

# Heartland

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## Ease Client User Guide

Heartland and Ease have partnered together to provide an integration that benefits specific data from Ease into the Heartland payroll system. This guide reviews the integration functionality and provides answers to FAQs at your fingertips.

# Heartland

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# Heartland

## Heartland and Ease

Heartland and Ease have partnered together to provide an integration that brings benefit-specific data from Ease to the Heartland payroll system.

The integration is an automated secure data feed that transfers immediately. In addition, Heartland will send new hire information and updates to employee demographics and compensation to Ease.

### How does the integration work?

Our new and improved API (Application Programming Interface) allows information to be sent between Heartland and Ease without any manual action necessary.

- ***Heartland is the system of record for employee-specific information, which means that all new hires will be entered in Heartland.*** In addition, any updates to employee demographics or compensation updates will be done in Heartland. Once the new hire is added in Heartland or an update is made, the system will transmit the updated information to Ease without any action.
- ***Ease will be the system of record for benefits-related information that is being offered through Ease. Any updates to those benefits, including new enrollments, termination of benefits, etc., will be done in Ease.*** Ease will then send these updates from Ease to Heartland. The exchange of information will be done in real-time.

### How do I get started?

First, either you or your broker will log in to your Ease portal and navigate to the Marketplace → Payroll Integration → Heartland Tile.

- Once Heartland receives notification that the tile has been enabled, we will start to reconcile the information between Heartland and Ease and prepare your account for the integration.
- Our team will contact you and your broker to ensure that everything is accurate before automating your account. We will review account information, Social Security Numbers, and any existing benefit deductions in both Heartland Payroll and Ease.

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## **What information is sent from Ease to Heartland?**

Ease is the System of Record for employee Benefit information.

The following data is sent directly from Ease to Heartland:

- *Deduction Types*
- *Payroll Cycle*
- *Deduction Amount (Pre Tax/Post Tax)*
- *Start Date*
- *Stop Date*

All Ease-related benefit data must be updated in Ease and not Heartland, as the integration is designed to overwrite Heartland's data with what is in Ease.

While your integration is being configured, work with your payroll specialist for deduction changes that may need to be made.

## **What information is sent from Heartland to Ease?**

Heartland is the System of Record for employee information.

The following data is sent directly from Heartland to Ease:

- *Employee Name (First, Middle, Last)*
- *Social Security Number*
- *Hire Date*
- *Date of Birth*
- *Termination Date*
- *Termination Reason*
- *Compensation Frequency*
- *Compensation Amount*
- *Home Address (including city, state & zip code)*
- *Employment Status*
- *Employment Category*
- *Email (work or personal)*
- *Telephone Number*
- *Job Title*
- *Normal Hours Worked*
- *Gender*

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## New Hire: Action needed for EID

### Important notes regarding information sent from Heartland to Ease:

**Data Flow:** For the data to flow from Heartland to Ease as intended, all of the information on the previous page needs to be populated in Heartland. Failure to provide all information will prevent the employee record from being created and being linked between accounts. As a result, the employee will not be able to enroll in benefits.

**Gender:** At this time, Ease has two options for gender; Male and Female, as gender options for health insurance purposes. Ease advises that you use the gender found on most employment documents such as passport, ID, driver's license, etc.

**Employment Categories:** Employment Categories must not be customized in Heartland. This is because Ease has specific Employment Types that cannot be customized in the Ease system. The following Employment Categories are the options that you can choose from:

- *Full-Time*
- *Part-Time*
- *Variable-Hour*
- *Intern*
- *Contractor*
- *Seasonal*

**Normal Hours Worked:** Heartland is the System of Record for employee data, including hours worked. This can be viewed in your payroll site by logging in to Heartland → Employees → Select an Employee → Pay Information → Normal Hours. It is important that this is updated to reflect the expected total hours worked per pay period, as this will transfer to Scheduled Hours per Week in Ease. This is the data field that is tied to your eligibility rules for your benefit plans and **failure to review this field could result in loss of coverage or improper offers of coverage to employees.**

### Employee Identification Number

These will have different labels in each system:

- In Ease, Employee Identification Numbers are referred to as **EIDs**.
- In Heartland, Employee Identification Numbers are referred to as **Employee #** or abbreviated as **EIN**.

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## New Hire: Action needed for EID

### How do I update an EID in Ease?

Navigate to your Ease portal and log in. Click on your Employee tab and select the employee from the list that you would like to update. Click on the Employment tab to edit the EID field.

The screenshot shows the 'Employee Profile' page for Otto Davis. The 'Employment' tab is selected, displaying the 'Employment Details' section. The form includes fields for Type, Location (Brook Park, OH), Manager, Status (Active), Department, HR Manager, Hire Date (12/11/2013), Job Class, Sick Hours, ID (0001), Job Title (Clerk), Personal Hours, and Scheduled Hours Per Week (80). A 'Terminates Employee' button is visible in the top right corner of the details section.

*If I hire someone, will their EID transfer?*

- Yes. Since Heartland is the System of Record for employee data, this will transfer over to Ease once saved in Heartland.
- Demographic information should be updated in Heartland, and then those changes will transfer over to Ease.
- You can change the EID when you add the employee to the Ease portal by following the instructions above, or you can utilize the ID in Ease and use that number at the time you hire them in Heartland.

## Deductions: how they display and adding new

*How do deductions appear on our employee's paychecks, and what do I need to do if our company adds new deductions?*

- The type of the deduction, while not customizable in Ease, is customizable in Heartland. It is essential that the deduction names in Heartland match the deduction type in Ease.
- If they do not match, the deduction will duplicate because the system is designed to bring over deductions that do not exist in Heartland or when a benefit is added. The label that will appear on the employee's paycheck is based on the benefit type.
- If you add a new deduction in Ease, please reach out to Heartland's HCM team at [benefits.productsupport@e-hps.com](mailto:benefits.productsupport@e-hps.com) to ensure it is set up correctly.

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## Open Enrollment: New benefits

What happens when new benefits are elected during open enrollment?

- One of the many great features of this integration is that it is designed to bring over deductions based on the effective date.
- The integration will update these deductions as of 12 a.m. of the effective start date.
- The same applies to deductions added throughout the year for new hires and employees with applicable life changes.

## Removing and Waiving Deductions

What happens to employees who remove a deduction during the year or waive deductions they previously had?

If an employee has a life event and decides to waive the existing benefits they have, you will need to ensure an end date is applied to each benefit and thus, the deduction.

- To do that, you will log in to your *Ease portal* → *Select Employees* → *Click on applicable employee* → *Click on Benefits* → *Click on the blue Actions button* → *Terminate Benefits*.
  - Fill out the fields with the (\*) and then click terminate.
- This will then prompt the integration to send over the end date to Heartland to remove the deduction from the employee's payroll.
  - It is imperative not to zero out the deduction or make the end date before the current date; otherwise, the changes will not be sent to Heartland, and deductions will continue to be taken out.

The screenshot displays the 'Ease' portal interface for an employee named Larry Smith. A 'Terminate Benefits' modal is open, requiring the user to specify the event type, date, and details. The modal includes a dropdown for 'Event \*', a date field for 'Event Date \*', and a 'Details \*' section. Below this, there is a section to 'Specify' plans to terminate, with a dropdown showing 'Larry Smith Plans to terminate'. A 'Terminate' button is at the bottom of the modal. In the background, the 'Benefit Enrollments' section is visible, showing a 'Benefits Summary' table with columns for 'Wellness', 'Dental', and 'Vision'. The 'Total' cost is listed as '\$23.08 Per Pay Period (Weekly)'. An 'Important' message states: 'Employee has elections that have yet to be signed.'

Benefit	Cost
Wellness	Waived
Dental	\$17.31
Vision	\$5.77
<b>Total</b>	<b>\$23.08</b>

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## Terminating Employees

*What happens if I terminate an employee?*

An HCM ben admin specialist must map termination reasons. Any new termination reasons added to the account in Payroll should be reported to your assigned specialist for mapping. Heartland will then send over the termination dates for that employee, as long as they exist in Ease.

Should you need assistance terminating an employee, please reach out to your specialist.

## Verify the Integration

*How can I ensure that the integration is working and that information is transferring from Ease to Heartland?*

There are a couple of ways to ensure that the integration is working:

One way is to log in to your Heartland payroll account and click on your Employees tab.

- Next, click on an employee and then scroll down and click on the Recurring tab on the left side of your screen.
- Click on the Deductions tab. New deductions will appear as Active under the Status bar. Deductions that have been terminated should appear as Inactive.

Pay Item	Schedule	Status	Amount	Percent	Rate	Balance	Actions
401(k)	Every Pay	Active			5.00		
401(k) ROTH	Disabled	Inactive					
Dental Pre Tax	Every Pay	Active		6.72			
Med Pre Tax	Every Pay	Active		57.25			

*(continued)*

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The second way to validate your information is to utilize the Employee Change Log Report.

*Reports → Date Range Reports → Employee Change Log Report*

- Updates made in either system, such as adding a new hire in Heartland or making a deduction change in Ease, will reflect the appropriate system within minutes.
- The effective start date is the determining factor for when new deductions from Ease will show in Heartland. The information stays in Ease and syncs to the Heartland system at 12 a.m. on the effective date.
  - For example: If there is a start date for a new medical deduction on May 1st, the Heartland system will not show it until that specific date. If you logged in to payroll, you would not see that deduction until May 1st.
- Your report will be generated as a PDF on another tab.
- Any changes made by the Ease integration will show *HCM.Hub.APIUser* as the user.

## Support

*If I have questions not answered in this guide, where do I go for support?*

Reach out to Heartland's HCM team via email at [benefits.productsupport@e-hps.com](mailto:benefits.productsupport@e-hps.com).