# Heartland

## Payroll Reporting Tips: Processing Method Details & Tips to Ensure Accuracy

| Payroll Method | Payroll Processing Method Details | Tips to Ensure Accuracy |
|---|---|---|
| **Online - Manual Entry** | <ul><li>Online is our most convenient payroll method!</li><li>Process immediately, on your time, 24/7.</li><li>Allows you to input the pay period data and process the payroll when it is convenient for you.</li><li>You manage your payroll account.</li></ul> | <ul><li>We offer continued support through your Payroll Support Team, a Help Center, & User Guides.</li><li>Review the Time Entry Totals and Payroll Preview Reports. Verify all data before processing to ensure accuracy and timely payments.</li><li>Utilize the Heartland-generated timesheet to track and finalize your payroll totals each pay period!</li></ul> |
| **Online - Importing an Excel or CSV file** | <ul><li>Online is our most convenient payroll method!</li><li>Process immediately, on your time, 24/7.</li><li>Import your payroll directly into Heartland without manually entering amounts for each employee.</li><li>It can be imported multiple times if you track worked hours daily.</li><li>You manage your payroll account.</li></ul> | <ul><li>The import is your Time Entry Grid in Excel format.</li><li>Wages are imported using the employee number.</li><li>Always select *View Validation Details* to locate potential errors/warnings.</li><li>An updated Time Import Spreadsheet is available when you add new employees, earnings, or deductions to your account.</li></ul> |
| **Email/Fax - Heartland Employee Entry** | <ul><li>Email or Fax payroll to your Payroll Support Team.</li><li>The benefit of having a Heartland employee review your payroll before processing potentially identifying discrepancies outside the norm.</li><li>We can provide preview reports for your review and confirmation before processing as needed.</li></ul> | <ul><li>Provide any new employee data, garnishments, and wage updates to your Payroll Support Team in advance so we can set them up before processing.</li><li>Provide clear confirmation that you give permission to process. Your Payroll Support Team cannot assume the right to process your business's payroll.</li></ul> |

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|---|---|---|
| **Telephone - Call-in Client** | • Call in your payroll during regular business hours, and provide grand totals for verification.<br>• Speak directly to your Payroll Support Team.<br>• Confirm to process and receive the total needed to fund your payroll before processing. | • Have your Client ID, Authorization PIN, and last 4 digits of your Federal ID ready before calling Heartland.<br>• Before the call, provide any new employee data, garnishments, etc. to your Payroll Support Team so we can set those up before payroll reporting. |
| **Telephone - Call-out Client** | • We will call you for payroll!<br>• Request a desired time, during regular business hours, for a Payroll Support Team member to call.<br>• Confirm to process and receive the total needed to fund your payroll before processing. | • Before the call, provide any new employee data, garnishments, etc. to your Payroll Support Team so we can set those up before payroll reporting.<br>• You can request to be called on a specific day/time for payroll, call windows may fluctuate 15-30 minutes. |
| **Auto Pay - Automatic Processing** | • Payroll is processed automatically each pay period!<br>• No contact is needed; auto-pay will process on the scheduled date chosen during implementation.<br>• A convenient option if pay is the same each payroll. | • Report any changes at least 3 business days before the check date to ensure the changes are effective prior to the auto-processing. |
| | | |
| **How to contact us!** | **Payroll Operations:** 800-285-0005, M-F 8:00 a.m. - 8:00 p.m. EST.<br><br>**Heartland Hire:** 888-279-8734, Option 1<br><br>**Heartland Time:** 888-279-8734, Option 2<br><br>**HR On-Demand (On-Demand for +HR Clients):** 877-880-4772 | |

*(continued)*

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## Customization Requests & Account-Specific Changes

- The Heartland Timesheet can be customized to hide pay rates and salary amounts.
- The Time Entry Grid can be made into an Excel spreadsheet (Time Import Spreadsheet) to import your payroll.
- Request additional templates for your Time Entry Grid. These same templates can be made into an Excel file.
- Certified payrolls can also be imported into Heartland with three columns added to your spreadsheet.

## Online Importing Q&A

💡 **Tip:** Provide the import file, screenshots, and additional details to help us better understand the situation.

### *Why should I use the Importing Option?*
*You could save time using an import file versus manually entering the payroll data.*
*Using our simple feature, you will import the file(s), verify the import, preview the reports, and process them all in minutes.*

### *I use a CSV file to track employee hours. Is there a way I can import this rather than manually enter it each week?*
*Of course! The Heartland payroll system can support CSV and Excel files for a timecard import. Would you like to send me a copy to review the file specifications needed to import your next payroll?*

### *When importing, I received an error/warning (Validation Issue). What should I do to correct this?*
*No worries, we are here to help!*
*Simply provide a screenshot of the error/warning message and the file for review. Some warnings must be addressed; if a warning needs clarification, please contact us.*
- *If it's a Validation Error, the file will need adjustments for a successful import.*
- *If it's a Validation Warning, the file can be imported, and non-payroll data will be bypassed.*
  **Example:** *"The 'Department' column is unrecognized or cannot be matched to a proper data type. This column will be ignored in the import process."*

### *What if I receive errors? Can I get additional help?*
*Don't worry; we are here to assist you! Your payroll team is happy to help, and we offer user guides as well!*