Heartland

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.

V2

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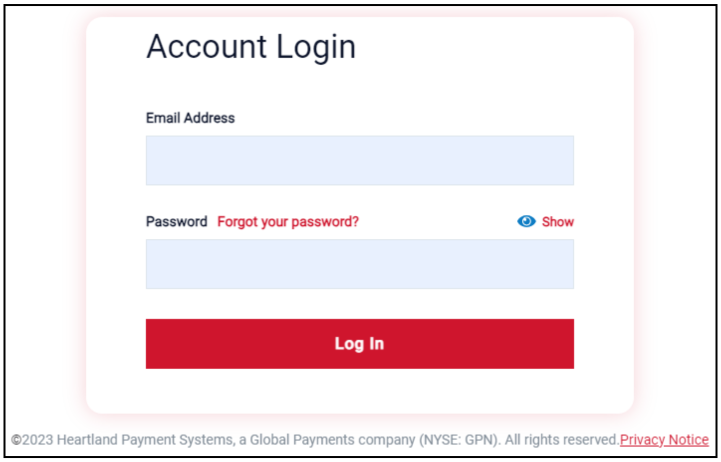
Logging in to Your Account

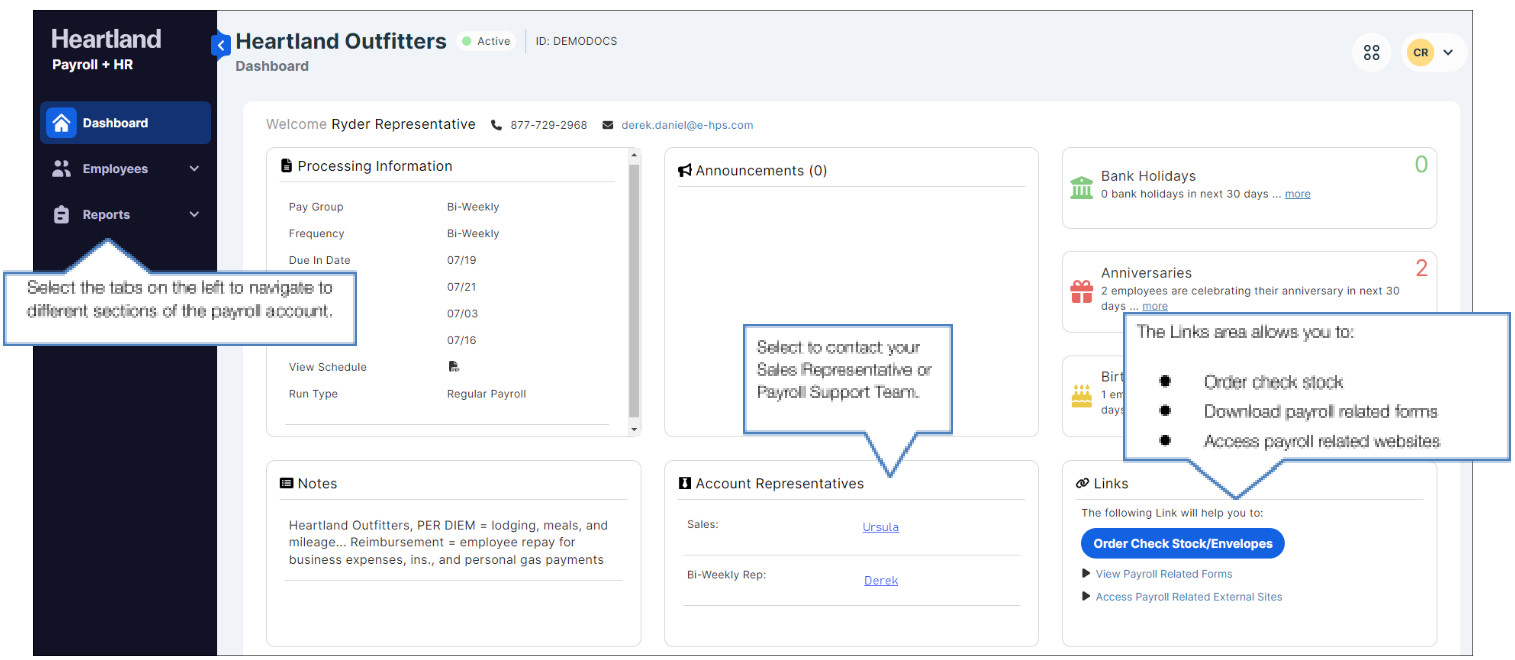
Before starting, verify you have received the enrollment link from your Payroll Support Team and have completed the registration process. Once registered, you will then be ready to access your reports! To access your account, go to www.heartlandpayroll.com. Enter your email address and the password created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



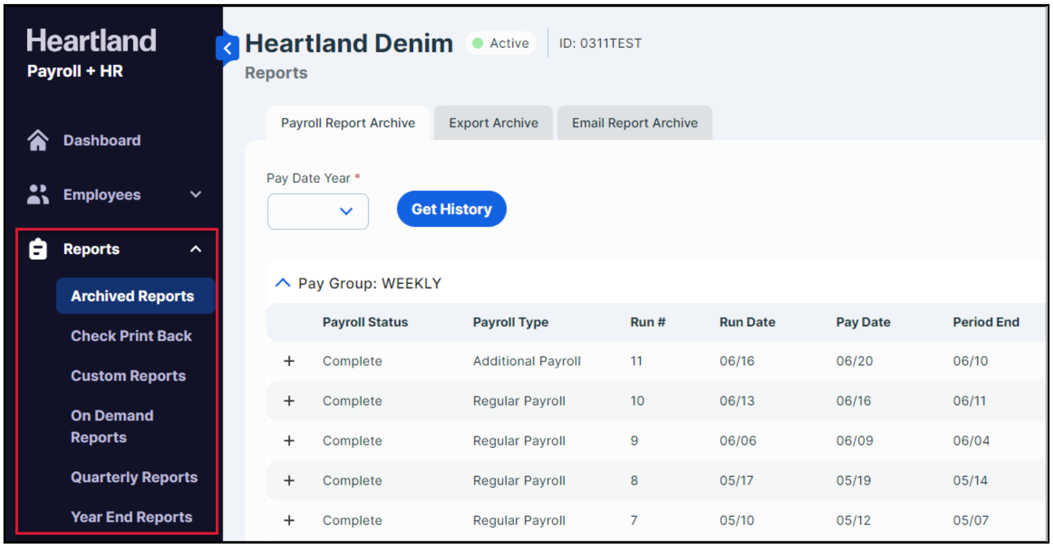
Dashboard

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

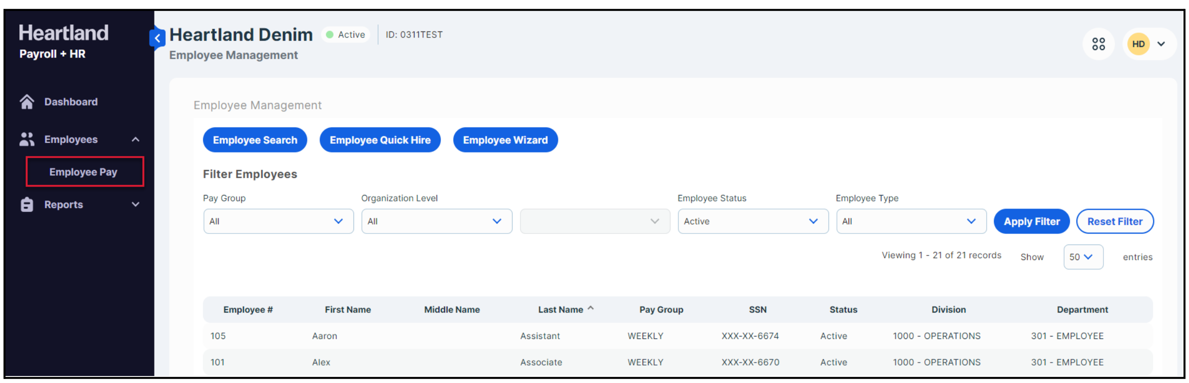
> 💡 *Clients with Multiple Heartland accounts:* If you have access to more than one payroll account with Heartland, you will see your accounts listed prior to accessing the Dashboard. Select the desired account to be taken to that account's Dashboard.



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.

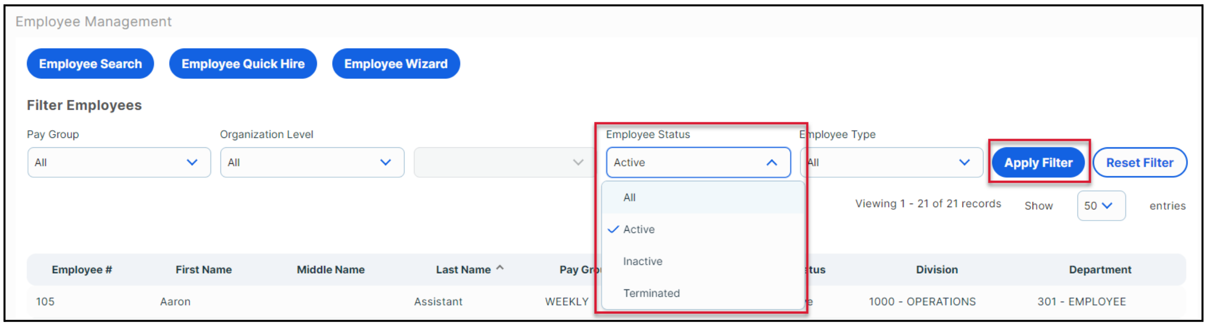


In addition to Reports and the Dashboard, you can access ***limited Employee data***. Specifically the *Employee Check History* and *Employee Tax Forms*. This data may be masked for security purposes based on your access.



Employees

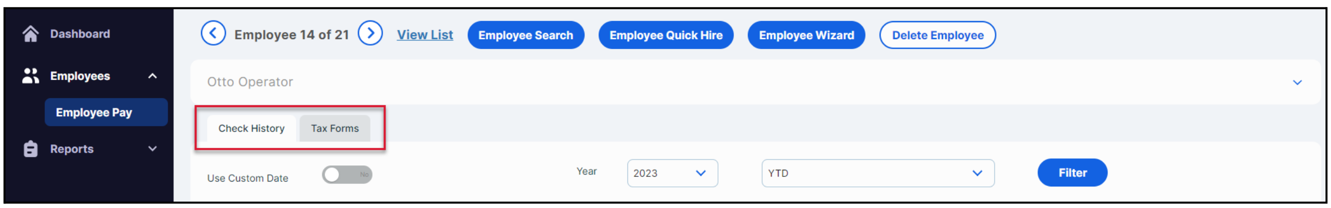
When you select the *Employees section*, you will see a list of your active employees. You can view inactive and/or terminated employees using the ***Employee Status filter***. Select an employee to view their profile.



Employee Pay

Employees → Select Employee → Employee Pay → Check History

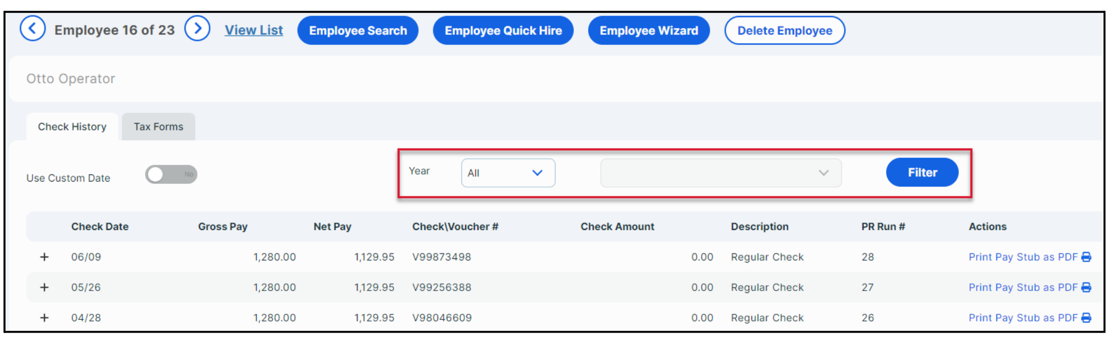
Check History tab to view the pay stubs, and ***Tax Forms tab*** to view W-2 or 1099 for the selected employee.



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.

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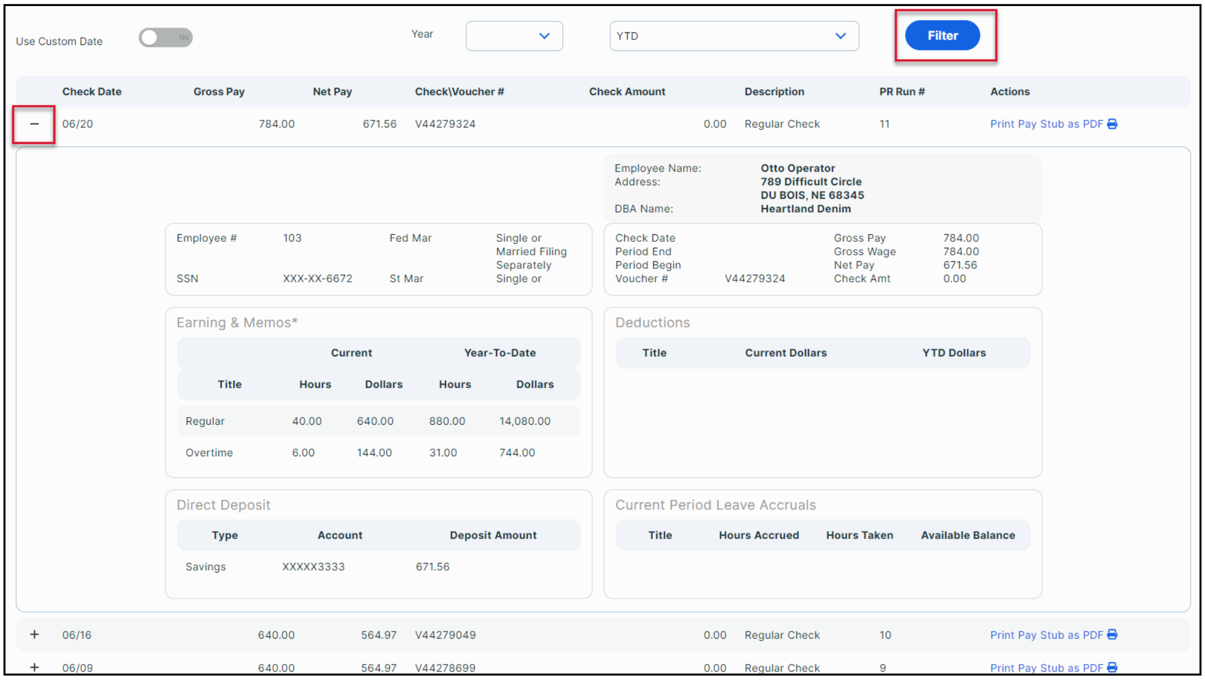
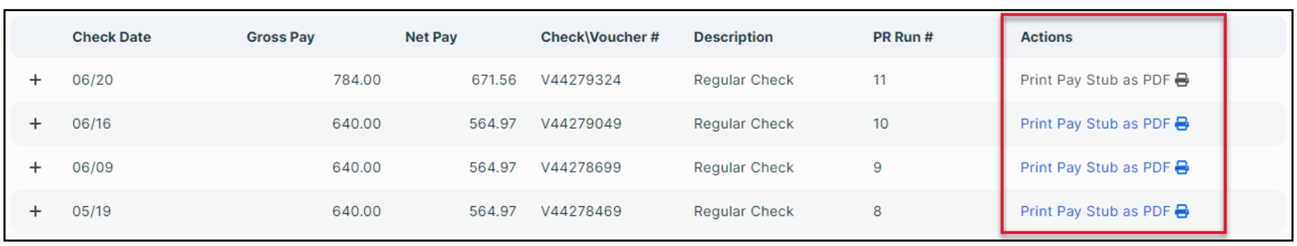
- Select the **+** to the left of the check date to expand the screen to display the check information.



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



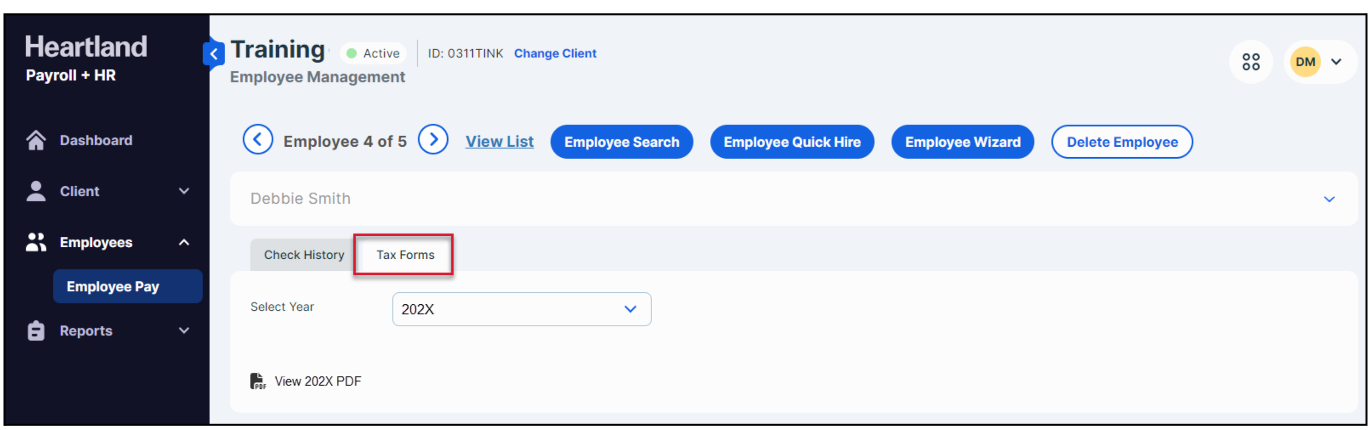
	Check Date	Gross Pay	Net Pay	Check\Voucher #	Description	PR Run #	Actions
+	06/20	784.00	671.56	V44279324	Regular Check	11	Print Pay Stub as PDF
+	06/16	640.00	564.97	V44279049	Regular Check	10	Print Pay Stub as PDF
+	06/09	640.00	564.97	V44278699	Regular Check	9	Print Pay Stub as PDF
+	05/19	640.00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

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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Reports

Archived Reports

Reports → Archived Reports → Payroll Report Archive tab

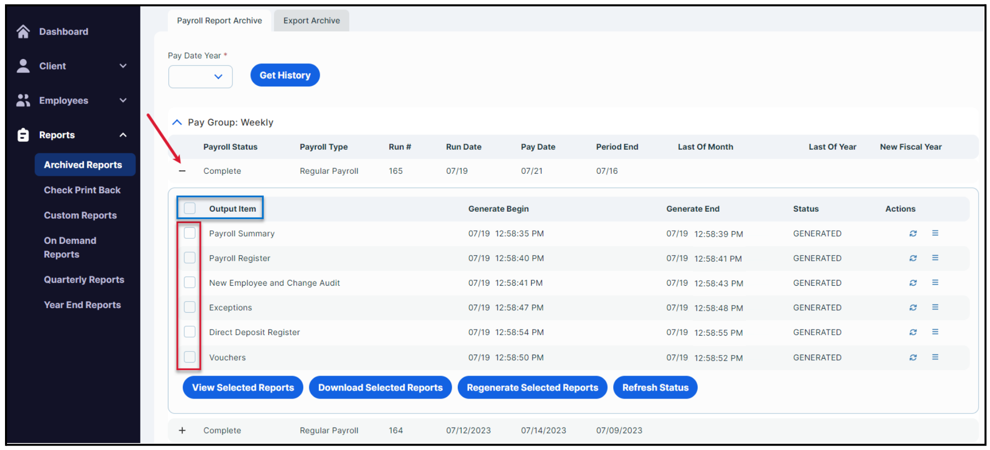
Generate groups of reports as a single PDF for a specific check date, *Payroll Report Archive*, or retrieve the GL export file and view certain types of custom reports, *Export Archive*.

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.

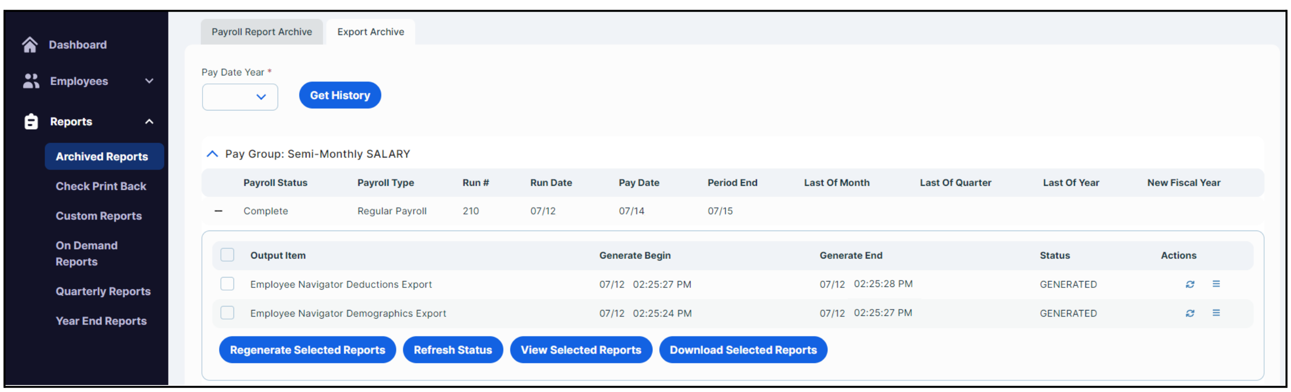
Select *View Selected Reports*; all selected reports will consolidate into a single PDF file.



Export Archive

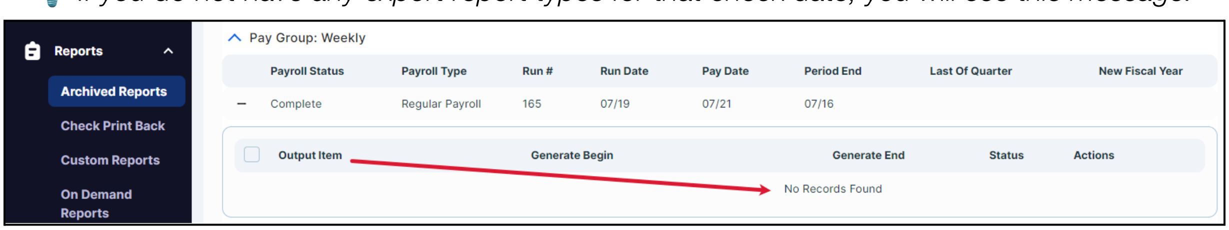
Reports → Archived Reports → Export Archive tab

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.

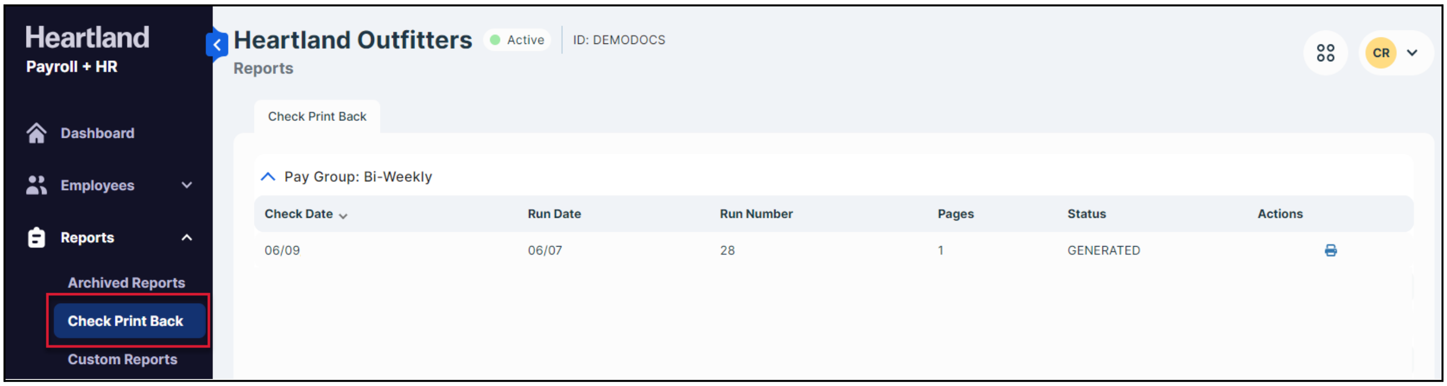
💡 *If you do not have any export report types for that check date, you will see this message:*



Check Print Back

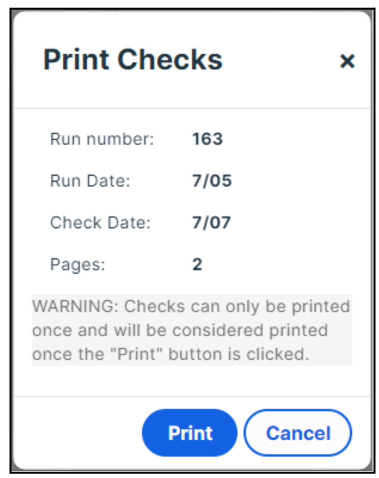
Reports → Check Print Back → Check Print Back

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.

On-Demand Reports

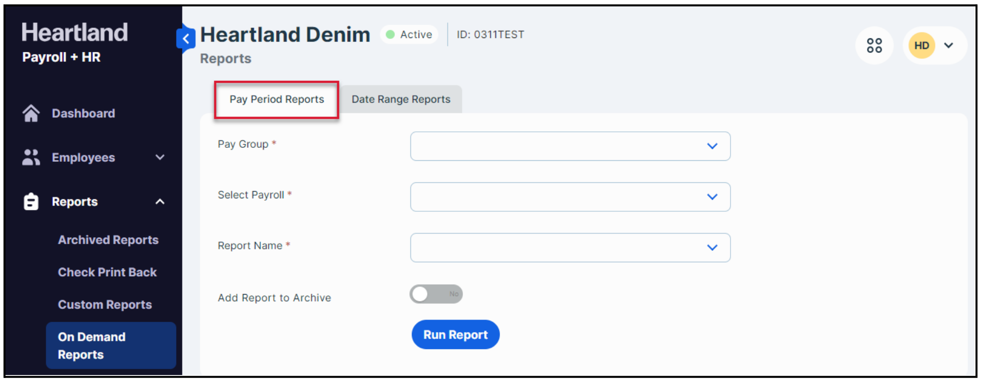
Used to generate a report on-demand for a selected check date, *Pay Period Reports*, or for a specific time frame *Date Range Reports*.

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

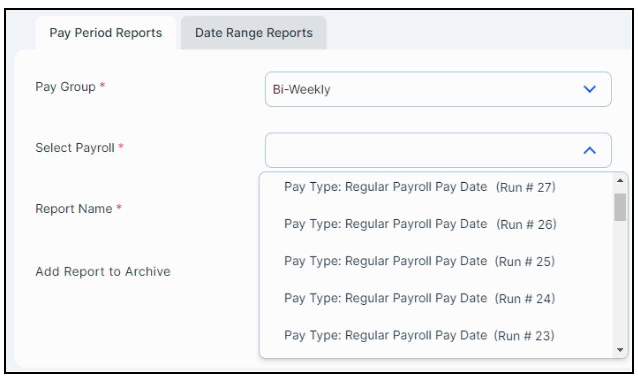
Pay Period Reports (On Demand)

Reports → On Demand Reports → Pay Period Reports tab

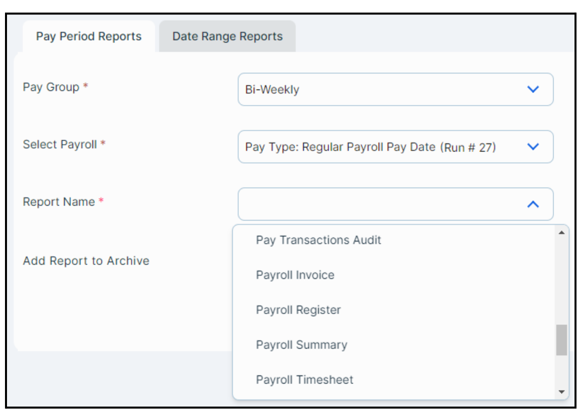
Can run one report at a time for a ***specific check date***.



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



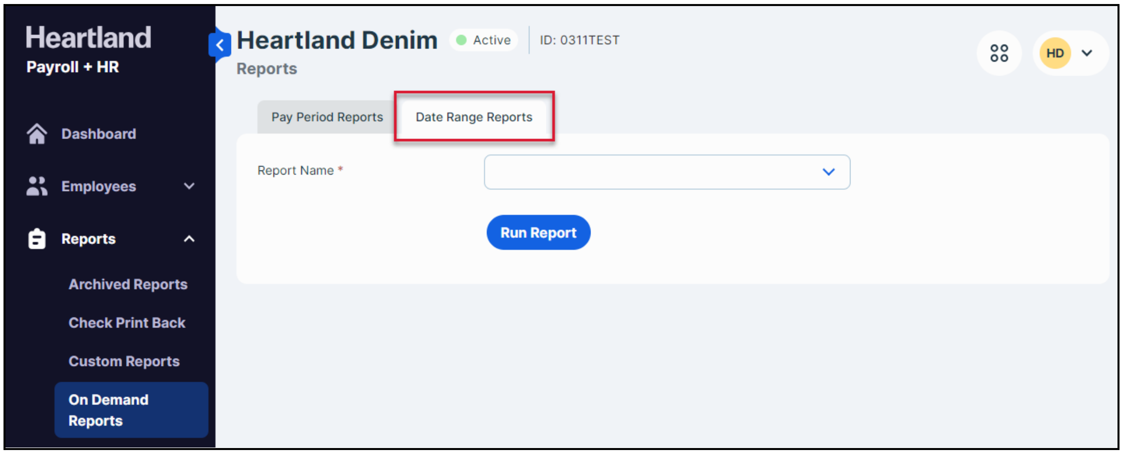
- Select the report type from the *Report Name* dropdown, see below.
- Select the ***Run Report*** button.



Date Range Reports (On Demand)

Reports → On Demand Reports → Date Range Reports tab

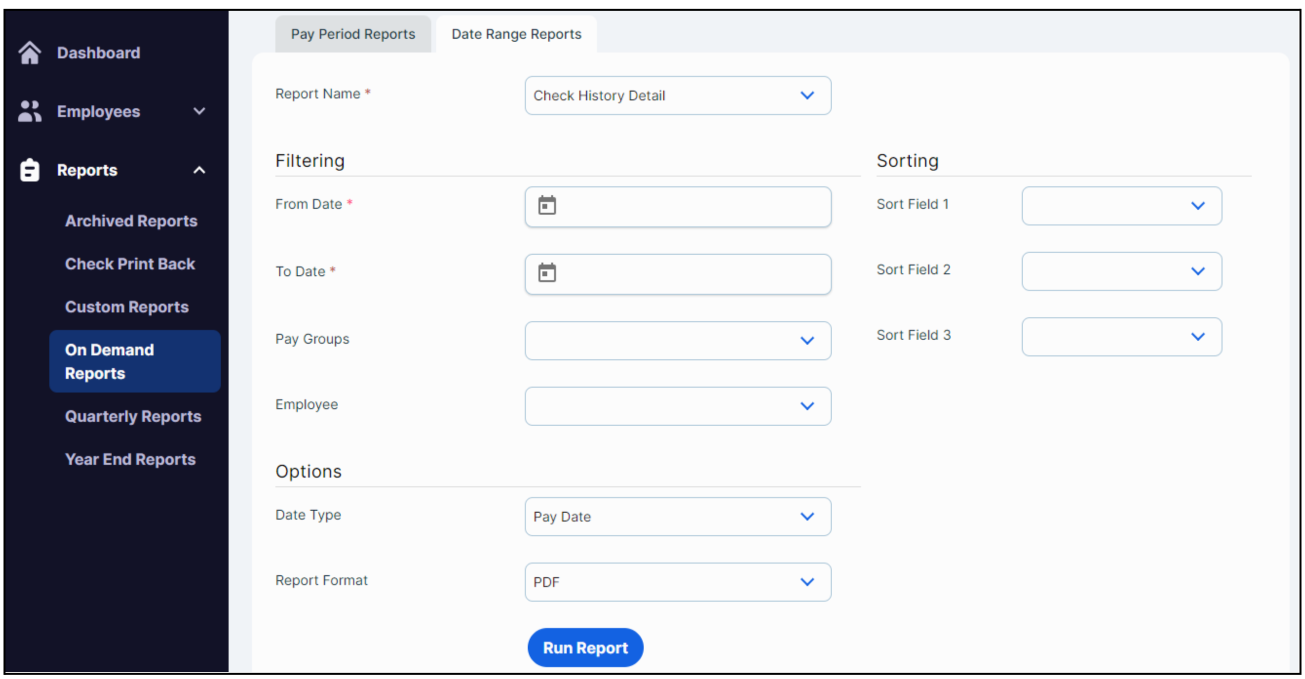
This can be used to generate a report on-demand for a selected date range.



- 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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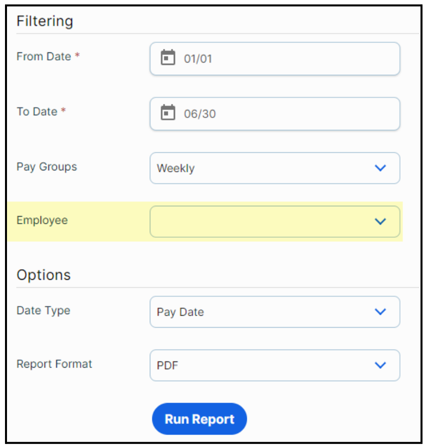
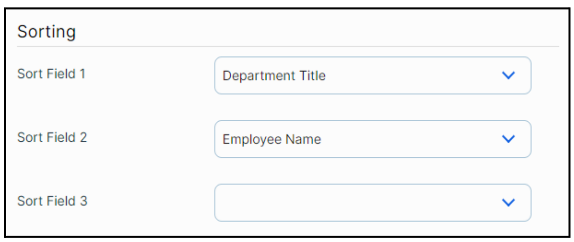
Options

- ***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*.



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.



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.

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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.

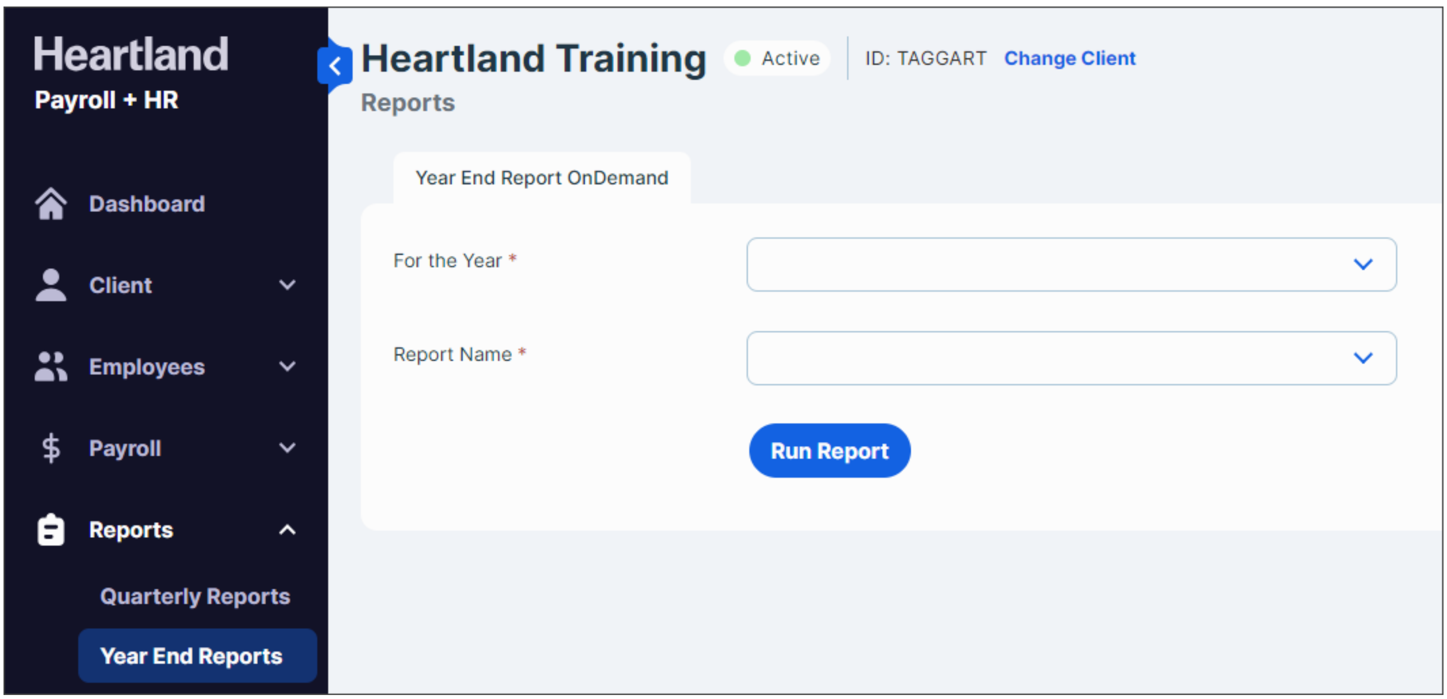
Select *View PDF* to open the file in a new PDF window.

You can then save or print the Quarterly Reports.

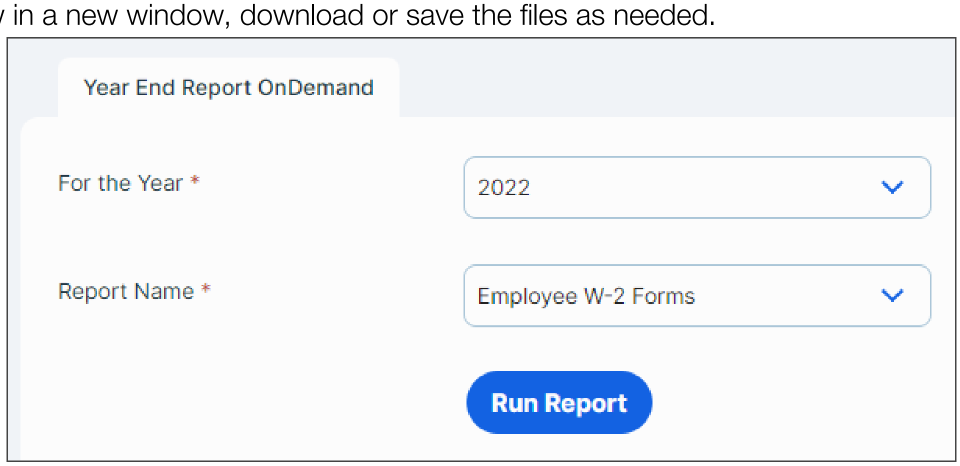
Year-End Reports

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.



FAQs

Are the links in the emails secure? *Yes, the link redirects you to our secure Heartland login.* ***Bookmark our URL:*** *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.*