



Client Guide: Online Access to Auris Reports

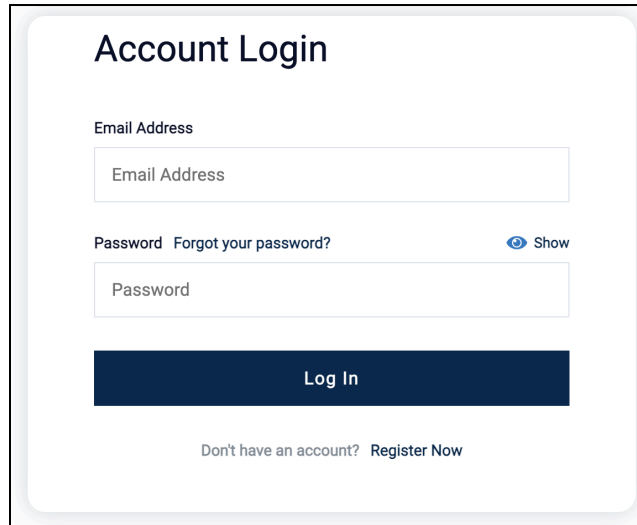
This guide reviews the system availability for online users with Reports Only access. This user is a view-only type and cannot modify any existing reports or employee data.

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Logging in to Your Account

Before starting, verify you have received the enrollment link from your Payroll Support Team and have completed the registration process. Once registered, you will then be ready to access your reports! To access your account, go to www.heartlandpayroll.com. Enter your email address and the password created during your registration.



Account Login

Email Address

Email Address

Password [Forgot your password?](#) [Show](#)


Password

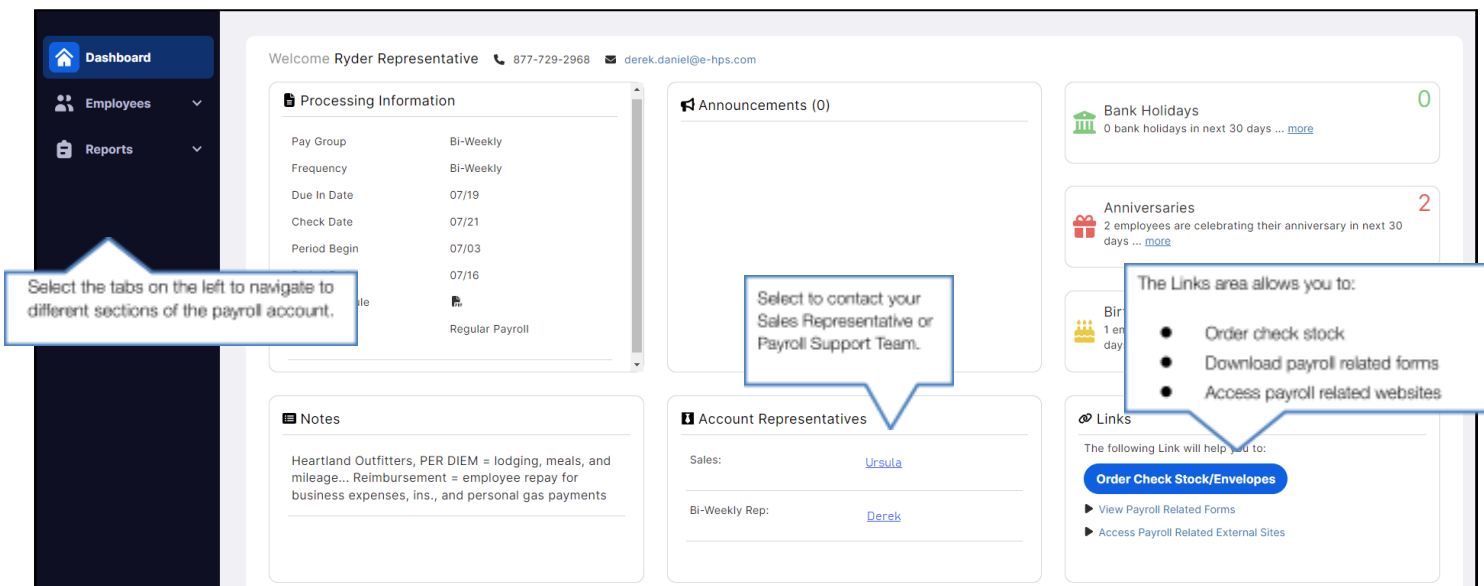
Log In

Don't have an account? [Register Now](#)

Dashboard

The first screen after the login is the **Dashboard**, also referred to as the *Client Landing Page*.

 **Clients with Multiple Auris accounts:** If you have access to more than one payroll account with Auris, you will see your accounts listed prior to accessing the Dashboard. Select the desired account to be taken to that account's Dashboard.



Welcome Ryder Representative [877-729-2968](tel:877-729-2968) derek.daniel@e-hps.com

Processing Information

Pay Group	Bi-Weekly
Frequency	Bi-Weekly
Due In Date	07/19
Check Date	07/21
Period Begin	07/03 07/16
	Regular Payroll

Announcements (0)

Bank Holidays 0
0 bank holidays in next 30 days ... [more](#)

Anniversaries 2
2 employees are celebrating their anniversary in next 30 days ... [more](#)

Notes

Heartland Outfitters, PER DIEM = lodging, meals, and mileage... Reimbursement = employee repay for business expenses, ins., and personal gas payments

Account Representatives

Sales: [Ursula](#)

Bi-Weekly Rep: [Derek](#)

Links

The following Link will help you to:

- [Order Check Stock/Envelopes](#)
- [View Payroll Related Forms](#)
- [Access Payroll Related External Sites](#)

Select the tabs on the left to navigate to different sections of the payroll account.

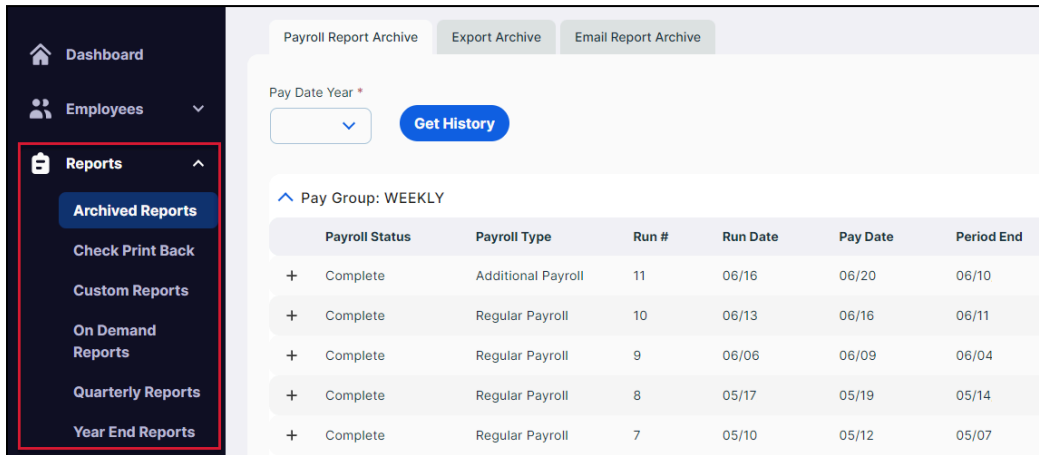
Select to contact your Sales Representative or Payroll Support Team.

The Links area allows you to:

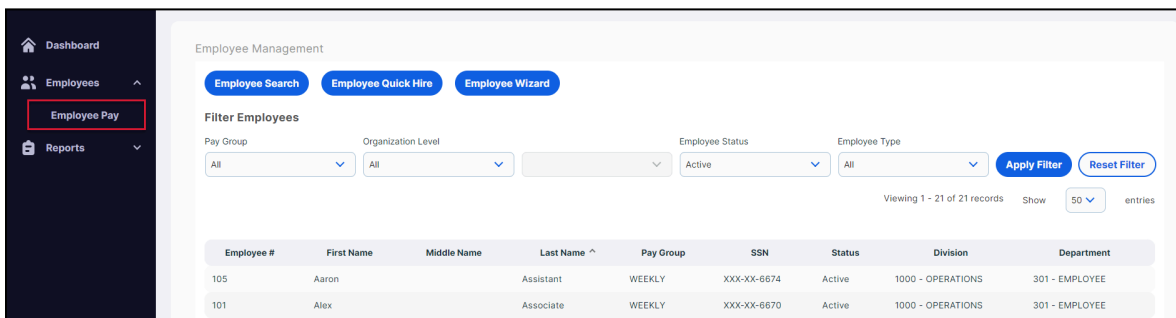
- Order check stock
- Download payroll related forms
- Access payroll related websites

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From the Dashboard, you would navigate to the **Reports section**, which contains an arrow to expand on the left-hand side. Your navigation screen should look similar to the image below.

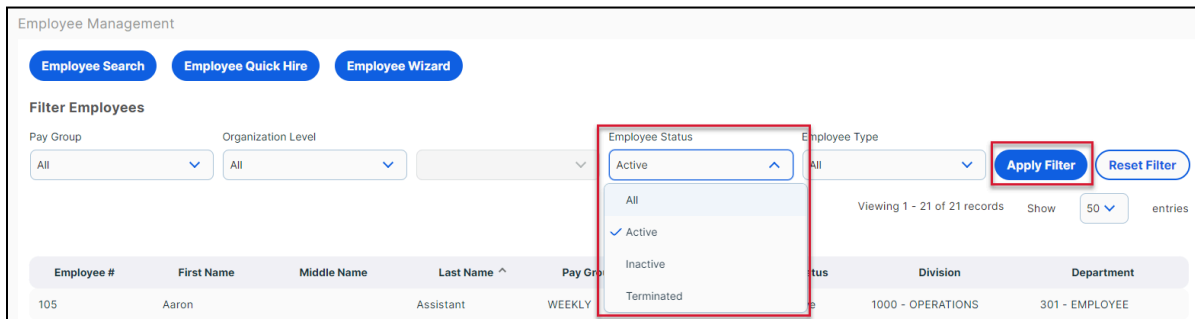


In addition to Reports and the Dashboard, you can access **limited Employee data**. Specifically the *Employee Check History* and *Employee Tax Forms*. This data may be masked for security purposes based on your access.



Employees

When you select the *Employees section*, you will see a list of your active employees. You can view inactive and/or terminated employees using the **Employee Status filter**. Select an employee to view their profile.

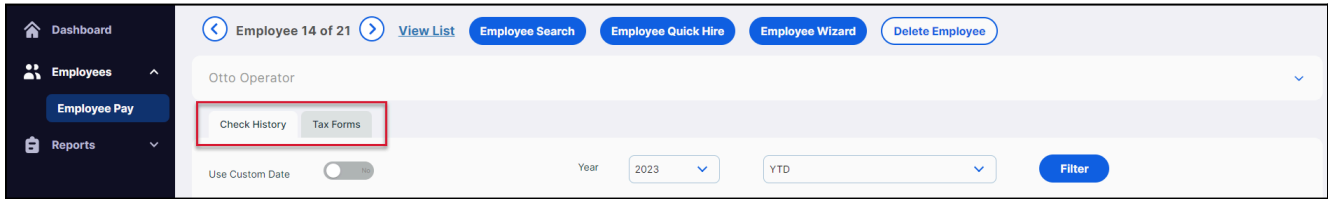


Employee Pay

Employees → *Employee Pay* → *Select Employee* → *Check History*

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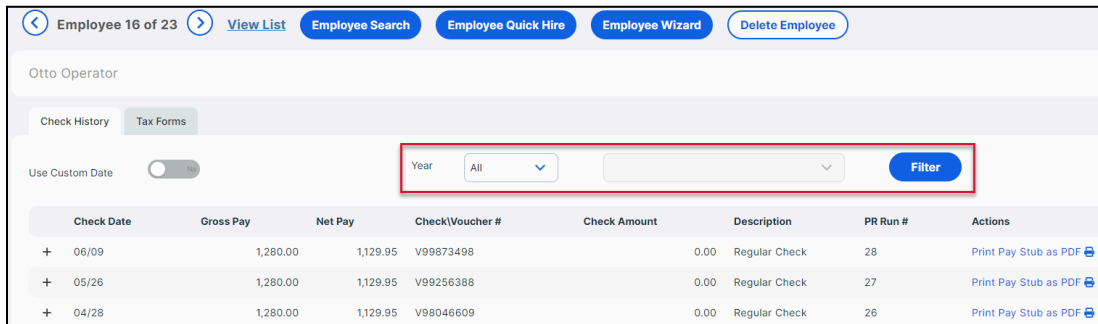
Check History tab to view the pay stubs, and **Tax Forms tab** to view W-2 or 1099 for the selected employee.



Check History

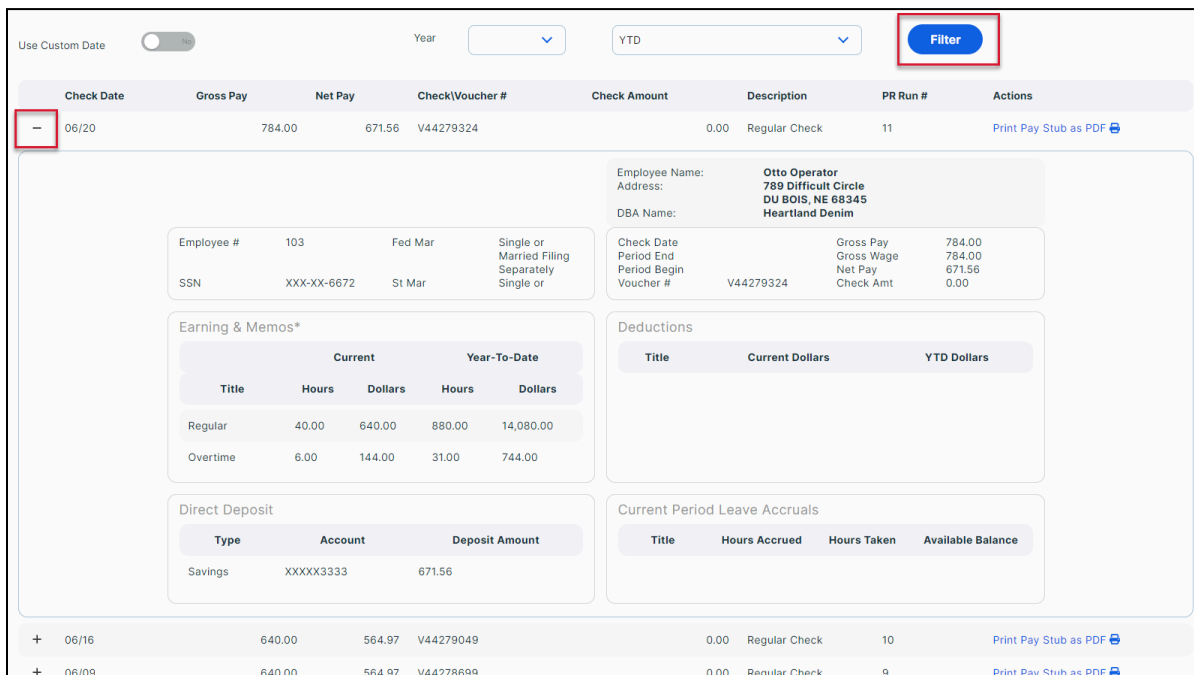
Employees → Employee Pay → Select Employee → Check History tab

This is where you can access copies of the employee's pay stubs.



- Select the desired *Year* or toggle *Use Custom Date* to *Yes* to enter a start and end date.
- Select *Filter*.
- This will generate a list of the employee's check history.

Select the **+** to the left of the check date to expand the screen to display the check information.



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Scroll to the right and select **Print Pay Stub as PDF** to print or save a copy of the pay stub.

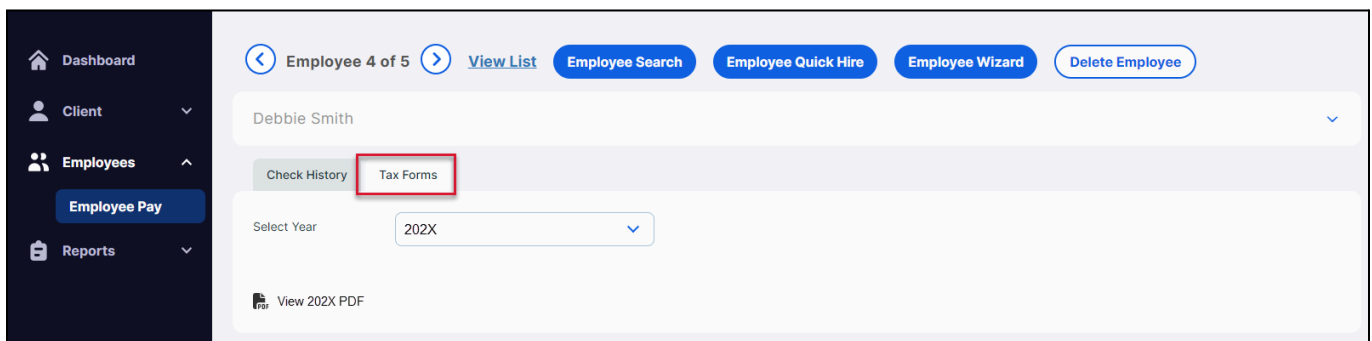
Check Date	Gross Pay	Net Pay	Check/Voucher #	Description	PR Run #	Actions
+ 06/20	784.00	671.56	V44279324	Regular Check	11	Print Pay Stub as PDF 🖨️
+ 06/16	640.00	564.97	V44279049	Regular Check	10	Print Pay Stub as PDF 🖨️
+ 06/09	640.00	564.97	V44278699	Regular Check	9	Print Pay Stub as PDF 🖨️
+ 05/19	640.00	564.97	V44278469	Regular Check	8	Print Pay Stub as PDF 🖨️

Employee Tax Forms

Employees → Employee Pay → Select Employee → Tax Forms tab

Tax Forms is where you can access copies of W-2s or 1099s.

Select a year from the dropdown, then select **View 202X PDF** to print or save a copy of the Tax Form.



Reports

Archived Reports

Reports → Archived Reports → Payroll Report Archive tab

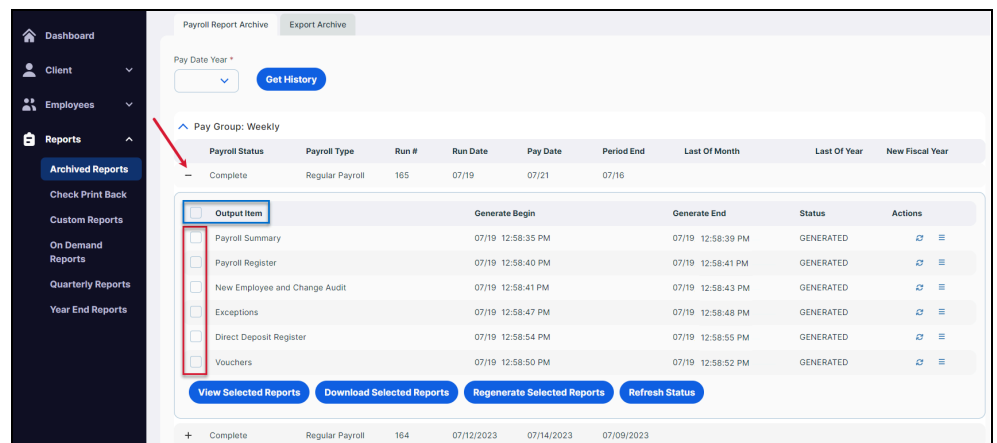
Generate groups of reports as a single PDF for a specific check date, *Payroll Report Archive*, or retrieve the GL export file and view certain types of custom reports, *Export Archive*.

Select the year you need the report from the *Pay Date Year* dropdown and select **Get History**.

Select the *Plus sign* for the desired pay date to expand the available reports.

Check the top box, *Output Item*, to select all reports or check *specific reports* to include.

Select *View Selected Reports*; all selected reports will consolidate into a single PDF file.

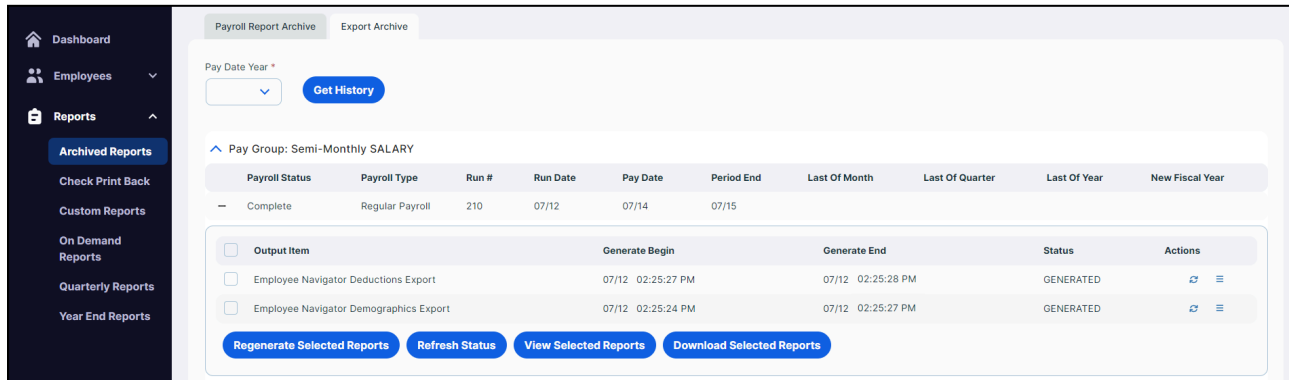


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Export Archive

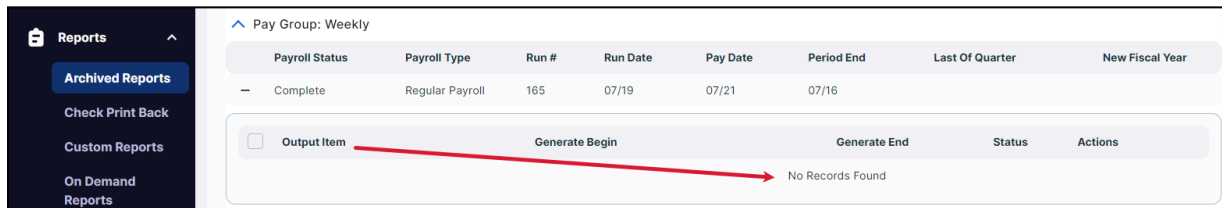
Reports → Archived Reports → Export Archive tab

Access to General Ledger Reports by check date if enrolled in our General Ledger Product. It also allows you to access certain custom reports if any have been built for your account.



- Select the year you need the report from the *Pay Date Year* dropdown and select **Get History**.
- Select the *Plus sign* on the far left for the desired pay date to expand the available reports.
- Check the top box beside *Output Item* to select all reports or check *specific reports* to include.

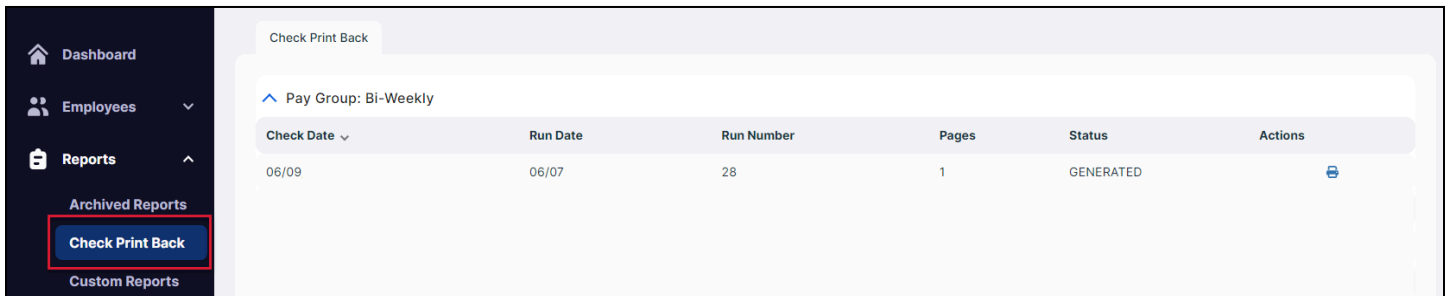
💡 If you do not have any export report types for that check date, you will see this message:



Check Print Back

Reports → Check Print Back → Check Print Back

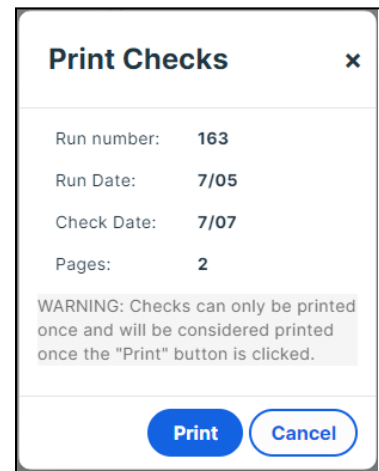
Optional Feature: If you are printing your checks in-house, rather than having them delivered, this is where you will retrieve your check file after your payroll processes.



💡 The Check Print Back area will populate with data if your organization utilizes this feature. Clients that have a payroll package delivered will not have this area visible.

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- Select the Printer icon under *Actions* to the right of the Check Date you want to print.
- Select **Print**, and a new window will appear.
 - You will notice that there is a Warning in the Print Checks box. This warning indicates that you can only open the file once as a security measure.



To download the latest version of Adobe Reader at no cost, go to:
<https://get.adobe.com/reader/>

Check Print Back Tips

- Choose *Actual Size* under the *Page Sizing & Handling* settings to ensure proper check spacing.
- Our check output is formatted for Adobe Reader and *Actual Size*.
- Keep the file open until you verify that the checks are printed properly (spacing is correct). Then, close the tab with the check file.
 - In the event that you have an issue printing your checks or inadvertently closing the file before printing, please contact your Payroll Support Team. They have the ability to reset your check file for you.

On-Demand Reports

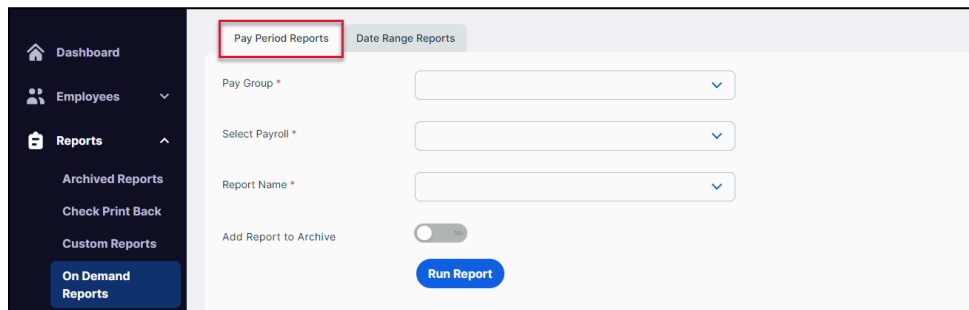
Used to generate a report on-demand for a selected check date, *Pay Period Reports*, or for a specific time frame *Date Range Reports*.

💡 If there is a report that you would like added to your available reports, contact your Payroll Support Team.

Pay Period Reports (On Demand)

Reports → On Demand Reports → Pay Period Reports tab

Can run one report at a time for a **specific check date**.



- Select the Pay Group from the *Pay Group* dropdown.
- Select the payroll date from the *Select Payroll* dropdown, see below.

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- Select the report type from the *Report Name* dropdown, see below.
- Select the **Run Report** button.

Date Range Reports (On Demand)

Reports → On Demand Reports → Date Range Reports tab

This can be used to generate a report on-demand for a selected date range.

- Select the report type from the *Report Name* dropdown.
- This will generate Filtering, Sorting, and Options fields.
- Not all report types will allow Sorting or have the same options.

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Filtering

- Enter the *To Date* and *From Date* manually or select dates from the calendar icon.
- Select the appropriate pay group from the *Pay Groups* dropdown.
- If this report should only include a single employee, select that individual from the *Employee* dropdown.

The screenshot shows the 'Date Range Reports' interface. On the left is a dark sidebar with navigation options: Dashboard, Employees, Reports (expanded), Archived Reports, Check Print Back, Custom Reports, On Demand Reports (highlighted), Quarterly Reports, and Year End Reports. The main content area has two tabs: 'Pay Period Reports' and 'Date Range Reports'. Below the tabs, there are several sections: 'Report Name' with a dropdown set to 'Check History Detail'; 'Filtering' section with 'From Date' and 'To Date' (both with calendar icons), 'Pay Groups' dropdown, and 'Employee' dropdown; 'Options' section with 'Date Type' dropdown set to 'Pay Date' and 'Report Format' dropdown set to 'PDF'. A blue 'Run Report' button is at the bottom.

Options

- **Date Type field:** Select *Pay Date* or *Period Ending Date* to generate a report based on that criteria.
- Select either Excel or PDF from the *Report Format* dropdown. *Not all reports are available in Excel.*

This is a close-up of the filtering options section. It shows 'From Date' set to 01/01 and 'To Date' set to 06/30, both with calendar icons. 'Pay Groups' is set to 'Weekly'. The 'Employee' dropdown is highlighted in yellow. Under the 'Options' section, 'Date Type' is set to 'Pay Date' and 'Report Format' is set to 'PDF'. A blue 'Run Report' button is at the bottom.

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Sorting

- You may select up to 3 *Sort Fields* from the possible options.
- If you need any of the organization fields to be added to your account, contact your Payroll Support Team.

Sorting

Sort Field 1


Sort Field 2

Sort Field 3

Quarterly Reports

Reports → *Quarterly Reports* → *Quarterly Reports*

Access to all Quarterly tax filing reports and returns that were generated on your behalf by Auris, such as Form 941 and appropriate state quarterly returns.



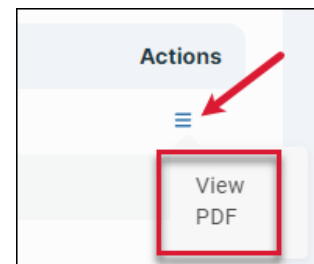
Year	Quarter	File Type	Actions
202X	1	PDF	
202X	2	PDF	

Locate the specific year and quarter that is needed.

Select the menu icon, *three horizontal lines*, under *Actions* to view the specific Quarterly Reports.

Select *View PDF* to open the file in a new PDF window.

You can then save or print the Quarterly Reports.

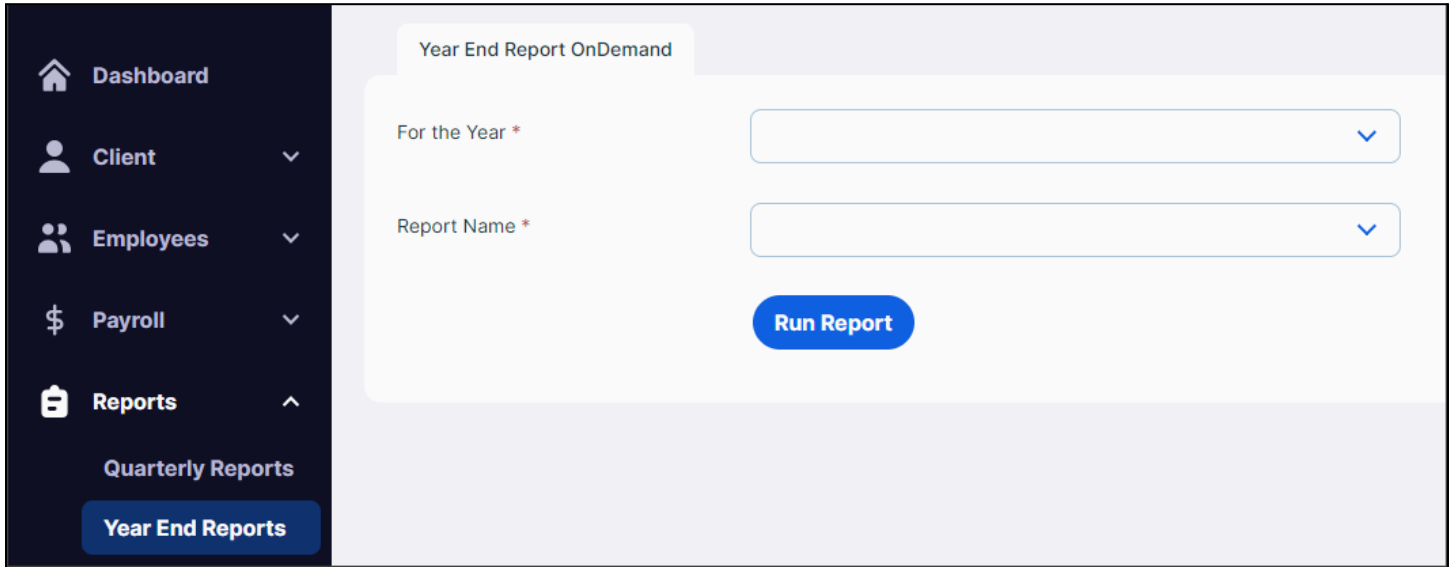


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Year End Reports

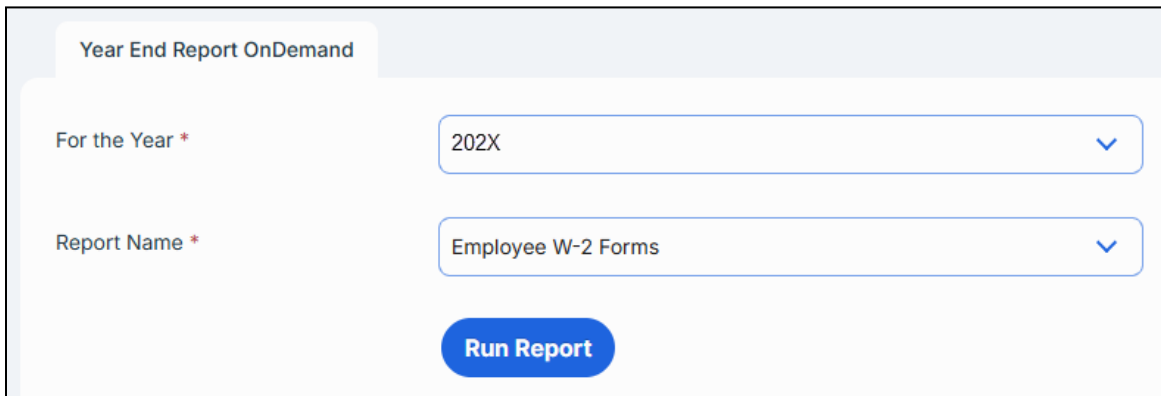
Reports → Year End Reports → Year End Report OnDemand tab

Access your Year End tax returns that were generated on your behalf by Auris, such as Employee W-2 Forms or Form W-3.



The screenshot shows the 'Year End Report OnDemand' interface. On the left is a dark navigation menu with the following items: Dashboard (home icon), Client (person icon), Employees (two people icon), Payroll (dollar sign icon), and Reports (calendar icon). Under 'Reports', there are sub-items for 'Quarterly Reports' and 'Year End Reports' (highlighted with a blue button). The main content area has a light blue header with the title 'Year End Report OnDemand'. Below the header are two dropdown menus: 'For the Year *' and 'Report Name *'. A blue 'Run Report' button is positioned below the dropdowns.

Select the year you are retrieving your Year End information, and select the appropriate document. The forms will open in a PDF view in a new window, download or save the files as needed.



This is a close-up of the 'Year End Report OnDemand' form. The 'For the Year *' dropdown menu is selected with '202X'. The 'Report Name *' dropdown menu is selected with 'Employee W-2 Forms'. A blue 'Run Report' button is located at the bottom of the form.

FAQs

Are the links in the emails secure? Yes, the link redirects you to our secure login. **Bookmark our URL:**
www.heartlandpayroll.com

I have forgotten my password. If you forget your password, select the *Forgot your password?* link located on the login screen and follow the instructions.

I do not see the quarterly reports. Who do I contact? Quarter and Year End Reports have their own subsections under the Reports section. If those sections are blank, contact your Payroll Support Team. They are happy to assist in getting reports uploaded for you.

How do I request copies of my amended returns? Amended returns are not available under the usual Reports sections. Contact your Payroll Support Team, and they will be able to provide those to you.