

# **Heartland**

---

## **How to Start your Employee Handbook**

# Heartland

## Create Your Customized Employee Handbook

We recommend beginning the handbook creation process as soon as possible.

### 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](#).
- From the menu bar, select *Company Policies*, then choose *Create Handbook*.

The screenshot shows the 'Company Policies' page in the Heartland HR Support Center. The top navigation bar includes 'HR Compliance', 'Company Policies' (highlighted with a red box), 'Safety', 'HR Tools', 'Templates', and 'Resources'. Below the navigation bar is a search bar with the text 'Search Content and Documents in the Platform'. The main content area is titled 'Company Policies' and includes a sub-header 'Keep your Handbooks and policies up to date, watch Videos, or check out the Help articles and how-to videos for Handbooks.' There are two main content blocks: 'Smart Employee Handbooks' and 'Smart Employee Handbook Help'. The 'Smart Employee Handbooks' block contains the text 'Create a new Handbook or go to the Handbooks library where you can access existing Handbooks and create new policies.' and a button labeled 'CREATE HANDBOOK' (highlighted with a red box). Below this block is a link 'Access Handbooks'. The 'Smart Employee Handbook Help' block contains a video player thumbnail with a play button and a link 'View All Related Help'.

 **View the Smart Employee Handbook Help video for additional information.**

# Heartland

Carefully read the descriptions for the handbook fields, and enter the option that best meets your business needs.

< **New Handbook** Settings

All fields are required unless marked optional.

Handbook Information

**Important:** If you operate in more than one state and are attempting to build separate handbooks for each individual state, the handbook builder may not provide the correct policies. In order to correctly generate the proper policies, the total number of employees across all states is needed. This feature is only included in the multi-state handbook builder. If you do not use the handbook builder in the described manner, you assume the risk that the policies provided may not be in compliance with the law.

|   |  |
|---|--|
| <p>Handbook Name</p> <input type="text"/> | <p>Handbook Type</p> <p>Federal + States</p> |
|---|--|

This name will appear on the cover page of the handbook upon download and is a searchable field within the Handbook Library.

The handbook type may not be changed after the handbook has been created.

Employee / State Information

Choose State

Choose a State

Add State

This handbook requires the total number of employees be entered to add to required compliance policies.

**Be sure to provide an accurate employee count for the state in which your organization operates; this is crucial for your handbook to comply with all employment laws that may apply to your organization.**

# Heartland

Enter information for each field, as everything on this page is required. Please read each question carefully.

Your responses will affect the policies that appear in your handbook.

< **New Handbook** Settings

### Company Information

|   |  |
|---|--|
| <p><b>Company Name</b></p> <input type="text"/> <p>This text will replace the {{COMPANY-NAME}} entry in applicable policies.</p>  | <p><b>Company Logo (Optional)</b></p> <div><input type="file"/> <span>Select a file...</span> <span>Upload</span></div> <p>The company logo will appear on the cover page for the handbook upon download. Please upload either a JPEG, PNG, or GIF formatted file.</p> |
| <p><b>How do you refer to your Company?</b></p> <input type="text" value="Company"/>  | <p><b>How do you refer to your Employees?</b></p> <input type="text" value="Employees"/>   |
| <p>This text will replace the {{COMPANY-TERM}} entry in applicable policies.</p>  | <p>This text will replace the {{EMPLOYEE-TERM}} entry in applicable policies.</p>  |
| <p><b>Head of Company</b></p> <input type="text"/> <p>This text will replace the {{HEAD-OF-COMPANY}} entry in applicable policies. Include first and last name.</p>   | <p><b>Head of Company Title</b></p> <input type="text"/> <p>This text will replace the {{HEAD-OF-COMPANY-TITLE}} entry in applicable policies.</p>   |
| <p><b>Primary Contact</b></p> <input type="text"/> <p>This field will be used as a point of contact for employees, the best practice being to use the Human Resources department name. For example 'People Operations.'</p> | <p><b>How do you refer to your managers/supervisors?</b></p> <input type="text"/> <p>This text will replace the {{MANAGER-SUPERVISOR}} entry in applicable policies.</p>   |

On creation of this handbook, all optional policies will be disabled by default and can be enabled at any time in the Table of Contents.

# Heartland

The policies page guides you through different content to complete your handbook. There is a key in the top corner indicating which policies are required, optional, custom, or a best practice.

- \* Required** Policy is mandatory and will be included in your handbook.
- Optional** Can add optional policies based on your company's needs.
- ≡/i Custom** Requires customization to add policy to your handbook.
- 🔒 Best Practice** Recommended policies to add to your handbook, but can be removed if needed.

This screen is broken out by *Core Policies*, *State Policies*, and *Custom Policies*. Expand the menus to see the content that applies to your business. Add any customizations, and use the toggle on the far right to include or remove policies from your handbook.

Policy Types: \* Required ● Optional ≡/i Custom 🔒 Best Practice

Core Policies (75 Total Employees)

- Welcome
  - 🔒 A WELCOME POLICY Edit Details
  - \* AT-WILL EMPLOYMENT Edit Details
- Introductory Language and Policies
- Hiring and Orientation Policies
- Wage and Hour Policies

Colorado Policies (75 State Employees)

- Hiring and Orientation Policies
- Wage and Hour Policies
  - \* ACCOMMODATIONS FOR NURSING MOTHERS Requires Customization Edit Details
  - 🔒 TRAVEL TIME PAY Edit Details
  - WAGE DISCLOSURE PROTECTION Requires Customization Edit Details
- General Policies

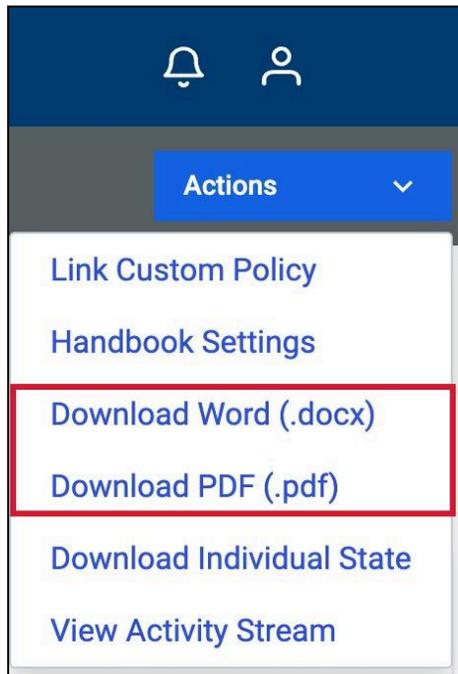
Custom Policies

- ≡/i Dress Code Details Unlink
- ≡/i Test/Sample 2 Details Unlink
- ≡/i test/sample 3 Details Unlink

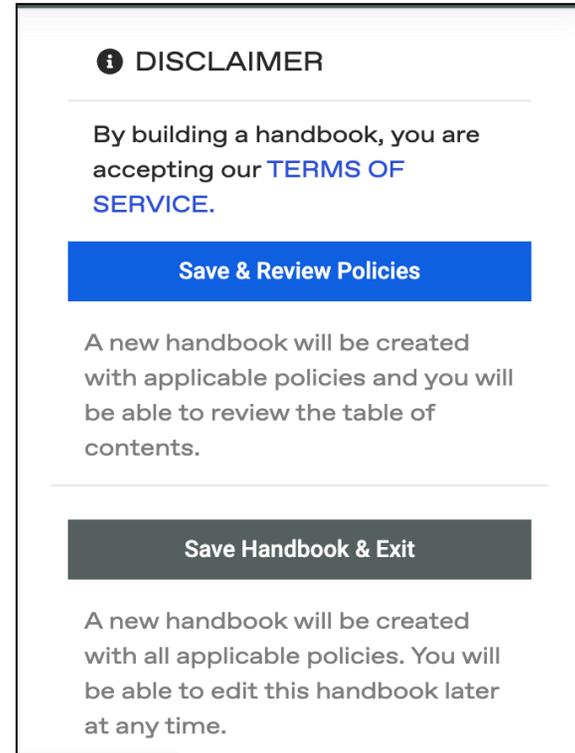
# Heartland

Once you have entered information into the fields, choose *Save & Review Policies* if you are ready to review and finalize your handbook.

Select *Save Handbook & Exit* to review your policies at a later time.



Once you are finished editing and reviewing your policies, use the *Actions* button to download your handbook.

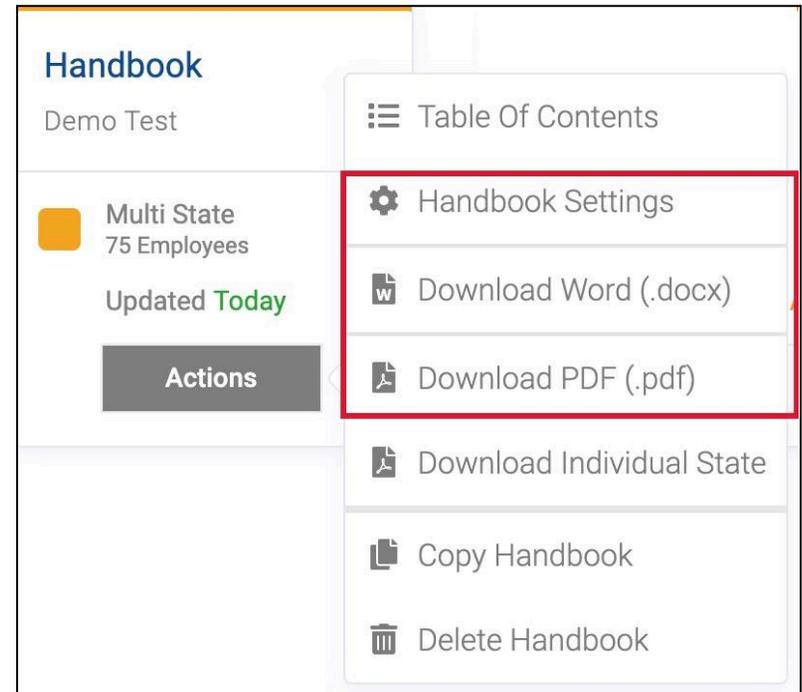


# Heartland

You'll find your completed handbook in the *Handbooks* section under *Company Policies* (*Company Policies* → *Handbooks*).

Go to the Handbook Settings page to make additional updates.

Access the *Actions* button in the menu bar on the *Policies* page, or under *Company Policies* → *Handbooks*.



 **For additional support with Employee Handbooks, use the Get Help feature to contact us!**