

Heartland

How to Start your Employee Handbook

Heartland

Create Your Customized Employee Handbook

We recommend beginning the handbook creation process as soon as possible. With the Express Wizard, your handbook will be ready in as little as 30 minutes and with the Professional Wizard, your handbook will be ready within 3-5 business days.

To begin:

- Log into your Payroll account; on the left menu, select *HR Solutions* → *My HR Support*.
- A new browser window will open and take you to the [HR Support Center](#).
- In the main menu, select *Get Started* in the Employee Handbooks section, or hover over HR On-Demand and choose *Employee Handbooks*.

The screenshot displays the Heartland HR Support Center interface. At the top left is the Heartland logo with the tagline "A Global Payments Company". The top right contains navigation links: My Account, My Messages, Contact Us, HR Concierge, Feedback, and Logout. Below the logo is a horizontal menu with categories: Topics, Laws, Learning, Tools, Documents, and HR On-Demand. A search bar is located below the menu. A blue banner for "Holiday Closure - 11/10/23" spans the width of the page. The main content area features a "Welcome to the Heartland HR Support Center" section with introductory text. To the right, a promotional banner for "The New Form I-9 and Remote Verification are Coming in Hot on August 1" includes a "Tell me more!" button. On the left, there is an "Ask The Pro" section with a text input field. On the right, the "Employee Handbooks" section is highlighted with a red border, featuring a green folder icon, descriptive text, and a "Get Started" button. A red arrow points from the "HR On-Demand" menu item to the "Employee Handbooks" option in its dropdown menu.

Heartland

Carefully read the descriptions for the handbook assistance we provide, and choose which option best meets your business needs. The Handbook Wizard will guide you through each section of the questionnaire. Be sure to provide an accurate employee count for all states in which your organization operates; this is crucial for your handbook to comply with all employment laws that may apply to your organization.

Handbook November 6, 2023

Step 1: Instructions

Step 2: Basics

Step 3: Policies & Practices

The appropriate employee policies for your handbook will often depend on your state and number of employees. So let's start by getting those basics answered. Please note that we'll use your responses to these two questions to create the structure for your custom handbook, so you won't be able to change them later. If you need to change your state or employee count later, you can always start a new handbook.

★ Configure your state and employee count

State: California

Employee Count: 15

Next

This Handbook

Type of Handbook: Express

Need Help?

Having trouble finding what you need? Chat live with your HR Concierge. We're here to help!

Express Handbook

- Complete our easy-to-use wizard and get your handbook in about 30 minutes. It does not contain consultation options and will be specific to a single state.
- Your completed handbook is delivered electronically in an editable Word document.

Professional Handbook

- Complete our easy-to-use wizard with information about your company and up to three of your own policies to be reviewed and included in your brand-new handbook.
- Our Pros will create your new custom handbook in an editable Word document.
- A personal consultation can be scheduled to review your new handbook.

Handbook Update Manager

- Understand when and how to update your handbook with our handbook tools.
- Review our real-time policy advisor for updates the Pros have made to handbook policies in all 50 states.
- Submit individual policies for review by the HR Pros.

💡 For Professional handbooks, a ticket will be created under the *HR On-Demand* tab in *My Tickets*. You will receive status updates via email.

Heartland

The second question once you click “Get Started” asks whether or not you would like to be able to schedule a 1:1 personal phone consultation with an HR Pro to review your handbook:

The screenshot displays the 'Tools' section of the Heartland handbook creation interface. At the top, there is a navigation bar with tabs for Topics, Laws, Learning, Tools (highlighted in blue), Documents, and HR On-Demand. Below the navigation bar, the page title is 'Handbook, June 25, 2024' and there is a search bar. A blue banner indicates 'Holiday Closure - 7/4/24 & 7/5/24'. The main content area is divided into three steps: 'Step 1: Instructions', 'Step 2: Basics' (highlighted with a blue underline), and 'Step 3: Policies & Practices'. A checkmark icon indicates that the user has completed the first step. The current step, 'Step 2: Basics', contains a paragraph of instructions and two main configuration sections. The first section, 'Configure your state and employee count', includes a 'State' dropdown menu set to 'Ohio', an 'Employee Count' input field set to '1', and an '+ Add State' button. The second section, 'Once your handbook is created, would you like to schedule a personal consultation with one of our HR Pros to walk through you new handbook?', features two radio button options: 'Yes. (You will receive a notification and calendar link to schedule a consultation once your handbook is created.)' (which is selected) and 'No. (Handbook delivered in 3-5 days without consultation.)'. A 'Next' button is located at the bottom of this section. On the right side, a 'This Handbook' sidebar shows 'Type of Handbook: Professional'. Below that, a 'Need Help?' section offers chat support with 'HR Concierge'.

Handbook, June 25, 2024

Holiday Closure - 7/4/24 & 7/5/24

Step 1: Instructions

Step 2: Basics

Step 3: Policies & Practices

✓ The appropriate employee policies for your handbook will often depend on your state and number of employees. So let's start by getting those basics answered. **Please note that we'll use your responses to these two questions to create the structure for your custom handbook, so you won't be able to change them later. If you need to change your state or employee count later, you can always start a new handbook.**

★ **Configure your state and employee count**

State	Employee Count	Actions
Ohio	1	

+ Add State

★ **Once your handbook is created, would you like to schedule a personal consultation with one of our HR Pros to walk through you new handbook?**

Yes. (You will receive a notification and calendar link to schedule a consultation once your handbook is created.)

No. (Handbook delivered in 3-5 days without consultation.)

Next

This Handbook

Type of Handbook:
Professional

Need Help?

Having trouble finding what you need? Chat live with your HR Concierge. We're here to help!

HR Concierge

Heartland

Then, you will want to answer all of the questions with stars next to them. Please read each question carefully. Your responses will affect the policies that appear in your handbook. You can select the information bubbles to the left of the questions for guidance if you're unsure how to respond. Once you complete the questionnaire, Express handbooks will be available within 30 minutes and Professional handbooks will be available within 3-5 business days. You'll find your completed handbook in the My Handbooks section (*My Account* → *My Handbooks*). For Professional handbooks, if you opted for the 1:1 consultation, you will find a link to schedule that in your ticket (*HR On-Demand* → *My Tickets*).

Handbook November 6, 2023

Search

Step 1: Instructions ✓

Step 2: Basics ✓

Step 3: Policies & Practices

ABOUT YOU 3 / 5

ABOUT YOUR EMPLOYEES 0 / 3

PAY & PERFORMANCE 0 / 5

BENEFITS 2 / 13

POLICIES 0 / 5

7% complete

Done!

★ 1. What is your organization's name?

★ 2. Enter the month and year when you would like your new handbook to be effective.
Example: "January 2017"

ⓘ We don't recommend back dating an employee handbook.

✓ 3. Provide a brief summary of your organization's history.

ⓘ

✓ 4. Provide your organization's mission and vision.

ⓘ

This Handbook

Type of Handbook:
Express

Applicable To:
• California - 15

Need Help?

Having trouble finding what you need?
Chat live with your HR Concierge. We're here to help!

HR Concierge

💡 For additional support with *Employee Handbooks*, use the Chat feature, Contact Us via email, or schedule a meeting with your HR Pro!