

# Heartland

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## **Client Guide: Online Access to Heartland Reports**

This guide reviews the system availability for online users with Reports Only access. This user is a view-only type and cannot modify any existing reports or employee data.

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# Heartland

## Logging in to Your Account

Before starting, verify you have received the enrollment link from your Payroll Support Team and have completed the registration process. Once registered, you will then be ready to access your reports! To access your account, go to [www.heartlandpayroll.com](http://www.heartlandpayroll.com). Enter your email address and the password created during your registration.

Account Login

Email Address

Password [Forgot your password?](#) [Show](#)

Log In

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## Dashboard

The first screen after the login is the **Dashboard**, also referred to as the *Client Landing Page*.

💡 *Clients with Multiple Heartland accounts:* If you have access to more than one payroll account with Heartland, you will see your accounts listed prior to accessing the Dashboard. Select the desired account to be taken to that account's Dashboard.

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Heartland Outfitters Active ID: DEMODOCS

Welcome Ryder Representative 877-729-2968 derek.daniel@e-hps.com

Processing Information

Pay Group	Bi-Weekly
Frequency	Bi-Weekly
Due In Date	07/19
	07/21
	07/03
	07/16
View Schedule	
Run Type	Regular Payroll

Announcements (0)

Bank Holidays 0  
0 bank holidays in next 30 days ... [more](#)

Anniversaries 2  
2 employees are celebrating their anniversary in next 30 days ... [more](#)

Notes

Heartland Outfitters, PER DIEM = lodging, meals, and mileage... Reimbursement = employee repay for business expenses, ins., and personal gas payments

Account Representatives

Sales: [Ursula](#)

Bi-Weekly Rep: [Derek](#)

Links

The following Link will help you to:

- Order Check Stock/Envelopes
- View Payroll Related Forms
- Access Payroll Related External Sites

Select the tabs on the left to navigate to different sections of the payroll account.

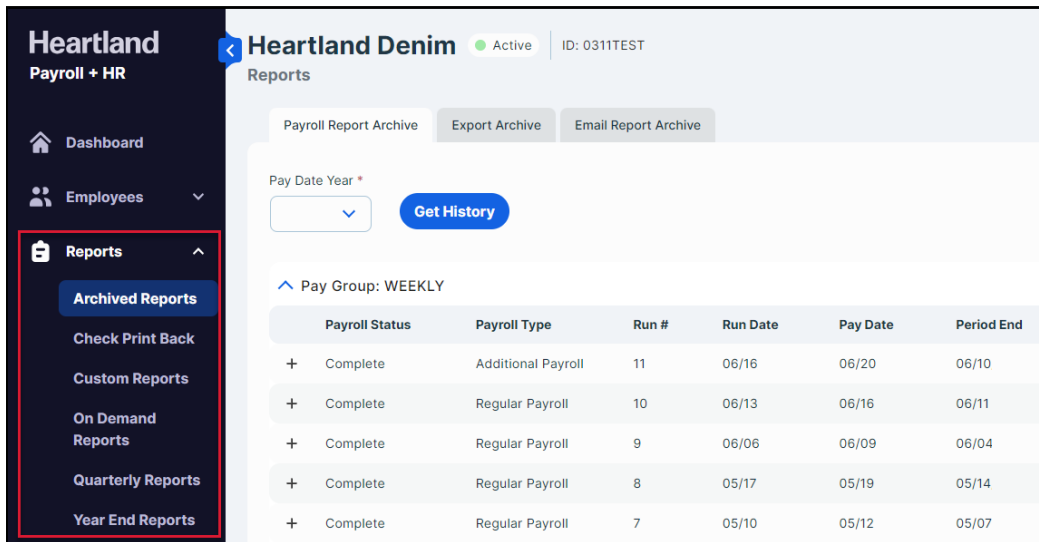
Select to contact your Sales Representative or Payroll Support Team.

The Links area allows you to:

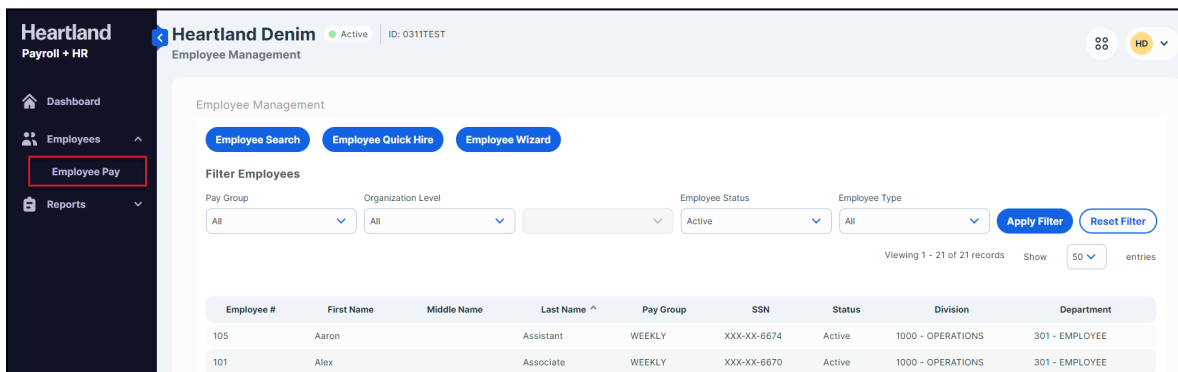
- Order check stock
- Download payroll related forms
- Access payroll related websites

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From the Dashboard, you would navigate to the **Reports section**, which contains an arrow to expand on the left-hand side. Your navigation screen should look similar to the image below.



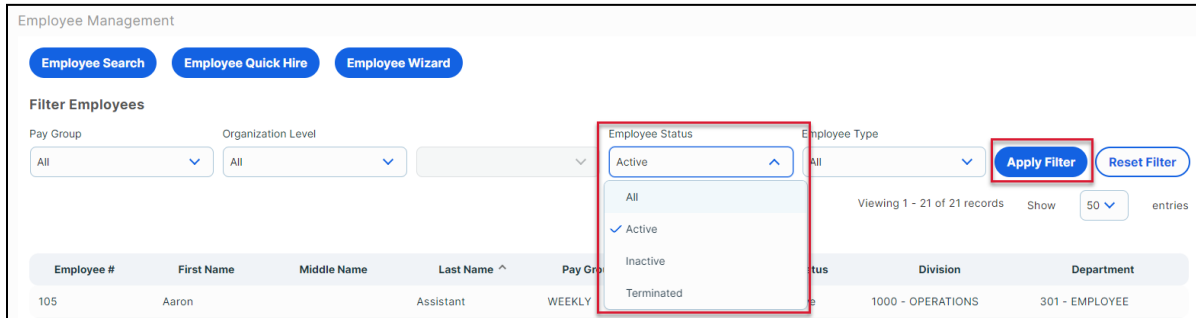
In addition to Reports and the Dashboard, you can access **limited Employee data**. Specifically the *Employee Check History* and *Employee Tax Forms*. This data may be masked for security purposes based on your access.



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## Employees

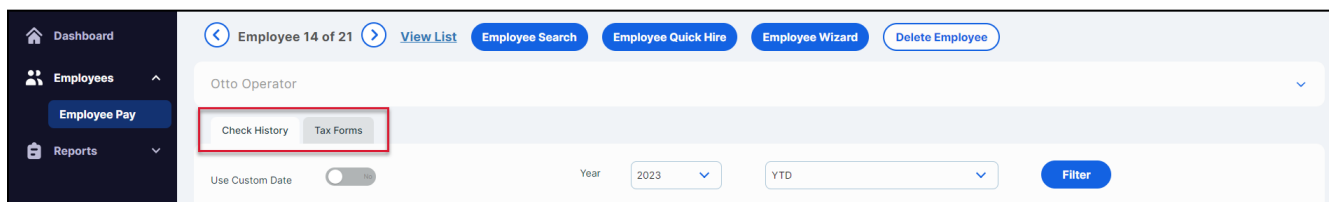
When you select the *Employees* section, you will see a list of your active employees. You can view inactive and/or terminated employees using the **Employee Status filter**. Select an employee to view their profile.



## Employee Pay

*Employees* → *Select Employee* → *Employee Pay* → *Check History*

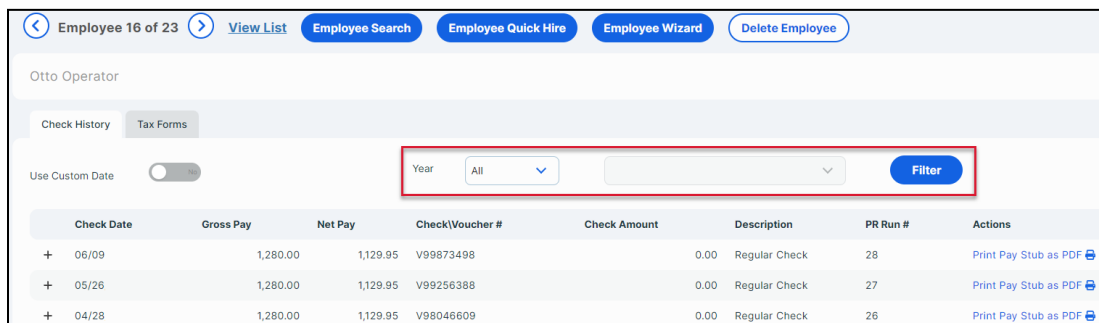
**Check History tab** to view the pay stubs, and **Tax Forms tab** to view W-2 or 1099 for the selected employee.



## Check History

*Employees* → *Select Employee* → *Employee Pay* → *Check History tab*

This is where you can access copies of the employees' pay stubs.



- Select the desired *Year* or toggle *Use Custom Date* to *Yes* to enter a start and end date.
- Select *Filter*.
- This will generate a list of the employee's check history.

(continued)

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- Select the + to the left of the check date to expand the screen to display the check information.

Use Custom Date  Year

Check Date	Gross Pay	Net Pay	Check\Voucher #	Check Amount	Description	PR Run #	Actions
- 06/20	784.00	671.56	V44279324	0.00	Regular Check	11	<a href="#">Print Pay Stub as PDF</a>
+ 06/16	640.00	564.97	V44279049	0.00	Regular Check	10	<a href="#">Print Pay Stub as PDF</a>
+ 06/09	640.00	564.97	V44278699	0.00	Regular Check	9	<a href="#">Print Pay Stub as PDF</a>

Employee Name: **Otto Operator**  
 Address: **789 Difficult Circle**  
**DU BOIS, NE 68345**  
 DBA Name: **Heartland Denim**

Employee #	103	Fed Mar	Single or Married Filing Separately	Check Date	06/20	Gross Pay	784.00
SSN	XXX-XX-6672	St Mar	Single or	Period End		Gross Wage	784.00
				Period Begin		Net Pay	671.56
				Voucher #	V44279324	Check Amt	0.00

**Earning & Memos\***

Title	Current		Year-To-Date	
	Hours	Dollars	Hours	Dollars
Regular	40.00	640.00	880.00	14,080.00
Overtime	6.00	144.00	31.00	744.00

**Deductions**

Title	Current Dollars	YTD Dollars

**Direct Deposit**

Type	Account	Deposit Amount
Savings	XXXXX3333	671.56

**Current Period Leave Accruals**

Title	Hours Accrued	Hours Taken	Available Balance

- Scroll to the right and select **Print Pay Stub as PDF** to print or save a copy of the pay stub.

Check Date	Gross Pay	Net Pay	Check\Voucher #	Description	PR Run #	Actions
+ 06/20	784.00	671.56	V44279324	Regular Check	11	<a href="#">Print Pay Stub as PDF</a>
+ 06/16	640.00	564.97	V44279049	Regular Check	10	<a href="#">Print Pay Stub as PDF</a>
+ 06/09	640.00	564.97	V44278699	Regular Check	9	<a href="#">Print Pay Stub as PDF</a>
+ 05/19	640.00	564.97	V44278469	Regular Check	8	<a href="#">Print Pay Stub as PDF</a>

## Employee Tax Forms

Employees → Select Employee → Employee Pay → Tax Forms tab

Tax Forms is where you can access copies of W-2s or 1099s.

- Select a year from the dropdown, then select **View 202X PDF** to print or save a copy of the Tax Form.

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Training ● Active ID: 0311TINK [Change Client](#)

Employee Management

Employee 4 of 5 [View List](#) [Employee Search](#) [Employee Quick Hire](#) [Employee Wizard](#) [Delete Employee](#)

Debbie Smith

Check History **Tax Forms**

Select Year

[View 202X PDF](#)

## Reports

### Archived Reports

Reports → Archived Reports → Payroll Report Archive tab

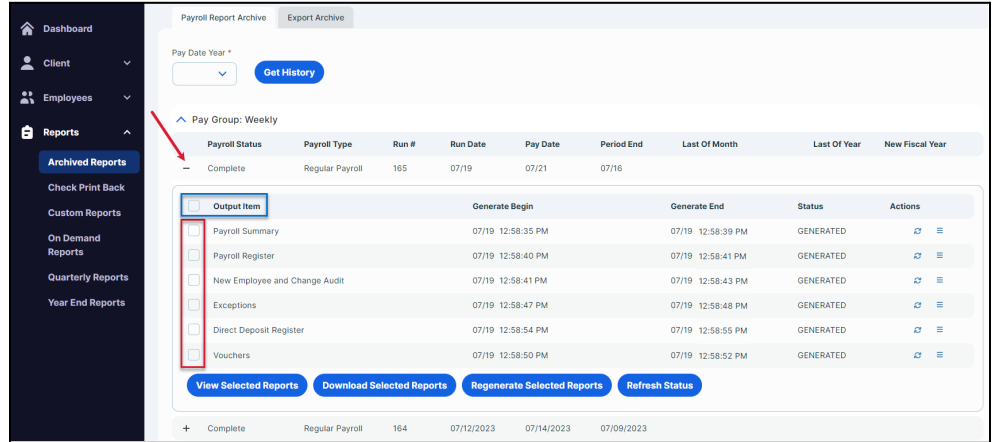
Generate groups of reports as a single PDF for a specific check date, *Payroll Report Archive*, or retrieve the GL export file and view certain types of custom reports, *Export Archive*.

Select the year you need the report from the *Pay Date Year* dropdown and select **Get History**.

Select the *Plus sign* for the desired pay date to expand the available reports.

Check the top box, *Output Item*, to select all reports or check *specific reports* to include.

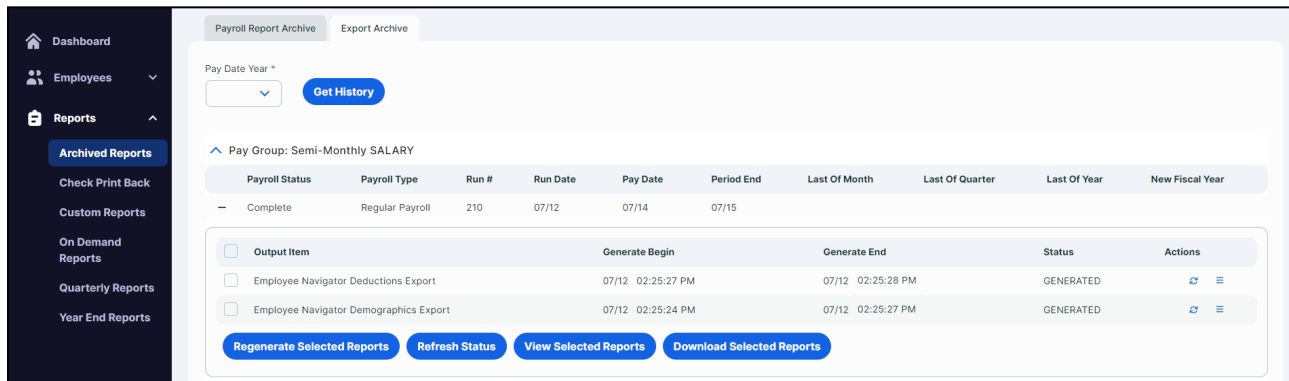
Select *View Selected Reports*; all selected reports will consolidate into a single PDF file.



### Export Archive

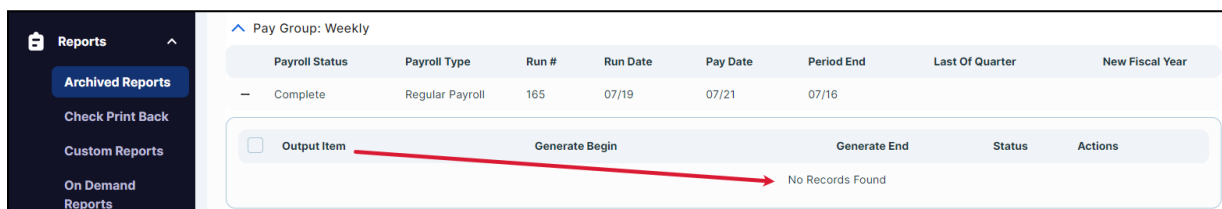
Reports → Archived Reports → Export Archive tab

Access to General Ledger Reports by check date if enrolled in our General Ledger Product. It also allows you to access certain custom reports if any have been built for your account.



- Select the year you need the report from the *Pay Date Year* dropdown and select **Get History**.
- Select the *Plus sign* on the far left for the desired pay date to expand the available reports.
- Check the top box beside *Output Item* to select all reports or check *specific reports* to include.

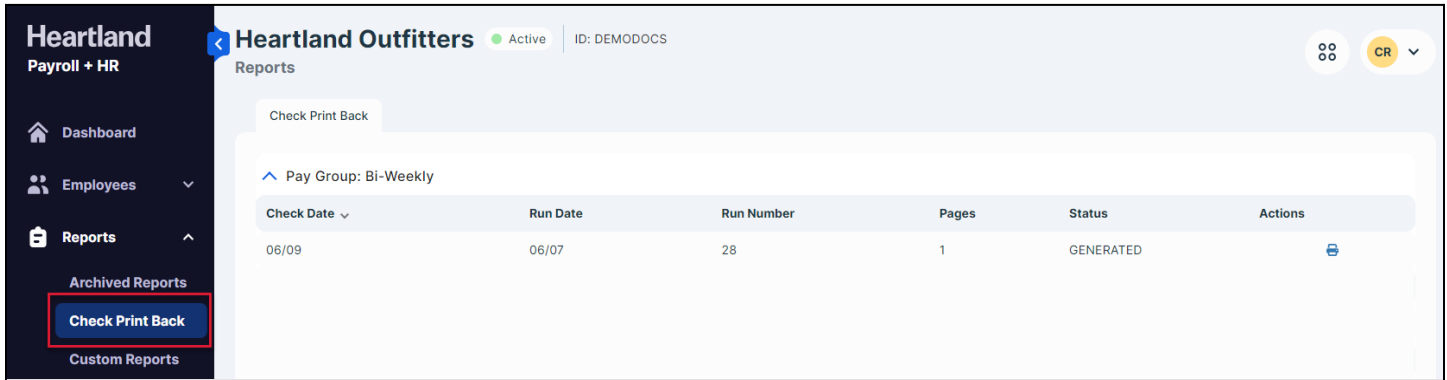
💡 If you do not have any export report types for that check date, you will see this message:



## Check Print Back

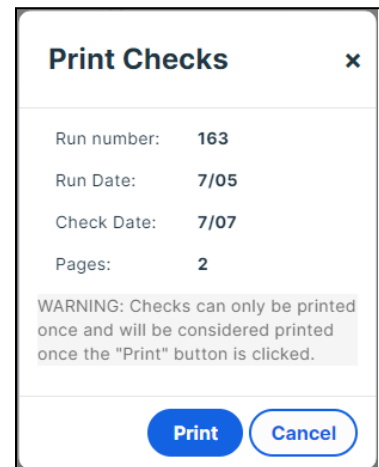
Reports → Check Print Back → Check Print Back

Optional Feature: If you are printing your checks in-house, rather than having them delivered, this is where you will retrieve your check file after your payroll processes.



💡 The Check Print Back area will populate with data if your organization utilizes this feature. Clients that have a payroll package delivered will not have this area visible.

- Select the Printer icon under *Actions* to the right of the Check Date you want to print.
- Select **Print**, and a new window will appear.
  - You will notice that there is a Warning in the Print Checks box. This warning indicates that you can only open the file once as a security measure.



To download the latest version of Adobe Reader at no cost, go to: <https://get.adobe.com/reader/>

### Check Print Back Tips

- Choose *Actual Size* under the *Page Sizing & Handling* settings to ensure proper check spacing.
- Our check output is formatted for Adobe Reader and *Actual Size*.
- Keep the file open until you verify that the checks are printed properly (spacing is correct). Then, close the tab with the check file.
- In the event that you have an issue printing your checks or inadvertently closing the file before printing, please contact your Payroll Support Team. They have the ability to reset your check file for you.



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## On-Demand Reports

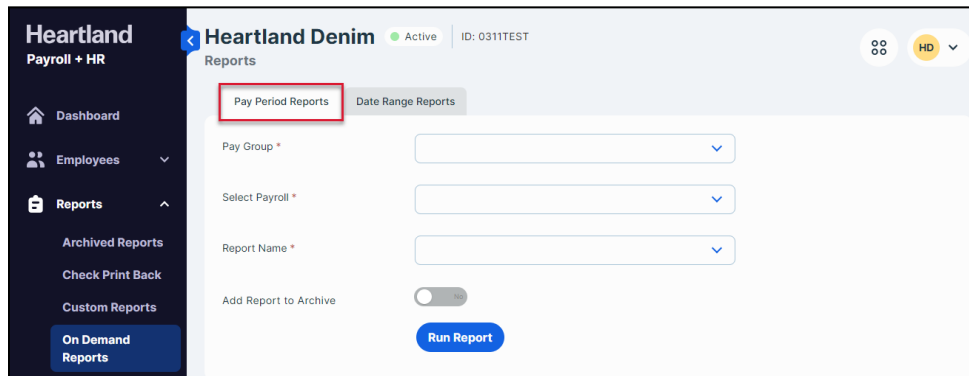
Used to generate a report on-demand for a selected check date, *Pay Period Reports*, or for a specific time frame *Date Range Reports*.

💡 If there is a report that you would like added to your available reports, contact your Payroll Support Team.

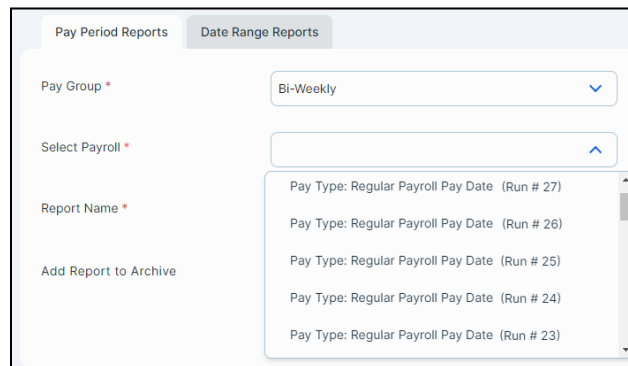
### Pay Period Reports (On Demand)

Reports → On Demand Reports → Pay Period Reports tab

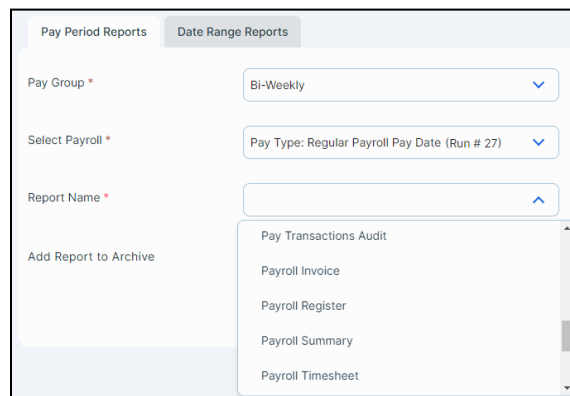
Can run one report at a time for a **specific check date**.



- Select the Pay Group from the *Pay Group* dropdown.
- Select the payroll date from the *Select Payroll* dropdown, see below.



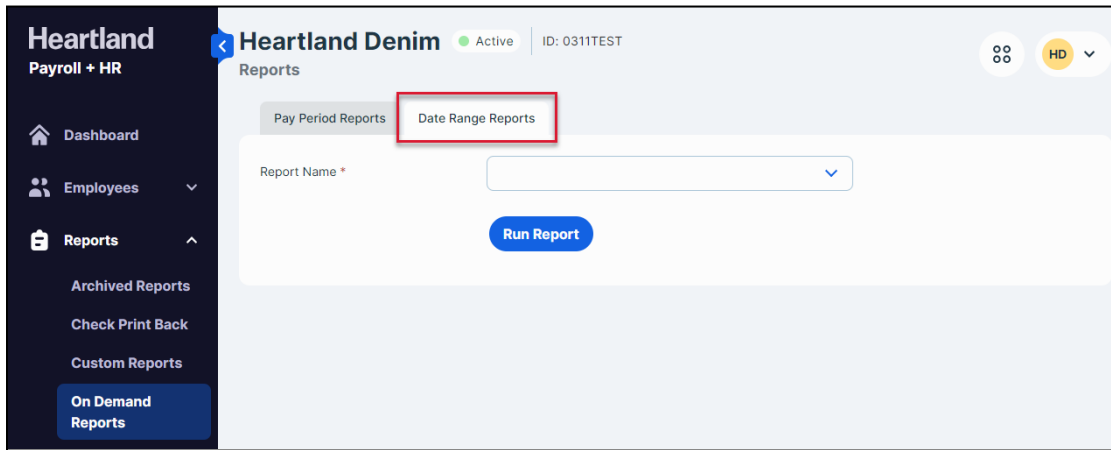
- Select the report type from the *Report Name* dropdown, see below.
- Select the **Run Report** button.



## Date Range Reports (On Demand)

Reports → On Demand Reports → Date Range Reports tab

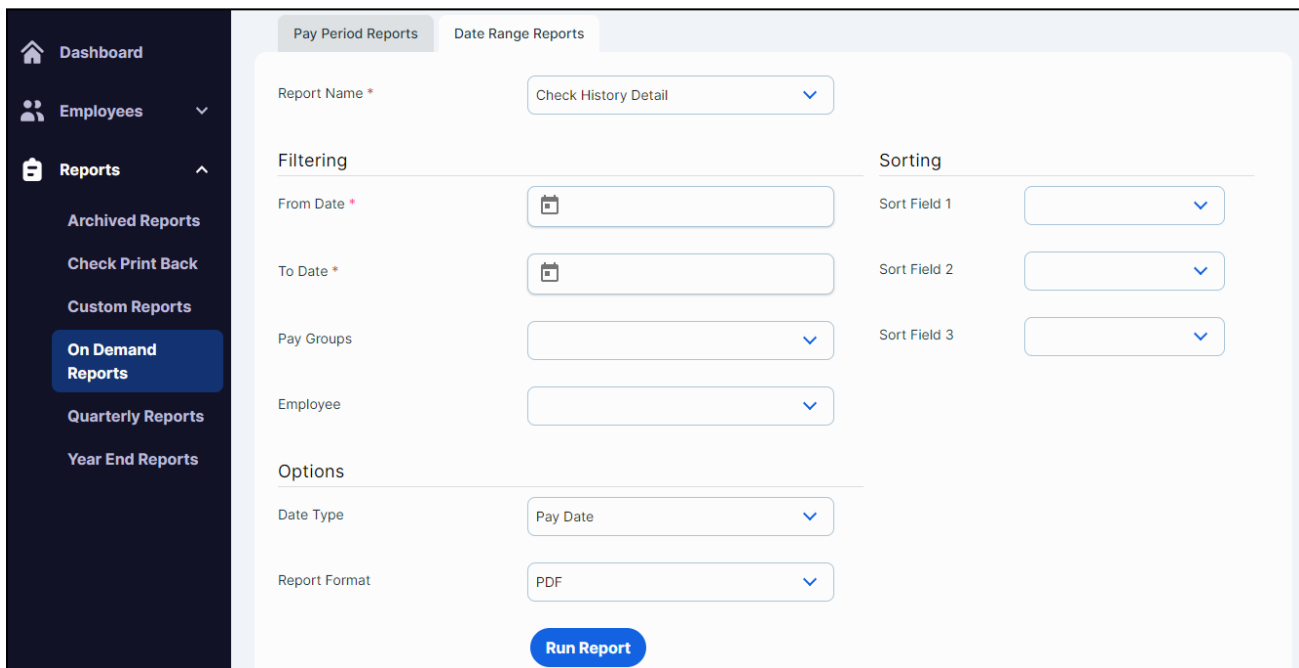
This can be used to generate a report on-demand for a selected date range.



- Select the report type from the *Report Name* dropdown.
- This will generate Filtering, Sorting, and Options fields.
- Not all report types will allow Sorting or have the same options.

## Filtering

- Enter the *To Date* and *From Date* manually or select dates from the calendar icon.
- Select the appropriate pay group from the *Pay Groups* dropdown.
- If this report should only include a single employee, select that individual from the *Employee* dropdown.



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## Options

- **Date Type field:** Select *Pay Date* or *Period Ending Date* to generate a report based on that criteria.
- Select either Excel or PDF from the *Report Format* dropdown. *Not all reports are available in Excel.*

The screenshot shows a 'Filtering' section with the following fields: 'From Date' (01/01), 'To Date' (06/30), 'Pay Groups' (Weekly), and 'Employee' (highlighted in yellow). Below this is an 'Options' section with 'Date Type' (Pay Date) and 'Report Format' (PDF). A 'Run Report' button is at the bottom.

## Sorting

- You may select up to 3 *Sort Fields* from the possible options.
- If you need any of the organization fields to be added to your account, contact your Payroll Support Team.

The screenshot shows a 'Sorting' section with three dropdown menus: 'Sort Field 1' (Department Title), 'Sort Field 2' (Employee Name), and 'Sort Field 3' (empty).

## Quarterly Reports

*Reports* → *Quarterly Reports* → *Quarterly Reports*

Access to all Quarterly tax filing reports and returns that were generated on your behalf by Heartland, such as Form 941 and appropriate state quarterly returns.

The screenshot shows a sidebar with navigation options: Dashboard, Employees, Payroll, Reports (expanded), Archived Reports, Check Print Back, Custom Reports, On Demand Reports, and Quarterly Reports (highlighted). The main content area shows a table titled 'Quarterly Reports' with the following data:

Year	Quarter	File Type	Actions
202X	1	PDF	🔄 ☰
202X	2	PDF	🔄 ☰

(continued)

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Locate the specific year and quarter that is needed.

Select the menu icon, *three horizontal lines*, under *Actions* to view the specific quarterly reports.

Select *View PDF* to open the file in a new PDF window.

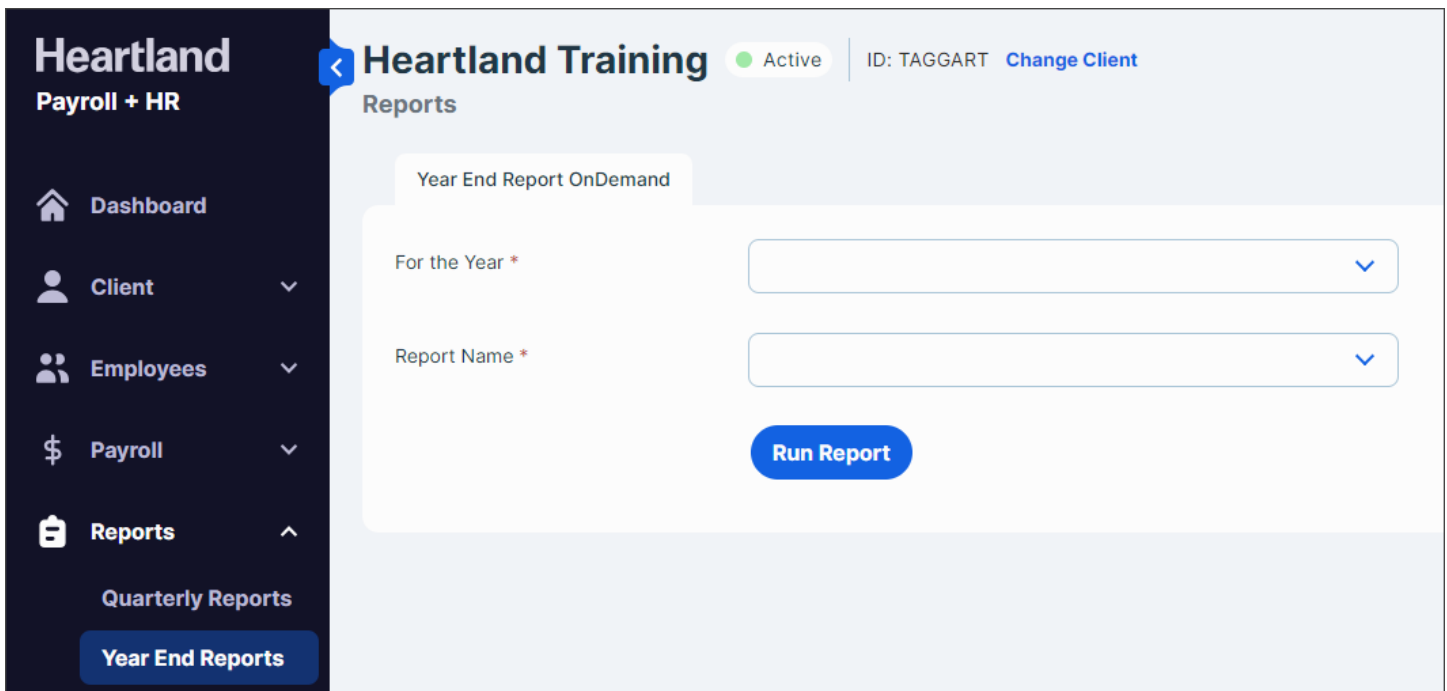
You can then save or print the Quarterly Reports.



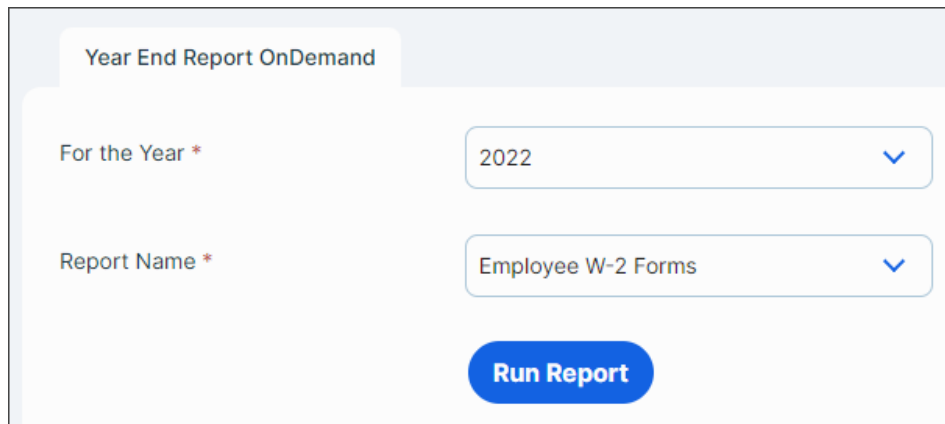
## Year-End Reports

Reports → Year-End Reports → Year-End Report OnDemand tab

Access your Year-End tax returns that were generated on your behalf by Heartland, such as Employee W-2 Forms or Form W-3.



Select the year you are retrieving your Year-End information, and select the appropriate document. The forms will open in a PDF view in a new window, download or save the files as needed.



# Heartland

## FAQs

**Are the links in the emails secure?** Yes, the link redirects you to our secure Heartland login. **Bookmark our URL:** [www.heartlandpayroll.com](http://www.heartlandpayroll.com)

**I have forgotten my password.** If you forget your password, select the *Forgot your password?* link located on the login screen and follow the instructions.

**I do not see the quarterly reports. Who do I contact?** Quarter and Year-End Reports have their own subsections under the Reports section; if those sections are blank, contact your Payroll Support Team. They are happy to assist in getting reports uploaded for you.

**How do I request copies of my amended returns?** Amended returns are not available under the usual Reports sections. Contact your Payroll Support Team, and they will be able to provide those to you.