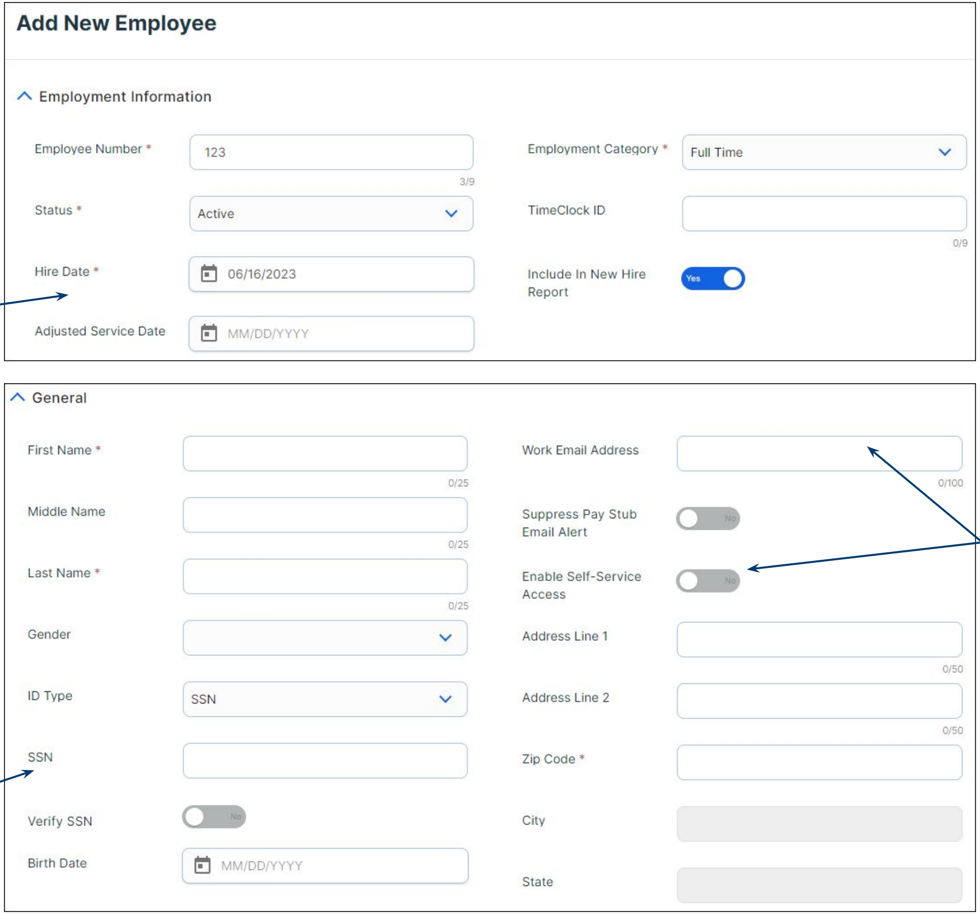
Employees | Manage existing employees, add new employees, and modify employee profiles.



Employee #	First Name	Middle Name	Last Name	Pay Group	SSN	Status	Division	Department
105	Aaron		Assistant	WEEKLY	XXX-XX-6674	Active	1000 - OPERATIONS	301 - EMPLOYEE
101	Alex				XXX-XX-6670	Active	1000 - OPERATIONS	301 - EMPLOYEE
109	Bentley				XXX-XX-6678	Active	1000 - OPERATIONS	101 - MANAGER
108	Clark		Clerk	WEEKLY	XXX-XX-6677	Active	1000 - OPERATIONS	301 - EMPLOYEE
116	Casper		Coworker	WEEKLY	XXX-XX-6686	Active	2000 - SALES	301 - EMPLOYEE
121	Dylan		Deduction	WEEKLY	XXX-XX-6691	Active	1000 - OPERATIONS	301 - EMPLOYEE
120	Easton		Earning	WEEKLY				301 - EMPLOYEE
112	Ella		Employee	WEEKLY				301 - EMPLOYEE
107	Helen		Heartland	WEEKLY	XXX-XX-6676	Active	2000 - SALES	201 - SUPERVISOR
102	Isaac		Instructor	WEEKLY	XXX-XX-6671	Active	1000 - OPERATIONS	301 - EMPLOYEE

Employee Quick Hire | The quickest way to add employees. The required fields are marked with a ***red asterisk**** .

Reach out to your Payroll Support Team for assistance with any fields.



The ***Hire Date*** defaults to the current date. Update this to the actual date the employee began working for your company.

Social Security Number (SSN) is a requirement of the IRS and state tax agencies for wage reporting.

Self-Service is a free option allowing your employees to set up an account to view and print their own pay stubs.

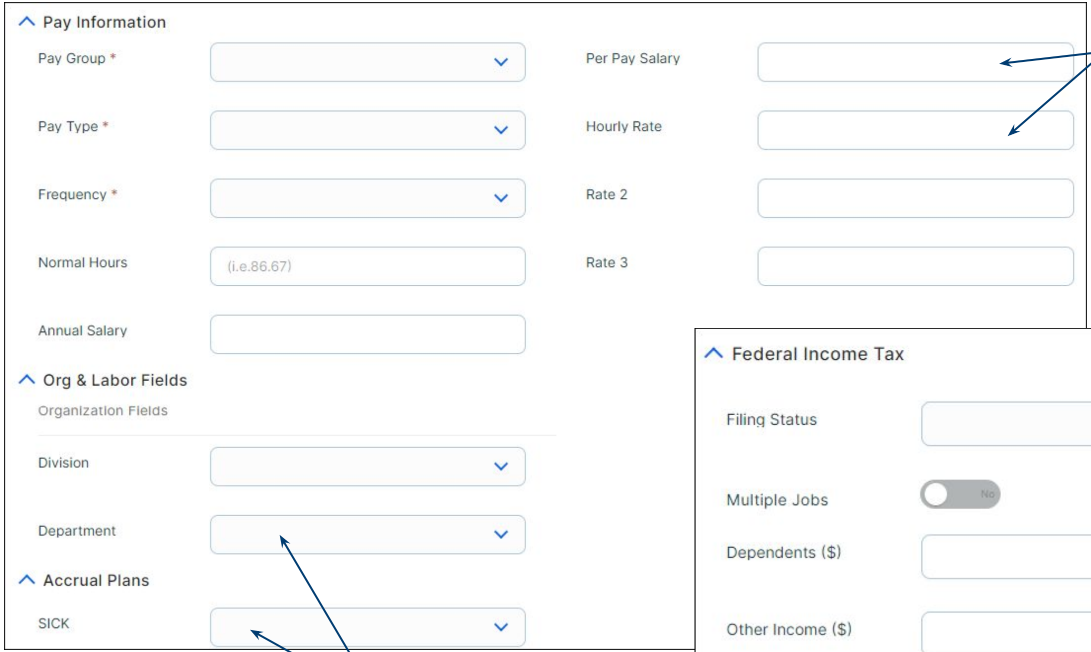
Enter the employee's email address and toggle the ***Enable Self-Service Access*** option to ***Yes.***

Once saved, the system sends an email to the employee to finalize the setup.

If no email address is available at the time of hire, this option can be activated at a later date.

Employee Quick Hire | *Continued*

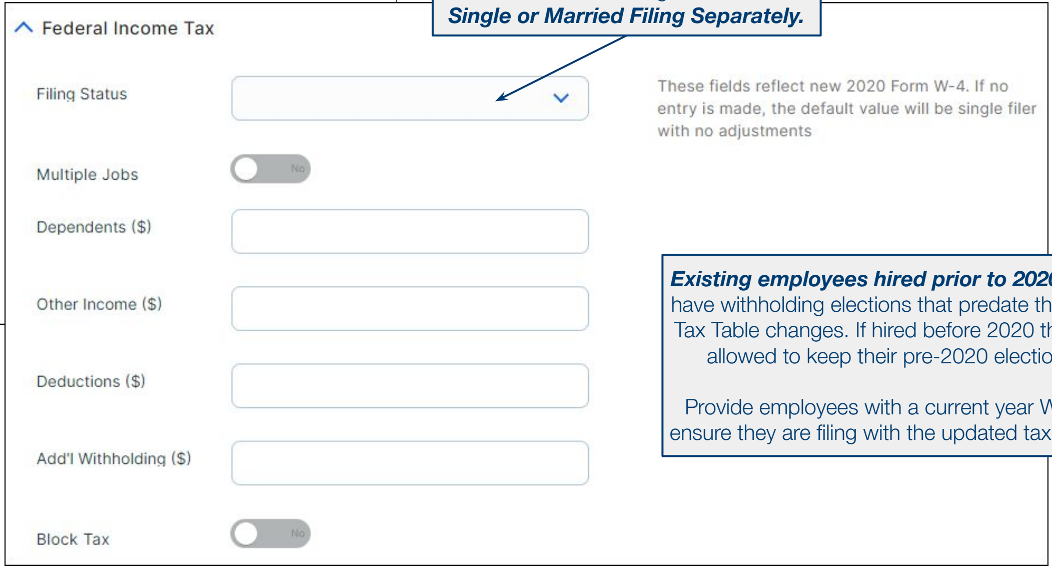
The quickest way to add employees. The required fields are marked with a ***red asterisk**** .
Reach out to your Payroll Support Team for assistance with any field.



Annual Salary, Per Pay Salary, and ***Hourly Rate*** are associated items. Entering data in one field will update the two corresponding fields.

Certain entry fields will only be visible if your organization utilizes them.
Division, Department, and ***Accruals*** can all be added to your account at any time.

If the ***Federal Income Tax*** section is left blank, the default Filing Status will be ***Single or Married Filing Separately.***

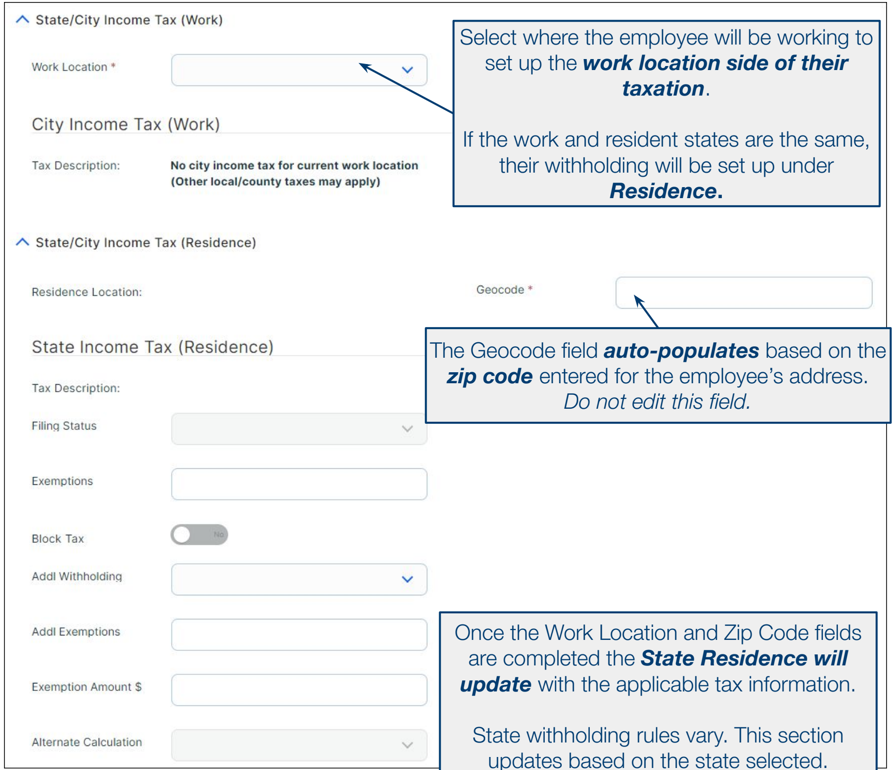


Existing employees hired prior to 2020 could have withholding elections that predate the 2020 Tax Table changes. If hired before 2020 they are allowed to keep their pre-2020 elections.

Provide employees with a current year W-4 to ensure they are filing with the updated tax tables.

Employee Quick Hire | *Continued*

The quickest way to add employees. The required fields are marked with a ***red asterisk**** .
Reach out to your Payroll Support Team for assistance with any field.



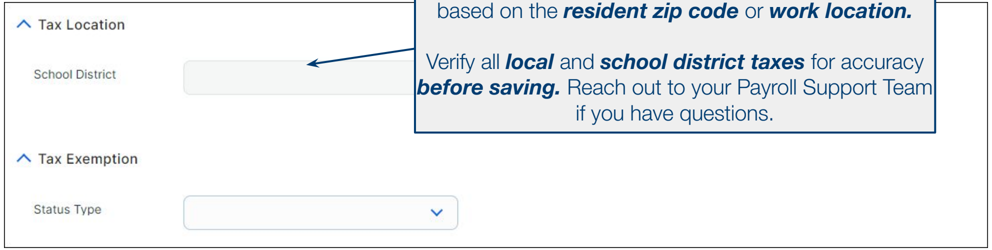
Select where the employee will be working to set up the ***work location side of their taxation***.

If the work and resident states are the same, their withholding will be set up under ***Residence.***

The Geocode field ***auto-populates*** based on the ***zip code*** entered for the employee's address. *Do not edit this field.*

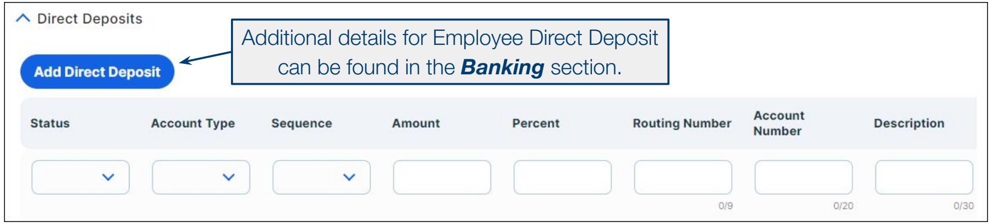
Once the Work Location and Zip Code fields are completed the ***State Residence will update*** with the applicable tax information.

State withholding rules vary. This section updates based on the state selected.

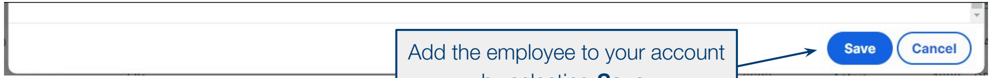


The Heartland system updates options for ***Local Taxes*** based on the ***resident zip code*** or ***work location.***

Verify all ***local*** and ***school district taxes*** for accuracy ***before saving.*** Reach out to your Payroll Support Team if you have questions.

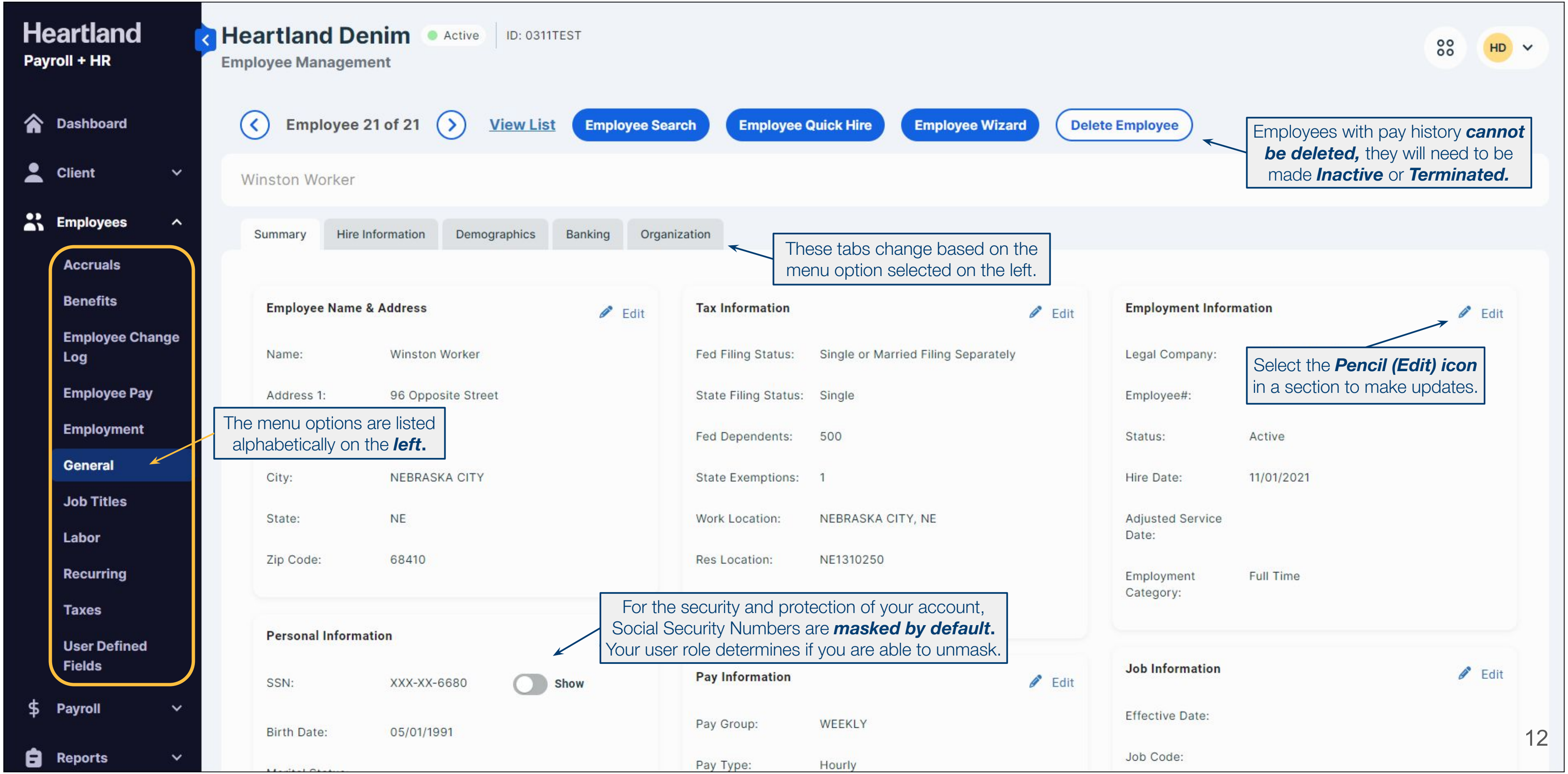


Additional details for Employee Direct Deposit can be found in the ***Banking*** section.

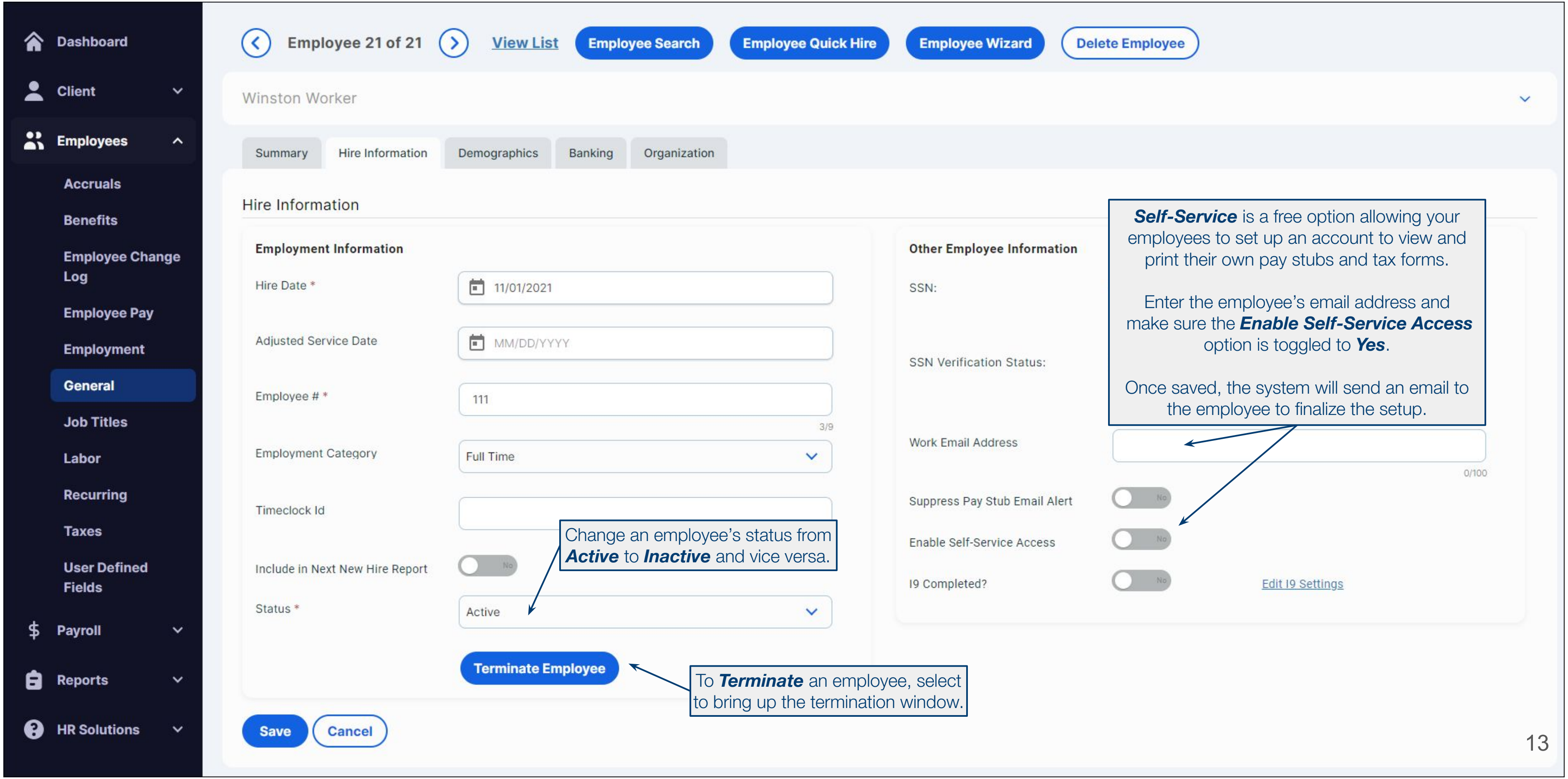


Add the employee to your account by selecting ***Save.***

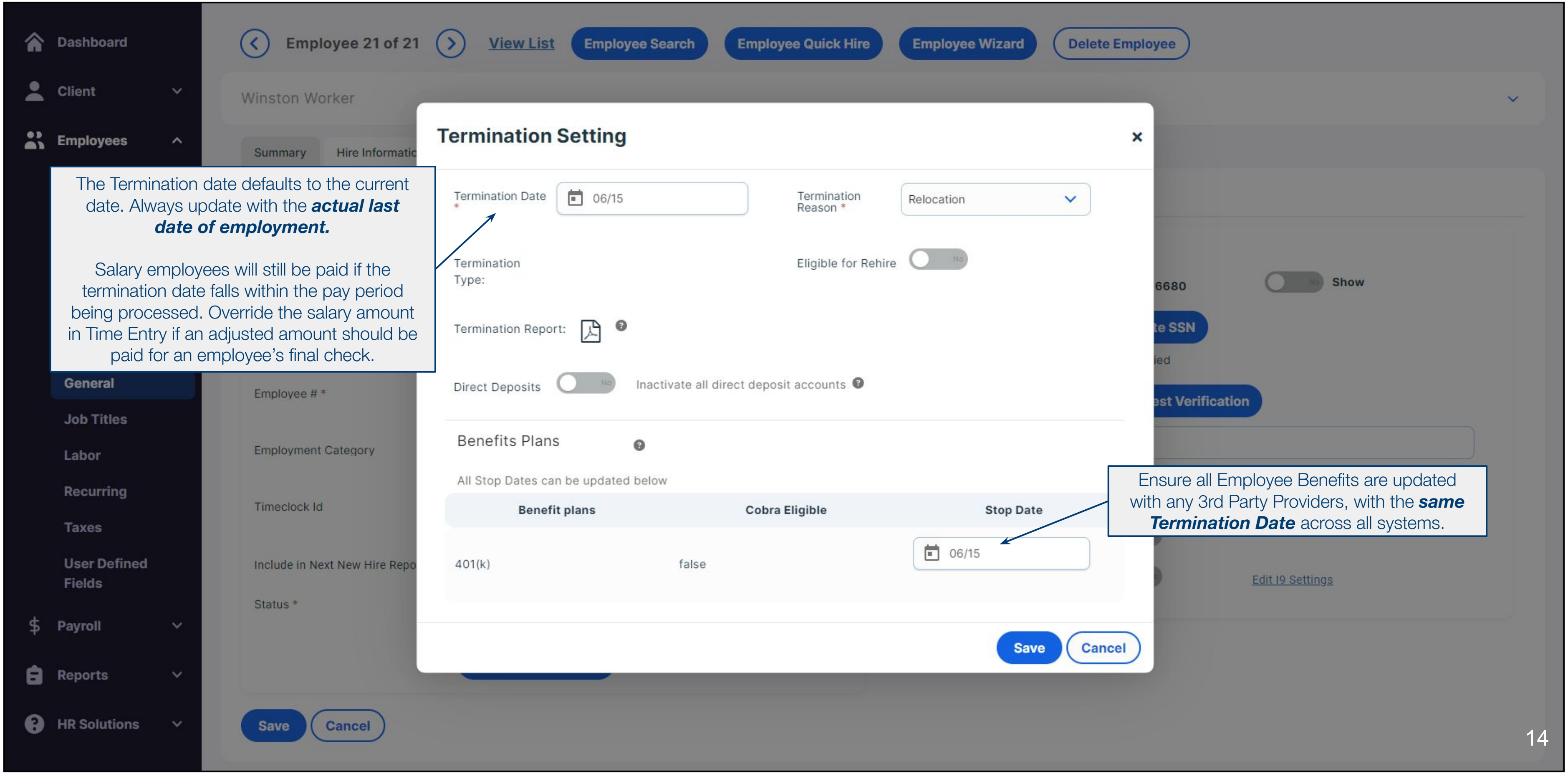
Summary | Provides a snapshot of employee information. You can edit this information by selecting the applicable pencil icon.



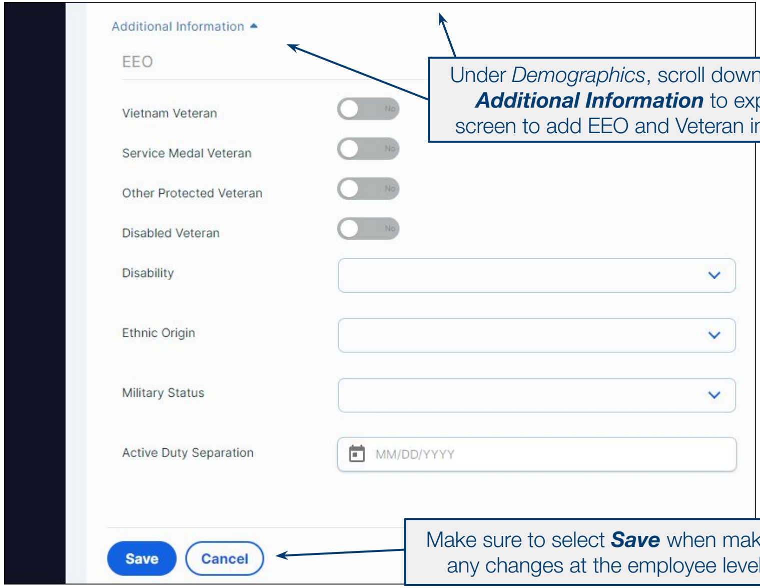
Hire Information | Change an employee’s status, terminate an employee, and update an employee’s Self-Service access.



Terminations | This screen is used to terminate an employee. A termination reason will need to be selected in order to save.



Demographics | Edit the employee's name, address, personal and EEO information.



Under *Demographics*, scroll down and select ***Additional Information*** to expand the screen to add EEO and Veteran information.

Make sure to select ***Save*** when making any changes at the employee level.

Did you know ***Heartland offers*** HR Services, POS systems, Credit Card processing, and many more ***HCM Products?***

EEO and Veteran status would associate with your ***Work Opportunity Tax Credit*** (WOTC). Contact your Payroll Sales Team to discuss what HCM Products would ***work well for your organization!***

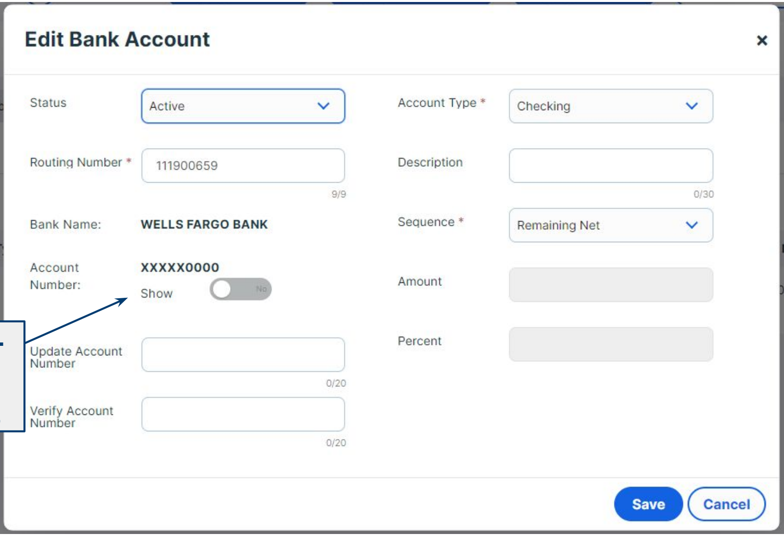
Banking | Add or edit an employee's direct deposit information. For complete details see the *Employee Direct Deposit Job Aid* found on your *Dashboard → Links → View Payroll Related Forms*.

Is ***Self-Service*** enabled on your account? Contact your Payroll Support Team to ***activate Enhanced Self-Service.***

Employees can update their personal data, ***banking info***, and tax filing themselves. Employers can even make the change automatic or have a payroll approver review.

For security, the account number is ***masked by default.***

Your user role determines if you are able to unmask. Toggle the slider to ***Yes*** to view the full account number.



Routing Number: 9 digits in length. Routing numbers that start with 5 are internal to the bank and will not work for direct deposit.

Security Features: Any time direct deposit information is added or changed for an employee, an email notification is sent out to notify you of direct deposit changes. An employee direct deposit change log is also available to review changes before processing payroll.

An employee can have ***up to 9 bank accounts*** set up for direct deposit purposes.

Status

Active: Sends funds via direct deposit to the account without verifying account information. We recommend using *Prenote* status for all new direct deposit accounts.
Prenote (Recommended): Sends a test file to the bank to verify the account is valid; the employee will receive a live check until verified. This can take up to 1-2 payroll cycles.
Inactive: No deposit will be made to the account until the status is changed.

Account Type

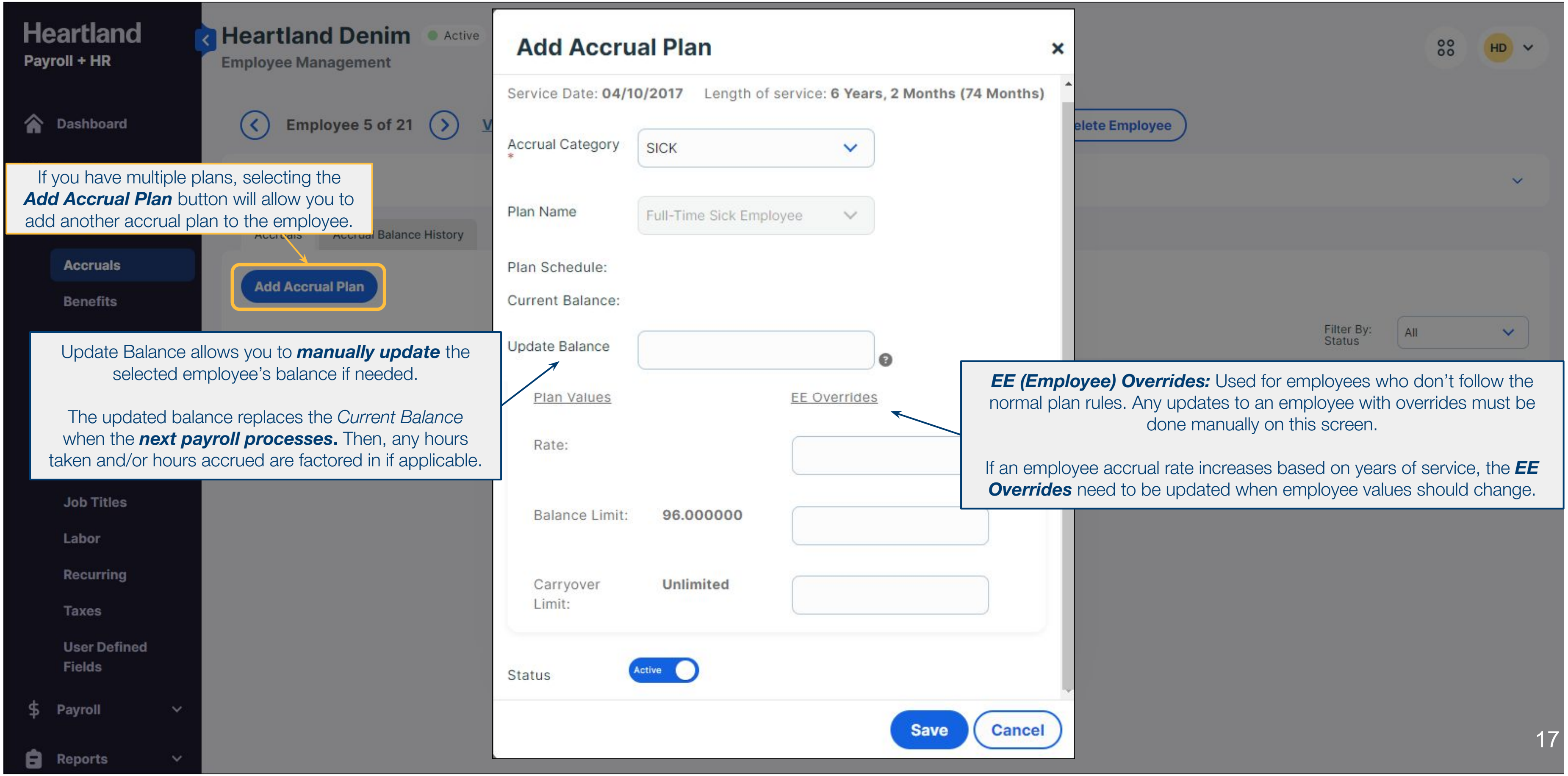
Checking, Prepaid Card or Savings: Account type on employee bank documentation.

Sequence

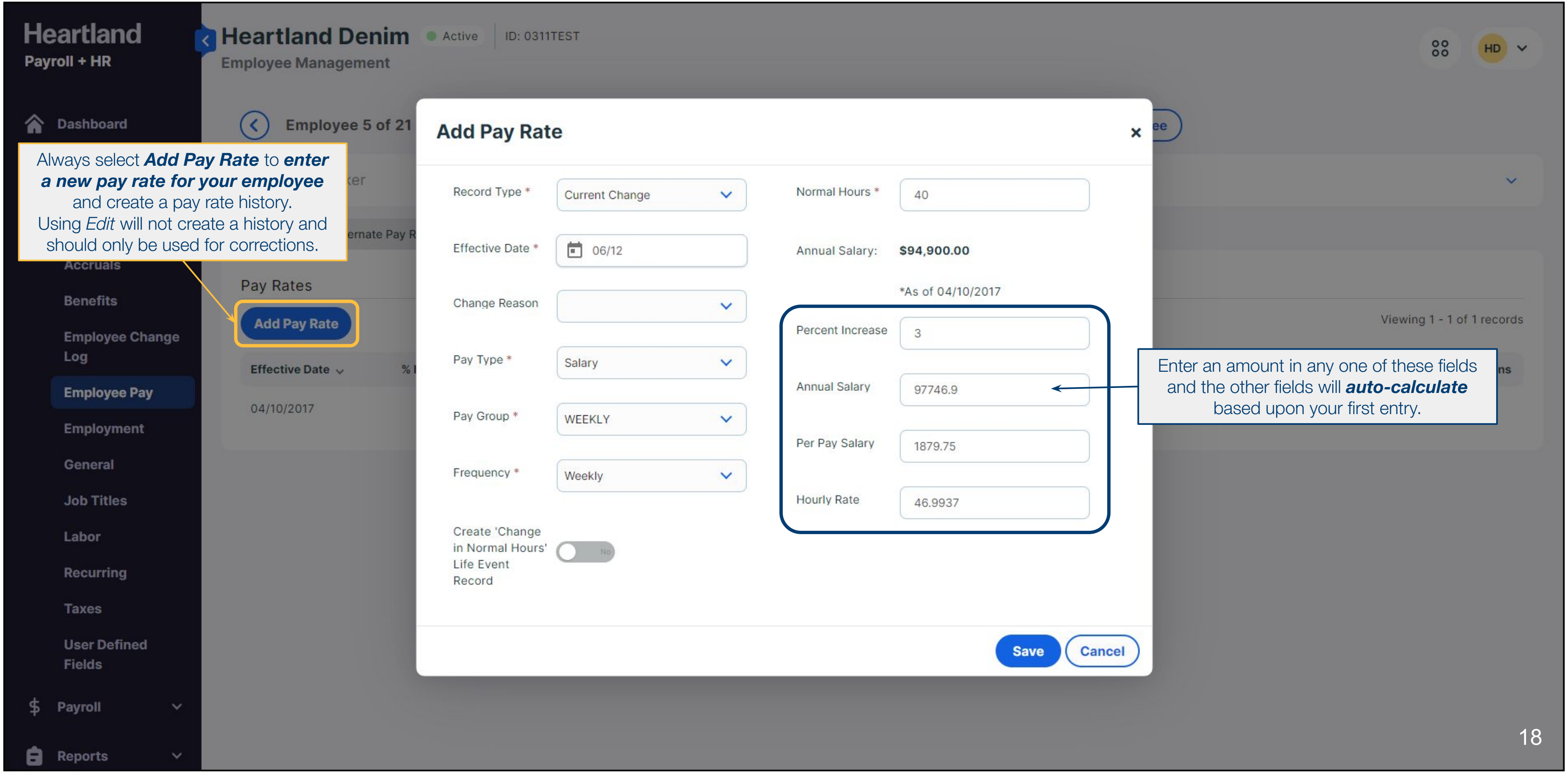
1, 2, 3 (Numbers): Used for partial direct deposits. Sequence by order of importance. One being first, see below. Can be an *Amount* or *Percentage*.
Example: Partial 1 or Sequence 1 - $50.00 to Savings & Sequence Remaining Net to Checking
Remaining Net: One direct deposit account for the entire net pay or the last account to receive the remaining net pay after partial direct deposits.

Accruals |

View or override accrual plan amounts for an employee. Any change to the plan as a whole should be communicated to your Payroll Support Team. If you are not currently tracking accruals through payroll, you will not see any information on this screen.



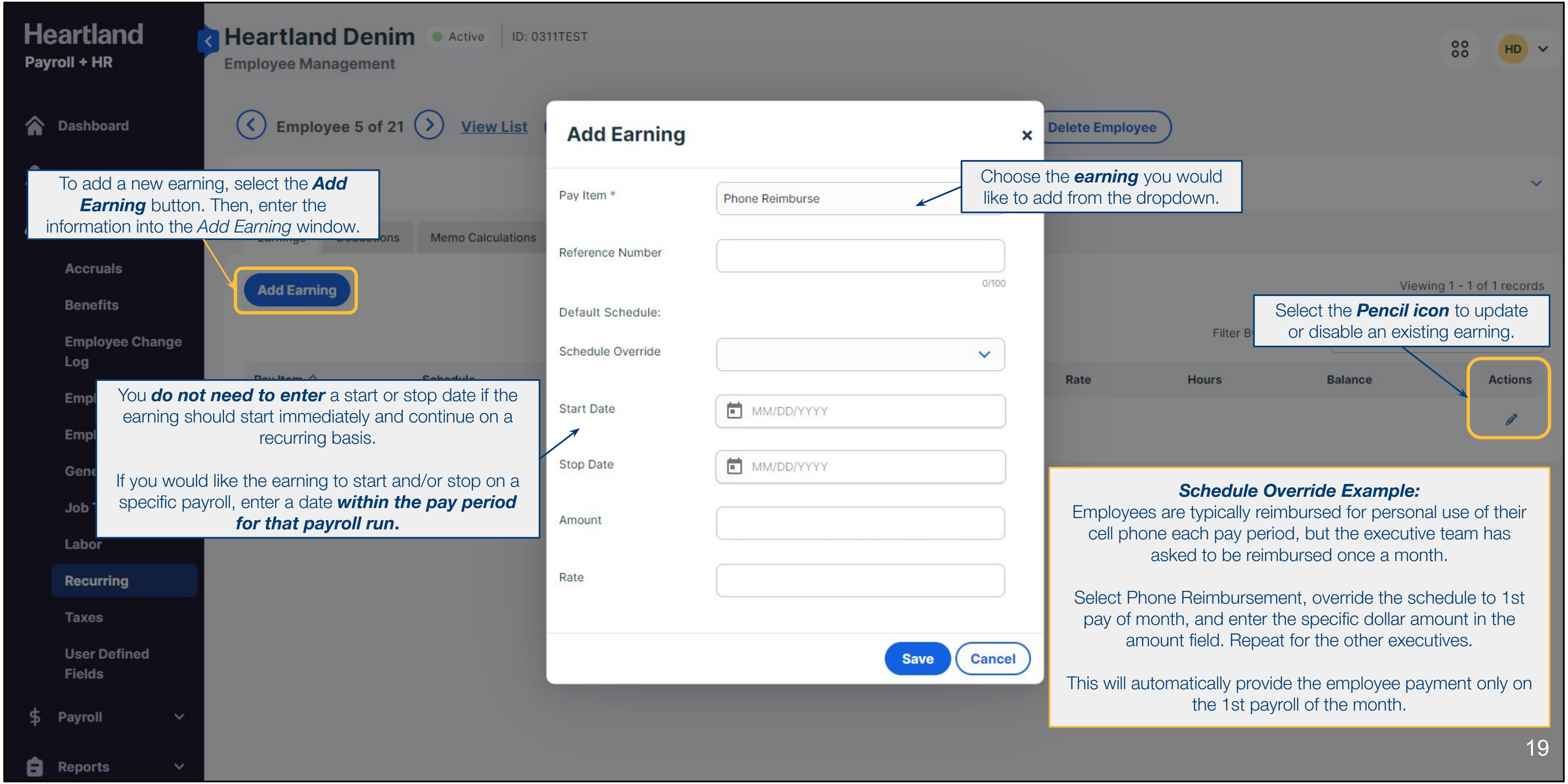
Pay Rate | Update employee pay information.



Always select ***Add Pay Rate*** to ***enter a new pay rate for your employee*** and create a pay rate history. Using *Edit* will not create a history and should only be used for corrections.

Enter an amount in any one of these fields and the other fields will ***auto-calculate*** based upon your first entry.

Recurring Earnings | Add new earnings and update existing ones. One-time earnings should be entered in the Payroll section.



To add a new earning, select the ***Add Earning*** button. Then, enter the information into the *Add Earning* window.

Choose the ***earning*** you would like to add from the dropdown.

Select the ***Pencil icon*** to update or disable an existing earning.

You ***do not need to enter*** a start or stop date if the earning should start immediately and continue on a recurring basis.

If you would like the earning to start and/or stop on a specific payroll, enter a date ***within the pay period for that payroll run.***

Schedule Override Example:

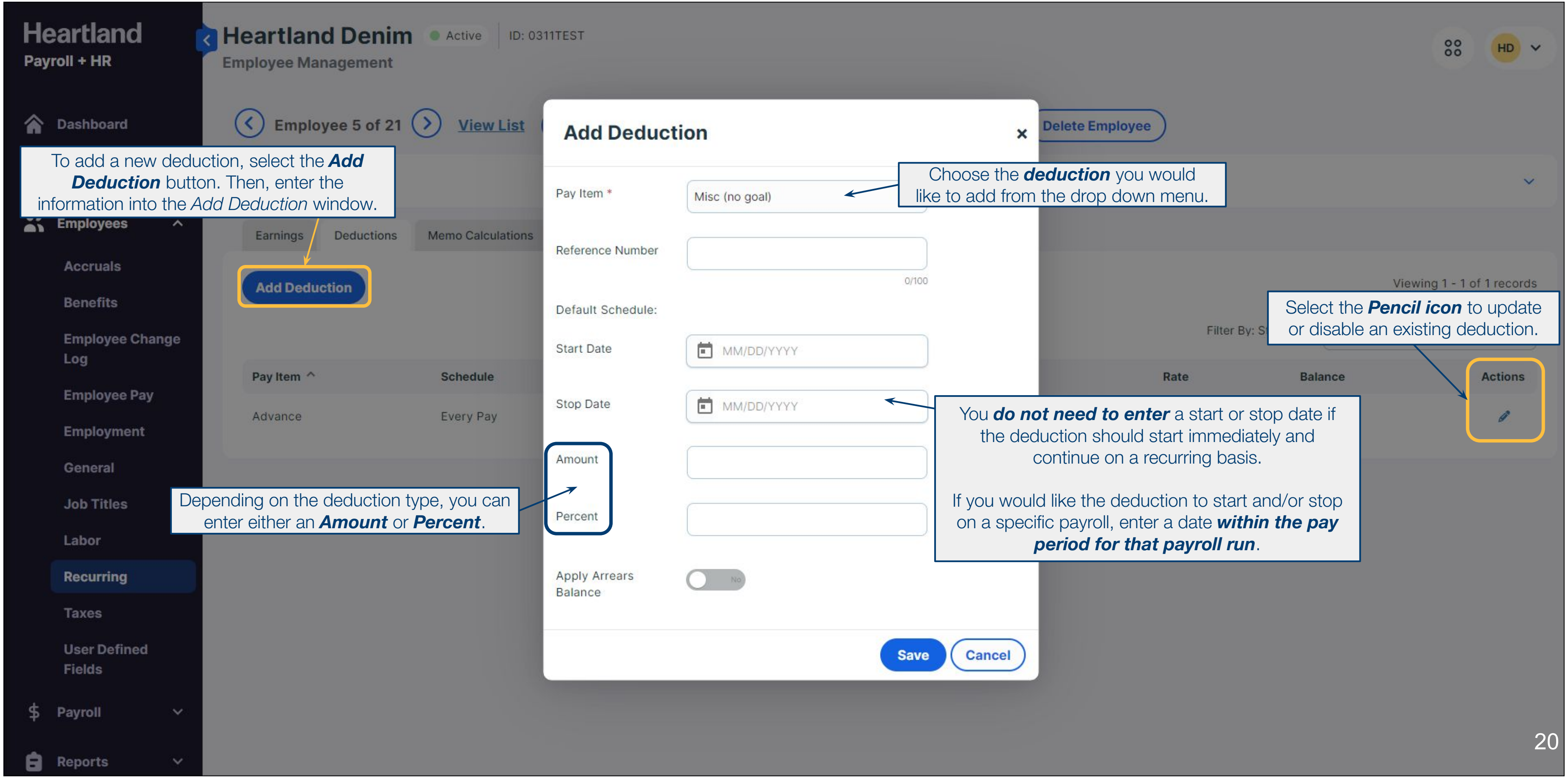
Employees are typically reimbursed for personal use of their cell phone each pay period, but the executive team has asked to be reimbursed once a month.

Select Phone Reimbursement, override the schedule to 1st pay of month, and enter the specific dollar amount in the amount field. Repeat for the other executives.

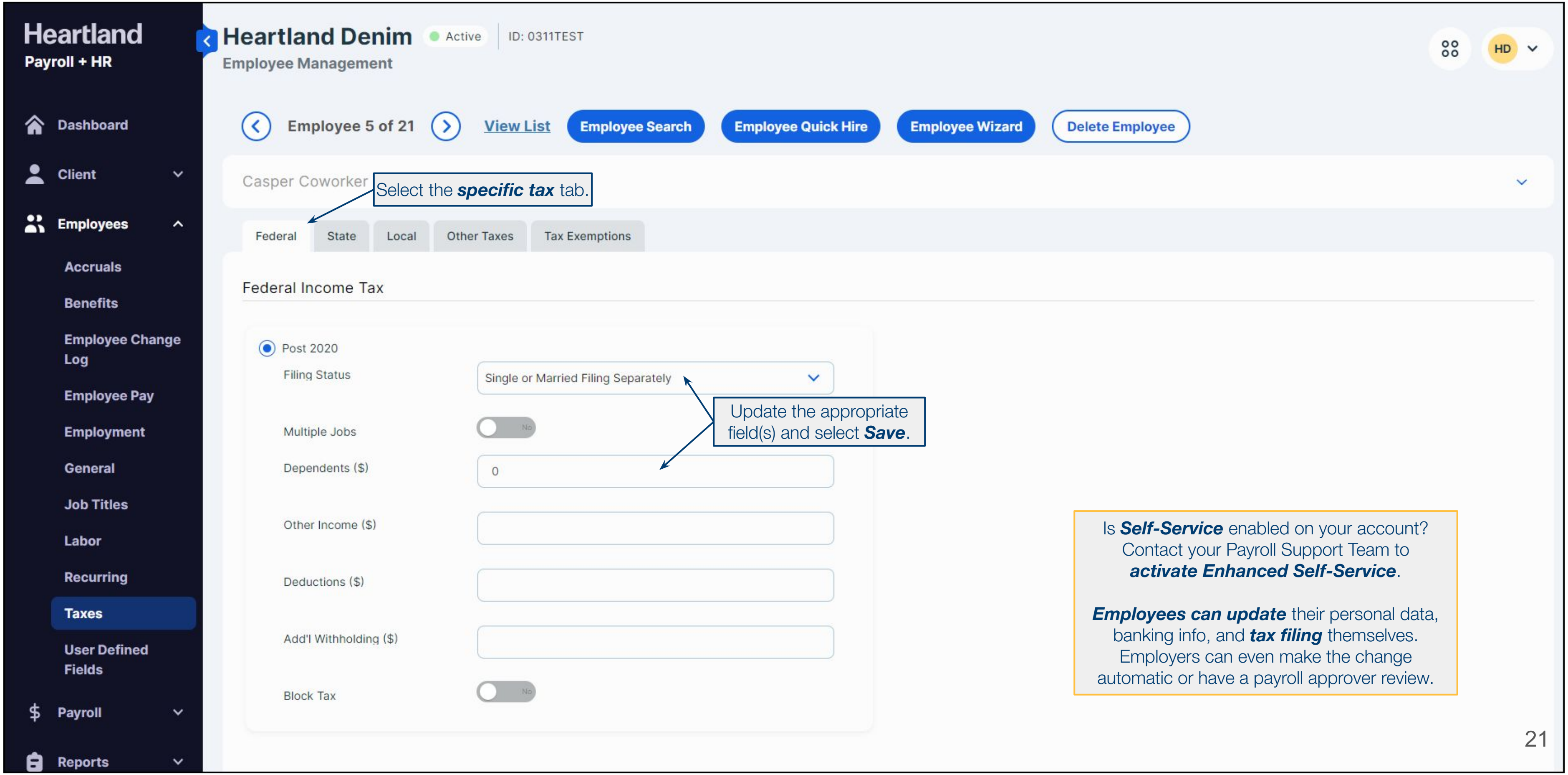
This will automatically provide the employee payment only on the 1st payroll of the month.

Recurring Deductions |

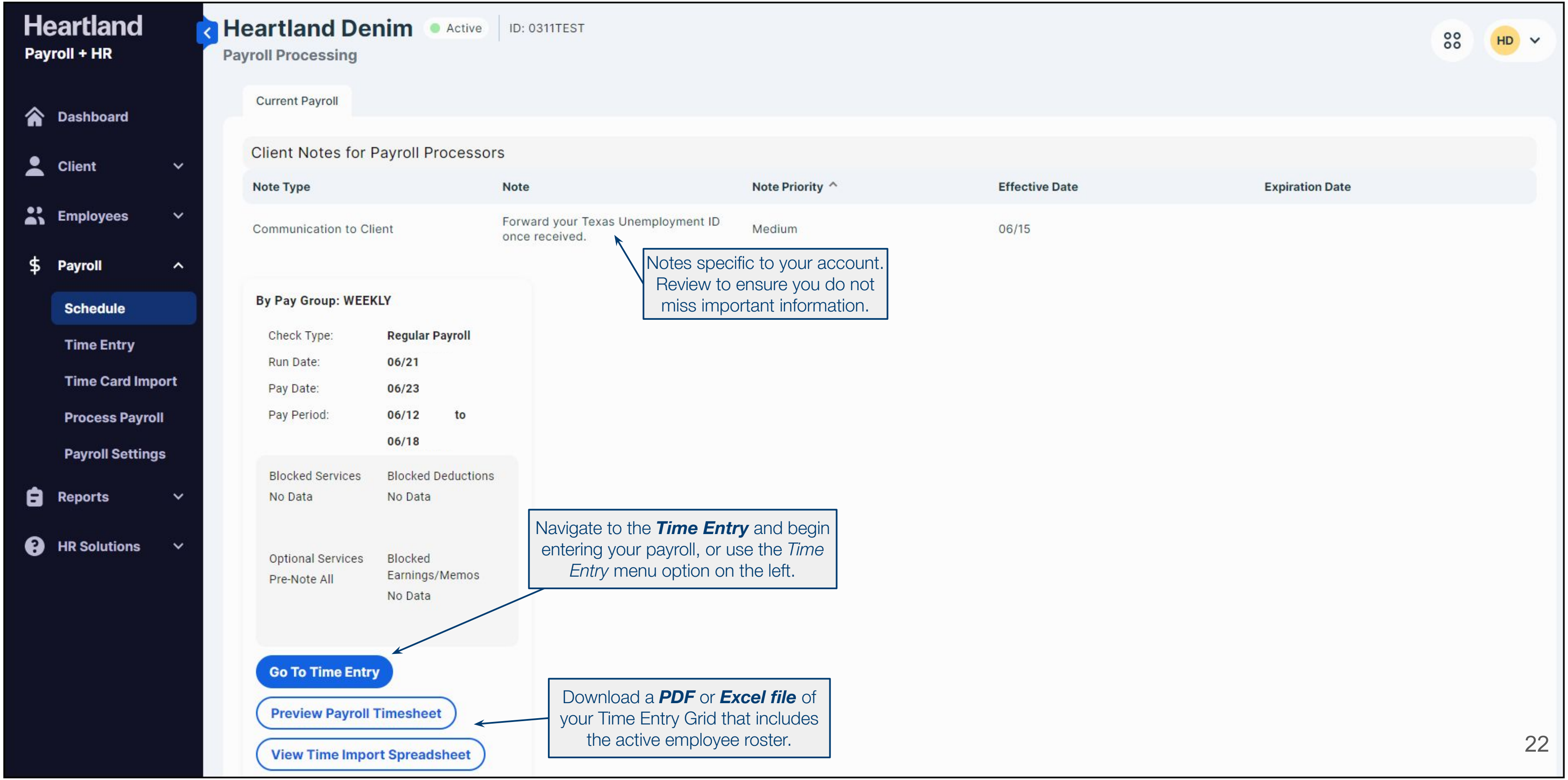
Add new and update existing deductions such as medical insurance or retirement. One-Time deductions should be entered in the payroll grid. *Send any Garnishment Orders to your Payroll Support Team for entry.*



Taxes | View and edit the tax information for an employee; select tab (Federal, State, etc.) to view the various taxes.



Schedule | View dates and any notes for your upcoming payroll. *If changes need to be made, reach out to your Payroll Support Team.*

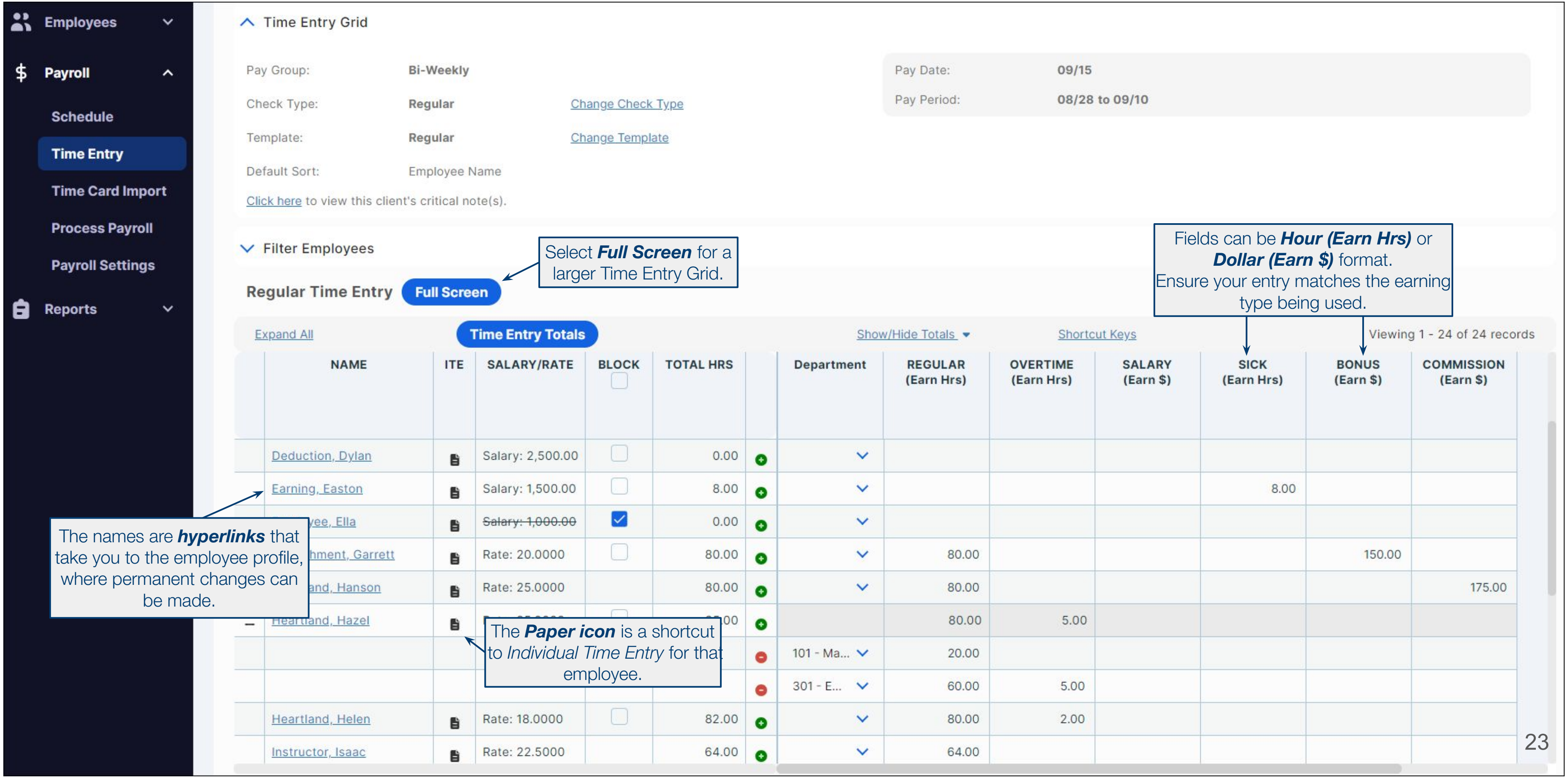


Notes specific to your account. Review to ensure you do not miss important information.

Navigate to the ***Time Entry*** and begin entering your payroll, or use the *Time Entry* menu option on the left.

Download a ***PDF*** or ***Excel file*** of your Time Entry Grid that includes the active employee roster.

Time Entry Grid | Enter the payroll information for all employees. Changes made in the Time Entry Grid are for the current payroll. Permanent changes need to be made in the employee's profile.



Select ***Full Screen*** for a larger Time Entry Grid.

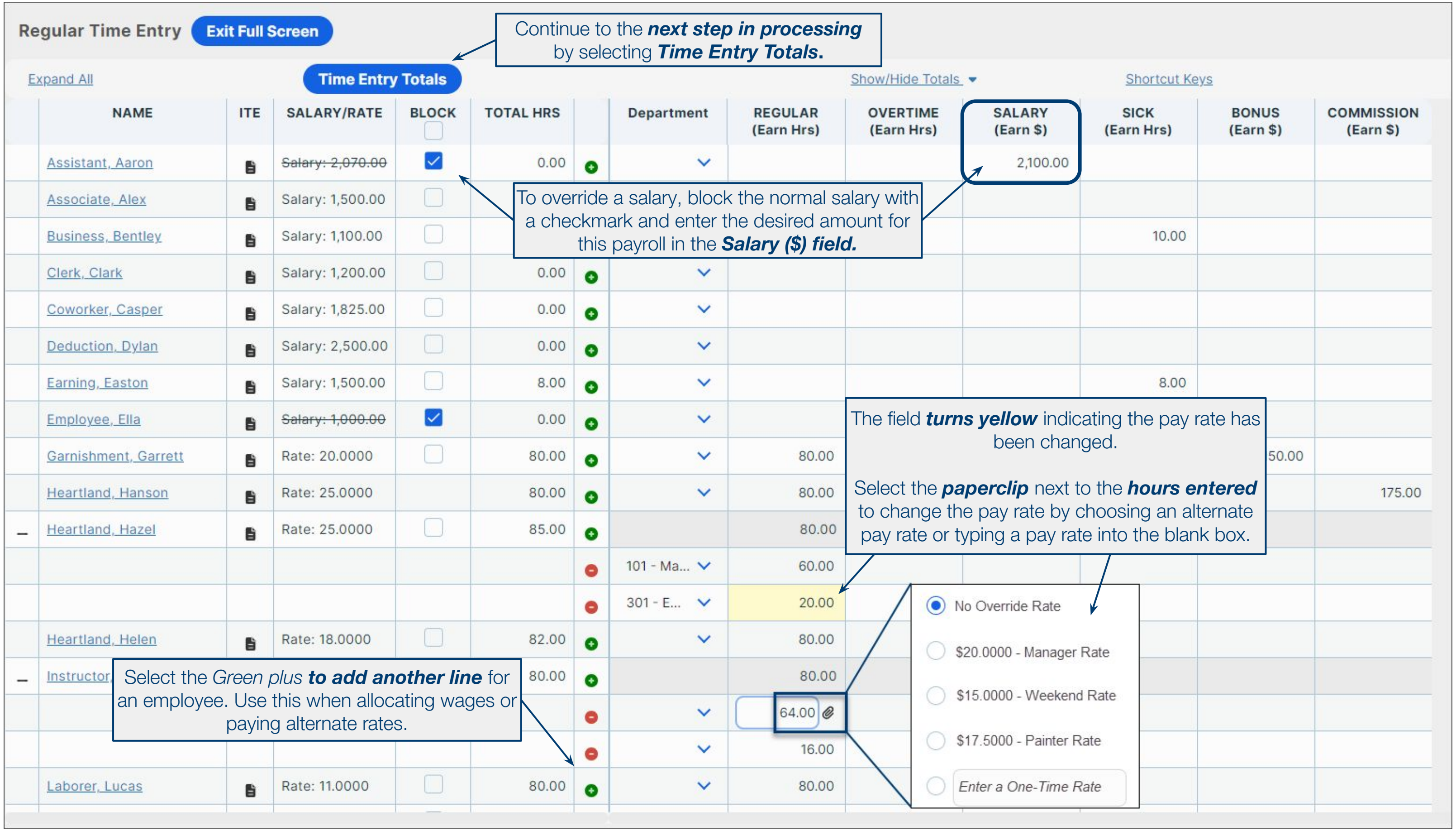
Fields can be ***Hour (Earn Hrs)*** or ***Dollar (Earn $)*** format. Ensure your entry matches the earning type being used.

The names are ***hyperlinks*** that take you to the employee profile, where permanent changes can be made.

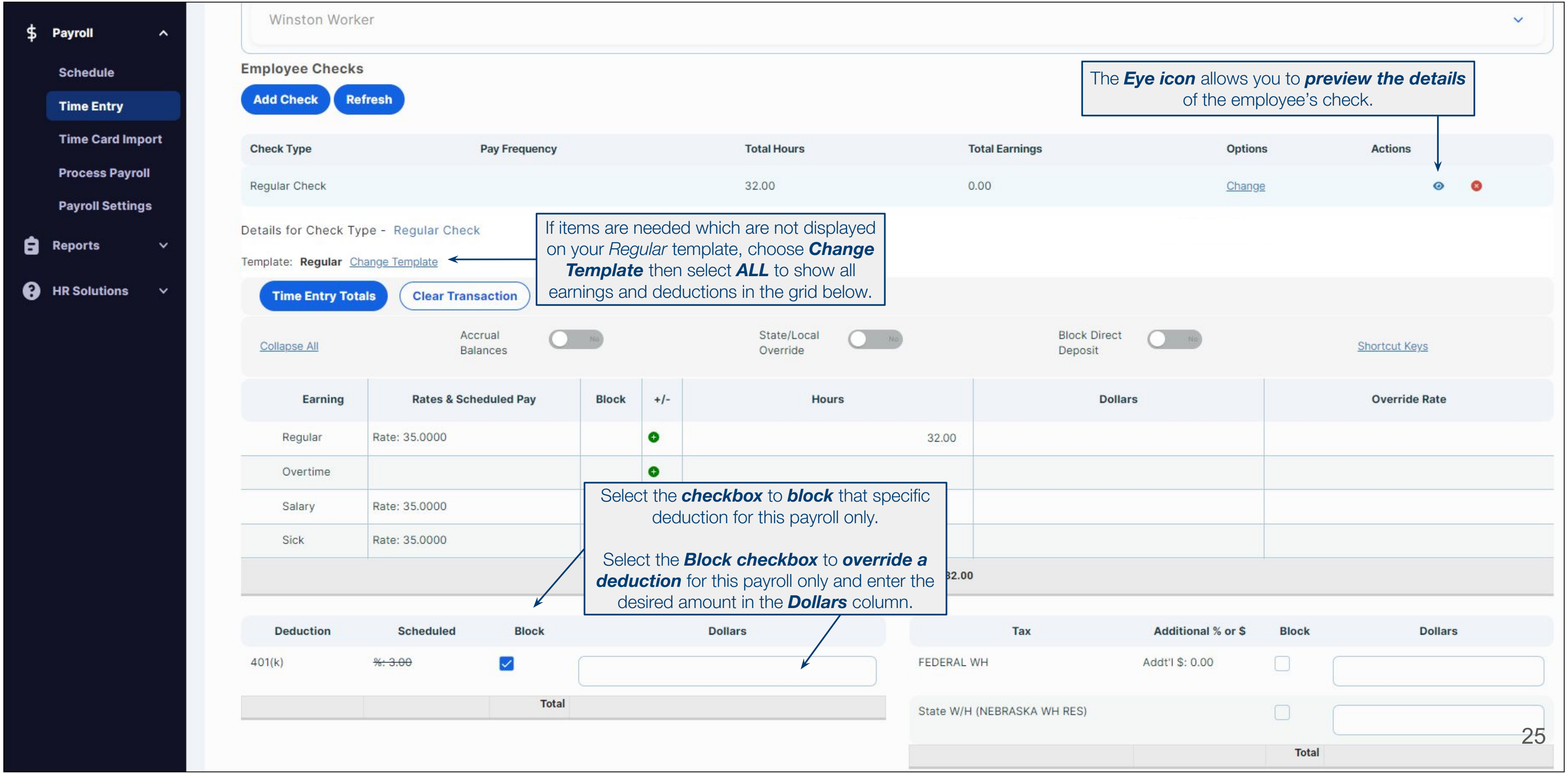
The ***Paper icon*** is a shortcut to *Individual Time Entry* for that employee.

Time Entry Grid | *Full Screen*

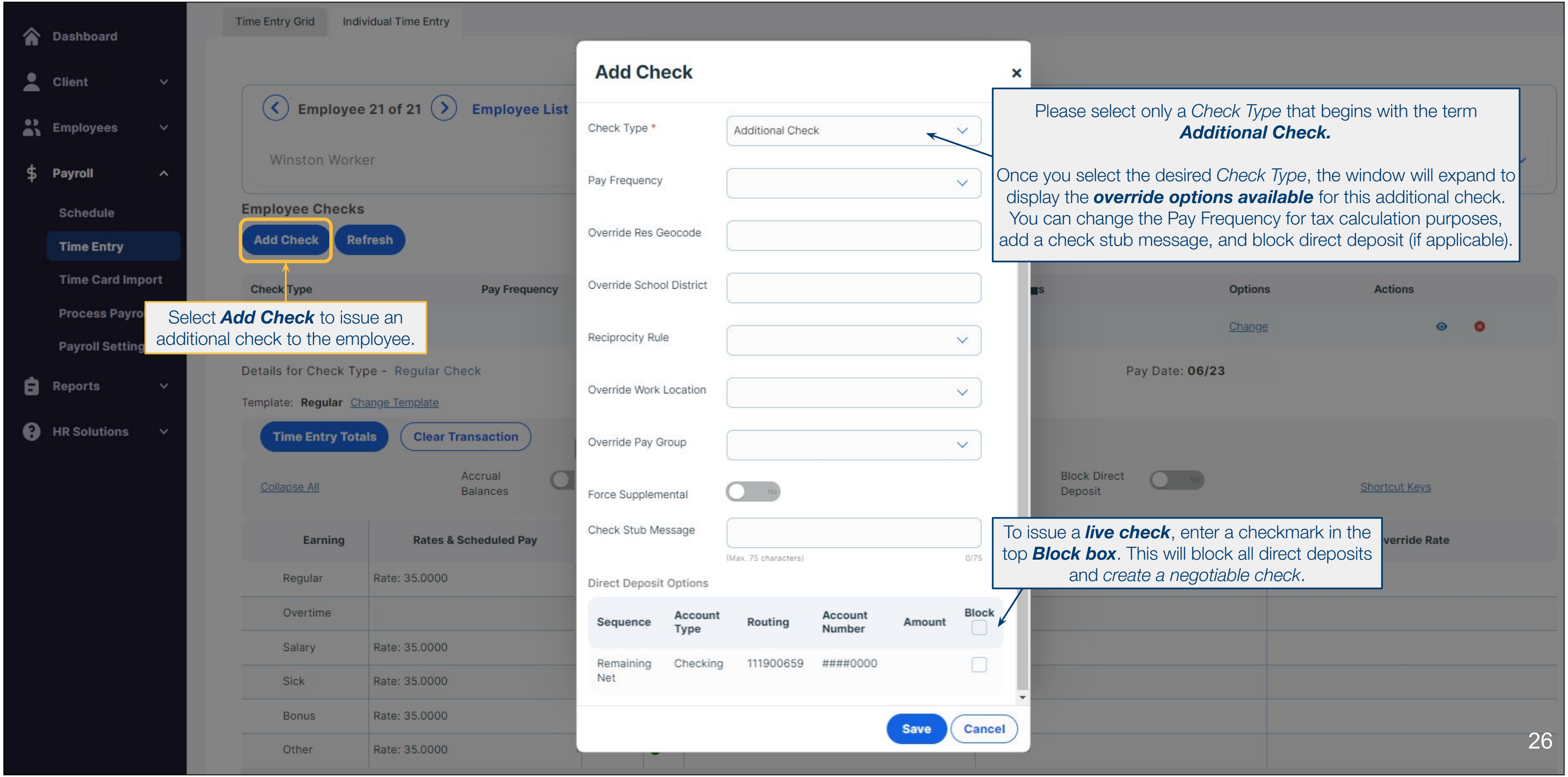
Changes made in the Time Entry Grid are for the current payroll. Permanent changes need to be made in the employee's profile. ***Important:*** *Salary checks are automatically generated. For details to block or override, see below.*



Individual Time Entry | Enter payroll one employee at a time with detailed options such as the ability to issue an additional check.



Additional Checks | ***Add Check*** button allows you to add a check to the selected employee; often used to pay out bonuses, commissions, manual checks, and payments separate from regular paychecks.



Select ***Add Check*** to issue an additional check to the employee.

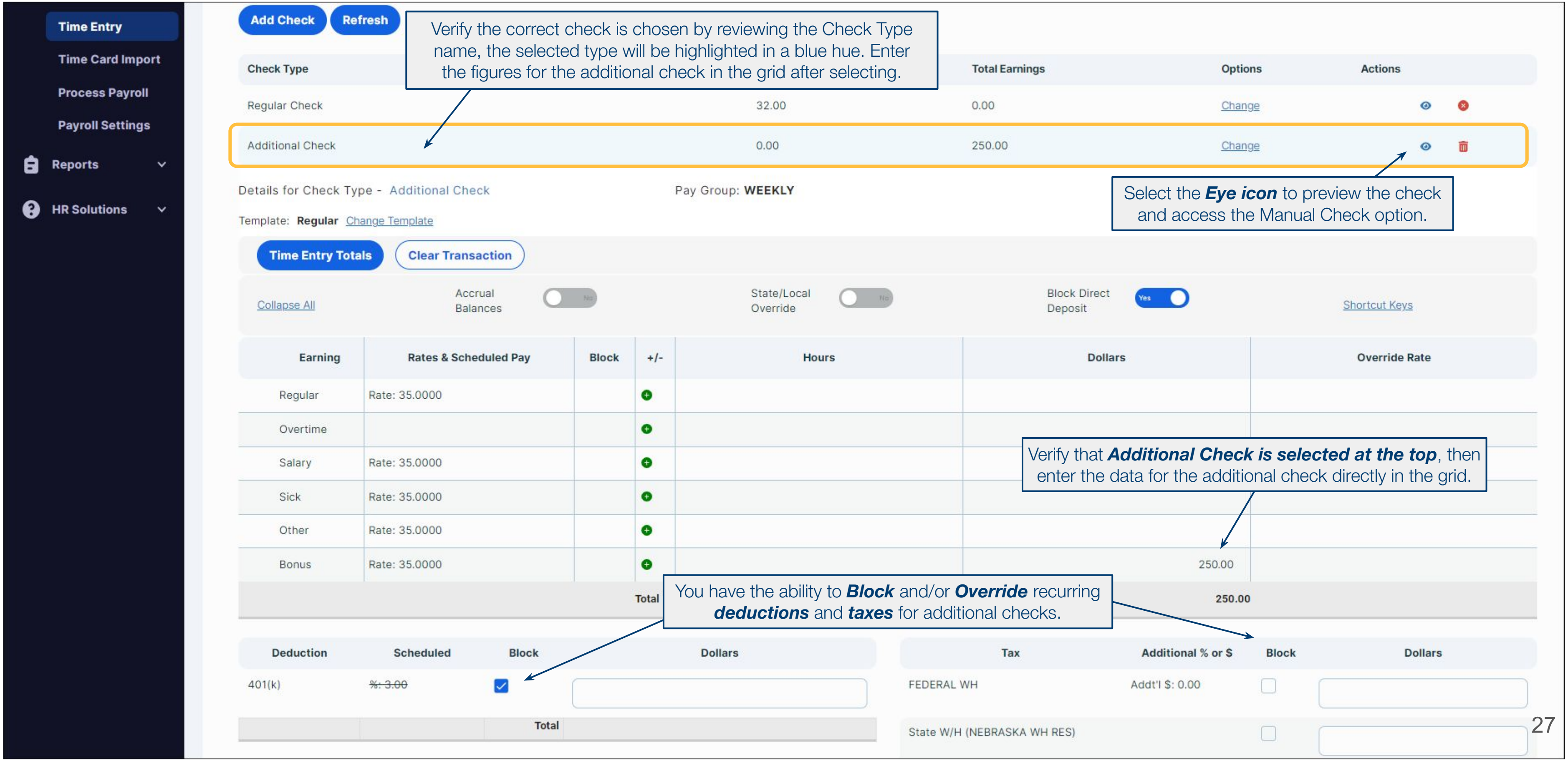
Please select only a *Check Type* that begins with the term ***Additional Check.***

Once you select the desired *Check Type*, the window will expand to display the ***override options available*** for this additional check. You can change the Pay Frequency for tax calculation purposes, add a check stub message, and block direct deposit (if applicable).

To issue a ***live check***, enter a checkmark in the top ***Block box***. This will block all direct deposits and *create a negotiable check*.

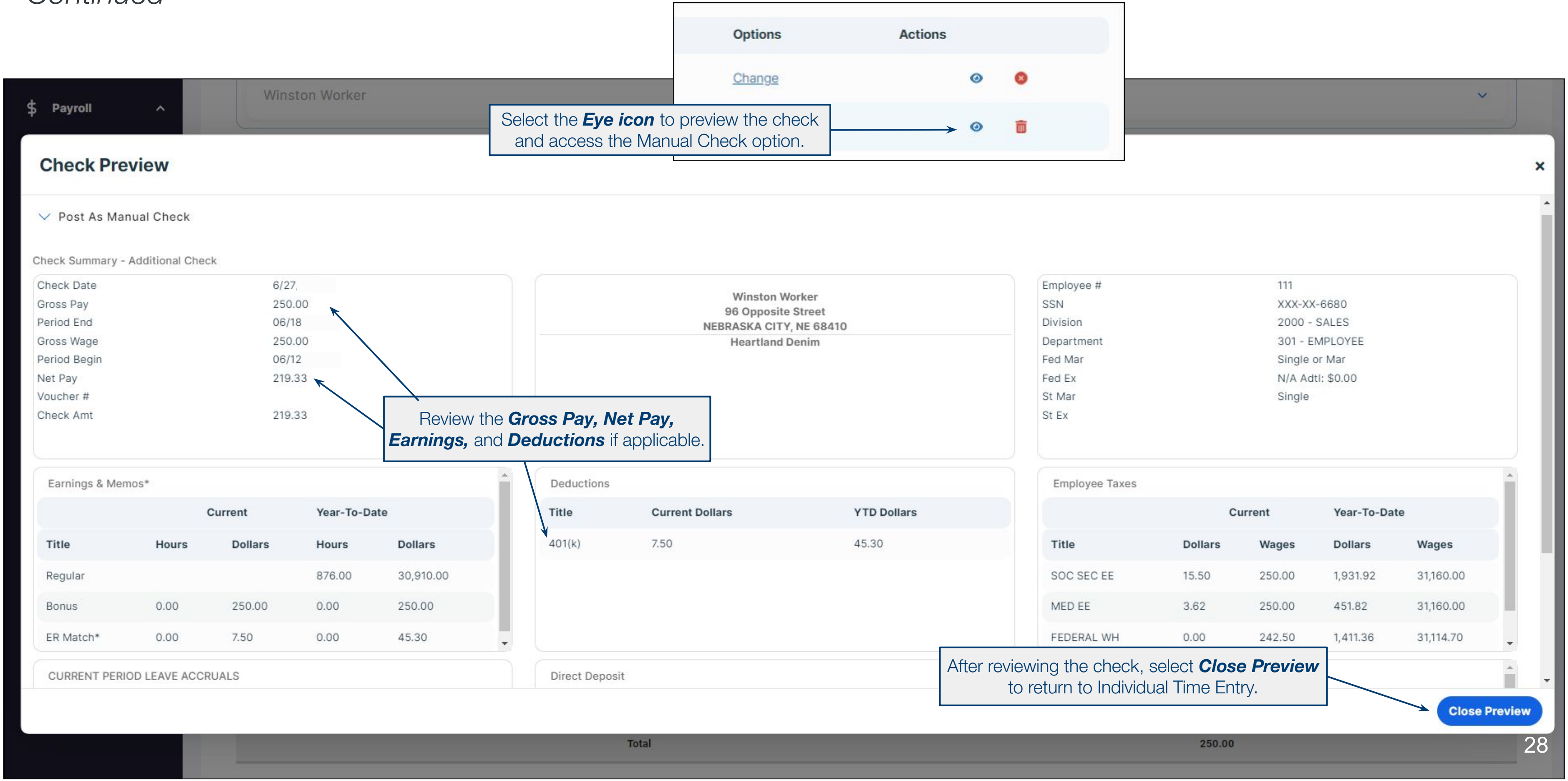
Additional Checks | *Continued*

Add Check button allows you to add a check to the selected employee; often used to pay out bonuses, commissions, manual checks, and payments separate from regular paychecks.

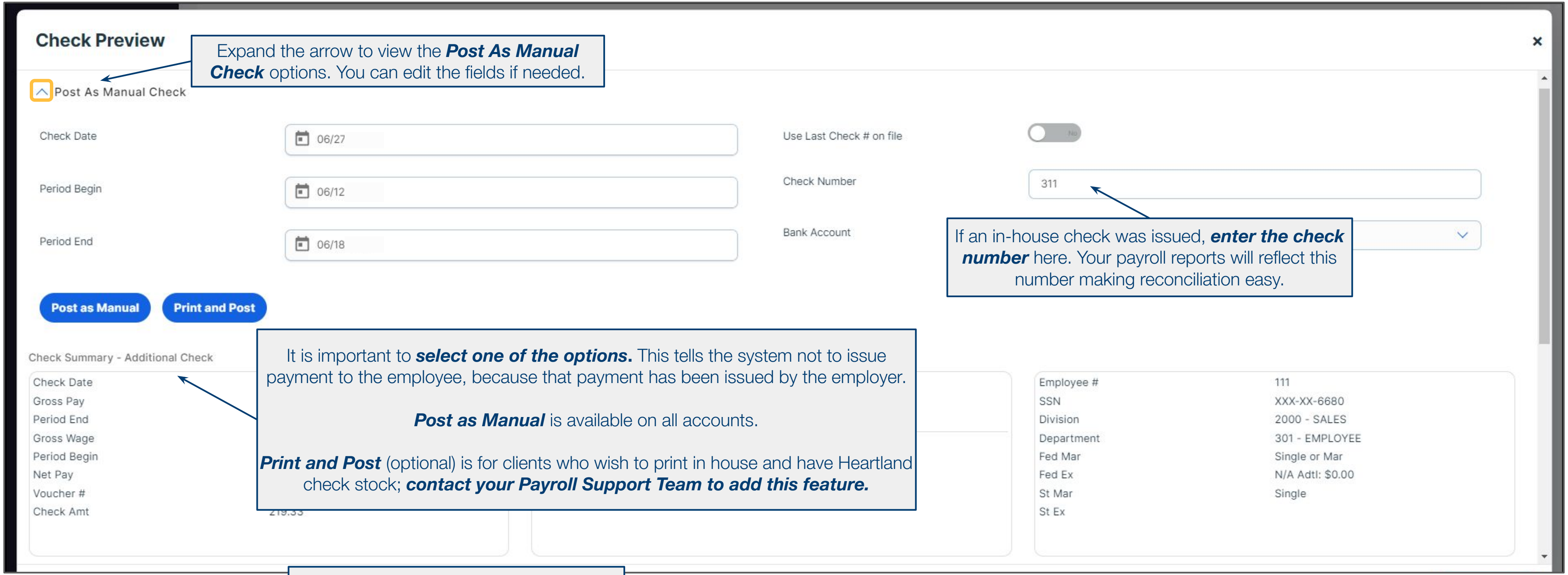


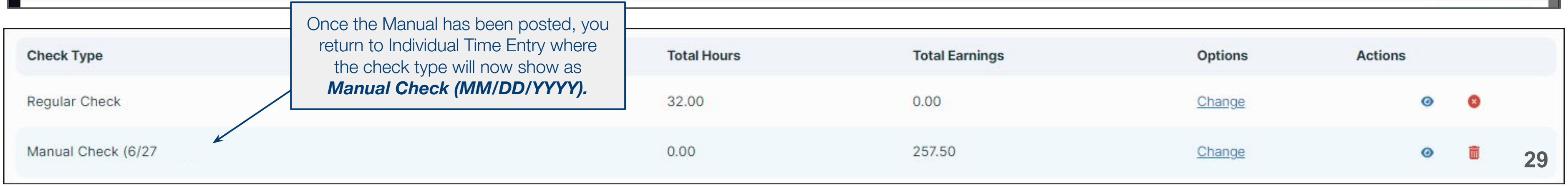
Additional Checks | *Continued*

Selecting the eye icon under Actions brings up the Check Preview screen for the additional check allowing you to review the details of the check for accuracy.



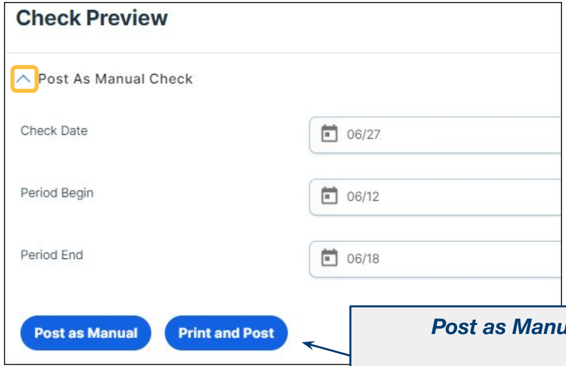
Manual Checks | A manual check is entered when an employee has already been paid or is going to be paid directly by the employer, and the figures need to be recorded and taxes paid. To enter, follow the additional check steps. When you get to the Check Preview, select the arrow to expand the Post As Manual Check options.





Manual Checks | *Continued*

A manual check is entered when an employee has already been paid or is going to be paid directly by the employer, and the figures need to be recorded and taxes paid. To enter a manual check, follow the additional check steps. When you get to the Check Preview, select the arrow to expand the Post As Manual Check options.

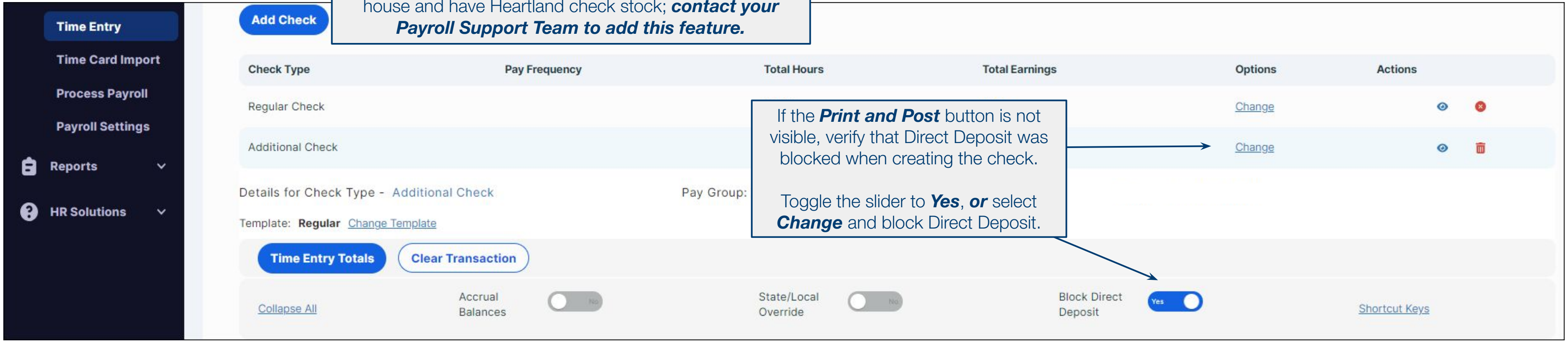


Post as Manual: Saves and posts into the system with the entered dates. The taxes will be collected on the next scheduled payroll run.

Print and Post: A PDF check stub will generate in real-time to provide to the employee. Saves and posts into the system with the entered dates. The taxes will be collected on the next scheduled payroll run.

Post as Manual is available on all accounts.

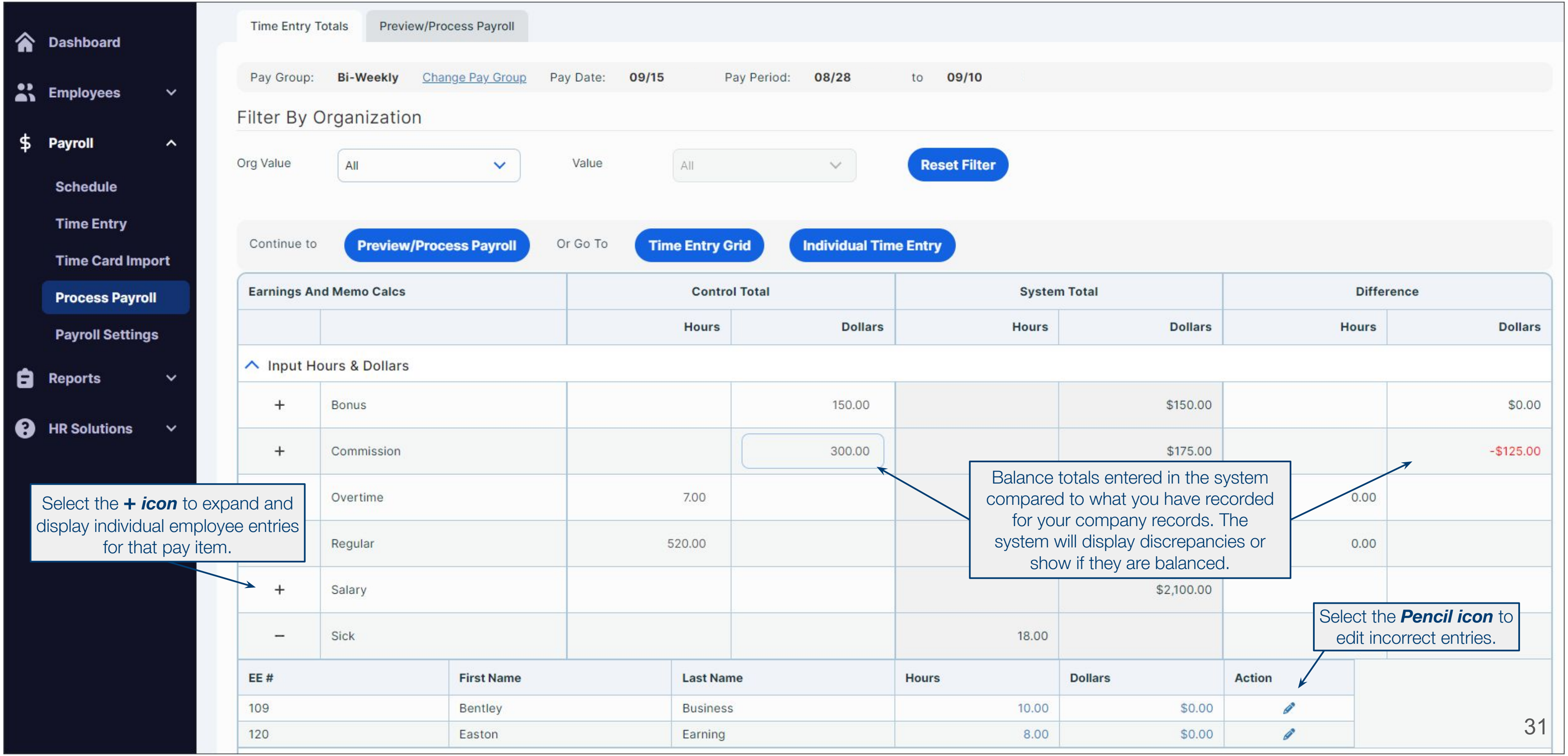
Print and Post (optional) is for clients who wish to print in house and have Heartland check stock; ***contact your Payroll Support Team to add this feature.***



If the ***Print and Post*** button is not visible, verify that Direct Deposit was blocked when creating the check.

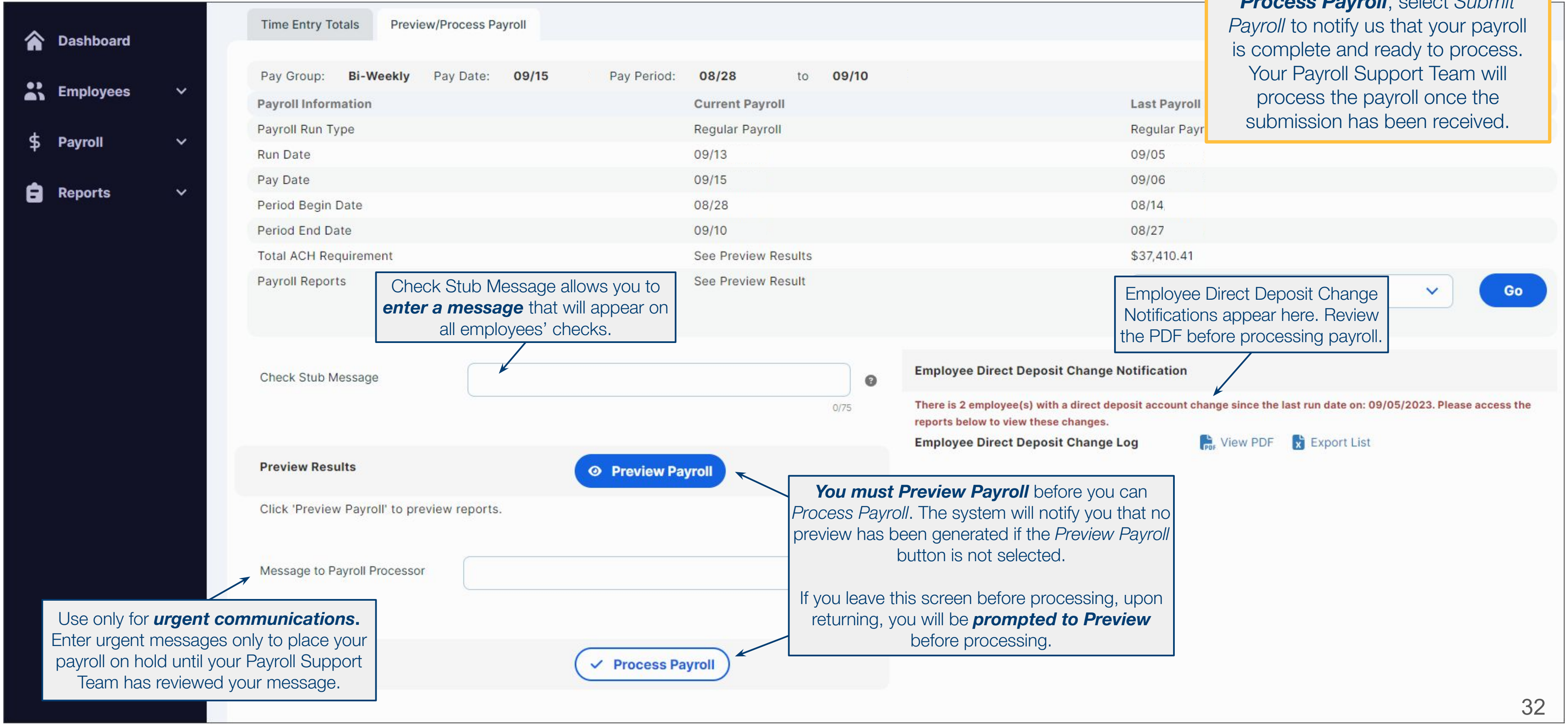
Toggle the slider to ***Yes***, ***or*** select ***Change*** and block Direct Deposit.

Time Entry Totals | Compare your totals to the system totals and identify any differences. This is a quick way to verify entries, preventing errors before they occur!



Preview & Process Payroll |

The Preview Payroll button generates reports to preview before processing. After previewing the reports for accuracy, select the Process Payroll button to finalize the payroll.



If ***Submit Payroll*** shows instead of ***Process Payroll***, select *Submit Payroll* to notify us that your payroll is complete and ready to process. Your Payroll Support Team will process the payroll once the submission has been received.

Check Stub Message allows you to ***enter a message*** that will appear on all employees' checks.

Employee Direct Deposit Change Notifications appear here. Review the PDF before processing payroll.

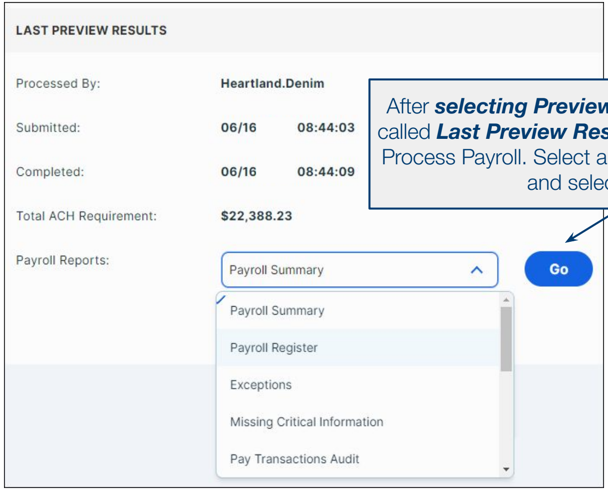
You must Preview Payroll before you can *Process Payroll*. The system will notify you that no preview has been generated if the *Preview Payroll* button is not selected.

If you leave this screen before processing, upon returning, you will be ***prompted to Preview*** before processing.

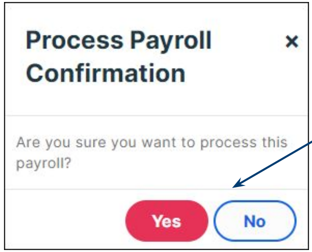
Use only for ***urgent communications.*** Enter urgent messages only to place your payroll on hold until your Payroll Support Team has reviewed your message.

Preview & Process Payroll | Preview results and receive a processing confirmation.

Last Preview Results



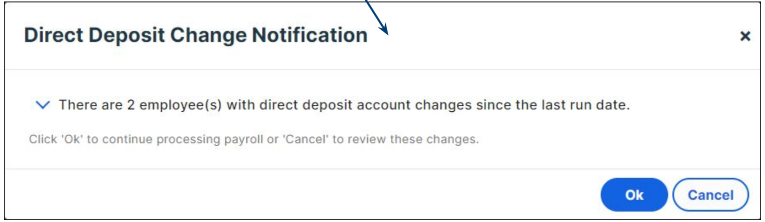
After ***selecting Preview Payroll,*** a new area called ***Last Preview Results*** will appear under Process Payroll. Select a report from the menu and select **Go.**

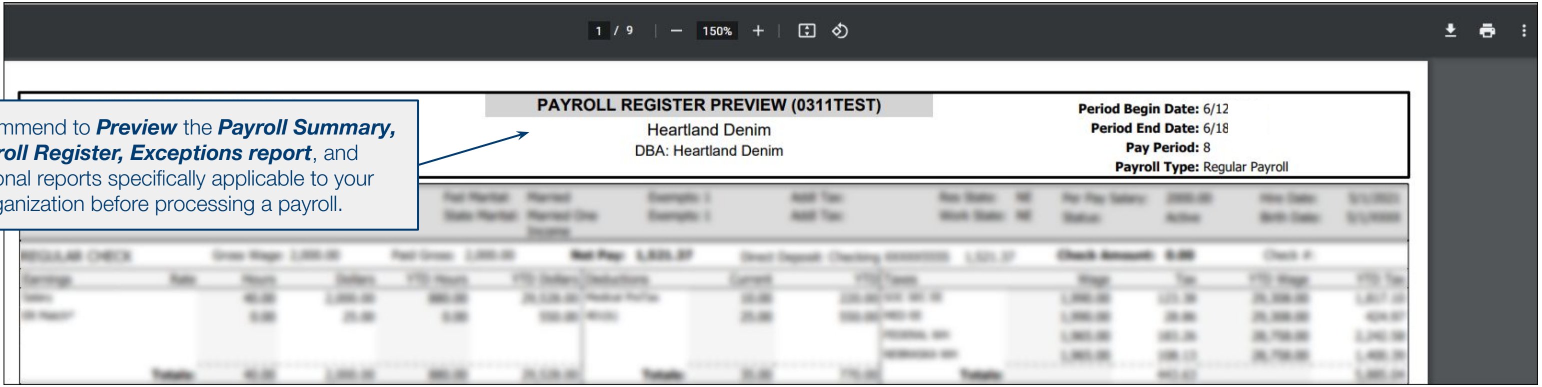


Once you ***select Process Payroll***, there are *two prompts* that you will experience.

(1) If ***no employee banking changes*** have occurred on this payroll run, then a general process confirmation appears.

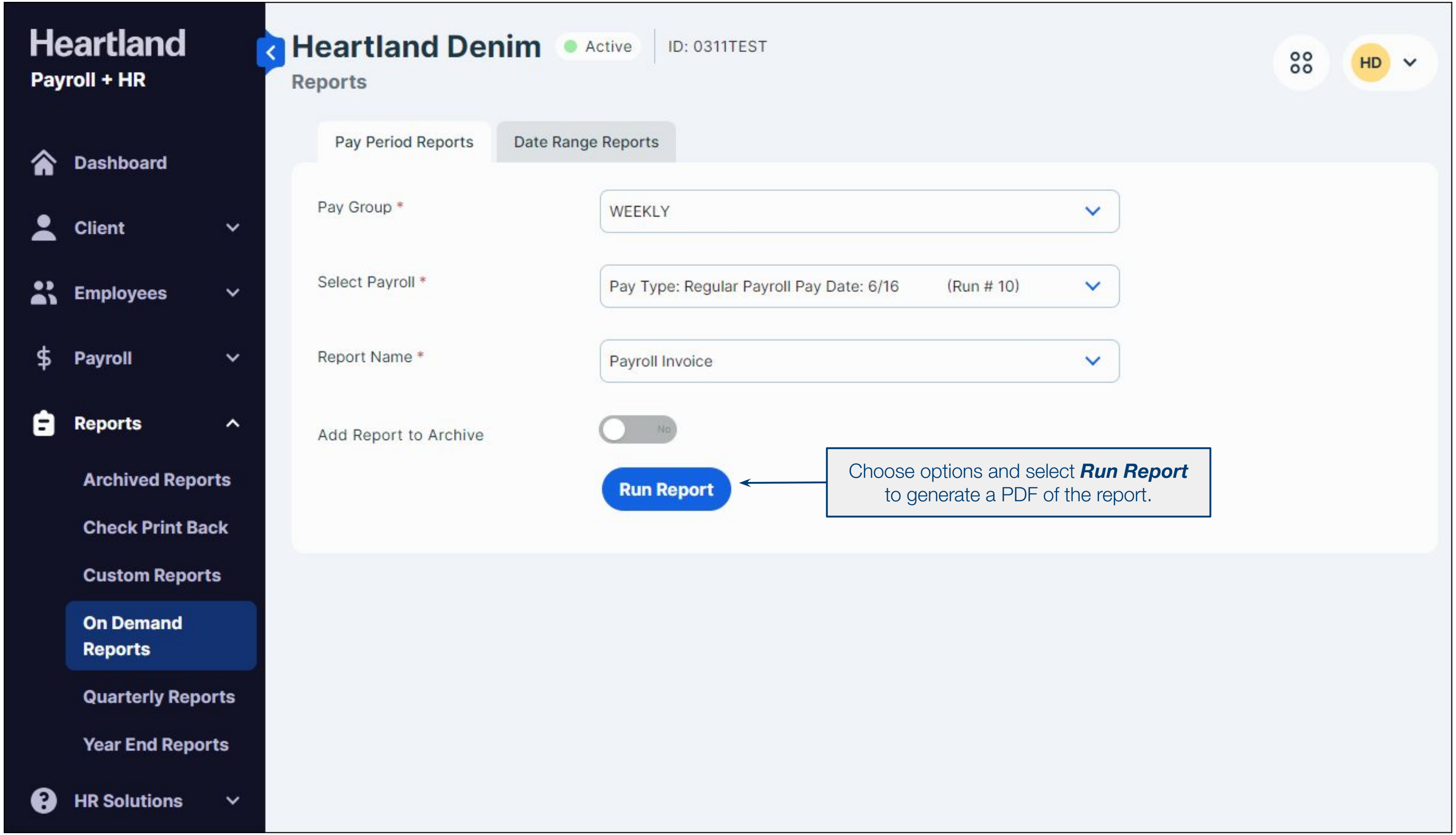
(2) If there ***have been banking changes***, you will be prompted to confirm your review of these entries.



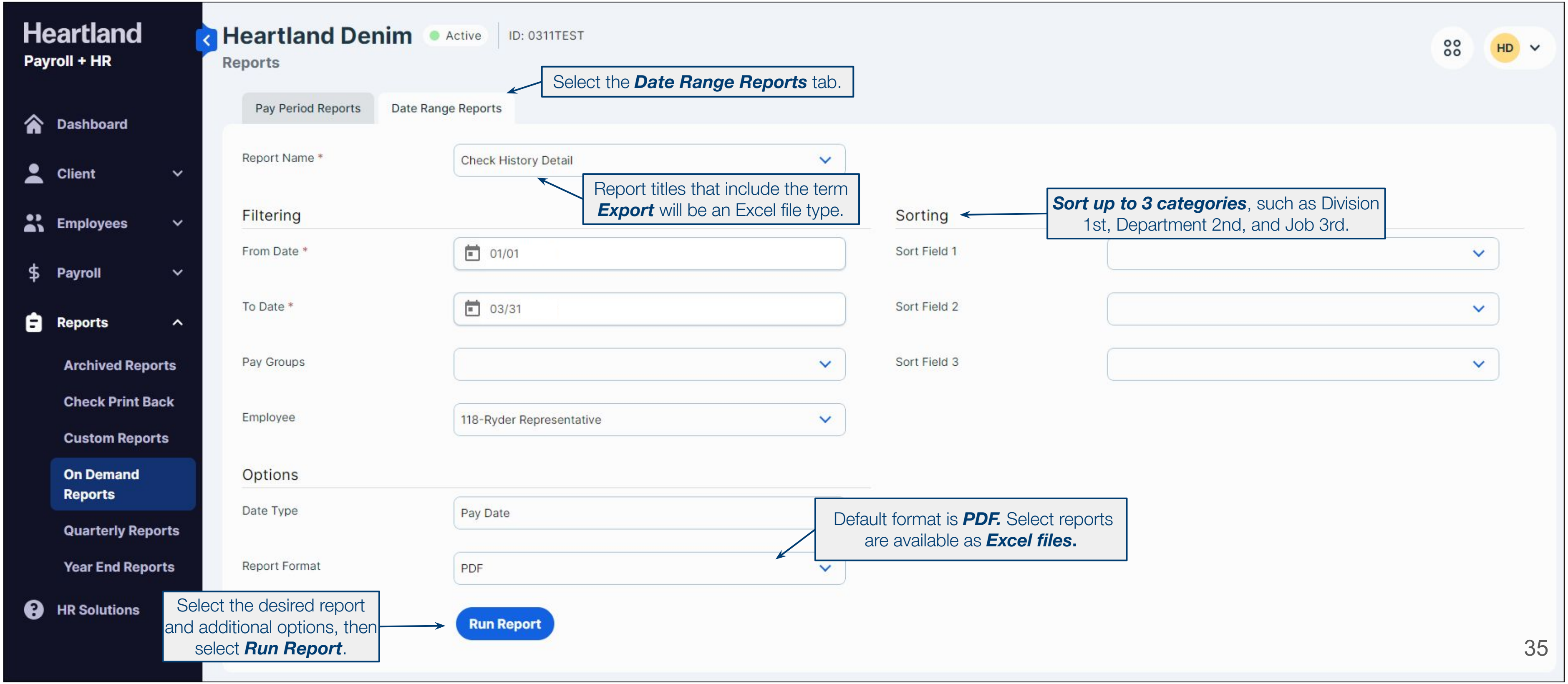


We recommend to ***Preview*** the ***Payroll Summary, Payroll Register, Exceptions report***, and additional reports specifically applicable to your organization before processing a payroll.

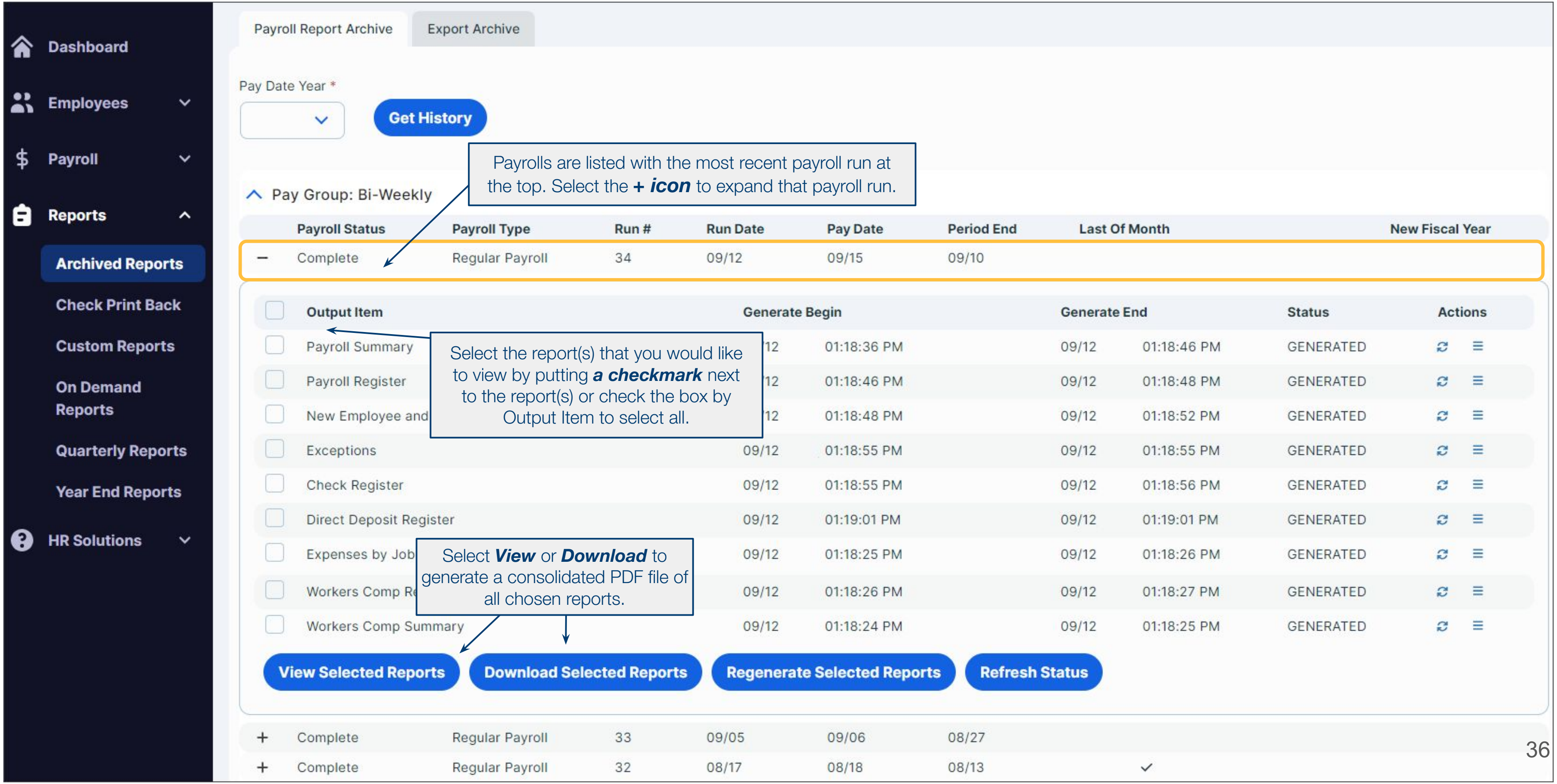
Pay Period Reports | Run a selected report for a specific check date.



Date Range Reports | Run a report for a specific date range.



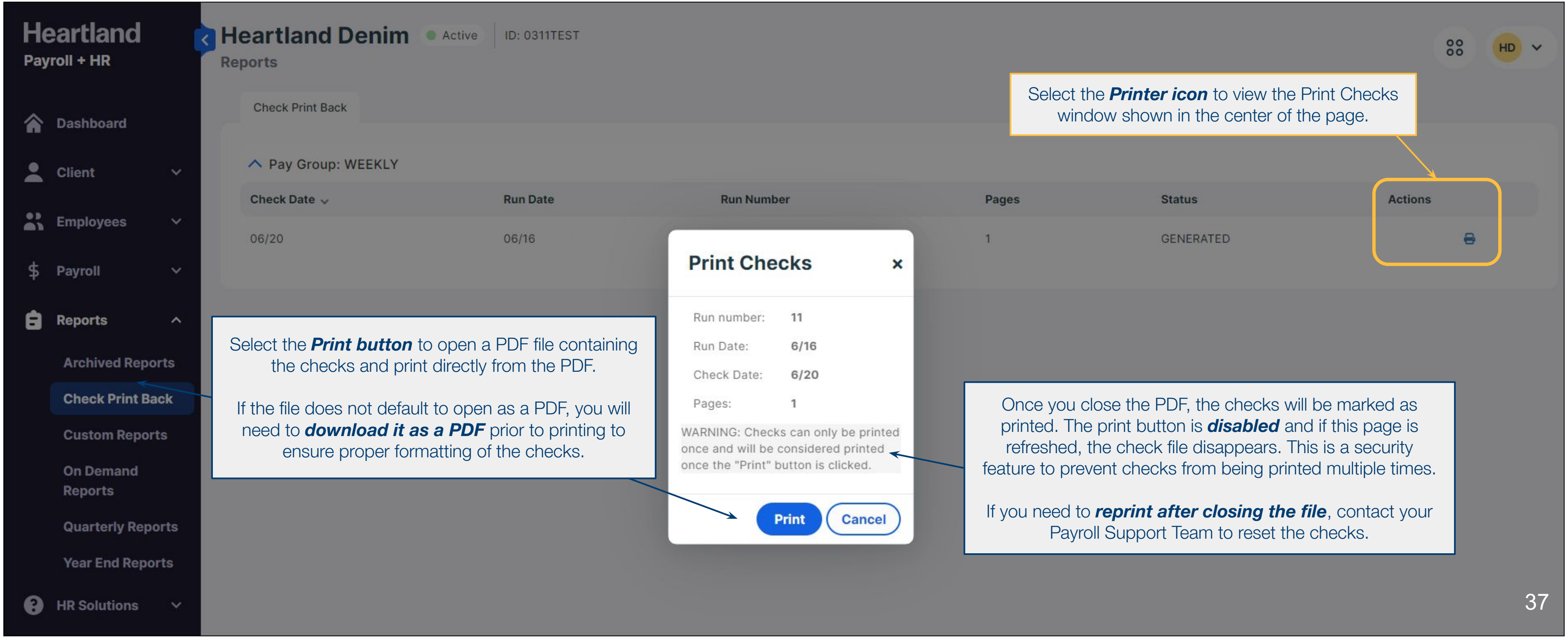
Payroll Report Archive | Run multiple reports for a specific check date and download them as a single consolidated file.



Check Print Back | Available only if you print your own checks in-house rather than choosing delivery.

Your check file is specially formatted to print from ***Adobe Reader*.** Please ensure you are using the most up-to-date version. There is a link to the free Adobe Reader on your *Dashboard* in the *Links* section under *Access Payroll Related External Sites*.

Heartland Check Stock must be used when printing checks to ensure they print correctly.

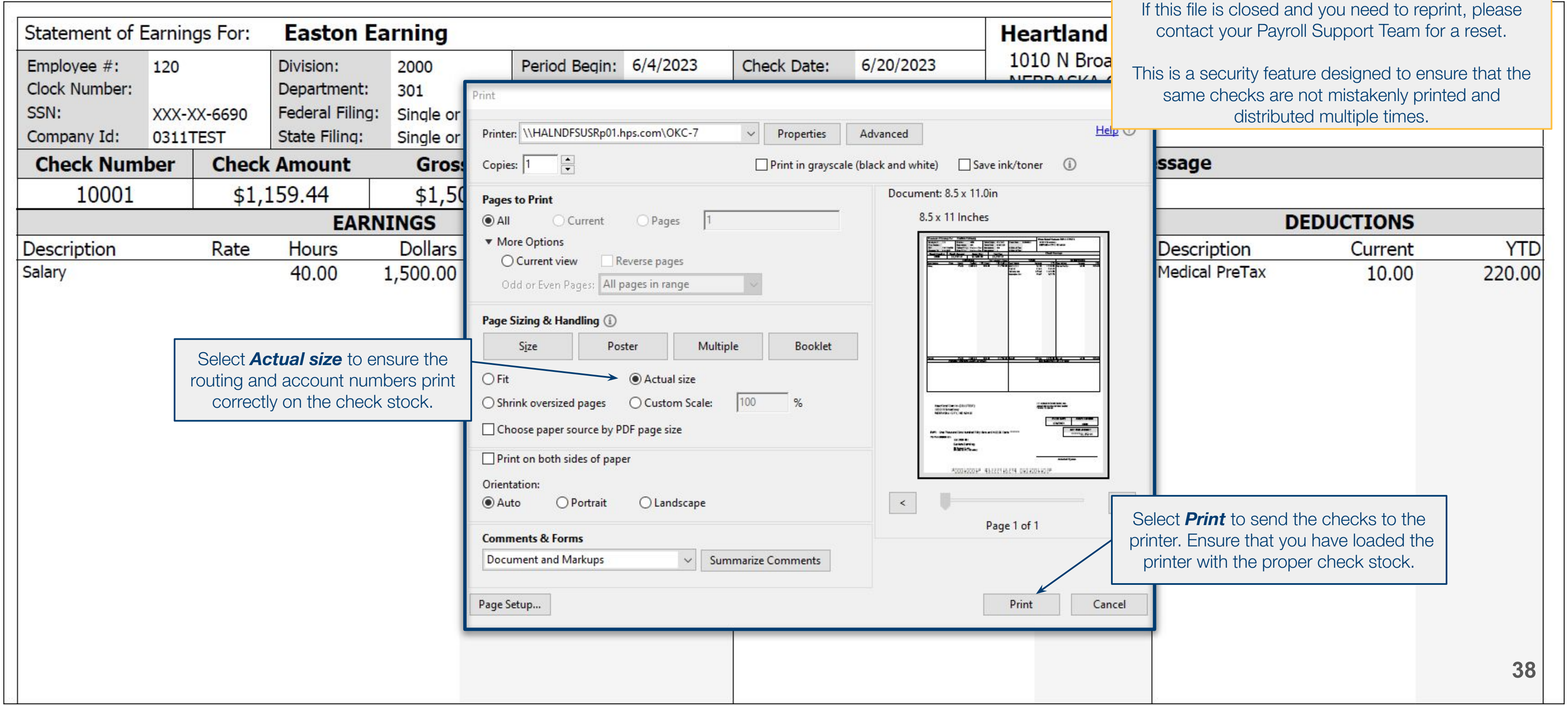


Check Print Back | When the check file appears in PDF, select *Print*, and in the pop-up choose *Actual size*.

Continued

If you leave the PDF check file open, you may print again if something goes wrong such as a printer jam. If this file is closed and you need to reprint, please contact your Payroll Support Team for a reset.

This is a security feature designed to ensure that the same checks are not mistakenly printed and distributed multiple times.



Select ***Actual size*** to ensure the routing and account numbers print correctly on the check stock.

Select ***Print*** to send the checks to the printer. Ensure that you have loaded the printer with the proper check stock.

Helpful Hints | Good things to know about the Heartland Payroll system!

Recommend Browser
Google Chrome is the recommended browser when using the Heartland Payroll System. The link in your welcome email is for one-time use to complete your registration. Please bookmark www.HeartlandPayroll.com to access your account after registration.

Avoid Autofill
Avoid using autofill to ensure that there are no trailing spaces on email addresses and/or passwords.

Forgot Password
Use the *Forgot your Password?* Link on the login screen to create a new password.

Session Closed Due to Inactivity
For security purposes, you will be logged out after 29 minutes of inactivity. Go to www.HeartlandPayroll.com to log back in.

Please contact your Payroll Support Team if you have any questions. We are happy to assist you!

Heartland Payroll Links to Bookmark:

Employer/Admin: www.HeartlandPayroll.com

Employee Portal: m.HeartlandCheckView.com