

Heartland

Online User Manual -
Employee Self Service

Once Heartland has set you up as a Self-Service user, you will receive an email to activate your account. You will need the last 4 digits of your social security number. The rest of the log in information will be provided within the email, including the activation link and client code:

Heartland Payroll Employee Self-Service Account Created

noreply@heartlandpayroll.com

Extra line breaks in this message were removed.

Sent: Mon 1/25/2016 9:31 AM

To: Harden, Jolene

*** Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox *** New Self Service User:

Welcome to Heartland Payroll. Below are your login credentials. Your account must be activated before it can be used. To access your payroll information through Heartland Employee portal , click the activation link below to get started.

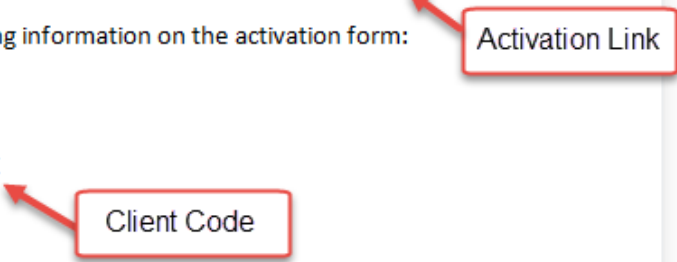
<https://www.heartlandcheckview.com/AuthenticateUser.aspx?ticket=84450ed7-3ba6-4648-b0fd-2fc73377265f>

In order to activate your account, you will need to provide the following information on the activation form:

Authorization Code (This will be the last 4 digits of your SSN)

User name: JHarden2@mylunchmoney.com Client Code: BROOKPARK

The Heartland Payroll Team



New User Account Setup

To activate your new account please enter the following information into the fields below and click the Continue button.

Account Information

User Name:

Client Code:

Identity Confirmation

Authorization Code/Pin:

This information is located in the activation email sent to you.

Enter last 4 of SS#

Setup Account Password

New Password:

Choose a password for your new account. Please ensure that passwords are a minimum of 8 alphanumeric (at least one each of alpha [a-z] and numeric [0-9]) characters in length and contain at least 1 special characters [!@#\$%^&* ()].

Choose and confirm a password (note special requirements)

Confirm New Password:

Re-enter your password to ensure it is correct.

Security Challenge Question 1

Choose a security challenge question from above. You will be prompted to answer this question if you need to reset your password.

Answer:

Specify the answer to the challenge question you selected above.

Confirm Answer:

Re-enter the answer from above to ensure it is correct.

You will also need to choose and answer two (2) security questions.

Security Challenge Question 2

Choose a second security challenge question from above. You will be prompted to answer this question if you need to reset your password.

Answer:

Specify the answer to the challenge question you selected above.

Confirm Answer:

Re-enter the answer from above to ensure it is correct.

Click "Continue" once complete.

Continue

Cancel

Once you click the link, you will be taken to the New User Account Set Up. Here you will need to enter your Authorization Code/Pin (last 4 of your social security number) and set up your password.

After you click continue, you will be redirected to log into the Employee Self Service Site:

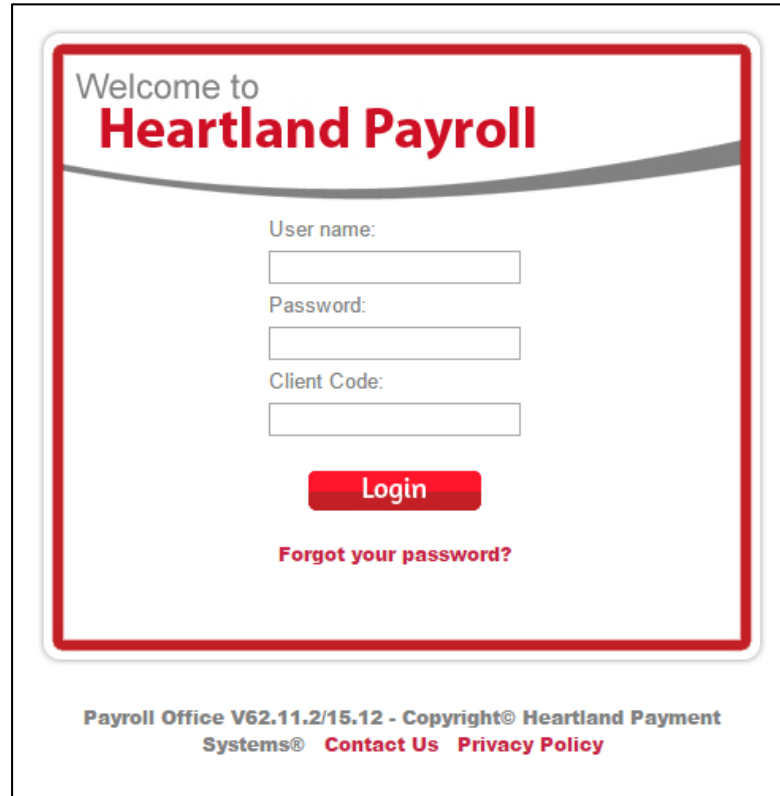


Heartland

New User Account Setup
Your account is now activated. Click the login button below to return to login form and begin using your account.

Click "Login" →

To log in, enter your user name, password you created and client code (reference activation email). Click "Login":



Welcome to
Heartland Payroll

User name:

Password:

Client Code:

[Forgot your password?](#)

Payroll Office V62.11.2/15.12 - Copyright© Heartland Payment Systems® [Contact Us](#) [Privacy Policy](#)

When you are logged in, you will be on the Employee Landing Page. From the landing page, you can view your pay stubs as well as your W-2's (once available):

The screenshot shows the Heartland Payroll system interface. At the top left is the logo "Heartland Payroll". Below it, a navigation menu includes "Payroll & Human Resources" and "Employee Management". The "Employee Management" menu is circled in red, with a red arrow pointing to a callout box. The callout box lists three options: "Check History", "W-2/1099 History", and "Employee Landing Page". The main content area displays employee information for SALLY GARCIA, including Employee#: 2, Status: Active, Hire Date: 12/9/2014, Salary: ####, Division: Hourly Emp, Department: 0200, and Pay Group: Weekly. A red banner below the employee information reads "Employee Landing Page". Below the banner is a welcome message: "Welcome to BROOK PARK TRAINING DEMO Employee Self Service."

Heartland Payroll

Payroll & Human Resources

Employee Management

Client: BROOKPARK - BROOKPARK TRAINING DEMO Company: BROOK PARK TRAINING DEMO Support Id: 124301

SALLY GARCIA

Employee#: 2 Status: Active Salary: #### Division: Hourly Emp Pay Group: Weekly

Pay Group: Weekly Hire Date: 12/9/2014 Work Location: DETROIT, MI Department: 0200 Work Location:

Employee Landing Page

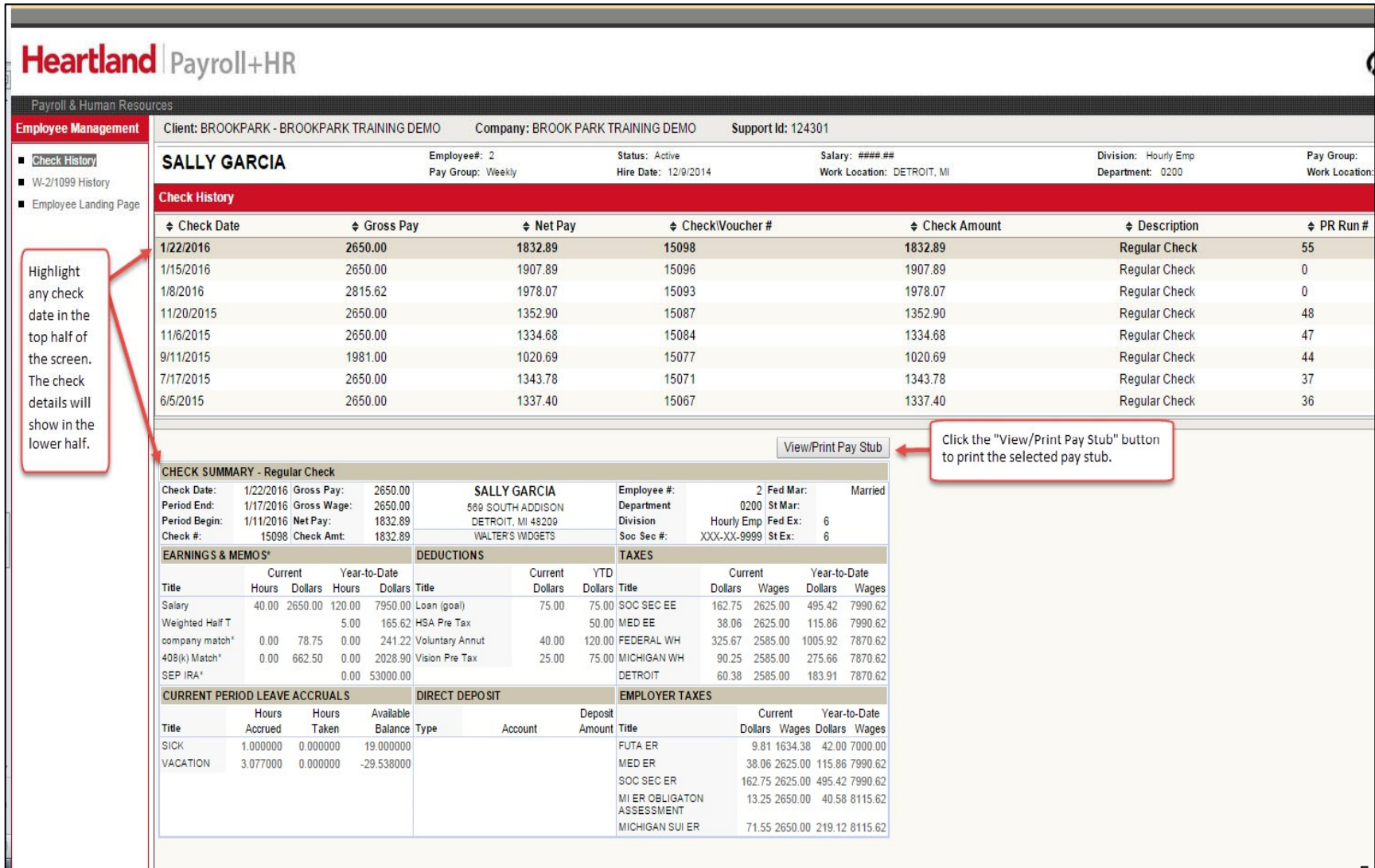
Welcome to BROOK PARK TRAINING DEMO Employee Self Service.

Employee Management

- Check History
- W-2/1099 History
- Employee Landing Page

Click on "Check History" to view current and past pay stubs. Click on "W-2/1099 History" to see current and past W-2/1099's. **Please note that historical documents prior to your first payroll on the Heartland Payroll platform will still be stored on the Ovation portal.**

When you choose Check History, the top half of the screen will show all pay stubs you have available to view. The most current check stub is always on top and is the default. If you would like to see any older pay stub, click on the date from the list on top half of the screen. (Please keep in mind that any check stubs or W-2's that were processed on the Ovation system will continue to be housed on the Ovation Employee Portal.) The summary of the check chosen will show on the bottom half of the screen. To print a selected pay stub, click the "View/Print Pay Stub". Your check will download as a .PDF file and you can print to any selected printer. You must have Adobe Reader 9 or later to view/print the paystubs.



Heartland Payroll+HR

Payroll & Human Resources

Employee Management Client: BROOKPARK - BROOKPARK TRAINING DEMO Company: BROOK PARK TRAINING DEMO Support Id: 124301

SALLY GARCIA Employee#: 2 Status: Active Salary: ####.## Division: Hourly Emp Pay Group: Weekly Hire Date: 12/9/2014 Work Location: DETROIT, MI Department: 0200 Work Location:

Check History

Check Date	Gross Pay	Net Pay	Check/Voucher #	Check Amount	Description	PR Run #
1/22/2016	2650.00	1832.89	15098	1832.89	Regular Check	55
1/15/2016	2650.00	1907.89	15096	1907.89	Regular Check	0
1/8/2016	2815.62	1978.07	15093	1978.07	Regular Check	0
11/20/2015	2650.00	1352.90	15087	1352.90	Regular Check	48
11/6/2015	2650.00	1334.68	15084	1334.68	Regular Check	47
9/11/2015	1981.00	1020.69	15077	1020.69	Regular Check	44
7/17/2015	2650.00	1343.78	15071	1343.78	Regular Check	37
6/5/2015	2650.00	1337.40	15067	1337.40	Regular Check	36

CHECK SUMMARY - Regular Check

Check Date: 1/22/2016 Gross Pay: 2650.00 SALLY GARCIA Employee #: 2 Fed Mar: Married
 Period End: 1/17/2016 Gross Wage: 2650.00 569 SOUTH ADDISON Department: 0200 St Mar:
 Period Begin: 1/11/2016 Net Pay: 1832.89 DETROIT, MI 48209 Division: Hourly Emp Fed Ex: 6
 Check #: 15098 Check Amt: 1832.89 WALTER'S WIDGETS Soc Sec #: XXX-XX-9899 St Ex: 6

EARNINGS & MEMOS*				DEDUCTIONS				TAXES				
Title	Current Hours	Current Dollars	Year-to-Date Hours	Year-to-Date Dollars	Title	Current Dollars	YTD Dollars	Title	Current Dollars	Current Wages	Year-to-Date Dollars	Year-to-Date Wages
Salary	40.00	2650.00	120.00	7950.00	Loan (goal)	75.00	75.00	SOC SEC EE	162.75	2625.00	495.42	7990.62
Weighted Half T					HSA Pre Tax	50.00		MED EE	38.06	2625.00	115.86	7990.62
company match*	0.00	78.75	0.00	241.22	Voluntary Annu	40.00	120.00	FEDERAL WH	325.67	2585.00	1005.92	7870.62
408(k) Match*	0.00	662.50	0.00	2028.90	Vision Pre Tax	25.00	75.00	MICHIGAN WH	90.25	2585.00	275.66	7870.62
SEP IRA*			0.00	53000.00				DETROIT	60.38	2585.00	183.91	7870.62

CURRENT PERIOD LEAVE ACCRUALS				DIRECT DEPOSIT			EMPLOYER TAXES				
Title	Hours Accrued	Hours Taken	Available Balance	Type	Account	Deposit Amount	Title	Current Dollars	Current Wages	Year-to-Date Dollars	Year-to-Date Wages
SICK	1.000000	0.000000	19.000000				FUTA ER	9.81	1634.38	42.00	7000.00
VACATION	3.077000	0.000000	-29.538000				MED ER	38.06	2625.00	115.86	7990.62
							SOC SEC ER	162.75	2625.00	495.42	7990.62
							MI ER OBLIGATON ASSESSMENT	13.25	2650.00	40.58	8115.62
							MICHIGAN SUI ER	71.55	2650.00	219.12	8115.62

When you choose "W-2/1099 History", you will see a .PDF for each year a W-2 and/or 1099 was issued for you. Select which year you would like to print and click "View PDF" to the right of the year. (As a reminder, W-2's and/or 1099's that were processed on the Ovation Payroll platform will continue to be housed on the Ovation Employee Portal.)

Please note that a W-2 will not be available to view until your company has processed the last payroll for the year and we have completed your company's year-end tax filing.

The screenshot displays the Heartland Payroll+HR interface. At the top, the logo "Heartland | Payroll+HR" is visible. Below it, the navigation bar includes "Payroll & Human Resources" and "Employee Management". The "Employee Management" menu is expanded, showing options: "Check History", "W-2/1099 History" (which is highlighted), and "Employee Landing Page".

The main content area shows the following information:

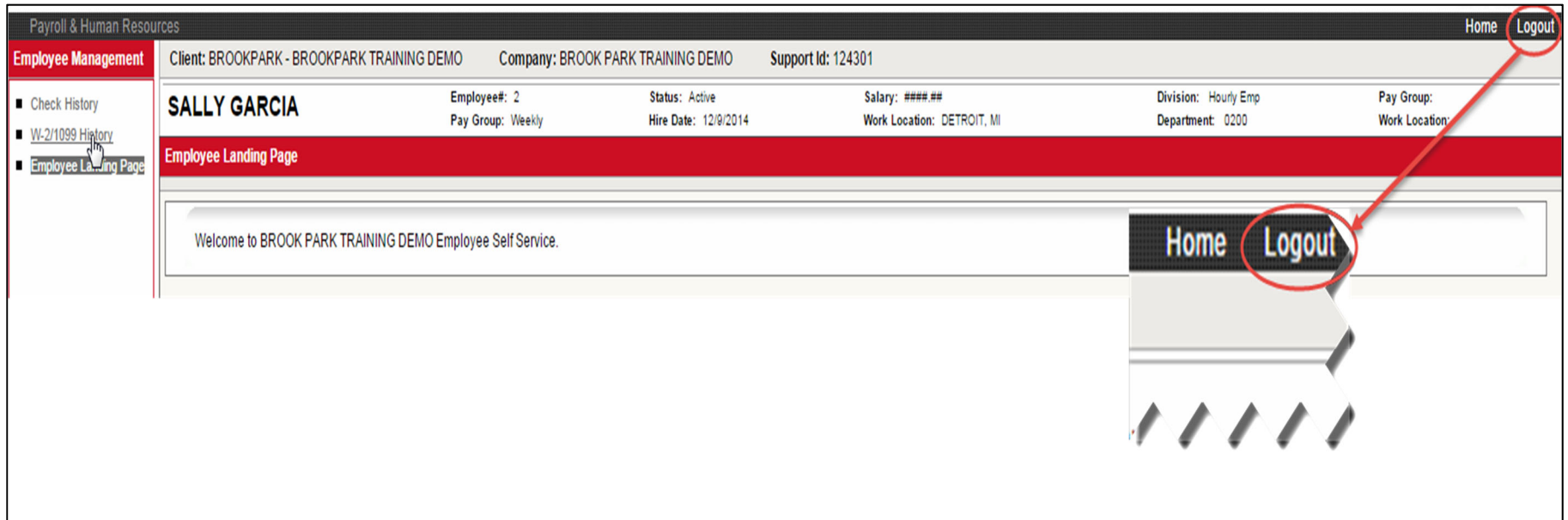
- Client: BROOKPARK - BROOKPARK TRAINING DEMO
- Company: [Redacted]
- Employee Name: **SALLY GARCIA**
- Employee#: 2
- Pay Group: Weekly

The "W-2/1099 History" section is highlighted in red. Below this, a table lists the years and corresponding "View PDF" links:

Year	Action
Year 2015	View PDF
Year 2014	View PDF

A red callout box with an arrow pointing to the "View PDF" link for Year 2015 contains the text: "Click the 'View PDF' to print the selected W-2 and/or 1099".

When you have completed using the Self Service site, click “Logout” on the upper right portion of the screen:



To log back in, go to www.heartlandcheckview.com and enter your user name, password and client code.