

## Self-Service: Mobile Site Enhanced Features

Enhanced Employee Self-Service allows employees to submit Update Requests for Name, Address, Tax and Direct Deposit information. (Optional features, availability is based on company preference.)

- **Information Needed to Submit an Update Request:** Your company policy may require specific information to verify and approve your update request.
  - Please see the payroll administrator at your company if you have questions regarding your company's policies.
- **Update Request Verification Process:** Your request will be submitted to your assigned approver at your company for verification before the change to your information becomes active.
  - You will receive a confirmation email when your update request has been received.
- **Review and Confirmation:** Your approver will review per your company's guidelines, and accept or reject the information.
  - You will receive a confirmation email once your approver reviews your request.

**\*Optional Service- if your pencil icons are grayed out, submit update requests through your payroll administrator.**

### Employee Update Request Received email:

Employee Update Request Received >

Dear Ella Elizabeth Employee,

We have received your request Ella Elizabeth Employee, to update one of the following: Name, Address, Tax or Direct Deposit information.

The request has been submitted to your approver, and you will receive a follow-up email once your request has been reviewed. If you did not submit an update request, please contact your company's payroll administrator immediately.

Thank you!

### Employee Update Approved email:

Name/Address Change Approved >

Dear Ella Elizabeth Employee,

Your Name and/or Address update request has been approved. Please verify your next check stub for accuracy. If you have any questions, please contact your company payroll administrator.

Thank you!

### Employee Update Rejected email:

See your approver or company payroll administrator for requirements and resubmit.

Tax Information Change Request Rejected >

Dear Ella Elizabeth Employee,

Your Tax Information update request has been rejected. Please verify that your information is complete and resubmit. If you have any questions, please contact your company payroll administrator.

Thank you!

### Direct Deposits

If your company allows Enhanced Employee Self-Service features, your icons (pencil, trash can and plus) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Heartland**

## Direct Deposits

View Direct Deposit details. 

**M&T Checki...**  

Status: Active  
Account Type: Checking  
Process Sequence: Remaining Net  
Amount n/a  
Percent n/a  
Account #: #####6897  
Routing #: 022000046

**Ella Savings**  

Status: Active  
Account Type: Savings  
Process Sequence: 1  
Amount 25  
Percent n/a  
Account #: #####1123  
Routing #: 022000046

**Savings for ...**  

Status: Prenote  
Account Type: Savings  
Process Sequence: 2  
Amount 10  
Percent n/a  
Account #: #####4879  
Routing #: 022000046

### Direct Deposits

If your company allows enhanced Self-Service features:

You can submit a request to update your information by clicking the: + to add an account, pencil to edit, or trash can to delete. Requests will be submitted to your assigned approver at your company for verification before they become active.

### Edit Direct Deposit Accounts

If your company allows Enhanced Employee Self-Service features, your icons (pencil, trash can and plus) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Edit Direct Deposit** If your company allows enhanced Self-Service features:

You can submit a request to update your information by clicking the pencil to edit and updating this screen. Requests will be submitted to your assigned approver at your company for verification before they become active.

#### Edit Direct Deposit

Status \*      **Status:** If changing account number, change the status to "Prenote". To temporarily stop direct deposit to this account, change to "Inactive".

Active

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Account Type \*      **Account Type:** This is the "ACH" account type, change only if incorrect. Verify account type with your financial institution if unsure of the type of account for direct deposit purposes.

Checking

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Sequence \*      **Sequence:**

Remaining Net      **1,2,3 (Numbers)-** Used for partial direct deposits. Sequence in the order of importance. (Example: Account 1 will receive funds first, then Account 2, etc.)

**Remaining Net-** Used in two scenarios.

- One direct deposit account for entire employee net pay.
- Last account to receive remaining net pay after partial direct deposits.

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Amount

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Percent

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Routing # \*      **Routing #:**

022000046      Number used by your bank to accept external direct deposits. Could be labeled "ACH Routing #". Verify with your financial institution if needed.

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Account # \*

###6897

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**Update Account #:**

Update Account #      Account number used to receive external direct deposits. Verify with your financial institution if needed.

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Description

M&T Checking

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\* Fields Required

Your company policy may require a completed employee direct deposit form and banking documentation to verify and approve your change request. Please see the payroll administrator at your company if you have questions regarding your company's policies.

CANCEL
SAVE >

### Add Direct Deposit Accounts

If your company allows Enhanced Employee Self-Service features, your icons (pencil, trash can and plus) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Add Direct Deposit:** If your company allows enhanced Self-Service features:  
You can submit a request to add a new direct deposit account by clicking the + and updating this screen. Requests will be submitted to your assigned approver at your company for verification before they become active.

#### Add Direct Deposit

Status ✓  
Prenote **Status:** Always choose "Prenote" for brand new direct deposit accounts. This sends a test file before sending your pay to ensure that the direct deposit will be successful. ▼

Account Type \* **Account Type:** This is the "ACH" account type used for direct deposits. Verify the account type with your financial institution if unsure of the type of account for direct deposit purposes. ▼

Sequence \* 
**Sequence**  
**1,2,3 (Numbers)**- Used for partial direct deposits. Sequence in the order of importance. (Example: Account 1 will receive funds first, then Account 2, etc.)  
**Remaining Net**- Used in two scenarios.  
 -One direct deposit account for entire employee net pay.  
 -Last account to receive remaining net pay after partial direct deposits.
  ▼

Amount 
**Amount or Percent:** For partial direct deposits, designate either a dollar amount or a percent of your net pay to be deposited to this account.

Percent

Routing # \* **Routing #:** Number used by your bank to accept external direct deposits. It could be labeled "ACH" Routing #. Verify with your financial institution if needed.

Account # \* **Account #:** Account number used by your bank to accept external direct deposits. Verify with your financial institution if needed.

Description **Description:** Optional. This description acts as a label on the account in your profile to make it easier to identify accounts when multiple accounts are set up.

\* Fields Required

Your company policy may require a completed employee direct deposit form and banking documentation to verify and approve your change request. Please see the payroll administrator at your company if you have questions regarding your company's policies.

CANCEL
SAVE >

## My Profile

If your company allows Enhanced Employee Self-Service features, your icons (pencil & trash can) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Heartland**

**Personal** 

Name: Ella E Employee  
Suffix:  
Prefix:  
SSN: XXX-XX-6311  
Birth Date:  
Marriage Status:

**Address** 

Address 1: 1 Shark Street  
Address 2:  
City: Honolulu  
State: HI  
Zip: 96815

**My Profile**  
If available, click the pencil icon to submit an update request for your information. Click the three dots for Additional Info.

**Tax** 

Fed Filing: Single  
State Filing:  
Fed Exempts: 0  
State Exempts: 0  
Res Location: HI0030050  
School District

**Contact**

Personal Email:  
Office Phone:  
Mobile Phone:

**Payment**

Type: Hourly  
Frequency: Weekly  
Legal Company: Enhanced ESS Inc  
Rate/Salary: 10.0000

**Job** 

Effective Date: 1/2/19  
FLSA Exempt No  
Seasonal Job: No

**Veteran** 

Ethnicity:  
Disability:  
Disabled Vet No  
Vietnam Vet No  
Other Vet Type: No

**Company**

Pay Group: Biweekly  
Hire Date: 12/17/18  
Work Location: HONOLULU, HI  
Client: Enhanced ESS Inc

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**Personal Information: Name and Address**

If your company allows Enhanced Employee Self-Service features, your icons (pencil & trash can) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil and trash can icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Heartland**

### Edit Personal Information

First Name \*  
Ella

Middle Name  
E

Last Name \*  
Employee

Prefix

Suffix

Address 1 \*  
1 Shark Street

Address 2

Zip \*      City \*      State \*      Tax Code \*

96815      Honolulu      Hawaii      ▼

\* Fields Required  
i We validate zip & state against available tax codes.

CANCEL      SAVE ➤

**Personal Information**

If your company allows enhanced Self-Service features:

You can submit a request to update your information by clicking the pencil to edit and updating this screen. Requests will be submitted to your assigned approver at your company for verification before they become active.

## Tax

If your company allows Enhanced Employee Self-Service features, your icons (pencil & trash can) will be red. Click on the icon and edit your information to submit an update request. You will receive an email when your update request is received, and a second email once your approver verifies your information.

*If the pencil and trash can icons are grayed out, please submit any update requests directly to the payroll administrator at your company.*

**Heartland**

**Federal Income Tax**

Filing Status  
Single

Exemptions (between 0-32767)  
0

Additional \$  
25

Dollar

**HI State Income Tax (Residence) - HAWAII WH**

Filing Status

Exemptions (between 0-32767)  
0

Additional \$

Dollar

**City Income Tax (Residence) - No city income tax for current residence (Other local/county taxes may apply)**

\* Fields Required

CANCEL SAVE

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**Tax**

If your company allows enhanced Self-Service features:

You can submit a request to update your information by clicking the pencil to edit and updating this screen. Requests will be submitted to your assigned approver at your company for verification before they become active.

**Paychecks**

- This page contains a listing of all checks recorded for you in the Heartland system.
- To view and/or print, first select the check date from the list.
- Select the *View Pay Stub* button to download or print the stub.

The screenshot shows the 'Heartland' payroll system interface. At the top, there is a menu icon and the title 'Heartland'. Below this, there are two main sections. The left section is titled 'Wage Information' and contains the following details: Type: Hourly, Frequency: Weekly, Legal Company: Enhanced ESS Inc, and Rate/Salary: 10.0000. The right section is titled 'Paychecks' and contains the instruction: 'Choose a check date and click "View Pay Stub" button to view details.' Below these sections, there is a list of paychecks. The first paycheck is for 3/1/19, with a gross amount of \$837.50 and a net amount of \$600.66. This paycheck is selected, and a red button labeled 'VIEW PAY STUB' with an external link icon is visible below it. Below the selected paycheck, there is a list of other paychecks for dates 2/15/19, 2/1/19, 1/18/19, and 1/4/19, all with a net amount of \$0.00.

Check Date	Net Amount
3/1/19	\$600.66
2/15/19	\$0.00
2/1/19	\$0.00
1/18/19	\$0.00
1/4/19	\$0.00

### W-2 Forms

- Select the correct year and click *View PDF*.
- You can then either download or print the document.

The screenshot shows the Heartland self-service portal interface. At the top, there is a hamburger menu icon on the left and the word "Heartland" in red text in the center. Below this, there are two main sections. On the left, under a house icon, is the "Tax Info" section, which lists: Fed Filing: Single, State Filing: Single, Fed Exempts: 0, State Exempts: 0, Location: HI0030050, and School District: n/a. On the right, there is a red-bordered box titled "W-2 Forms" containing the text: "Year End Forms such as the W-2 and 1099 can be retrieved on this page. Click on 'View PDF' to view, print or save." Below these sections, there is a horizontal bar with the year "2017" on the left and a "View PDF" button on the right, which is circled in green.

### Need assistance with Self-Service?

- You can reset your password on the login screen as needed.
- If you are unable to reset your password or get locked out of your account, please contact your employer's payroll department.
- The Payroll Specialists at Heartland are not able to speak with employees directly.