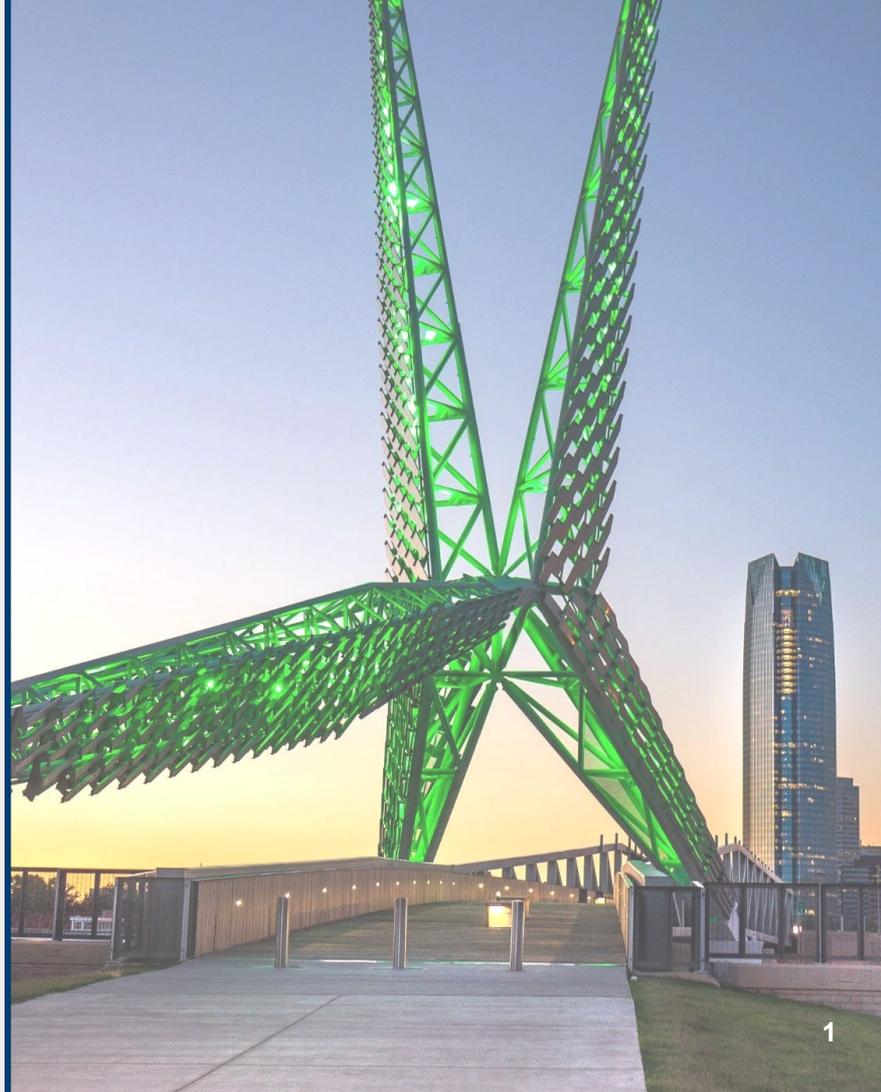


Heartland

Payroll HR Solution User Guide



Unsure which HR Guide contains what you need?

We offer a variety of HR Products and Services!

Payroll HR Solution User Guide	<u>HR Support Center</u> User Guide (click me!)
<p>HR Services in the Payroll System, Performance Reviews, Employee Messaging, Employee Documents, and Employee Tracking: Certifications, Trainings, Employee Assets, and OSHA Incidents.</p>	<p>HR On-Demand, Chat with an HR Pro, creation of an employee handbook, Tax and Compliance laws, HR Training videos, customized documents and policies.</p>



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HR Settings |

Building & Customizing Titles

Fields in the Human Resources (HR) tab are customizable based on company needs. Company-specific Titles (*Awards, Training, Company Assets, & Incidents*) must be added in the Client menu first to be able to assign them at the employee level. See [Adding HR Titles to Employees](#) for adding to an employee.

The screenshot displays the Heartland HR Demo interface. On the left is a dark sidebar with navigation options: Dashboard, Client (with a sub-menu containing Human Resources, Job Titles, and Settings), Employees, Payroll, Reports, Tools, and HR Solutions. The main content area is titled 'Heartland HR Demo' and shows 'Client Management' tabs for HR Settings, Employee Messages, Performance Review Settings, and Performance Reviews. Below these are tabs for Achievements, Training, Company Assets, and Incidents. The 'Achievements' tab is active, showing a list of HR Title categories: Awards, Certifications, Education, and Skills. Each category has an 'Add' button and a table with columns for description and actions. Callout boxes provide instructions: one explains that HR Titles include Achievements, Training, Company Assets, and Incidents; another points to the 'Add Education' button, stating it is used to add new HR categories; and a third points to the account menu (four circles and a yellow circle with '1H'), explaining how to access products/services and change the profile.

HR Settings | Employee Messages | Performance Review Settings | Performance Reviews

Achievements | Training | Company Assets | Incidents

HR Titles that can be created include: **Achievements** where you can create Awards, Certificates, Education and Skills.

Training, Company Assets, and Incidents are all HR Title categories you can create!

Select the 4 circle icon to access all of your Heartland products/services under **My Account**.

Select the yellow circle to change your profile (if applicable).

Select the **Add button** to add a new HR category that can be assigned to the employee.

Employee Messages | Building Message Categories

Message Categories are the main topics that allow the employer to group messages together of similar types. Build company-specific Message Categories under the Client menu first to be able to create and post customized Employee Messages on *The Employee Landing page*. Utilize the Display Order to arrange the Landing Page based on organization preferences.

The screenshot displays the 'Heartland HR Demo' interface. The left sidebar contains navigation options: Dashboard, Client (with 'Human Resources' highlighted), Job Titles, Settings, Employees, Payroll, and Reports. The main content area is titled 'Client Management' and includes tabs for HR Settings, Employee Messages, Performance Review Settings, and Performance Reviews. Under 'Employee Messages', there is a sub-section for 'Message Categories' with an 'Add Message Category' button. A table lists existing categories: HR Policies (Handbook, Policies, etc.), Performance Reviews, Ease Platform, and Coaching & Counselling. A table on the right shows the 'Display Order' and 'Actions' (edit and delete icons) for these categories. A modal window titled 'Add Message Category' is open, showing fields for 'Category Heading *', 'Category Description', and 'Display Order', with 'Save' and 'Cancel' buttons at the bottom.

Heartland
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Dashboard

Client

Human Resources

Job Titles

Settings

Employees

Payroll

Reports

Heartland HR Demo Active ID: 01HRDEMO

Client Management

HR Settings Employee Messages Performance Review Settings Performance Reviews

Message Categories Employee Messages

Add Message Category

Category Heading

HR Policies Handbook, Policies, etc.

Performance Reviews

Ease Platform

Coaching & Counselling

Display Order

Actions

1

2

3

4

Select the **Pencil icon** to **Edit** the information.

Select the **Trash Can** to **delete** the Message Category.

Selecting **Add Message Category** will open a new window for you to create a new message type for the employees.

Existing Message Categories will display in the order you assigned them. The Categories will later be linked to employee messages. See [Adding Employee Messages](#).

Add Message Category

Category Heading *

Category Description

Display Order

Save Cancel

Employee Messages | Adding Employee Messages

Customize company-specific messages for employees to access and acknowledge electronically through Self-Service Checkview. Fields, *Message Title* and *Message Text*, will need to have easily identifiable descriptions. The *Message Category* field references the previously created *Message Category* on **page 5**.

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Heartland HR Demo Active ID: 01HRDEMO

Client Management

HR Settings **Employee Messages** Performance Review Settings Performance Reviews

Message Categories **Employee Messages**

Add Employee Message

Message Category **Employee Messages**

Viewing 1 - 1 of 1 records

Add Employee Message

Message Title: Open Enrollment (15/100)

Message Text: Oct. 18 - Dec. 31 is our Open Enrollment period. (48/500)

Effective Date *: 10/18/2025

Expiration Date: MM/DD/YYYY

Message Category *: HR Policies

Display Order: 1

Show On Employee Landing Page: Yes

Show On Company Information Page: No

Links: **Add Link**

Documents:

Document Name *	Requires Acknowledgement	Display Order	Preview
New Employee Setup and M...	Yes	1	

Selecting **Add Employee Message** will open a new window for you to enter the Employee Message and related information.

Complete each section, required fields will be marked with a red * asterisk.

Select the **Pencil icon** to **Edit** the information.

Select the **Trash Can** to **delete** the Employee Message.

Order multiple items using the **Display Order** field. **1 being first**, and continuing.

Include URL website **Links** or **attach documents** to be included with your Employee Message.

Employee Messages |

Adding Employee Messages cont.

Employees can view websites from the Employee Landing Page. **Page 6** begins instructions on Adding Employee Messages. After creating a title, text, and assigning a message category, you have additional fields and functions to aid in your communication. Messages show for ALL Employees, but no notifications are sent to alert them. If assistance is needed, email plusteampayroll@e-hps.com.

Add Employee Message

Message Title	<input type="text" value="Development Questionnaire"/>	Message Category *	<input type="text" value="Survey & Feedback"/>
	<small>25/100</small>		
Message Text	<input type="text" value="Employee feedback to tier operations positions into a level format."/>	Display Order	<input type="text"/>
	<small>67/500</small>		
Effective Date *	<input type="text" value="01/01/2025"/>	Show On Employee Landing Page	<input checked="" type="checkbox"/>
	<small>MM/DD/YYYY</small>		
Expiration Date	<input type="text" value="MM/DD/YYYY"/>	Show On Company Information Page	<input type="checkbox"/>
	<small>MM/DD/YYYY</small>		
Links			
Link Text *	Link Url *		
<input type="text" value="Survey Monkey Questionnaire"/>	<input type="text" value="http://www.heartlandpayroll.com"/>	<input type="text" value="1"/>	
	<small>27/255</small>	<small>31/255</small>	
Documents			
Document Name *	Requires Acknowledgement	Display Order	Preview
<input type="text" value="Onboarding Checklist.pdf"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
	<small>No</small>		<small>x</small>
<input type="button" value="Browse"/>			
<input type="button" value="Add Document"/>			

Select one of the Message Categories previously created. See **page 6** to add a new category.

Add more than one Link or Document by selecting *Add Link/Document*.
Order the items using the Display Order field.

The URL must contain **HTTP://** or **HTTPS://**

Documents should be added in a PDF or writable format for security purposes, and to maintain the document's integrity.

Not all documents will require acknowledgement. Some company documents may require an electronic acknowledgment with a physical signature from each employee.

Employee Landing Page | The Employee Landing Page provides a platform to communicate information consistently to all team members. Self-Service users can view customized company information through web, mobile web or an app. This area is not specific to an individual employee; all employees with self-service access can access posted communications. Compatible documents include PDF, Web Links, Excel, JPG, and Word documents.

Heartland
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Dashboard
Client
Employees
Accruals
Benefits
Documents
Employee Change Log
Employee Landing Page
Employee Pay
Employment
General
HR-Achievements

Heartland HR Demo Active ID: 01HRDEMO
Employee Management

Employee 4 of 6 [View List](#) [Employee Search](#) [Employee Quick Hire](#)

Ryder Representative

Employee Landing Page

Survey & Feedback

Development Questionnaire:
Employee feedback to tier operations positions into a level format.
[Survey Monkey Questionnaire](#) [Onboarding Checklist.pdf](#)

HR Policies
Handbook, Policies, etc.

One or more messages in this category have attachments that you are required to read and acknowledge!

Open Enrollment:
Oct. 18 - Dec. 31 is our Open Enrollment period.
[New Employee Setup and Maintenance Form.pdf](#) - I acknowledge that I have read and understood this document.

Employee Message not visible?
Return to the Employee Message and **check the Effective Date**. Messages will not appear until **after** the scheduled effective date.

Message Category will display based on the order you created. The associated Employee Message(s) will be listed under each category.

The Link will open in a new window. The included documents will download as PDFs to view.

This Employee Message has **Requires Acknowledgement** added. The employee will need to access Employee Self-Service to review and sign the acknowledgement.

[Sign Acknowledgment](#)

Employee Landing Page | *Employee Documents*

Store employee documents on a secure web-based platform to access files anywhere an internet connection is available. Documents can be scanned one at a time or as a complete packet of up to 50 pages (per packet), scanned in a black & white resolution. To view documents stored electronically, select the item, choose the pencil icon, and select the file name under Document for Upload.

The screenshot displays the Heartland HR Demo interface. The left sidebar contains a navigation menu with items: Employees, Accruals, Benefits, Documents (highlighted with a red box), Employee Change Log, Employee Landing, General, and HR-Achievements. The main content area shows the 'Employee Management' section with an 'Add Document' button (highlighted with a red box). A modal window titled 'Add Document' is open, containing the following fields and controls:

- Document Type ***: A dropdown menu.
- Description ***: A text input field with a 0/255 character count.
- Upload Document ***: A file selection area with a 'Browse' button.
- Allow Employee Access**: A toggle switch set to 'No'.
- Allow Manager Access**: A toggle switch set to 'No'.
- Allow Supervisor Access**: A toggle switch set to 'No'.
- Save** and **Cancel** buttons at the bottom.

Four callout boxes provide additional instructions:

- Top Left:** Selecting **Add Document** will open a new window. Complete the required fields, attach the document, and Save. This must be done to each applicable employee.
- Top Right:** Select the appropriate **Document Type** that applies to the employee scenario. Document Types include: *Benefits, Drug Testing, Employee Files, Offer Letters, Performance Review, Resignations, Resumes, and more!*
- Bottom Left:** Only select **allow employee access** to non-confidential documents. Managers and Supervisors must be set up under the Jobs section of the Employee's menu, prior to having access to documents.
- Bottom Right:** Documents must be saved to the computer desktop or server to upload a document. *Cloud based services are not supported.*

Employees Menu |

Adding HR Titles to Employees

Applying, editing, and deleting customized HR Titles for individual employees occurs under the Employees menu. Fields with an * asterisk are required; all other fields are optional and can be populated based on company requirements.

Repeat the steps until all additional HR information has been added for each employee. Prior Employment does not require set up in the Client menu before populating employee data.



Employees Menu |

Employee Contact Information

Store Beneficiary and Dependent data for benefit applications, Emergency Contacts and Employee data relating to wellness programs. Included is the ability to provide Manager/Supervisor access to their subordinates' emergency contact information at any time.

Dashboard

Client

Employees

Accruals

Benefits

Documents

Employee Landing Page

Employee Pay

Employment

General

HR-Achievements

HR-Company Assets

HR-Employee Contacts

Employee 4 of 6

Ryder Representative

Employee Contacts

Add Employee Contact

Contact Person

Add Employee Contact

Contact Name

First Name * Harry 5/25

Middle Name 0/25

Last Name * Heartland 9/25

Prefix 0/10

Suffix 0/10

Address

Address 1 123 Easy Street 15/50

Address 2

Personal Information

SSN

Birth Date MM/DD/YYYY

Gender

Contact Info

Relationship * Spouse

Call Order

Emergency Contact No

Dependent No

Save Cancel

Selecting **Add Employee Contact** will open a new window for you to enter the employee's emergency contact information.

First Name, Last Name, and Relationship to the Employee are the only required fields.

Additional Contact fields are available based on company preferences.

Employee Menu |

OSHA Incidents & Documentation

Track incidents and accidents based on OSHA guidelines and document accidents or injuries to improve safety. Generate reports in Excel or populate the required 300A form for electronic reporting. Select fields are required with an * asterisk, we recommend you enter additional information for a more detailed company record.

Selecting **Add OSHA Incident** will open a new window for you to enter all known information related to the incident.

Select each  icon to expand the section.

Complete each section. Required fields will be marked with a red * asterisk.

OSHA 300A Reports & Excel Injury Reports are found in *Reporting* → *Date Range Reports*.

HR-Incidents

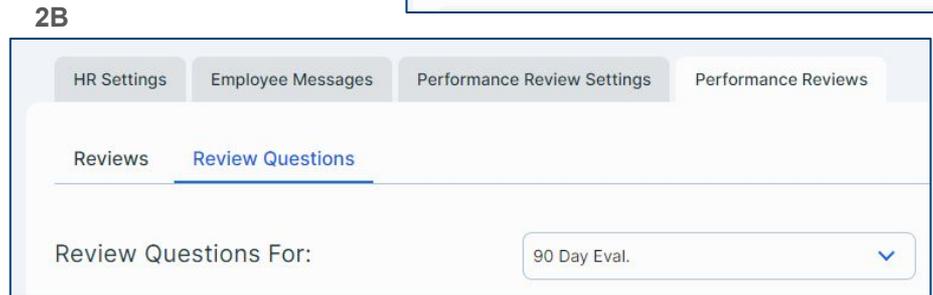
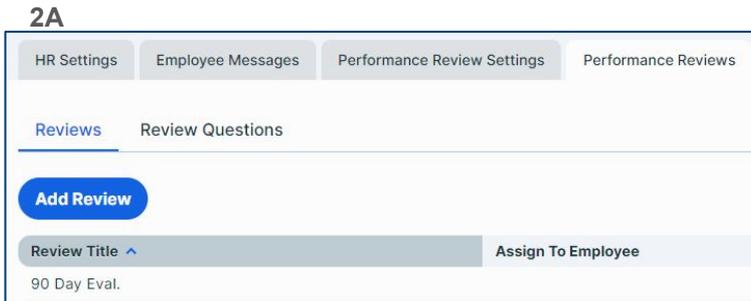
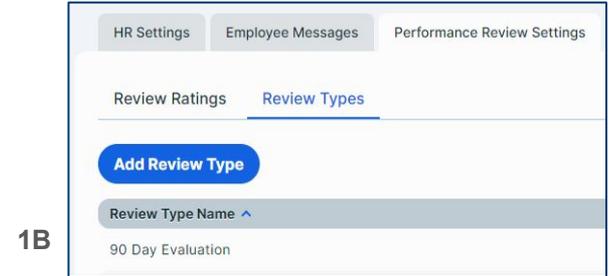
Performance Review | Recommended Steps

Pages 14 - 20 are all related to *Creating Performance Reviews* and assigning them to the Employees. Below we have the order of operations for creating Performance Reviews, as many of the review settings follow a sequence order. One item must exist as an option, before the next review step can be finalized.

Follow this order of operations to successfully streamline your Performance Reviews

1. Performance Review Settings tab
 - a. Review Ratings tab (ex. title *90 Day Evaluation*). You will assign values and enter descriptions (ex. *Meets Expectations, Below Expectations, Pass, Fail*).
 - b. Review Types tab (ex. *90 Day Evaluation, Quarterly Review, Annual Review*).

2. Performance Reviews tab
 - a. Adding a Review (ex. Title *90 Day Evaluation*). Overall Rating System dropdown, cannot populate unless a Review Rating (1a) has been created.
 - b. Review Questions - select which Review (2a) that the questions will apply to.



Performance Review Settings | Building Review Ratings

Create Performance Reviews, Review Types, and even create a Review Rating system! Once a Review Rating title has been selected, you will use that to build the full performance rating system. Ratings determine the level an employee is performing during the period indicated in the review. Different Rating Systems can be added for each Review Type built.

The screenshot shows the 'Performance Review Settings' page. The left sidebar contains navigation options: Dashboard, Client, Human Resources (highlighted), Job Titles, Settings, Employees, Payroll, Reports, Tools, and HR Solutions. The main content area has tabs for HR Settings, Employee Messages, Performance Review Settings (selected), and Performance Reviews. Under 'Performance Review Settings', there are sub-tabs for 'Review Ratings' (selected) and 'Review Types'. An 'Add Review Rating' button is visible. Below it, a 'Rating System Title' dropdown is set to 'Non-Exempt Review Ratings'. A table titled 'Ratings' contains three entries:

Rating Title *	Code	Display Order *	Value	Description	Actions
Exceeds	E	1	3	Outstanding, Exceeds expectations. Achiever in quality and quantity.	✕
Meets	M	2	2	Meets all requirements. Regularly assists team members.	✕
Below		3	0	Below expectations. Performance can improve to meet quality standards.	✕

Callouts provide instructions: 'Expand existing Review Ratings by selecting the + icon.' points to the '+' icon in the 'Rating System Title' dropdown. 'When adding new Review Ratings the fields might appear small, see example on next page. Simply Save and expand the Title to edit the Ratings.' points to the input fields in the table. 'Select the Trash Can to delete the Rating System.' points to the trash icon in the 'Actions' column. A larger callout at the bottom states: 'Match Review Types with Review Ratings using similar names to ensure the correct Rating System is used for each Review.' with arrows pointing to the 'Meets' and 'Below' rows.

Performance Review Settings | Building Review Ratings cont.

Create Performance Reviews, Review Types, and even create a Review Rating system! Once a Review Rating title has been selected, you will use that to build the full performance rating system. Ratings determine the level an employee is performing during the period indicated in the review. Different Rating Systems can be added for each Review Type built.

The screenshot shows the 'Add Review Rating' modal window. The background shows the 'Human Resources' menu and the 'Add Review Rating' button. The modal window has the following fields and table:

Rating System Title * 25/100

Ratings

Rating Title *	Code	Display Order *	Value	Description
<input type="text" value="Exceed"/> 7/100	<input type="text" value="E"/> 1/5	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="Outstanding, Exceeds expectations. Achiever in quality and quantity."/> 68/500
<input type="text" value="Meet"/> 5/100	<input type="text" value="M"/> 1/5	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="Meets all requirements. Regularly assists team members."/> 55/500
<input type="text" value="Below"/> 5/100	<input type="text" value="B"/> 1/5	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="text" value="Below expectations. Performance can improve to meet quality standards."/> 70/500

Buttons:

Callouts:

- Selecting **Add Review Rating** will open a new window. Enter the Review Type name and Save.
- When adding new Review Ratings the fields might appear small. Simply Save and click the **+** sign to expand the Title and edit the Ratings.
- Enter a number for the Value to tier performance reviews based on the rating system created.
- Continue to add new ratings. Utilize the **Display Order** to have the items align in a specific order.

Performance Review Settings | Building Review Types

Set up Performance Review Types that can be used to Review employees based on position, pay structure, or tenure. Different Review Types can be built for each type of Performance Evaluation the company utilizes. Before starting the Performance Review build, all employees should first have Job Titles assigned before being able to assign performance reviews.

The screenshot displays the 'Heartland HR Demo' interface. The left sidebar contains navigation options: Dashboard, Client, Human Resources (highlighted), Employees, and Payroll. The main content area is titled 'Client Management' and includes tabs for HR Settings, Employee Messages, Performance Review Settings (highlighted), and Performance Reviews. Under 'Performance Review Settings', there are sub-tabs for 'Review Ratings' and 'Review Types' (highlighted). A blue 'Add Review Type' button is visible. Below it, a table lists existing review types: 'Annual 1:1 - Operations' and 'Quarterly 1:1 - Operations'. An 'Actions' column for each row contains a pencil icon (edit) and a trash can icon (delete). A modal window titled 'Add Review Type' is open, showing a text input field for 'Review Type Name' with the value 'Quarterly 1:1 - Management' and a character count of 26/100. At the bottom of the modal are 'Save' and 'Cancel' buttons. A callout box explains that performance review types can be used to review employees based on position, pay structure, or tenure, and that different review types can be built for each type of performance evaluation. Another callout box points to the pencil icon, stating 'Select the Pencil icon to Edit the information.' A third callout box points to the trash can icon, stating 'Select the Trash Can to delete the Review Type.'

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Heartland HR Demo Active ID: 01HRDEMO

Client Management

HR Settings Employee Messages Performance Review Settings Performance Reviews

Review Ratings Review Types

Add Review Type

Viewing 1 - 2 of 2 records

Review Type Name	Actions
Annual 1:1 - Operations	
Quarterly 1:1 - Operations	

Add Review Type

Review Type Name * Quarterly 1:1 - Management 26/100

Save Cancel

Performance Review Types can be used to review employees based on position, pay structure, or tenure. Different review types can be built for each type of performance evaluation your company utilizes.

Select the **Pencil icon** to **Edit** the information.

Select the **Trash Can** to **delete** the Review Type.

Performance Reviews

Building Reviews

Customize each Review by adding the Rating system and Manager specifications. Reviews can be specific to one employee role (ex: customer support, or non-exempt employees) or generalized to all employees (ex: 90 day review). In this screen you can add options like Manager assignments, comment areas, and Acknowledgment requirements.

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Heartland HR Demo Active ID: 01HRDEMO

Client Management

HR Settings Employee Messages Performance Review Settings **Performance Reviews**

Reviews Review Questions

Add Review

Review Title **Non-Exempt Operations Review**

Assign To Supervisor **Actions**

Add Review

Review Title * 28/50

Assign To Employee Yes

Assign To Manager No

Assign To Supervisor Yes

Requires Acknowledgement Yes

Overall Rating System

Allow Overall Comments Yes

Select the **Pencil icon** to **Edit** the information.
Print the Review to complete manually.
Select the **Trash Can** to **delete** the Review.

Selecting **Add Review** will open a new window. Complete the required fields and Save.

See [Building Review Ratings](#) to create a Rating System. One must be created prior for this drop-down to populate with data.

The toggles are optional and can be used in a combination. Jobs must have been set up prior to the Review for Supervisor/Manager visibility.

Performance Reviews | Building Review Questions

Questions entered for each Review can be copied and pasted from existing company reviews, created on the site, or copied from customized reviews created by the HR Professionals available in the HR Support Portal (available with HR On-Demand services).

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Heartland HR Demo Active ID: 01HRDEMO

Client Management

HR Settings Employee Messages Performance Review Settings **Performance Reviews**

Reviews **Review Questions**

Review Questions For: Non-Exempt Operations Review

Add Review Question

Display Order	Question
1	Does the employee
	How well does the
	How well does the

Viewing 1 - 3 of 3 records

Add Review Question

Display Order * 4

Rating System Non-Exempt Review Ratings

Allow Comments No

Text * Does the employee adhere to scheduled work times or have any attendance issues? If so, provide details. Create a SMART goal or corrective action as needed.

155/255

Save **Cancel**

Actions

-
-
-

Selecting **Add Review Question** will open a new window. Complete the required fields and Save.

Use the drop-down to select the Review that the questions will apply to. See **Page 17** to create Review categories.

Allow Comments is an optional feature. Copy and Paste or write out the question that will generate on the employees review.

Select the **Pencil icon** to **Edit** the information. **Print** the Review to complete manually. Select the **Trash Can** to **delete** the Review.

Performance Reviews |

Scheduling Employee Reviews

Schedule the reviews by going to *Employees* → *HR-Performance Reviews*, when all steps to the Review Setup Process are completed.

The screenshot displays the HR-Performance Reviews interface. On the left is a dark sidebar with navigation options: Dashboard, Client, Employees, Accruals, Benefits, Documents, and HR-Performance Reviews (highlighted with a red box). The main content area shows the profile for 'Ryder Representative' with a 'Performance Reviews' section containing an 'Add Performance Review' button. A callout box explains that clicking this button opens a new window to complete fields and save. Below this is a table with columns for 'Review Date', 'Period Start', and 'Period End'. To the right, a modal window titled 'Add Performance Review' is open, showing fields for 'Review Date *' (10/15/2023), 'Period Start Date' (MM/DD/YYYY), 'Period End Date' (MM/DD/YYYY), 'Review Type *' (Quarterly 1:1 - Management), and 'Review *' (Non-Exempt Operations Review). A callout box notes that fields with an asterisk are required and that Review Type and Review must be created before assigning a review. At the bottom, a table lists existing reviews with columns for Status, Review Type, Review, Reviewer, and Actions. A callout box instructs to check the status of assigned reviews. The 'Status' column shows 'Not Started' (highlighted with a red box). The 'Actions' column shows a three-bar menu icon and a callout box explaining that clicking it allows editing or deleting a review. Below the menu icon, 'Edit Performance Review' and 'Delete' are listed (both highlighted with a red box).

For additional support with Performance Reviews contact, plusteampayroll@e-hps.com

Selecting **Add Review** will open a new window. Complete the required fields and Save.

Add Performance Review

Review Date * 10/15/2023

Period Start Date MM/DD/YYYY

Period End Date MM/DD/YYYY

Review Type * Quarterly 1:1 - Management

Review * Non-Exempt Operations Review

Fields marked with an * asterisk are required.

Review Type and Review must be created prior to assigning a performance review.

Check the status of the performance review assigned to the employee.

Status	Review Type	Review	Reviewer	Actions
Not Started	Quarterly 1:1 - Management	Non-Exempt Operations Review		Edit Performance Review Delete

Select the 3 Bars to expand the Actions. You can Edit the review, or delete an existing one.

Performance Reviews | Completing My Reviews

Employees, Managers, and Supervisors can then log in to <http://heartlandplusone.com> to complete their assigned Performance Review(s) by clicking Employee Self Service → HR → My Reviews.

No notifications for Checkview: Employees will not be notified when a Performance Review has been added to their account.



Reporting | Access the Reports menu on the toolbar to view the additional HR Reports available. Select the desired report, enter the dates, and identify the individual employee or leave blank to include all employees. Most Reports can be ran in PDF or Excel. If additional HR information needs to be included in a report, access the *Custom Report Writer* menu to create tailored reports, contact plusteampayroll@e-hps.com to have the Custom Reports access added to your account.

The screenshot shows the 'Date Range Reports' section of the HR Reporting tool. The interface includes a sidebar with navigation options: Dashboard, Client, Employees, Payroll, Reports (highlighted), Archived Reports, Check Print Back, Custom Reports, On Demand Reports (highlighted), Quarterly Reports, Year End Reports, and Tools. The main content area is divided into sections: Report Name (Employee OSHA Incident History Report), Filtering (From Date: 01/01/2023, To Date: 12/31/2023), Pay Groups, Employee (7-Ryder Representative), Options (Date Type: Pay Date, Report Format: Excel), and Sorting (Sort Field 1, 2, 3). A 'Run Report' button is at the bottom. Three callout boxes provide instructions: 1) Sorting fields to organize employees, with an example of 'Sort Field 1' as 'Department 100 - Operations'. 2) Leaving the Employee field blank to run the report for all employees. 3) Reports by default are in PDF format, but can be selected as Excel.

Utilize the Sorting fields to organize the employees.
For example **Sort Field 1** could be Department 100 - Operations. Running the report for employees only assigned to this dept. type.

Leave the Employee field blank to run the report with all employees. Delegate a single selection to have the report generate for the sole employee selected.

Reports by **default are a PDF** format. Select this field to have the report generated in an Excel format. This feature is not available for all report types.

Reporting | cont.

Access the Reports area on the toolbar to view the HR Reports available under Date Range Reports. Select the desired report, enter the dates, and identify the individual employee or leave blank to include all employees. Most Reports can be ran in PDF or Excel. If additional HR information needs to be included in a report, access the Custom Report Writer area to create tailored reports that can be scheduled or populated as needed.

Pay Period Reports | Date Range Reports

Report Name * Employee Award History Report

Filtering

From Date * MM/DD/YYYY

To Date * MM/DD/YYYY

Pay Groups

Employee

Award Categories

- Award Categories
- Employee of the Month

Certain HR Reports will have you select applicable categories to include in the reports.

Dashboard

Client

Employees

Reports

Archived Reports

Check Print Back

Custom Reports

Custom Report Writer

Add Custom Report Writer

Report Title	Report Type
Employee Census	Payroll Employee Report

To add additional HR information to your reports use the **Custom Reports** section to create specialized reports specific to your needs!

HR Support Center | Additional Services

To access the HR Support Center with Single Sign-On Access, select *HR Solution* → *My HR Support*. First-time users must update their contact information and agree to the terms and conditions. Click on My Subscriptions to receive updates on laws and policies for additional states. Heartland HR Implementation will create a general password within three business days of the first payroll and send it via email. Select Account in the HR Support Center to set up your Mobile HR app.

Heartland
A Global Payments Company

HR Compliance Company Policies Safety HR Tools Templates Resources

Search Content and Documents in the Platform

Powered By **Mineral**
INTERTECH

See our **HR Support Center User Guide** for a detailed guide of this HR Service!

Your Main Menu might have different options depending on your access type. Contact your Payroll Support Team to discuss your access.

Dashboard

Client

Payroll

Reports

HR Solutions

Heartland Hire

My HR Support

Hover over any of the toolbar buttons to expand the page options.

HR Compliance Company Policies Safety HR Tools Templates Resources

Compliance Dashboard	Topics	
Compliance Insights	Benefits	Managing Employees
Law Alerts	Discrimination & Equal Employment	Safety & Health
Laws	Hiring	Termination
HR Assessment	Leaves & Time Off	Wage & Hour