Heartland

Online Payroll Client User Guide

Table of Contents

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

Account Login

Email Address

Email Address

Password   Forgot your password?   👁 Show

Password

Log In

Don't have an account?   Register Now

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

Heartland

Verify MFA (SMS)

Verify your code

Enter the security code sent to ••••••••1423

Didn't get a confirmation code? Resend

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.

| 8 | 3 | 1 | 1 | 4 | 8 |

☑ Don't ask me again for 45 days on this browser

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

We need to verify your identity.

This application requires all users to verify their identity with a secondary factor upon signin.

Why is this necessary now?

Lost access to your email? Contact support.
Need help? Contact support at +1 877.729.2968

VERIFY

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.

Heartland

Hi, Derek!   Sign Out

👥 Select a Profile to Log Into

Please find the profile that you want to log into, and click the row to login.
If we are unable to log you into the selected profile, you will be redirected to the login page where you can try again, or contact support.

Client Name	Client Code	Username	Account Type	Last Login Date	
Heartland Denim	DEMODOCS	Helen.Heartland	Client User		Select →
-	-	Heartland.Multi	Partner User		Select →

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Once you have determined the profile to access, use the ***Select*** button that corresponds to the profile.

This profile, for example, has a ***single access type*** only to the Heartland Outfitters account.

Profiles that have more than one account linked to the username will not have all accounts visible. The following page of ***Profile Selection will prompt which account*** to access.

*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.

Heartland
Payroll + HR

Heartland Denim ● Active | ID: 0311TEST
Dashboard

- 🏠 **Dashboard**
- 👤 Client ⌄
- 👥 Employees ⌄
- 💲 Payroll ⌄
- 📇 Reports ⌄
- ❓ HR Solutions ⌄

Dashboard

Welcome **Ryder Representative** 📞 555-800-5511

📄 Processing Information

Pay Group	WEEKLY
Frequency	Weekly
Due In Date	06/21
Check Date	06/23
Period Begin	06/12
Period End	06/18
View Schedule	📄
Run Type	

📢 Announcements (1)

Keep an eye out here for announcements!

📋 Notes

📇 Account Representatives

Sales: *Sales Representative Contact Name*

WEEKLY Rep: *Payroll Specialist Contact Name*

🏦 Bank Holidays — **2**
2 bank holidays in next 30 days ... more

🎁 Anniversaries — **3**
3 employees are celebrating their anniversary in next 30 days ... more

🎂 Birthdays — **3**
3 employees are celebrating their birthdays in next 30 days ... more

🔗 Links

The following Link will help you to:

Order Check Stock/Envelopes

▶ View Payroll Related Forms

▶ Access Payroll Related External Sites

The **App Tray** and **Help Center** house all of your Heartland Services and additional resources.

To ensure timely direct deposits and delivery of your payroll package, please process by 3:00 pm in your time zone on the **Due In Date (Run Date).**

Select to view your **processing schedule.** Contact your Payroll Support Team to make schedule changes.

The contact information for your Payroll Support Team can be found here by **selecting the name.**

Links: *Order* check stock and envelopes, access payroll forms, and websites such as IRS.gov.

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

Heartland
Payroll + HR

Heartland Denim ● Active | ID: 0311TEST **Change Client**
Employee Management

- Dashboard
- Client ⌄
- Employees ⌄
- Payroll ⌄
- Reports ⌄
- Tools ⌄

Employee Management

To add a new employee, select either the ***Employee Quick Hire*** or ***Employee Wizard***.

Employee Search   **Employee Quick Hire**   **Employee Wizard**

By default, ***Active*** employees are displayed. To see all employees, change the Employee Status to ***All*** and select the ***Apply Filter*** button.

Filter Employees

Employee Search allows you to quickly search for an employee.

Pay Group

| All ⌄ | All ⌄ | ⌄ | Employee Status Active ⌄ | Employee Type All ⌄ | **Apply Filter** | **Reset Filter** |

Filter Employees allows you to change the employee list view by selecting options from the dropdown(s) and selecting ***Apply Filter.***

Select the ***column heading*** to sort your employee list by that heading.

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			WEEKLY	XXX-XX-6670	Active	1000 - OPERATIONS	301 - EMPLOYEE
109	Bentley			WEEKLY	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

To make updates to an employee, select ***the line item*** with their details to pull up their profile.

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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.

Add New Employee

∧ Employment Information

Employee Number *	123	Employment Category *	Full Time ∨
	3/9		
Status *	Active ∨	TimeClock ID	
			0/9
Hire Date *	📅 06/16/2023	Include In New Hire Report	● Yes
Adjusted Service Date	📅 MM/DD/YYYY		

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

∧ General

First Name *		Work Email Address	
	0/25		0/100
Middle Name		Suppress Pay Stub Email Alert	○ No
	0/25		
Last Name *		Enable Self-Service Access	○ No
	0/25		
Gender	∨	Address Line 1	
			0/50
ID Type	SSN ∨	Address Line 2	
			0/50
SSN		Zip Code *	
Verify SSN	○ No	City	
Birth Date	📅 MM/DD/YYYY	State	

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.

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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.

Pay Information

Pay Group *

Pay Type *

Frequency *

Normal Hours — (i.e.86.67)

Annual Salary

Per Pay Salary

Hourly Rate

Rate 2

Rate 3

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

Org & Labor Fields

Organization Fields

Division

Department

Accrual Plans

SICK

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.

Federal Income Tax

Filing Status

Multiple Jobs — No

Dependents ($)

Other Income ($)

Deductions ($)

Add'l Withholding ($)

Block Tax — No

These fields reflect new 2020 Form W-4. If no entry is made, the default value will be single filer with no adjustments

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.

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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.

State/City Income Tax (Work)

Work Location *

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.**

City Income Tax (Work)

Tax Description: **No city income tax for current work location (Other local/county taxes may apply)**

State/City Income Tax (Residence)

Residence Location:

Geocode *

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

State Income Tax (Residence)

Tax Description:

Filing Status

Exemptions

Block Tax

Addl Withholding

Addl Exemptions

Exemption Amount $

Alternate Calculation

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.

Tax Location

School District

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.

Tax Exemption

Status Type

Direct Deposits

Add Direct Deposit

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

Status	Account Type	Sequence	Amount	Percent	Routing Number	Account Number	Description
					0/9	0/20	0/30

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

Save   **Cancel**

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

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Payroll + HR

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  - Employee Change Log
  - Employee Pay
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  - **General**
  - Job Titles
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  - User Defined Fields
- Payroll
- Reports

Heartland Denim ● Active | ID: 0311TEST
Employee Management

◀ Employee 21 of 21 ▶ | View List | Employee Search | Employee Quick Hire | Employee Wizard | Delete Employee

Employees with pay history **cannot be deleted,** they will need to be made **Inactive** or **Terminated.**

Winston Worker

Summary | Hire Information | Demographics | Banking | Organization

These tabs change based on the menu option selected on the left.

Employee Name & Address ✎ Edit

Name: Winston Worker

Address 1: 96 Opposite Street

The menu options are listed alphabetically on the **left.**

City: NEBRASKA CITY

State: NE

Zip Code: 68410

Tax Information ✎ Edit

Fed Filing Status: Single or Married Filing Separately

State Filing Status: Single

Fed Dependents: 500

State Exemptions: 1

Work Location: NEBRASKA CITY, NE

Res Location: NE1310250

Employment Information ✎ Edit

Legal Company:

Employee#:

Select the **Pencil (Edit) icon** in a section to make updates.

Status: Active

Hire Date: 11/01/2021

Adjusted Service Date:

Employment Category: Full Time

Personal Information

SSN: XXX-XX-6680 ⬤ Show

For the security and protection of your account, Social Security Numbers are **masked by default.** Your user role determines if you are able to unmask.

Birth Date: 05/01/1991

Pay Information ✎ Edit

Pay Group: WEEKLY

Pay Type: Hourly

Job Information ✎ Edit

Effective Date:

Job Code:

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

Dashboard

Client

Employees
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Payroll

Reports

HR Solutions

Winston Worker

Summary | Hire Information | Demographics | Banking | Organization

Hire Information

Employment Information

Hire Date *
📅 11/01/2021

Adjusted Service Date
📅 MM/DD/YYYY

Employee # *
111
3/9

Employment Category
Full Time

Timeclock Id

Include in Next New Hire Report
( ) No

Status *
Active

Terminate Employee

Other Employee Information

SSN:

SSN Verification Status:

Work Email Address
0/100

Suppress Pay Stub Email Alert
( ) No

Enable Self-Service Access
( ) No

I9 Completed?
( ) No   Edit I9 Settings

Save   **Cancel**

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

Enter the employee's email address and make sure the *Enable Self-Service Access* option is toggled to *Yes*.

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

Change an employee's status from *Active* to *Inactive* and vice versa.

To *Terminate* an employee, select to bring up the termination window.

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Terminations |

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

Navigation / Sidebar:

- Dashboard
- Client
- Employees
  - General
  - Job Titles
  - Labor
  - Recurring
  - Taxes
  - User Defined Fields
- Payroll
- Reports
- HR Solutions

Winston Worker

Summary   Hire Information

Termination Setting ✕

Termination Date * 📅 06/15

Termination Reason * Relocation ⌄

Termination Type:

Eligible for Rehire [No]

Termination Report: 📄 ❓

Direct Deposits [No] Inactivate all direct deposit accounts ❓

Benefits Plans ❓

All Stop Dates can be updated below

Benefit plans	Cobra Eligible	Stop Date
401(k)	false	📅 06/15

Save   Cancel

Callout (left):
The Termination date defaults to the current date. Always update with the *actual last date of employment.*

Salary employees will still be paid if the termination date falls within the pay period being processed. Override the salary amount in Time Entry if an adjusted amount should be paid for an employee's final check.

Callout (right):
Ensure all Employee Benefits are updated with any 3rd Party Providers, with the *same Termination Date* across all systems.

Partial background fields (right):
6680   Show
te SSN
ied
est Verification
Edit I9 Settings

Background fields (left):
Employee # *
Employment Category
Timeclock Id
Include in Next New Hire Repo
Status *

Save   Cancel

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

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Payroll + HR

Heartland Denim ● Active | ID: 0311TEST
Employee Management

- Dashboard
- Client ⌄
- Employees ⌃

⟨ Employee 21 of 21 ⟩ **View List** | **Employee Search** | **Employee Quick Hire** | **Employee Wizard** | Delete Employee

Winston Worker ⌄

Summary | Hire Information | Demographics | Banking | Organization

Additional Information ▲

EEO

Vietnam Veteran —○ No

Service Medal Veteran —○ No

Other Protected Veteran —○ No

Disabled Veteran —○ No

Disability [⌄]

Ethnic Origin [⌄]

Military Status [⌄]

Active Duty Separation [📅 MM/DD/YYYY]

Save | Cancel

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.

Edit Bank Account ✕

Status	Active ⌄
Routing Number *	111900659 9/9
Bank Name:	WELLS FARGO BANK
Account Number:	XXXXX0000 Show ⚪ No
Update Account Number	0/20
Verify Account Number	0/20
Account Type *	Checking ⌄
Description	0/30
Sequence *	Remaining Net ⌄
Amount	
Percent	

Save **Cancel**

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.

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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.

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Payroll + HR

Heartland Denim ● Active
Employee Management

🏠 Dashboard

⊙ Employee 5 of 21 ⊙

If you have multiple plans, selecting the **Add Accrual Plan** button will allow you to add another accrual plan to the employee.

Accruals   Accrual Balance History

Accruals

Benefits

Add Accrual Plan

Update Balance allows you to **manually update** the selected employee's balance if needed.

The updated balance replaces the *Current Balance* when the **next payroll processes.** Then, any hours taken and/or hours accrued are factored in if applicable.

Job Titles

Labor

Recurring

Taxes

User Defined Fields

$ Payroll ∨

🗎 Reports ∨

Add Accrual Plan ✕

Service Date: **04/10/2017**   Length of service: **6 Years, 2 Months (74 Months)**

Accrual Category * [SICK ∨]

Plan Name [Full-Time Sick Employee ∨]

Plan Schedule:

Current Balance:

Update Balance [   ] ❓

Plan Values   EE Overrides

Rate: [   ]

Balance Limit: **96.000000** [   ]

Carryover Limit: **Unlimited** [   ]

Status [Active ⬤]

Save **Cancel**

EE (Employee) Overrides: Used for employees who don't follow the normal plan rules. Any updates to an employee with overrides must be done manually on this screen.

If an employee accrual rate increases based on years of service, the **EE Overrides** need to be updated when employee values should change.

Filter By: Status [All ∨]

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Pay Rate | Update employee pay information.

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Heartland Denim ● Active ID: 0311TEST
Employee Management

🏠 Dashboard

Employee 5 of 21

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.

Accruals

Benefits

Employee Change Log

Employee Pay

Employment

General

Job Titles

Labor

Recurring

Taxes

User Defined Fields

$ Payroll ⌄

📄 Reports ⌄

Pay Rates

Add Pay Rate

Effective Date ⌄   % I

04/10/2017

Add Pay Rate ✕

Record Type *   Current Change ⌄

Effective Date *   📅 06/12

Change Reason   ⌄

Pay Type *   Salary ⌄

Pay Group   WEEKLY ⌄

Frequency *   Weekly ⌄

Create 'Change in Normal Hours' Life Event Record   ◯ No

Normal Hours *   40

Annual Salary: **$94,900.00**

*As of 04/10/2017

Percent Increase   3

Annual Salary   97746.9

Per Pay Salary   1879.75

Hourly Rate   46.9937

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

Viewing 1 - 1 of 1 records

Save   Cancel

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

Heartland Payroll + HR

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Employee Management

- Dashboard

(<) Employee 5 of 21 (>) **View List**   **Delete Employee**

- Accruals
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- Job T
- Labor
- **Recurring**
- Taxes
- User Defined Fields

$ Payroll ⌄

📋 Reports ⌄

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

Earnings   Deductions   Memo Calculations

Add Earning

Pay Item ⌃   Schedule

Add Earning ✕

Pay Item *   Phone Reimburse

Reference Number
0/100

Default Schedule:

Schedule Override   ⌄

Start Date   📅 MM/DD/YYYY

Stop Date   📅 MM/DD/YYYY

Amount

Rate

Save   **Cancel**

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

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

Viewing 1 - 1 of 1 records

Filter B

Rate   Hours   Balance   Actions

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.*

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Employee Management

Dashboard

⟨ Employee 5 of 21 ⟩ **View List**

Delete Employee

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

Employees ∧

Earnings | Deductions | Memo Calculations

Accruals

Benefits

Add Deduction

Employee Change Log

Employee Pay

Pay Item ∧ | Schedule

Employment

Advance | Every Pay

General

Job Titles

Labor

Depending on the deduction type, you can enter either an *Amount* or *Percent*.

Recurring

Taxes

User Defined Fields

$ Payroll ∨

🖪 Reports ∨

Add Deduction ✕

Pay Item * | Misc (no goal)

Reference Number |

0/100

Default Schedule:

Start Date | 📅 MM/DD/YYYY

Stop Date | 📅 MM/DD/YYYY

Amount |

Percent |

Apply Arrears Balance | No

Save **Cancel**

Choose the *deduction* you would like to add from the drop down menu.

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

Viewing 1 - 1 of 1 records

Filter By: S

Rate | Balance | Actions

✏️

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

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

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

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‹ Employee 5 of 21 › | View List | Employee Search | Employee Quick Hire | Employee Wizard | Delete Employee

Casper Coworker

Select the *specific tax* tab.

Federal | State | Local | Other Taxes | Tax Exemptions

Federal Income Tax

● Post 2020

Filing Status: [Single or Married Filing Separately ⌄]

Multiple Jobs: (No)

Dependents ($): [0]

Update the appropriate field(s) and select *Save*.

Other Income ($): [ ]

Deductions ($): [ ]

Add'l Withholding ($): [ ]

Block Tax: (No)

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.

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

Heartland
Payroll + HR

Heartland Denim ● Active ID: 0311TEST
Payroll Processing

Current Payroll

- Dashboard
- Client ⌄
- Employees ⌄
- $ Payroll ⌃
  - **Schedule**
  - Time Entry
  - Time Card Import
  - Process Payroll
  - Payroll Settings
- Reports ⌄
- ? HR Solutions ⌄

Client Notes for Payroll Processors

Note Type	Note	Note Priority ^	Effective Date	Expiration Date
Communication to Client	Forward your Texas Unemployment ID once received.	Medium	06/15	

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

By Pay Group: WEEKLY

Check Type: **Regular Payroll**
Run Date: **06/21**
Pay Date: **06/23**
Pay Period: **06/12** to
06/18

Blocked Services   Blocked Deductions
No Data   No Data

Optional Services   Blocked
Pre-Note All   Earnings/Memos
                   No Data

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

Go To Time Entry

Preview Payroll Timesheet

View Time Import Spreadsheet

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

22

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.

Employees ▼

$ Payroll ▲
- Schedule
- **Time Entry**
- Time Card Import
- Process Payroll
- Payroll Settings

Reports ▼

▲ Time Entry Grid

Pay Group:	**Bi-Weekly**		Pay Date:	09/15
Check Type:	**Regular**	Change Check Type	Pay Period:	08/28 to 09/10
Template:	**Regular**	Change Template		
Default Sort:	Employee Name			

Click here to view this client's critical note(s).

▼ Filter Employees

Regular Time Entry [Full Screen]

> 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.

Expand All   [Time Entry Totals]   Show/Hide Totals ▾   Shortcut Keys   Viewing 1 - 24 of 24 records

NAME	ITE	SALARY/RATE	BLOCK ☐	TOTAL HRS		Department	REGULAR (Earn Hrs)	OVERTIME (Earn Hrs)	SALARY (Earn $)	SICK (Earn Hrs)	BONUS (Earn $)	COMMISSION (Earn $)
Deduction, Dylan	📄	Salary: 2,500.00	☐	0.00	➕	▼						
Earning, Easton	📄	Salary: 1,500.00	☐	8.00	➕	▼					8.00	
...yee, Ella	📄	~~Salary: 1,000.00~~	☑	0.00	➕	▼						
...hment, Garrett	📄	Rate: 20.0000	☐	80.00	➕	▼	80.00				150.00	
...and, Hanson	📄	Rate: 25.0000	☐	80.00	➕	▼	80.00					175.00
— Heartland, Hazel	📄		☐	80.00	➕		80.00	5.00				
					➖	101 - Ma... ▼	20.00					
					➖	301 - E... ▼	60.00	5.00				
Heartland, Helen	📄	Rate: 18.0000	☐	82.00	➕	▼	80.00	2.00				
Instructor, Isaac	📄	Rate: 22.5000		64.00	➕	▼	64.00					

> 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.

23

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.*

Regular Time Entry [Exit Full Screen]

Continue to the **next step in processing** by selecting **Time Entry Totals**.

Expand All | [Time Entry Totals] | Show/Hide Totals ▾ | Shortcut Keys

NAME	ITE	SALARY/RATE	BLOCK ☐	TOTAL HRS		Department	REGULAR (Earn Hrs)	OVERTIME (Earn Hrs)	SALARY (Earn $)	SICK (Earn Hrs)	BONUS (Earn $)	COMMISSION (Earn $)
Assistant, Aaron	📄	~~Salary: 2,070.00~~	☑	0.00	⊕	▾			2,100.00			
Associate, Alex	📄	Salary: 1,500.00	☐									
Business, Bentley	📄	Salary: 1,100.00	☐							10.00		
Clerk, Clark	📄	Salary: 1,200.00	☐	0.00	⊕	▾						
Coworker, Casper	📄	Salary: 1,825.00	☐	0.00	⊕	▾						
Deduction, Dylan	📄	Salary: 2,500.00	☐	0.00	⊕	▾						
Earning, Easton	📄	Salary: 1,500.00	☐	8.00	⊕	▾				8.00		
Employee, Ella	📄	~~Salary: 1,000.00~~	☑	0.00	⊕	▾						
Garnishment, Garrett	📄	Rate: 20.0000	☐	80.00	⊕	▾	80.00				50.00	
Heartland, Hanson	📄	Rate: 25.0000		80.00	⊕	▾	80.00					175.00
— Heartland, Hazel	📄	Rate: 25.0000	☐	85.00	⊕				80.00			
					⊖	101 - Ma... ▾	60.00					
					⊖	301 - E... ▾	20.00					
Heartland, Helen	📄	Rate: 18.0000	☐	82.00	⊕	▾	80.00					
— Instructor,	📄			80.00	⊕				80.00			
					⊖	▾	64.00 📎					
					⊖	▾	16.00					
Laborer, Lucas	📄	Rate: 11.0000	☐	80.00	⊕	▾	80.00					

To override a salary, block the normal salary with a checkmark and enter the desired amount for this payroll in the ***Salary ($) field.***

The field ***turns yellow*** indicating the pay rate has been changed.

Select the ***paperclip*** next to the ***hours entered*** to change the pay rate by choosing an alternate pay rate or typing a pay rate into the blank box.

Select the *Green plus* ***to add another line*** for an employee. Use this when allocating wages or paying alternate rates.

- ⦿ No Override Rate
- ○ $20.0000 - Manager Rate
- ○ $15.0000 - Weekend Rate
- ○ $17.5000 - Painter Rate
- ○ *Enter a One-Time Rate*

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

Payroll
- Schedule
- **Time Entry**
- Time Card Import
- Process Payroll
- Payroll Settings

Reports

HR Solutions

Winston Worker

Employee Checks

Add Check **Refresh**

The *Eye icon* allows you to *preview the details* of the employee's check.

Check Type	Pay Frequency	Total Hours	Total Earnings	Options	Actions
Regular Check		32.00	0.00	Change	👁 ⊗

Details for Check Type - Regular Check

Template: **Regular** Change Template

If items are needed which are not displayed on your *Regular* template, choose **Change Template** then select **ALL** to show all earnings and deductions in the grid below.

Time Entry Totals **Clear Transaction**

Collapse All   Accrual Balances (No)   State/Local Override (No)   Block Direct Deposit (No)   Shortcut Keys
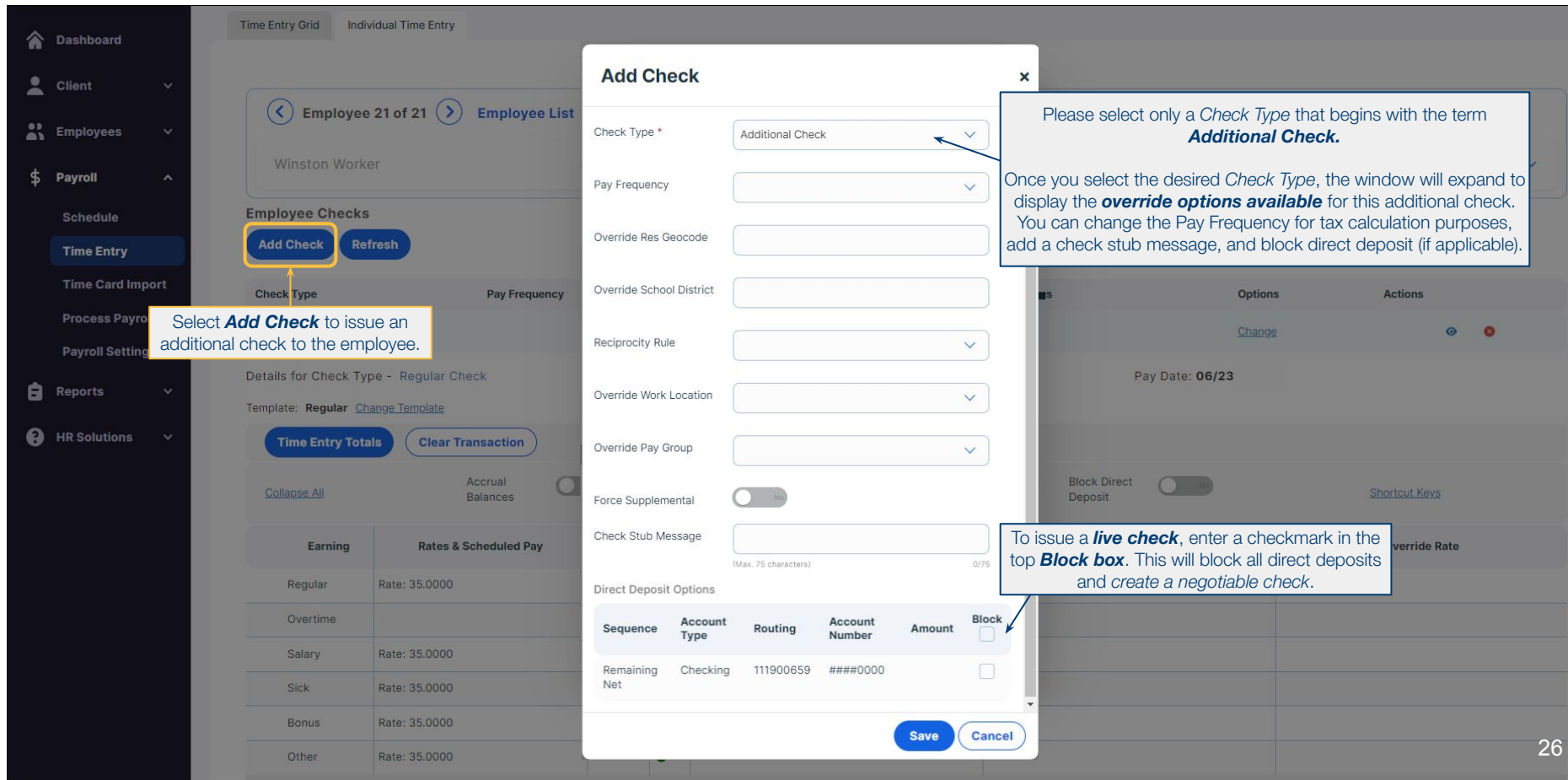
Earning	Rates & Scheduled Pay	Block	+/-	Hours	Dollars	Override Rate
Regular	Rate: 35.0000		⊕	32.00		
Overtime			⊕			
Salary	Rate: 35.0000					
Sick	Rate: 35.0000					
					32.00	

Select the *checkbox* to *block* that specific deduction for this payroll only.

Select the *Block checkbox* to *override a deduction* for this payroll only and enter the desired amount in the *Dollars* column.

Deduction	Scheduled	Block	Dollars		Tax	Additional % or $	Block	Dollars
401(k)	%: 3.00	☑			FEDERAL WH	Addt'l $: 0.00	☐	
		Total			State W/H (NEBRASKA WH RES)		☐	
							Total	

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.

Add Check

Check Type *	Additional Check
Pay Frequency	
Override Res Geocode	
Override School District	
Reciprocity Rule	
Override Work Location	
Override Pay Group	
Force Supplemental	No
Check Stub Message	
	(Max. 75 characters) 0/75

Direct Deposit Options

Sequence	Account Type	Routing	Account Number	Amount	Block
Remaining Net	Checking	111900659	####0000		

Save **Cancel**

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.

Time Entry

Time Card Import

Process Payroll

Payroll Settings

Reports

HR Solutions

Add Check   **Refresh**

Verify the correct check is chosen by reviewing the Check Type name, the selected type will be highlighted in a blue hue. Enter the figures for the additional check in the grid after selecting.

Check Type		Total Earnings	Options	Actions
Regular Check	32.00	0.00	Change	👁 ⊗
Additional Check	0.00	250.00	Change	👁 🗑

Details for Check Type - Additional Check   Pay Group: **WEEKLY**

Template: **Regular** Change Template

Select the ***Eye icon*** to preview the check and access the Manual Check option.

Time Entry Totals   **Clear Transaction**

Collapse All   Accrual Balances [No]   State/Local Override [No]   Block Direct Deposit [Yes]   Shortcut Keys

Earning	Rates & Scheduled Pay	Block	+/-	Hours	Dollars	Override Rate
Regular	Rate: 35.0000		⊕			
Overtime			⊕			
Salary	Rate: 35.0000		⊕			
Sick	Rate: 35.0000		⊕			
Other	Rate: 35.0000		⊕			
Bonus	Rate: 35.0000		⊕		250.00	
			Total		250.00	

Verify that ***Additional Check is selected at the top***, then enter the data for the additional check directly in the grid.

You have the ability to ***Block*** and/or ***Override*** recurring ***deductions*** and ***taxes*** for additional checks.

Deduction	Scheduled	Block	Dollars		Tax	Additional % or $	Block	Dollars
401(k)	%: 3.00	☑			FEDERAL WH	Addt'l $: 0.00	☐	
		Total			State W/H (NEBRASKA WH RES)		☐	

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.

Options	Actions	
Change	👁	✖
	👁	🗑

Select the **Eye icon** to preview the check and access the Manual Check option.

Check Preview

▾ Post As Manual Check

Check Summary - Additional Check

Check Date	6/27
Gross Pay	250.00
Period End	06/18
Gross Wage	250.00
Period Begin	06/12
Net Pay	219.33
Voucher #	
Check Amt	219.33

Winston Worker
96 Opposite Street
NEBRASKA CITY, NE 68410
Heartland Denim

Employee #	111
SSN	XXX-XX-6680
Division	2000 - SALES
Department	301 - EMPLOYEE
Fed Mar	Single or Mar
Fed Ex	N/A Adtl: $0.00
St Mar	Single
St Ex	

Review the **Gross Pay, Net Pay, Earnings,** and **Deductions** if applicable.

Earnings & Memos*

Title	Hours	Dollars	Hours	Dollars
		Current	Year-To-Date	
Regular			876.00	30,910.00
Bonus	0.00	250.00	0.00	250.00
ER Match*	0.00	7.50	0.00	45.30

CURRENT PERIOD LEAVE ACCRUALS

Deductions

Title	Current Dollars	YTD Dollars
401(k)	7.50	45.30

Direct Deposit

Employee Taxes

Title	Dollars	Wages	Dollars	Wages
	Current		Year-To-Date	
SOC SEC EE	15.50	250.00	1,931.92	31,160.00
MED EE	3.62	250.00	451.82	31,160.00
FEDERAL WH	0.00	242.50	1,411.36	31,114.70

After reviewing the check, select **Close Preview** to return to Individual Time Entry.

Close Preview

Total	250.00

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.

Check Preview

☒

☐ Post As Manual Check

Expand the arrow to view the **Post As Manual Check** options. You can edit the fields if needed.

Check Date	📅 06/27	Use Last Check # on file	No
Period Begin	📅 06/12	Check Number	311
Period End	📅 06/18	Bank Account	

If an in-house check was issued, **enter the check number** here. Your payroll reports will reflect this number making reconciliation easy.

Post as Manual   **Print and Post**

Check Summary - Additional Check

Check Date
Gross Pay
Period End
Gross Wage
Period Begin
Net Pay
Voucher #
Check Amt   219.33

It is important to **select one of the options.** This tells the system not to issue payment to the employee, because that payment has been issued by the employer.

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.**

Employee #	111
SSN	XXX-XX-6680
Division	2000 - SALES
Department	301 - EMPLOYEE
Fed Mar	Single or Mar
Fed Ex	N/A Adtl: $0.00
St Mar	Single
St Ex	

Once the Manual has been posted, you return to Individual Time Entry where the check type will now show as **Manual Check (MM/DD/YYYY).**

Check Type	Total Hours	Total Earnings	Options	Actions	
Regular Check	32.00	0.00	Change	👁	❌
Manual Check (6/27	0.00	257.50	Change	👁	🗑

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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.

Check Preview

⌃ Post As Manual Check

Check Date   📅 06/27

Period Begin   📅 06/12

Period End   📅 06/18

Post as Manual   **Print and Post**

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.**

Time Entry
Time Card Import
Process Payroll
Payroll Settings
Reports ⌄
HR Solutions ⌄

Add Check

Check Type	Pay Frequency	Total Hours	Total Earnings	Options	Actions
Regular Check				Change	👁 ❌
Additional Check				Change	👁 🗑

Details for Check Type - Additional Check   Pay Group:

Template: **Regular** Change Template

Time Entry Totals   **Clear Transaction**

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.

Collapse All | Accrual Balances (No) | State/Local Override (No) | Block Direct Deposit (Yes) | Shortcut Keys

30

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!

Navigation (left sidebar):
- Dashboard
- Employees
- Payroll
  - Schedule
  - Time Entry
  - Time Card Import
  - Process Payroll
  - Payroll Settings
- Reports
- HR Solutions

Tabs: Time Entry Totals | Preview/Process Payroll

Pay Group: **Bi-Weekly**   Change Pay Group   Pay Date: **09/15**   Pay Period: **08/28** to **09/10**

Filter By Organization

Org Value: All   Value: All   **Reset Filter**

Continue to **Preview/Process Payroll**   Or Go To **Time Entry Grid**   **Individual Time Entry**

Earnings And Memo Calcs		Control Total		System Total		Difference	
		Hours	Dollars	Hours	Dollars	Hours	Dollars
∧ Input Hours & Dollars							
+	Bonus		150.00		$150.00		$0.00
+	Commission		300.00		$175.00		-$125.00
	Overtime	7.00				0.00	
	Regular	520.00				0.00	
+	Salary				$2,100.00		
−	Sick			18.00			

EE #	First Name	Last Name	Hours	Dollars	Action
109	Bentley	Business	10.00	$0.00	✎
120	Easton	Earning	8.00	$0.00	✎

Annotations:
- Select the *+ icon* to expand and display individual employee entries for that pay item.
- Balance totals entered in the system compared to what you have recorded for your company records. The system will display discrepancies or show if they are balanced.
- Select the *Pencil icon* to edit incorrect entries.

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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.

Dashboard

Employees ▼

Payroll ▼

Reports ▼

Time Entry Totals   Preview/Process Payroll

Pay Group: **Bi-Weekly**   Pay Date: **09/15**   Pay Period: **08/28**   to   **09/10**

Payroll Information	Current Payroll	Last Payroll
Payroll Run Type	Regular Payroll	Regular Payr
Run Date	09/13	09/05
Pay Date	09/15	09/06
Period Begin Date	08/28	08/14
Period End Date	09/10	08/27
Total ACH Requirement	See Preview Results	$37,410.41
Payroll Reports	See Preview Result	

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.

Go

Check Stub Message

0/75

Employee Direct Deposit Change Notification

There is 2 employee(s) with a direct deposit account change since the last run date on: 09/05/2023. Please access the reports below to view these changes.

Employee Direct Deposit Change Log   View PDF   Export List

Preview Results   👁 **Preview Payroll**

Click 'Preview Payroll' to preview reports.

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.

Message to Payroll Processor

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

✓ **Process Payroll**

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

LAST PREVIEW RESULTS

Processed By:	**Heartland.Denim**
Submitted:	**06/16** **08:44:03**
Completed:	**06/16** **08:44:09**
Total ACH Requirement:	**$22,388.23**

Payroll Reports: | Payroll Summary ⌃ | **Go**

Payroll Summary ✓
Payroll Register
Exceptions
Missing Critical Information
Pay Transactions Audit

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.*

Process Payroll Confirmation ✕

Are you sure you want to process this payroll?

Yes | **No**

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.

Direct Deposit Change Notification ✕

⌄ There are 2 employee(s) with direct deposit account changes since the last run date.

Click 'Ok' to continue processing payroll or 'Cancel' to review these changes.

Ok | **Cancel**

1 / 9 | — 150% + | ⊡ ⟲ | ⬇ 🖨 ⋮

PAYROLL REGISTER PREVIEW (0311TEST)
Heartland Denim
DBA: Heartland Denim

Period Begin Date: 6/12
Period End Date: 6/18
Pay Period: 8
Payroll Type: Regular Payroll

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

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

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

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Payroll + HR

Heartland Denim • Active | ID: 0311TEST

Reports

- Dashboard
- Client
- Employees
- Payroll
- Reports
  - Archived Reports
  - Check Print Back
  - Custom Reports
  - **On Demand Reports**
  - Quarterly Reports
  - Year End Reports
- HR Solutions

Pay Period Reports | Date Range Reports

Select the *Date Range Reports* tab.

Report Name *   Check History Detail

Report titles that include the term *Export* will be an Excel file type.

Sorting

Sort up to 3 categories, such as Division 1st, Department 2nd, and Job 3rd.

Filtering

From Date *   📅 01/01

To Date *   📅 03/31

Pay Groups

Employee   118-Ryder Representative

Sort Field 1

Sort Field 2

Sort Field 3

Options

Date Type   Pay Date

Report Format   PDF

Default format is *PDF.* Select reports are available as *Excel files.*

Select the desired report and additional options, then select *Run Report*.

Run Report

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

Dashboard

Employees

Payroll

Reports
- **Archived Reports**
- Check Print Back
- Custom Reports
- On Demand Reports
- Quarterly Reports
- Year End Reports

HR Solutions

Payroll Report Archive | Export Archive

Pay Date Year *

[⌄] [**Get History**]

Payrolls are listed with the most recent payroll run at the top. Select the **+ icon** to expand that payroll run.

⌃ Pay Group: Bi-Weekly

	Payroll Status	Payroll Type	Run #	Run Date	Pay Date	Period End	Last Of Month	New Fiscal Year
—	Complete	Regular Payroll	34	09/12	09/15	09/10		

	Output Item		Generate Begin		Generate End		Status	Actions
☐	Payroll Summary		12	01:18:36 PM	09/12	01:18:46 PM	GENERATED	⟳ ☰
☐	Payroll Register		12	01:18:46 PM	09/12	01:18:48 PM	GENERATED	⟳ ☰
☐	New Employee and		12	01:18:48 PM	09/12	01:18:52 PM	GENERATED	⟳ ☰
☐	Exceptions		09/12	01:18:55 PM	09/12	01:18:55 PM	GENERATED	⟳ ☰
☐	Check Register		09/12	01:18:55 PM	09/12	01:18:56 PM	GENERATED	⟳ ☰
☐	Direct Deposit Register		09/12	01:19:01 PM	09/12	01:19:01 PM	GENERATED	⟳ ☰
☐	Expenses by Job		09/12	01:18:25 PM	09/12	01:18:26 PM	GENERATED	⟳ ☰
☐	Workers Comp R		09/12	01:18:26 PM	09/12	01:18:27 PM	GENERATED	⟳ ☰
☐	Workers Comp Summary		09/12	01:18:24 PM	09/12	01:18:25 PM	GENERATED	⟳ ☰

Select the report(s) that you would like to view by putting *a checkmark* next to the report(s) or check the box by Output Item to select all.

Select *View* or *Download* to generate a consolidated PDF file of all chosen reports.

[**View Selected Reports**] [**Download Selected Reports**] [**Regenerate Selected Reports**] [**Refresh Status**]

| + | Complete | Regular Payroll | 33 | 09/05 | 09/06 | 08/27 | |
| + | Complete | Regular Payroll | 32 | 08/17 | 08/18 | 08/13 | ✓ |

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.

Select the **Printer icon** to view the Print Checks window shown in the center of the page.

Select the **Print button** to open a PDF file containing the checks and print directly from the PDF.

If the file does not default to open as a PDF, you will need to **download it as a PDF** prior to printing to ensure proper formatting of the checks.

Once you close the PDF, the checks will be marked as printed. The print button is **disabled** and if this page is refreshed, the check file disappears. This is a security feature to prevent checks from being printed multiple times.

If you need to **reprint after closing the file**, contact your Payroll Support Team to reset the checks.

Print Checks

Run number:	**11**
Run Date:	**6/16**
Check Date:	**6/20**
Pages:	**1**

WARNING: Checks can only be printed once and will be considered printed once the "Print" button is clicked.

Print   **Cancel**

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.

Statement of Earnings For: **Easton Earning**

Employee #:	120	Division:	2000	Period Begin:	6/4/2023	Check Date:	6/20/2023
Clock Number:		Department:	301				
SSN:	XXX-XX-6690	Federal Filing:	Single or				
Company Id:	0311TEST	State Filing:	Single or				

Heartland
1010 N Broa
NEBRASKA

Check Number	Check Amount	Gross
10001	$1,159.44	$1,50

EARNINGS

Description	Rate	Hours	Dollars
Salary		40.00	1,500.00

DEDUCTIONS

Description	Current	YTD
Medical PreTax	10.00	220.00

Print

Printer: \\HALNDFSUSRp01.hps.com\OKC-7   Properties   Advanced   Help

Copies: 1   ☐ Print in grayscale (black and white)   ☐ Save ink/toner

Pages to Print
● All ○ Current ○ Pages [1]
▼ More Options
  ○ Current view ☐ Reverse pages
  Odd or Even Pages: [All pages in range]

Page Sizing & Handling ⓘ
[Size] [Poster] [Multiple] [Booklet]
○ Fit ● Actual size
○ Shrink oversized pages ○ Custom Scale: [100] %
☐ Choose paper source by PDF page size
☐ Print on both sides of paper

Orientation:
● Auto ○ Portrait ○ Landscape

Comments & Forms
[Document and Markups] [Summarize Comments]

[Page Setup...]

Document: 8.5 x 11.0in
8.5 x 11 Inches

Page 1 of 1

[Print] [Cancel]

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