Heartland

Payroll HR Solution

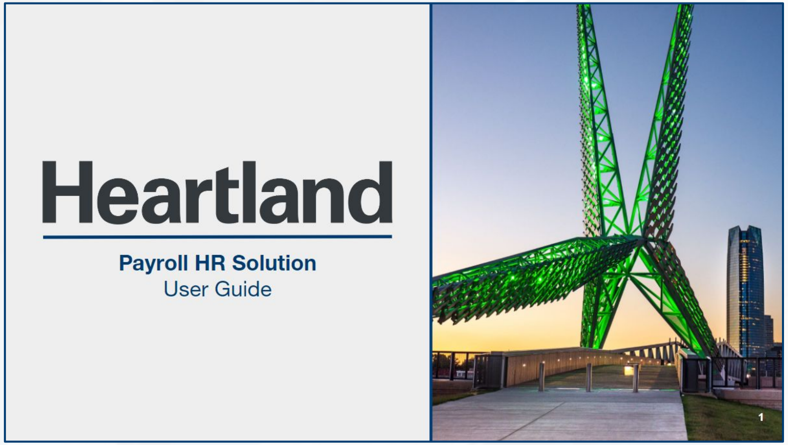
User Guide

Rev. 11/18/2024

Unsure which HR Guide contains what you need?

We offer a variety of HR Products and Services!

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



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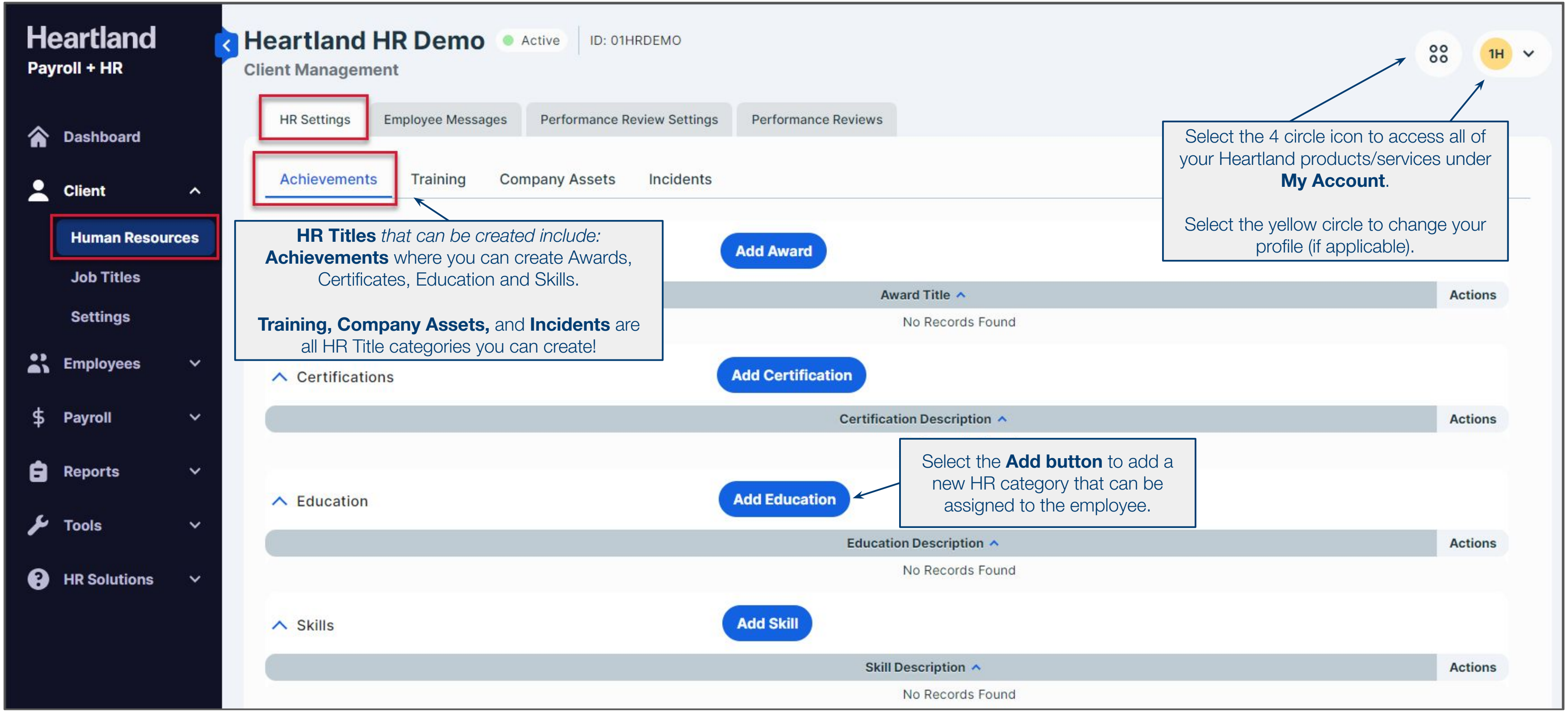
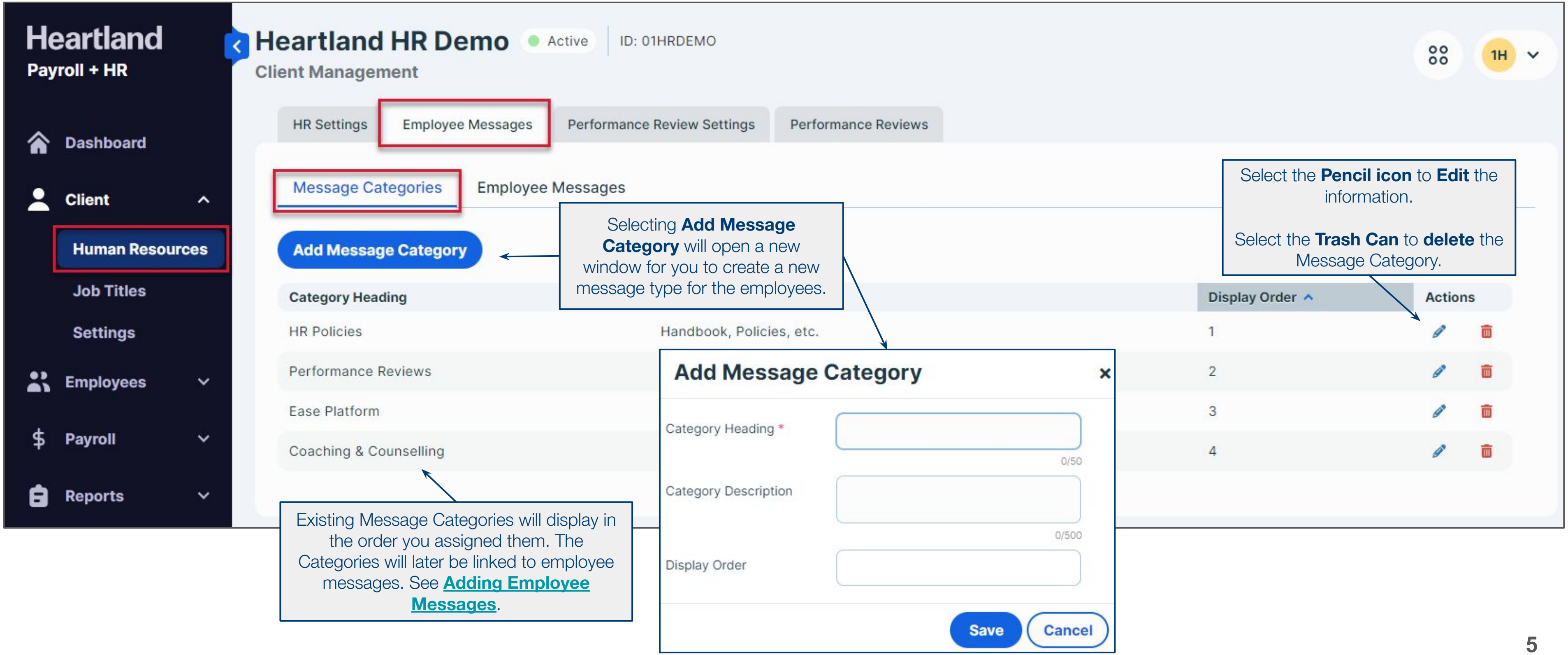
HR Settings |
Building & Customizing Titles

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.



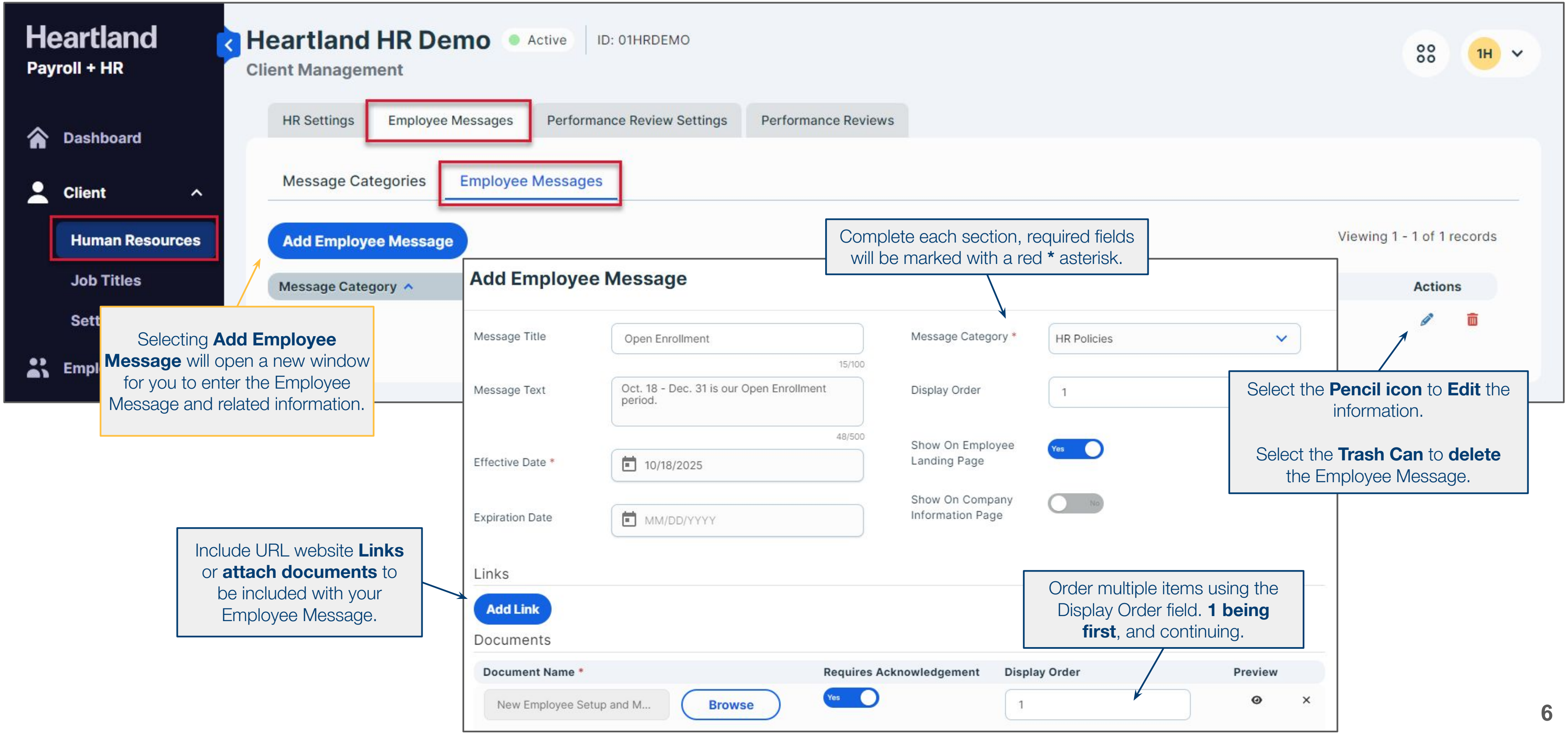
Employee Messages | *Building Message Categories*

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.



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**.



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

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

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

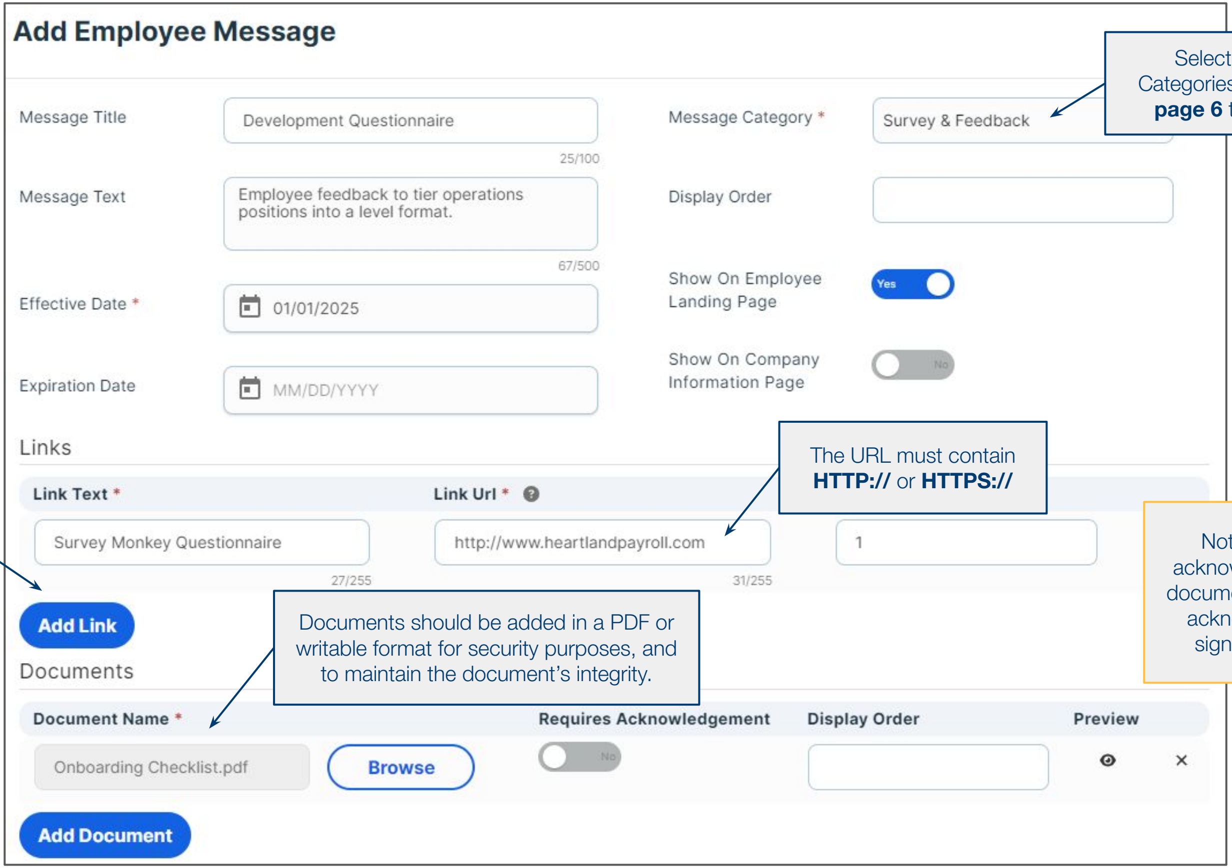
Select the **Trash Can** to **delete** the Employee Message.

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

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

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.



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

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

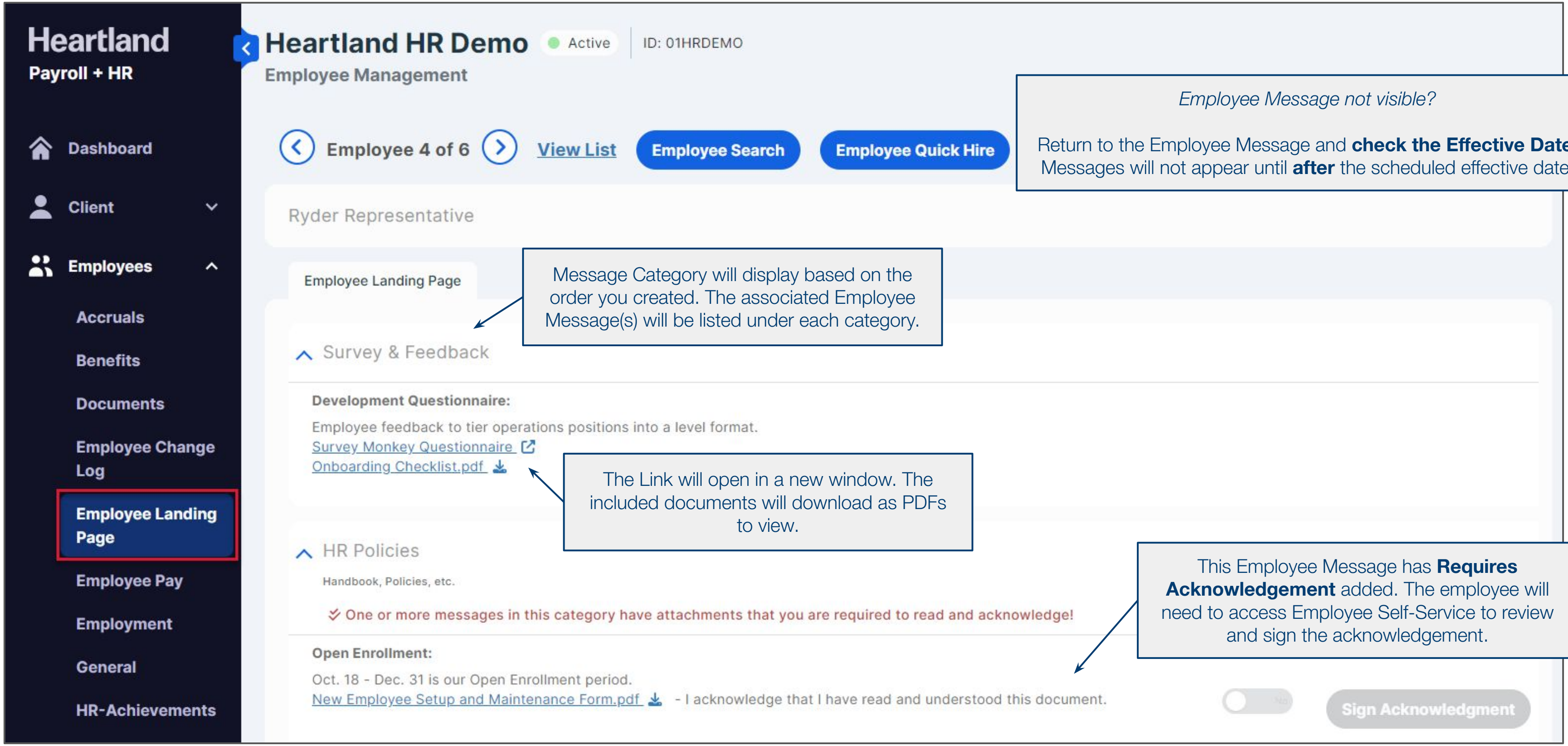
Add more than one Link or Document by selecting *Add Link/Document*.

Order the items using the Display Order field.

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.



Employee Message not visible?

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

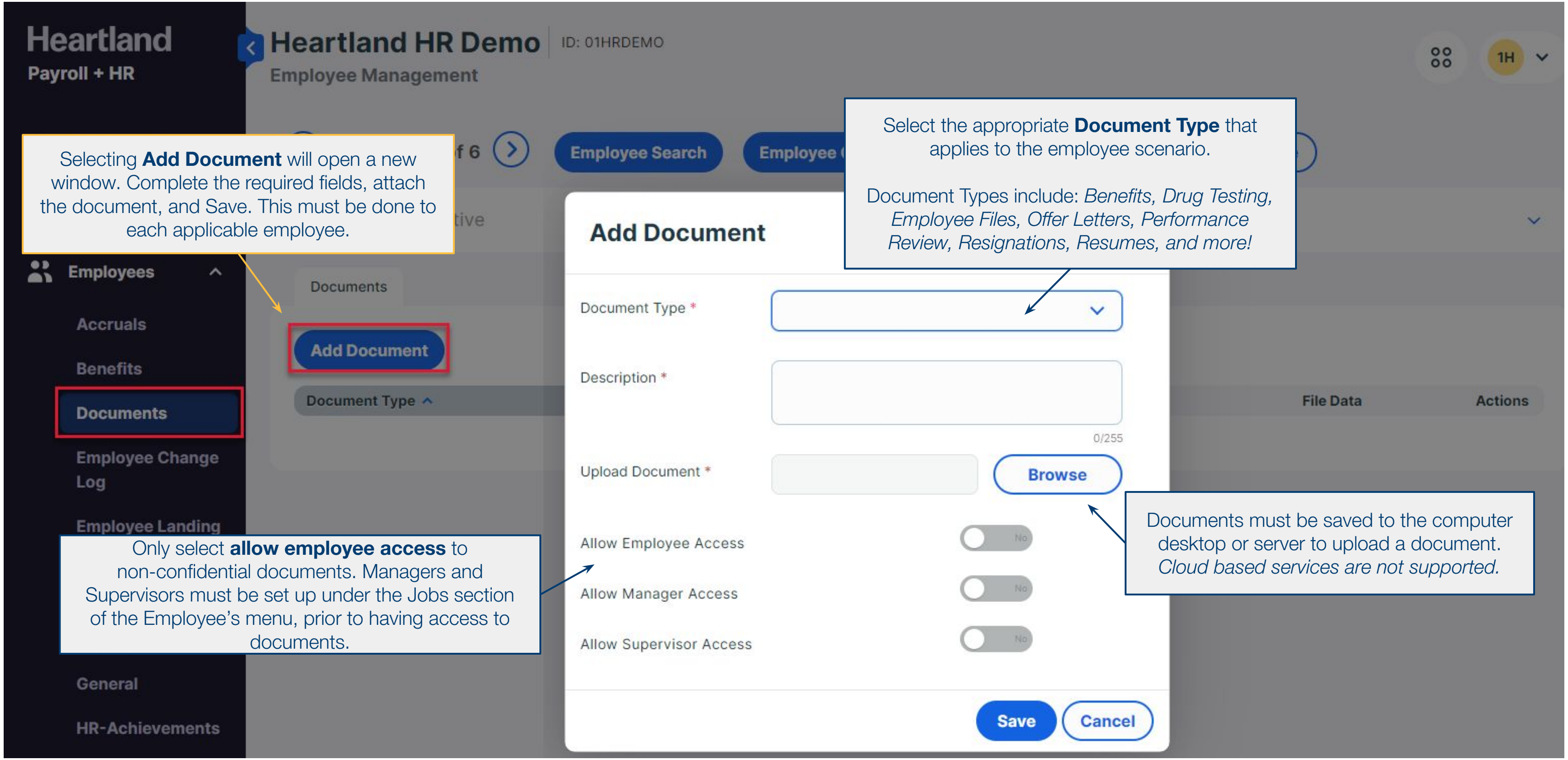
Message Category will display based on the order you created. The associated Employee Message(s) will be listed under each category.

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.

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.



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.

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!*

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.

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

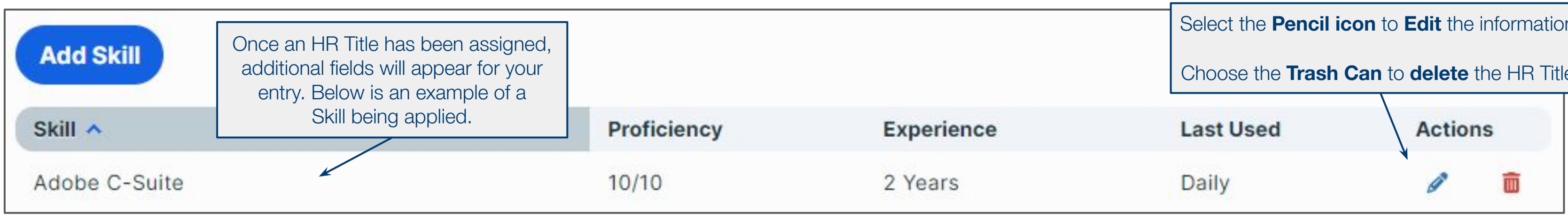
Applying, editing, and deleting customized HR Titles for individual employees occurs under the Employees menu. Fields with an ***** asterisk are required; all other fields are optional and can be populated based on company requirements.

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.

Select the appropriate HR menu to access and **assign** the **HR Title**.

Select the **HR Title category** based on the information applicable to the employee.

Choose **Add** to apply the related HR Title to the individual employee.



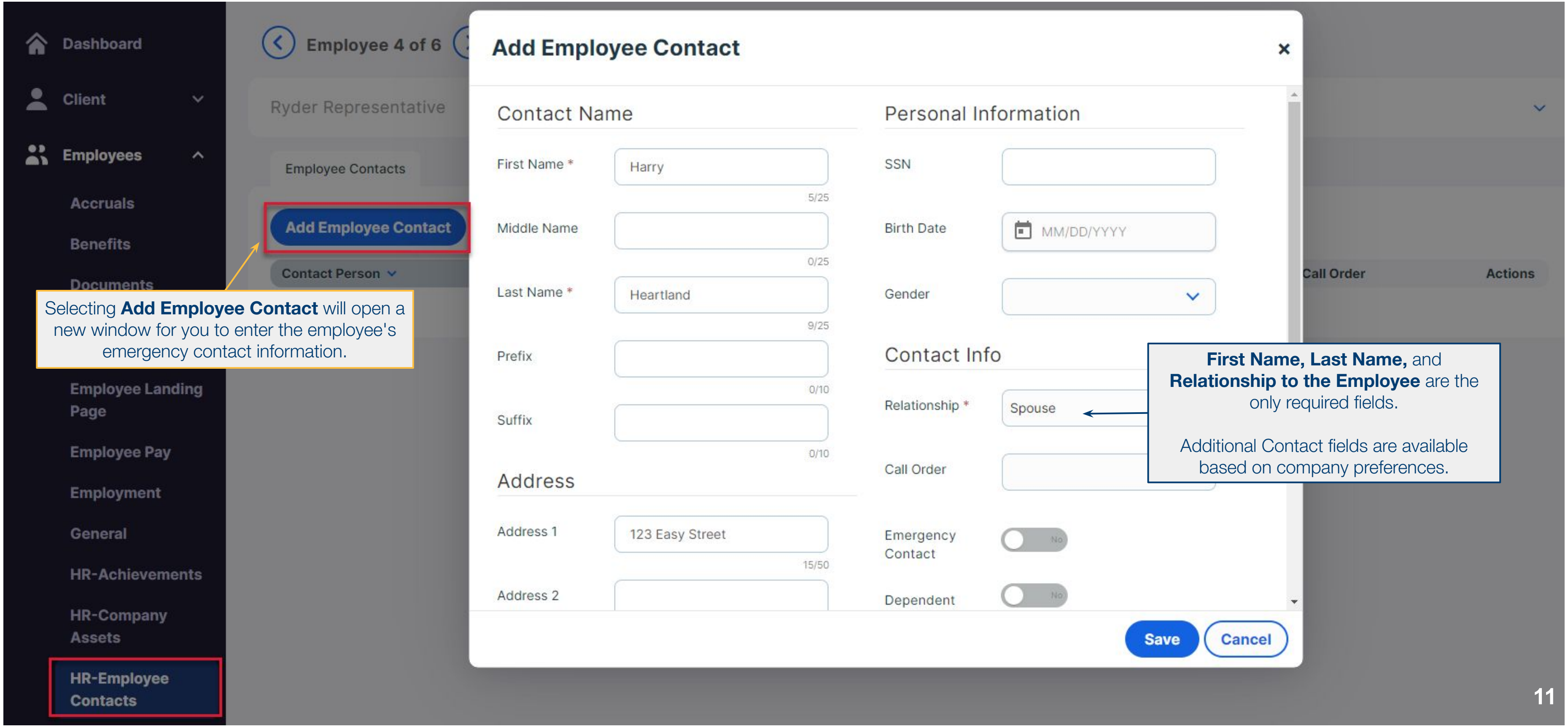
Once an HR Title has been assigned, additional fields will appear for your entry. Below is an example of a Skill being applied.

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

Choose the **Trash Can** to **delete** the HR Title.

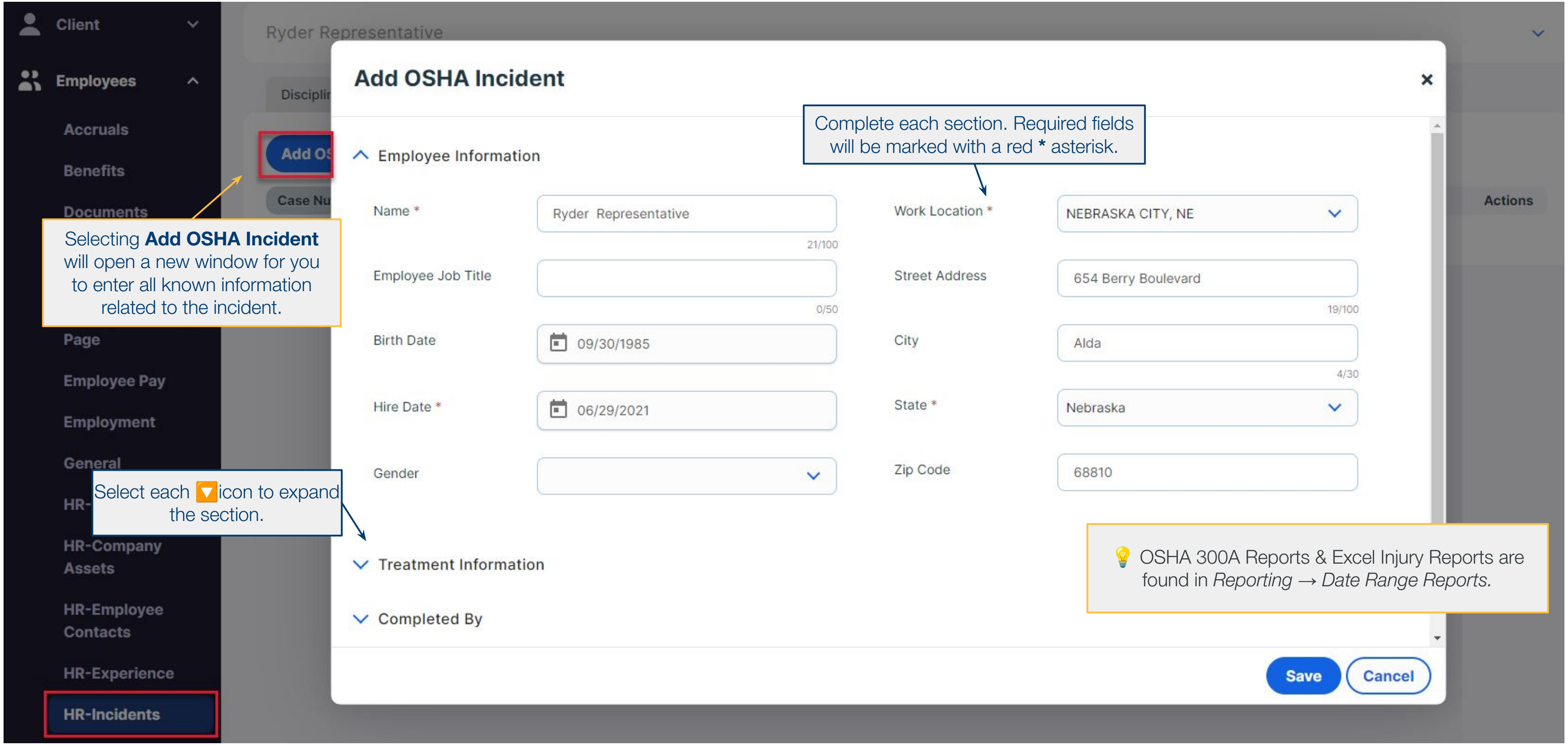
Employees Menu | *Employee Contact Information*

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.



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.



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.

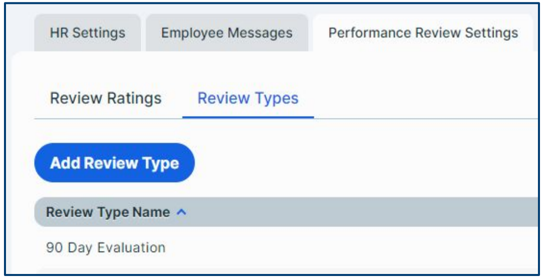
Follow this order of operations to successfully streamline your Performance Reviews

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).

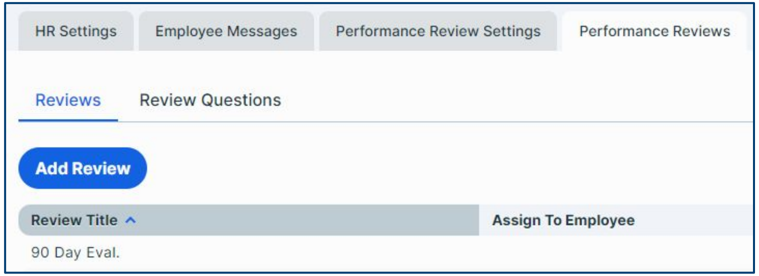
2. Performance Reviews tab
   - ***a.*** Adding a Review (ex. Title 90 Day Evaluation). Overall Rating System dropdown, cannot populate unless a Review Rating (1a) has been created.
   - ***b.*** Review Questions - select which Review (2a) that the questions will apply to.

1A

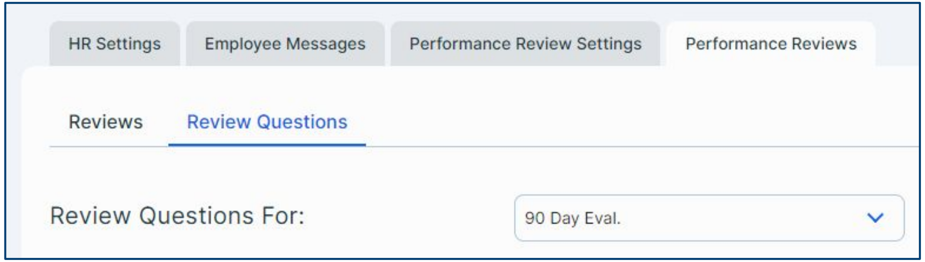
1B



2A

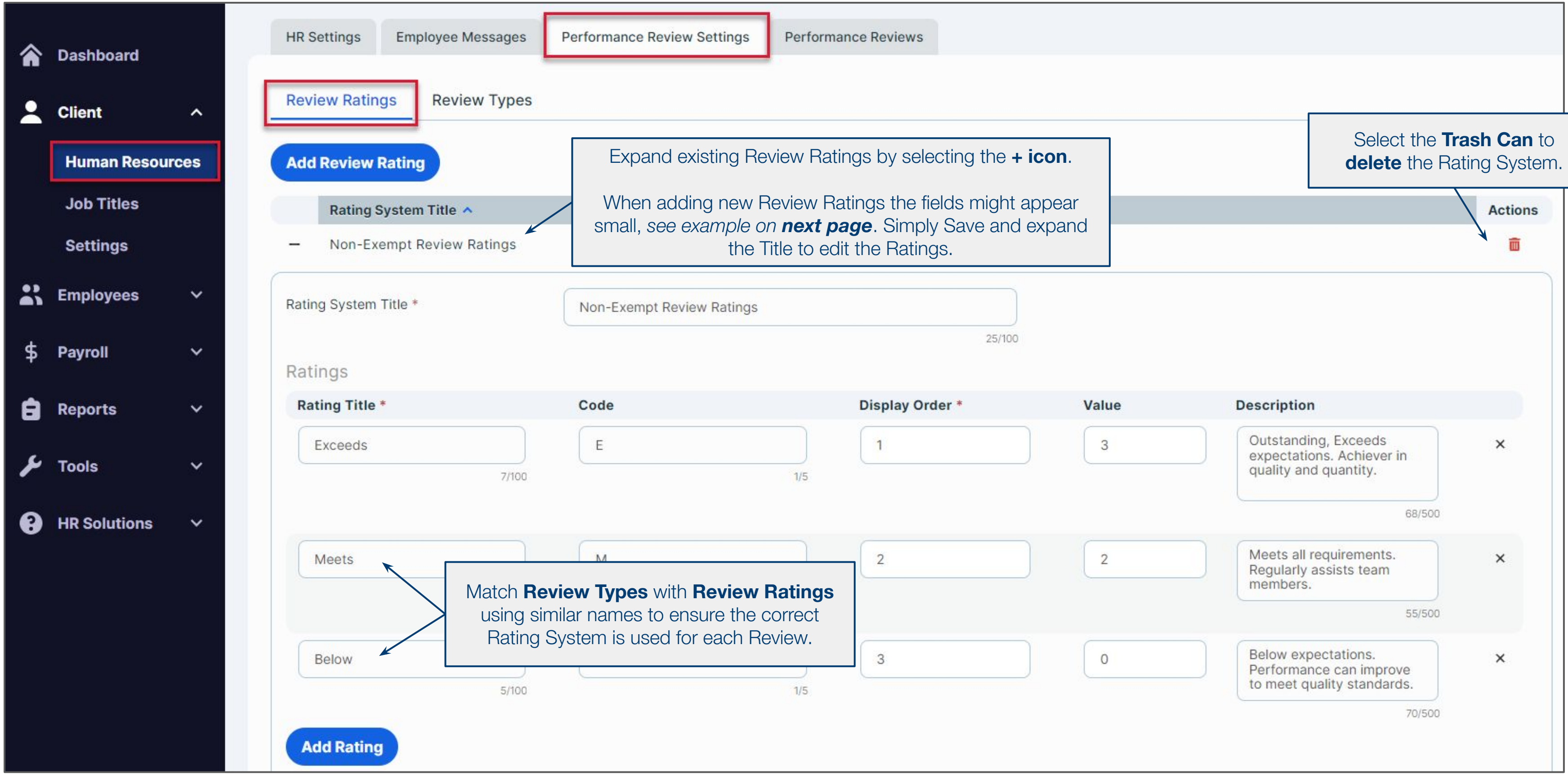


2B



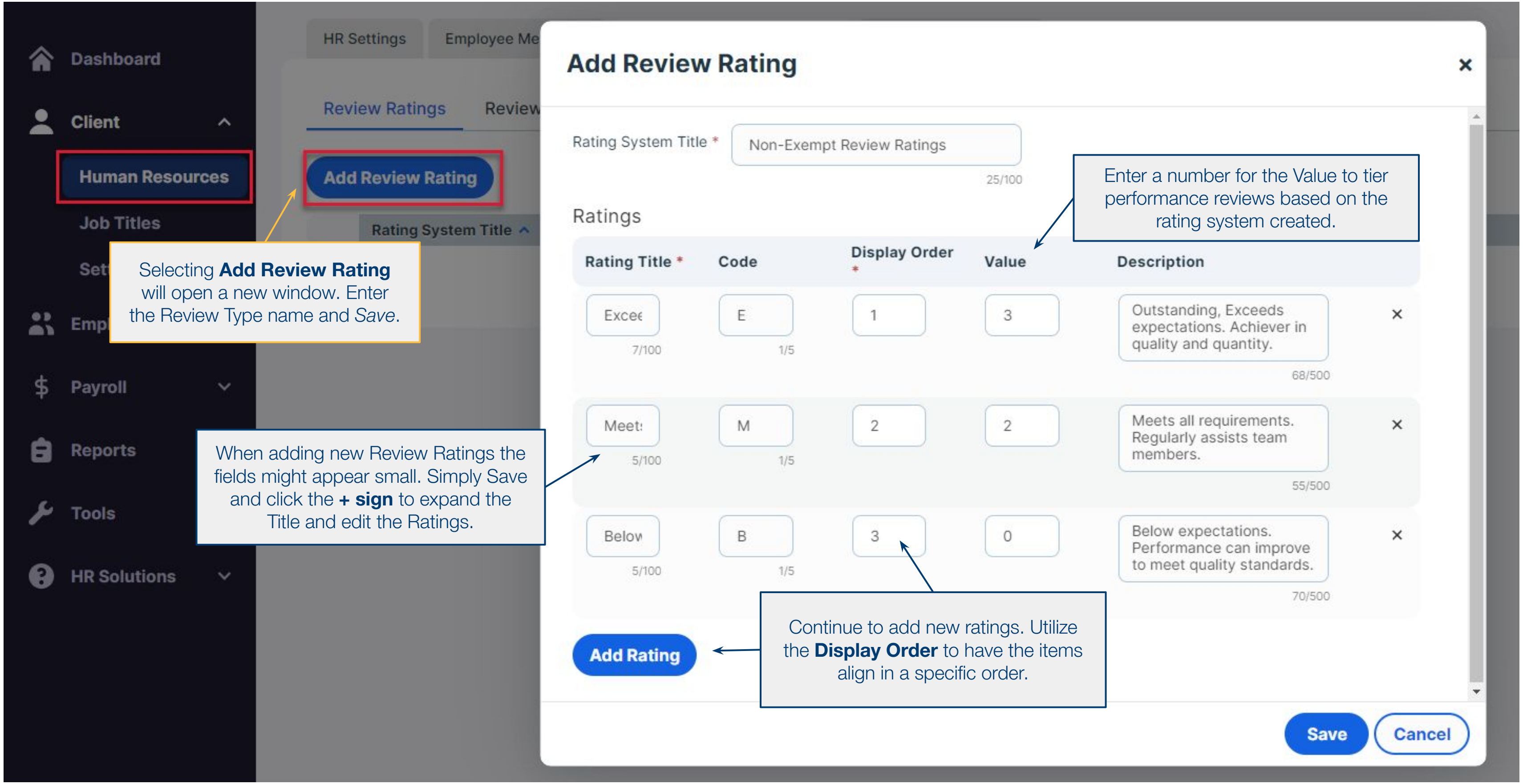
Performance Review Settings |
Building Review Ratings

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.



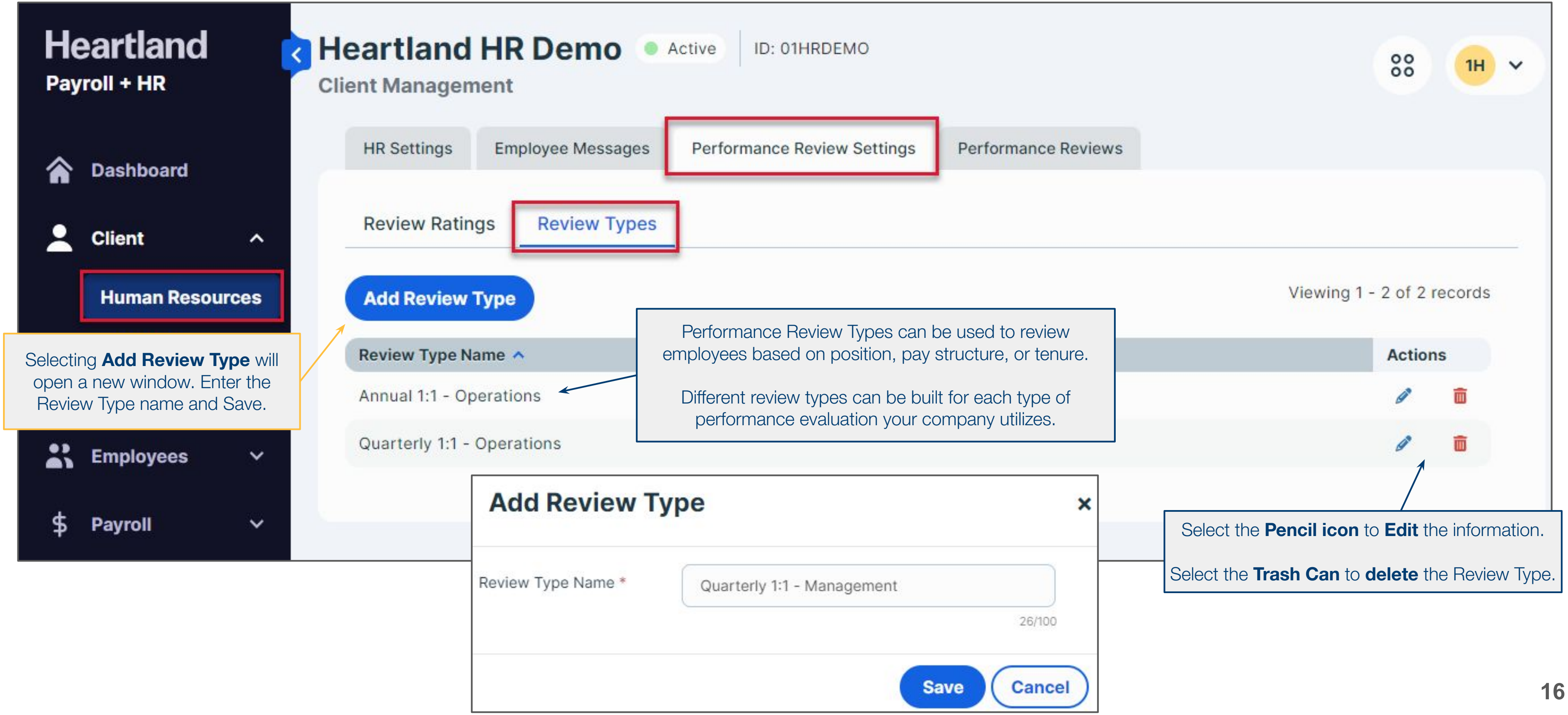
Performance Review Settings | *Building Review Ratings cont.*

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.



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.



Selecting **Add Review Type** will open a new window. Enter the Review Type name and Save.

Performance Review Types can be used to review employees based on position, pay structure, or tenure.

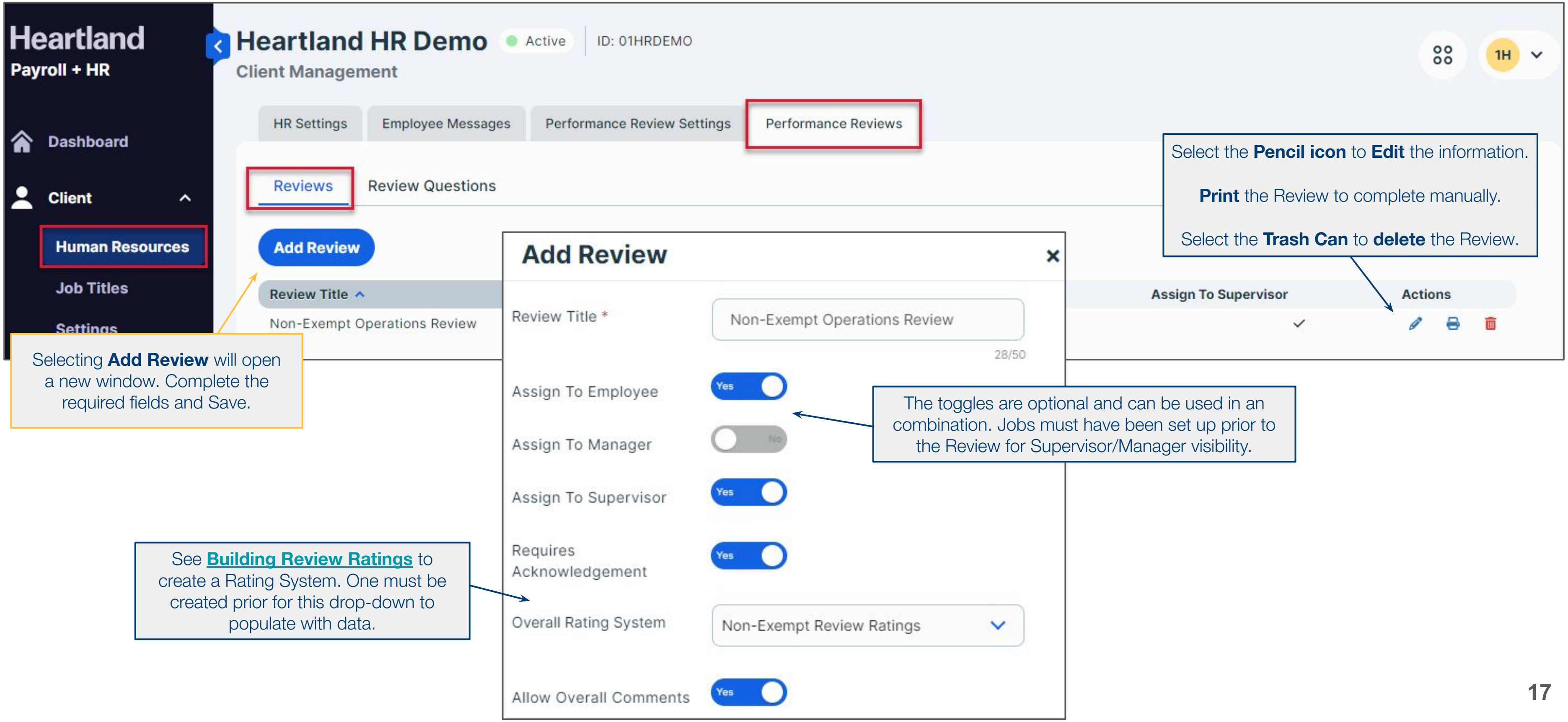
Different review types can be built for each type of performance evaluation your company utilizes.

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.



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

Print the Review to complete manually.

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

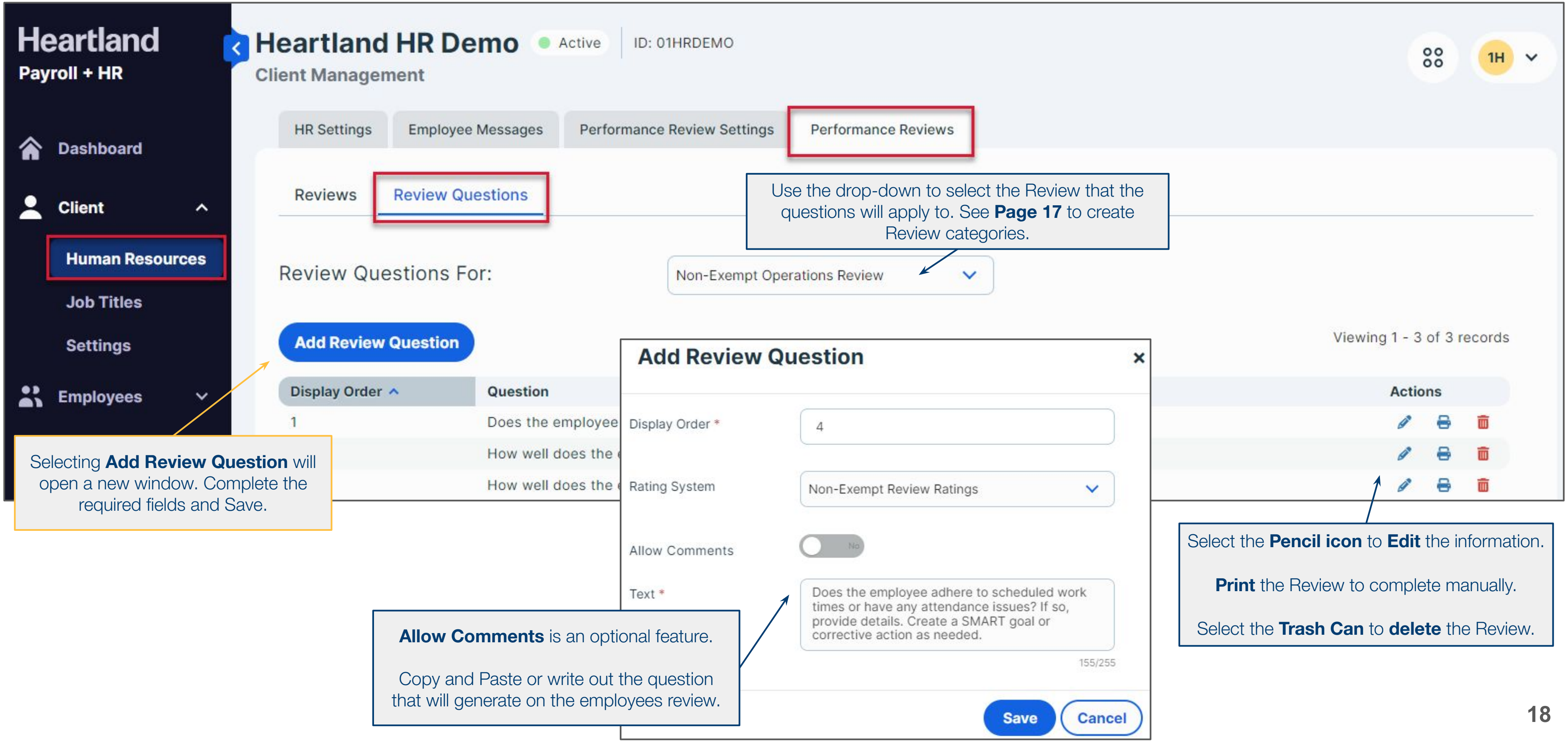
Selecting **Add Review** will open a new window. Complete the required fields and Save.

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

See **Building Review Ratings** to create a Rating System. One must be created prior for this drop-down to populate with data.

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).



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

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

Allow Comments is an optional feature.

Copy and Paste or write out the question that will generate on the employees review.

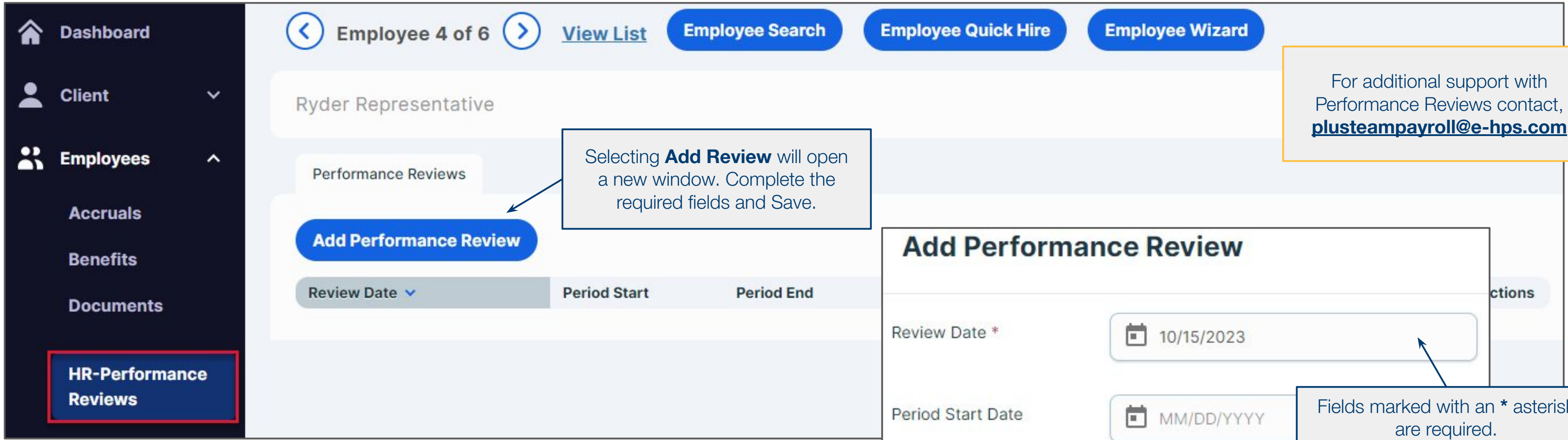
Select the **Pencil icon** to **Edit** the information.

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.



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.

Fields marked with an ***** asterisk are required.

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

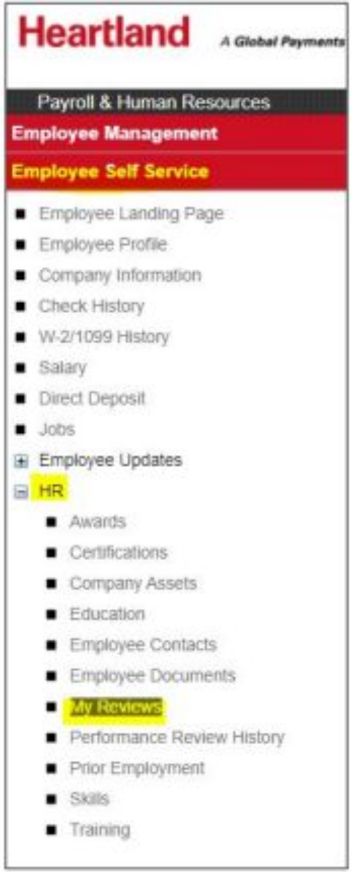
Check the status of the performance review assigned to the employee.

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

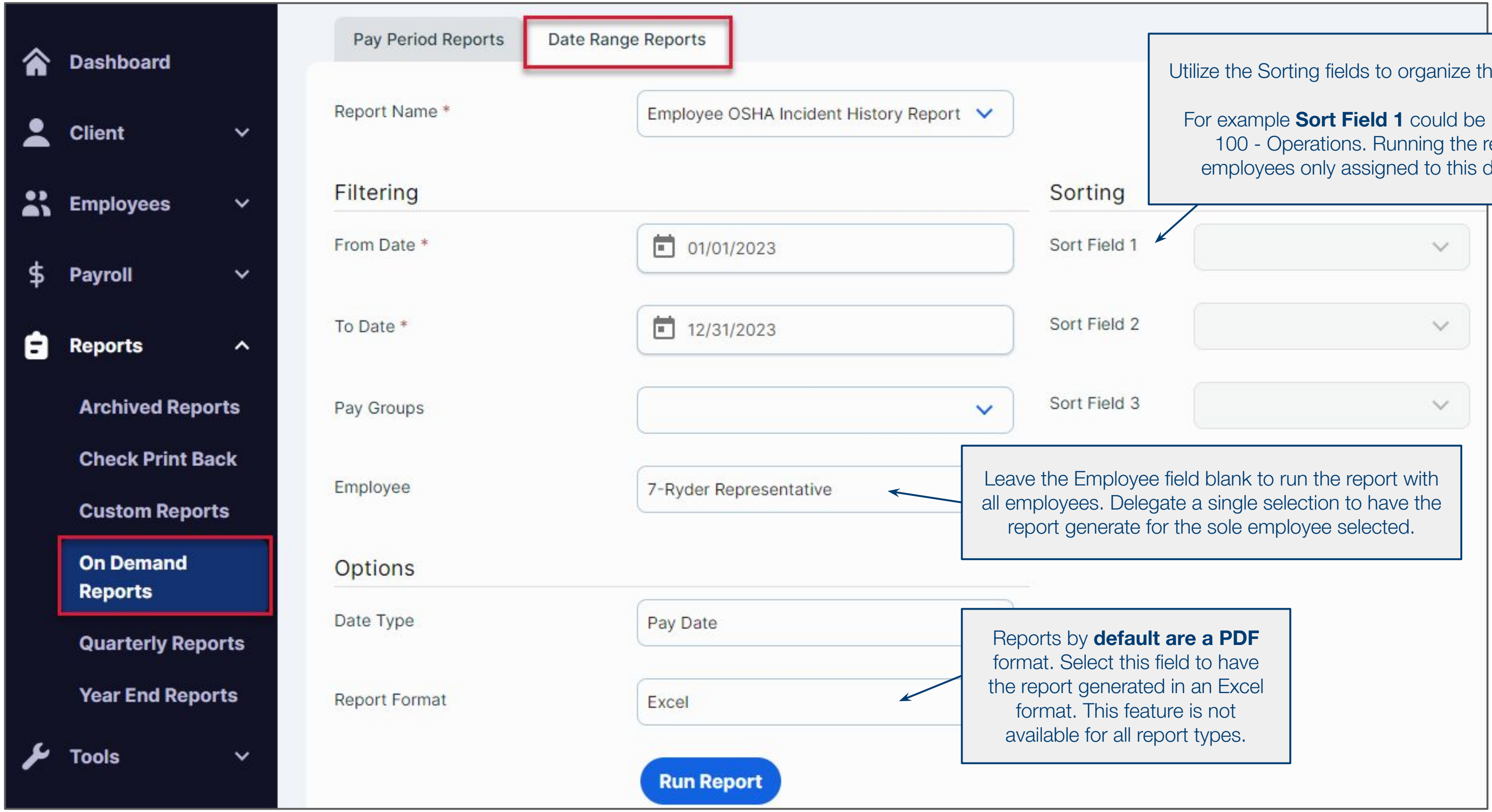
Performance Reviews | *Completing My Reviews*

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.



Utilize the Sorting fields to organize the employees.

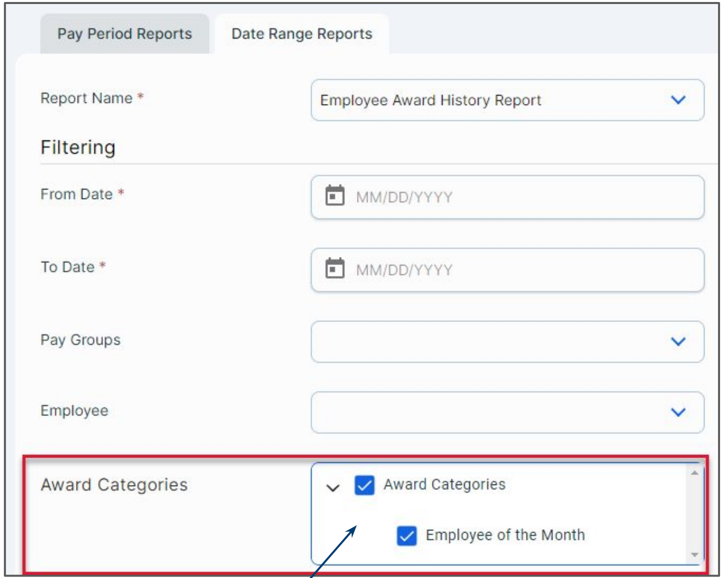
For example **Sort Field 1** could be Department 100 - Operations. Running the report for employees only assigned to this dept. type.

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.

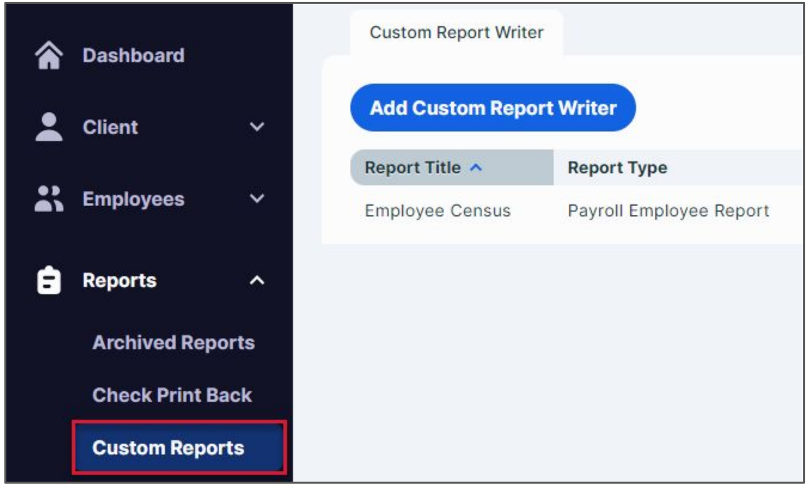
Reports by **default are a PDF** format. Select this field to have the report generated in an Excel format. This feature is not available for all report types.

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.



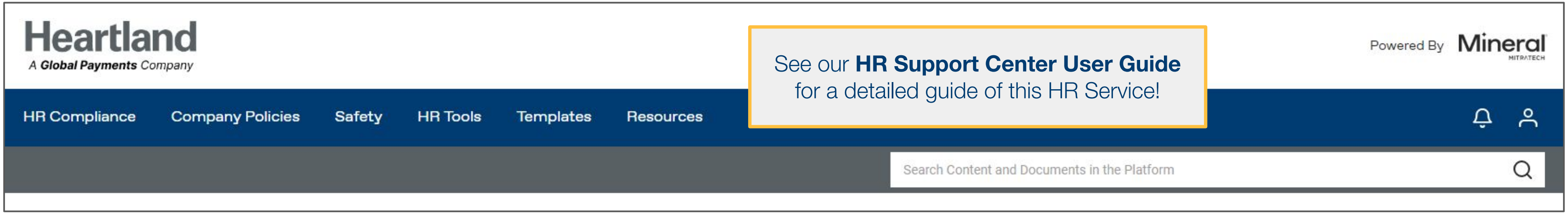
Certain HR Reports will have you select applicable categories to include in the reports.



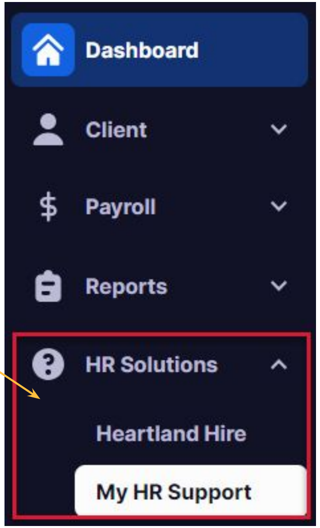
To add additional HR information to your reports use the **Custom Reports** section to create specialized reports specific to your needs!

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.



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.

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