

Heartland

Online User Guide: Employee Self-Service












-  Home
-  Direct Deposits
-  Messages
-  My Profile
-  Paychecks
-  W-2 Forms
-  Pending Transactions
-  Profile Selection
-  Logout

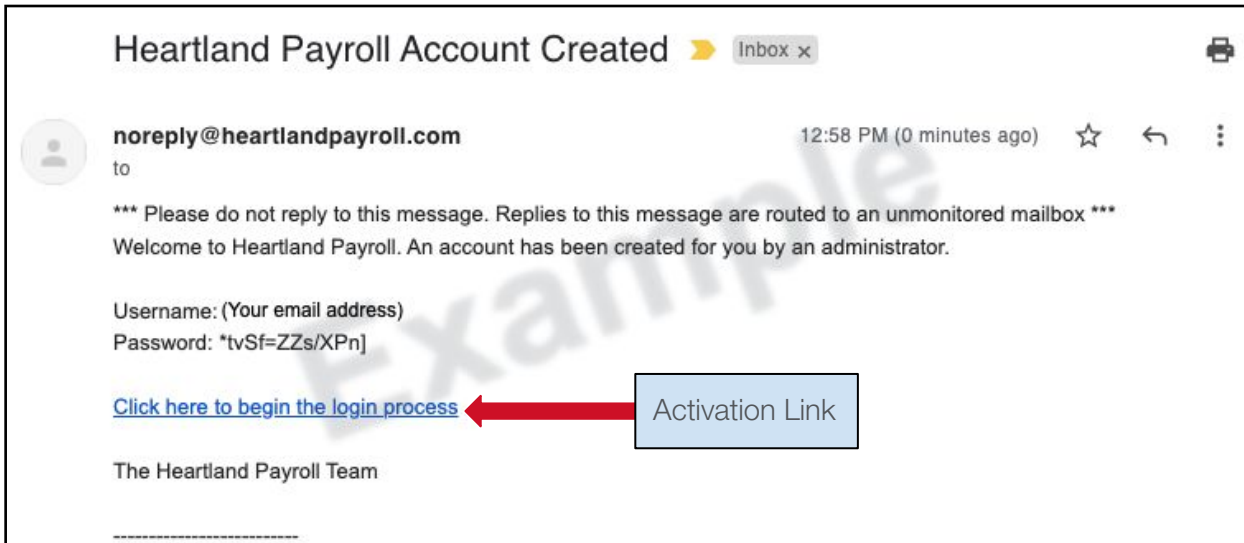
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Set up your account

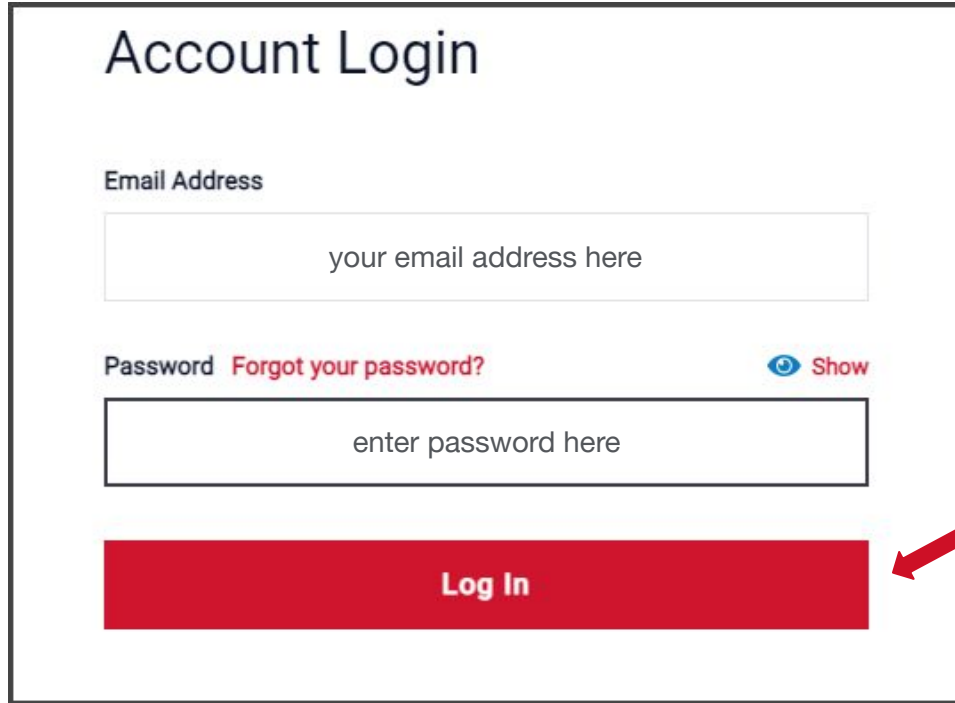
Once your employer has set you up as a Self-Service user, you will receive an email to activate your account.

Select the link which takes you to the Heartland site, and enter the Password provided. Be sure not to have a blank space before or after the password.



Set up your account

Enter the temporary password provided on the login screen. Be sure not to have a blank space before or after the password.



Account Login

Email Address

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

Log In

Select the **Log In** button

Set up your account

Create your new password and confirm the new password.

The screenshot shows a web form titled "Create New Password". It includes two input fields: "New Password" and "Confirm New Password", each with a "Show" toggle. A red "Continue" button is at the bottom. To the right, a light blue box lists password requirements: 8-16 characters, one lowercase letter, one uppercase letter, one number, and one special character. A blue box with an arrow points to the "Continue" button, and another blue box points to the requirements list.

Create New Password

You must enter a new password.

New Password Show

Confirm New Password Show

Continue

For your security we require a strong password.

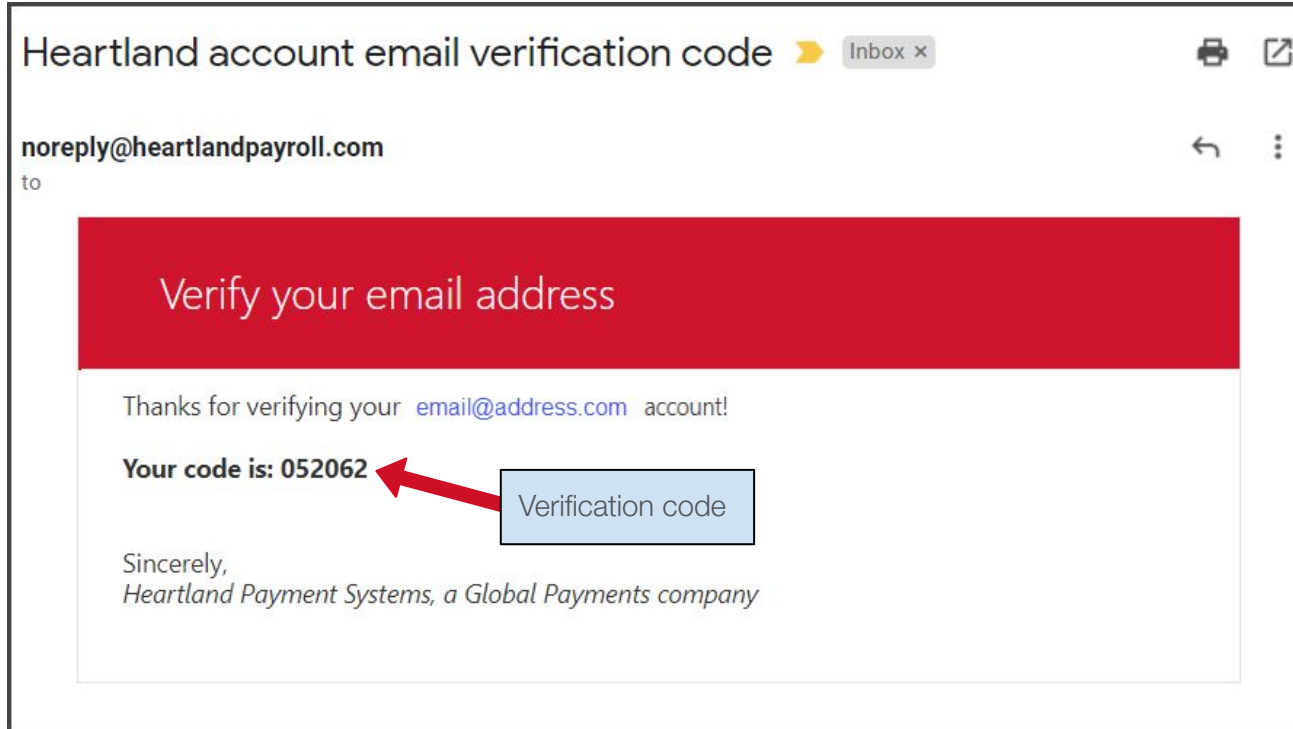
- Must be 8-16 characters
- One lowercase letter
- One uppercase letter
- One number
- One special character

Note the specified password requirements.

Select *Continue* to log in

Set up your account

You will receive an email with a code to verify your email address. This code will be entered on the next screen.



Set up your account

Enter the code you received via email and choose *VERIFY*.

Heartland Verify MFA (Email)

Verify your code

Enter the security code sent to L***@e***les.com

Didn't get a confirmation code? [Resend](#)

Enter your code

Select *VERIFY*

VERIFY

Set up your account

Choose *GET STARTED*.



Add extra security with Multi-Factor Authentication

With multi-factor authentication (MFA), even if someone guesses your password, they won't be able to sign in as you.

GET STARTED

Select *GET STARTED*

THE BENEFITS OF MULTI-FACTOR AUTHENTICATION



Extra protection

When you sign in or enter a secured area we will challenge you to verify your identity.



Multiple authentication methods

Have verification codes sent to your phone or email or verify with a security app of your choice.

Set up your account

Set up Multi-factor Authentication (MFA), which is an extra layer of security for your account. Follow the on-screen instructions. This guide walks through the Text Message (SMS) option step-by-step.

Option 1: Text message (SMS) to your mobile phone.

The screenshot shows the Heartland account setup interface. At the top left is the Heartland logo, and at the top right is the heading "Choose an authentication method". Below the heading is a sub-heading: "With multi-factor authentication (MFA), even if someone guesses your password, they won't be able to sign in as you." There are two authentication options listed:

- Authenticator App** (Enabled): (Authy, Google Authenticator, etc.) Retrieve codes from an authentication app on your device, like Google Authenticator, Authy or Microsoft Authenticator.
- Text Message (SMS)** (Optional): (Standard message rates apply) Receive a text message to your mobile device when signing in.

The "Text Message (SMS)" option is highlighted with a blue border and a blue radio button. A red arrow points from a box labeled "Option 1" to this option. A separate blue box on the right contains a note: "Note: App verification code refreshes every 30 seconds."

Set up your account

Option 1 Text (SMS): Receive a code via text to your mobile phone.
Text will say, *Use verification code ##### for Heartland authentication.*

The image shows a screenshot of a web form titled "Setup MFA (SMS)". The form is enclosed in a red border. At the top, the title "Setup MFA (SMS)" is displayed in a large, bold, black font. Below the title, the question "What Phone Number would you like to use?" is followed by a text input field. A red arrow points to this field from the left. The text inside the field reads: "Enter a number below that we can send a code to via SMS to authenticate you." Below this is a "Country Code" dropdown menu with "+1 (United States)" selected. Underneath is a "Phone Number" text input field containing "(888) 888-8878". Below the phone number field, the text "Message and data rates may apply." is displayed. At the bottom of the form is a large blue button labeled "Send Code". A red arrow points from a light blue box on the right, labeled "Select Send Code", to this button. At the very bottom of the form, there is a link that says "I want to set up a different method".

Setup MFA (SMS)

What Phone Number would you like to use?

Enter a number below that we can send a code to via SMS to authenticate you.

Country Code

+1 (United States) ▼

Phone Number

(888) 888-8878

Message and data rates may apply.

[Send Code](#)

[I want to set up a different method](#)

Select Send Code



Set up your account


Option 2 Authenticator App: Google Authenticator, Authy, or Microsoft Authenticator. Choose the link to install the app. Receive a code via the authenticator app.

Setup MFA (Authenticator app)

1. Download an authenticator app


Download and install any authenticator app you prefer on your phone.

 [Authy \(Mobile/Desktop\)](#)  [Microsoft Authenticator \(Mobile\)](#)

 [Google Authenticator \(Mobile\)](#)

2. Scan your QR code

Open the authenticator app and scan the image below using your phone's camera.



XYZ872HJ

3. Verify your code

Enter the 6-digit verification code generated.

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[I want to set up a different method](#)

1. Select the authenticator app preferred.

- Authy
- Microsoft Authenticator
- Google Authenticator

2. Scan your QR code

Open the authenticator app and scan the image with your mobile phone.

3. Verify your code

Enter the 6-digit verification code

4. Select Verify

Set up your account

Verification screen to enter code received via text

Heartland Setup MFA (SMS)

Verify your code
Enter the security code sent to1715
Didn't get a confirmation code? [Resend](#)

Enter code here → [] [] [] [] [] []

Select *VERIFY*

VERIFY

[I want to set up a different method](#)


Let's secure your account
This application requires all users to enable multi-factor authentication.
You will only have to do this once.
[Why is this necessary now?](#)

Profile Selection

Once logged in, you will be directed to select your *Profile*.

If you work for multiple companies that process payroll with Heartland and have Self-Service, you will see your different profiles on this screen.

The same email address will need to be used across all companies to ensure they are linked for easy selection.



Select a Profile to Log Into

You have multiple profiles associated with: [Email@test.net](#) . Please select the profile you wish to use below.

Available Profiles [Add Account](#)

Client Name	Name	Work Location	Client Code	Last Login
Heartland Homes	Winston Employee	1 - ATLANTA, GA	0311TEST	

Home

After selecting your profile, you will be taken to the Employee Landing Page. From here, you can view your pay stubs as well as your W-2s (once available):

Collapse the Navigation Menu by choosing the Blue [>] icon

Select *Paychecks* to view current and past pay stubs. Choose *W-2 Forms* to see current and past W-2/1099s.

Heartland
Employee Self Service

Heartland Homes
Home

Welcome back, **Winston Employee**
Hope you are having a great day.

Active Messages **0** [View](#)

Action Required **0** [View](#)

Home
Direct Deposits
Messages
My Profile
Paychecks
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Profile Selection
Logout

Paychecks: View Your Pay Stubs

When you select *Paychecks*, the bottom half of the screen will show all pay stubs you have available to view. The most recent stub shows at the top of the list.

To print a pay stub, select the *Pay Stub* link for the desired date and select *Download* when the preview window appears. Your check will be viewed as a PDF file. You can print to any selected printer or Print as a PDF. *Adobe Reader 9, or the most recent version, is required for viewing.*

Heartland
Employee Self Service

Heartland Homes
Paychecks

Wage Information

Type: Auto Hourly
Frequency: Weekly
Legal Company: Heartland Homes
Rate / Salary: 55.0000

[Understanding Your Paycheck](#)

My Paychecks

Filter: 05/20/ | 07/07/ | Zero Checks [Download](#)

<input type="checkbox"/>	Date	Check	For	Gross	Net Pay	Check Amount	
<input type="checkbox"/>	07/07/	V101124517	Regular Check	\$2,200.00	\$1,507.10	\$0.00	Pay Stub
<input type="checkbox"/>	06/23/	V100507605	Regular Check	\$2,200.00	\$1,507.09	\$0.00	Pay Stub
<input type="checkbox"/>	06/09/	V99897785	Regular Check	\$2,200.00	\$1,507.10	\$0.00	Pay Stub

CheckStubReport_ .pdf

1 of 1

[Download](#)

Select the *Download* button in order to print/download your pay stub.

W-2 Forms: View W-2 or 1099 Forms

When you choose *W-2 Forms*, you will see a *View PDF* option for each year a W-2 and/or 1099 was issued to you.

To print a copy, select the *View PDF* option on the right side of the screen. When the preview window appears, choose the *Download* option.

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

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Employee Self Service

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Profile Selection
Logout

Heartland Homes
W-2 Forms

Tax Information

Fed Filing
Single or Married Filing Separately

Fed Exempt
n/a

Location
OK0170890

State Filing
Single

State Exempt
1

School District
n/a

[W-2 Instructions for Employees](#)

W-2 Forms

A W-2 tax form shows important information about the income you've earned from your employer and the amount of taxes withheld from your paycheck.

2022 [View PDF](#)

W-2s will appear here, as they become available.

Employee W2 Report .pdf

1 of 2

Form W-2: For the First With Employer's FEDERAL Tax Return (OMB No. 1545-0046)

1. Employee's social security number	71211.75	2. Federal income tax withheld	893.45
3. State social security number	71211.75	4. Federal income tax withheld	893.45
5. Social security number	6871.75	6. Social security tax withheld	441.55
7. Medicare tax withheld	7121.75	8. Medicare tax withheld	103.27

Form W-2: For the First With Employer's State, City, or Local Income Tax Return

9. State social security number	71211.75	10. State income tax withheld	893.45
11. State social security number	6871.75	12. State income tax withheld	441.55
13. Medicare tax withheld	7121.75	14. Medicare tax withheld	103.27

Form W-2 Wage and Tax Statement 2022

Form W-2 Wage and Tax Statement 2022

[Download](#)

Select *Download* to view, print, or save your W-2.

Enhanced Features


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

For Enhanced Employee Self-Service features, your menu will contain additional options, *Employee Updates* or an Edit Pencil icon, where you can 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.

Information Needed to Submit an Update Request: Your company policy may require specific information to verify and approve your update request.

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.

Review and Confirmation: Your approver will review per your company's guidelines and accept or reject the information.



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!

My Profile: Name/Address Updates (Enhanced Feature)

If your company has enrolled in the Enhanced Employee Self-Service features, you will be able to select the pencil icon to submit an update request. You will receive an email when your update request is received, and a second email once your approver accepts or denies your updates.

Heartland
Employee Self Service

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Heartland Homes
My Profile

Winston Employee
SSN: XXX-XX-6683
Date of Birth: December 22, 2007
Marital Status:

Address

- Address 1
680 Castle Street
- Address 2
N/A
- City
YUKON
- State
OK
- Zip
73099

Tax

- Fed Filing
Single or Married Filing Separately
- State Filing
Single
- Fed Exempts
N/A
- State Exempts
1
- Res Location
OK0170890

Contact

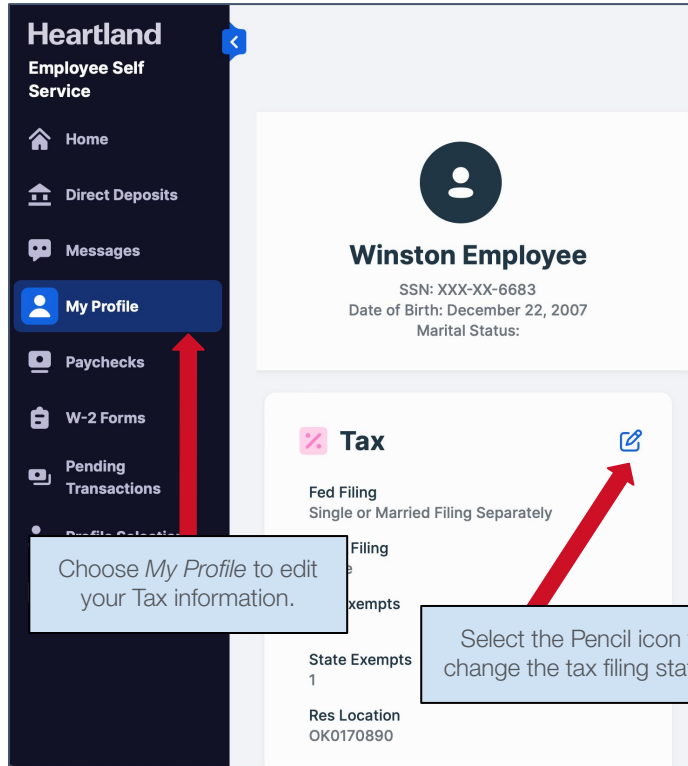
- Personal Email
N/A
- Office Phone
N/A
- Mobile Phone
N/A

Select *My Profile* to edit the Personal or Address fields.

The pencil icon will allow you to make changes to your personal employee information.

My Profile: Tax Updates (Enhanced Feature)

If your company has enrolled in the Enhanced Employee Self-Service features, you will be able to select the pencil icon to submit an update request. You will receive an email when your update request is received, and a second email once your approver accepts or denies your updates.



The screenshot shows the 'Edit Tax Information' form. It includes the following sections and fields:

- Federal Income Tax**
 - Filing Status: Single or Married Filing Separately (dropdown)
 - Dependents \$: \$ 2000 (input field with clear icon)
 - Other Income \$: \$ (input field)
 - Deductions \$: \$ (input field)
 - Add'l Withholding \$: \$ (input field)
 - Multiple Jobs: Yes No
- OK State Income Tax (Residence) - OKLAHOMA**
 - Filing Status: OK - Single (dropdown)
 - Exemptions: 1 (input field with clear icon)
 - Select: Dollar \$ Percent %
 - Additional \$: \$ (input field)
 - Add'l Exemptions: (input field)
 - Exemptions Amount \$: (input field)
 - Alternate Calculation: Please select (dropdown)

A blue callout box with a white background and black border contains the text: 'You are able to update the Federal Income Tax and or State Income Tax information (if applicable).'. Two red arrows point from this callout box to the 'Filing Status' dropdowns in the Federal and State tax sections.

Direct Deposits: Update Requests (Enhanced Feature)

If your company has enrolled in the Enhanced Employee Self-Service features, you will be able to select the pencil icon to submit an update request. You will receive an email when your update request is received, and a second email once your approver accepts or denies your updates.

The screenshot displays the Heartland Employee Self-Service interface. On the left is a dark navigation sidebar with the following items: Home, Direct Deposits (highlighted with a red arrow), Messages, My Profile, Paychecks, Transactions, Profile Selection, and Logout. The main content area is titled 'Heartland Homes' and 'Direct Deposits'. It features a 'Direct Deposit Settings' section with a blue button labeled 'Add New Account' (pointed to by a red arrow from a callout box). Below this is a card for an active account with a pencil icon (pointed to by a red arrow from a callout box). The account details are as follows:

Status	Active	Account Type	Prepaid Card
Process Sequence	Remaining Net	Amount	n/a
Percent	n/a	Account #	XXXXX0000
Routing #	124001545		

Callout boxes provide instructions: 'Choose *Direct Deposits* to edit your banking information.' (pointing to the sidebar), 'Choose the *Add New Account* button to add a new direct deposit.' (pointing to the 'Add New Account' button), 'Select the Pencil icon to edit the active banking information.' (pointing to the pencil icon), and 'See the next page for a glossary of Direct Deposit options.' (bottom right).

Direct Deposit Updates - Details of Options

Status: Active, Prenote, or Inactive. Always choose *Prenote* for brand new direct deposit accounts. This sends a test file to verify your account information to ensure that the direct deposit will be successful. Once your direct deposit request has been approved by your company, the prenote process can take up to 2 check dates for the direct deposit to become active.

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:

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 -

1. One direct deposit account for entire Net Pay.
2. Last account to receive remaining Net Pay after the partial 1, 2, 3, etc. direct deposits.

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.

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

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

Description: This optional description provides a label for the account to make it easy to identify when there are multiple accounts being used.

**Your company may require additional forms to verify/approve your direct deposit change. Please see your payroll administrator regarding your company's policy.*

Profile Selection - Multiple Companies

If you work for multiple companies who process payroll with Heartland, you can access your information with each business using the Profile Selection screen. Select other profiles here to switch between companies.

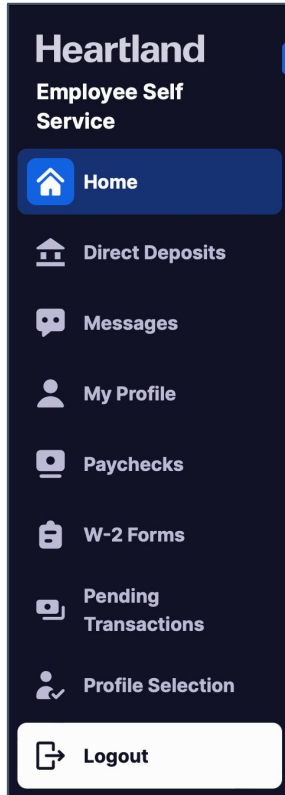
*You must use the same email address across all accounts to be able to switch profiles.

The screenshot displays the 'Heartland Homes' Profile Selection screen. On the left is a dark sidebar with the 'Heartland Employee Self Service' logo and navigation items: Home, Direct Deposits, Messages, My Profile, Paychecks, W-2 Forms, Pending Transactions, Profile Selection (highlighted with a red arrow), and Logout. The main content area has a header with a back arrow and 'Heartland Homes Profile Selection'. Below this is a section titled 'Select a Profile to Log Into' with a toggle switch and the text: 'You have multiple profiles associated with: madison.foster@e-hps.com . Please select the profile you wish to use below.' Underneath is an 'Available Profiles' section containing a table with one profile listed. To the right of the table is an 'Add Account' button, also highlighted with a red arrow.

Client Name	Name	Work Location	Client Code	Last Login
Heartland Homes	Winston Employee	1 - OKLAHOMA CITY, OK	DEMOMF13	Jan 26, 2023, 7:16:16 PM

Logout | Logging in after registering

When you have completed using the Self-Service site, select *Logout* on the bottom, left portion of the screen.

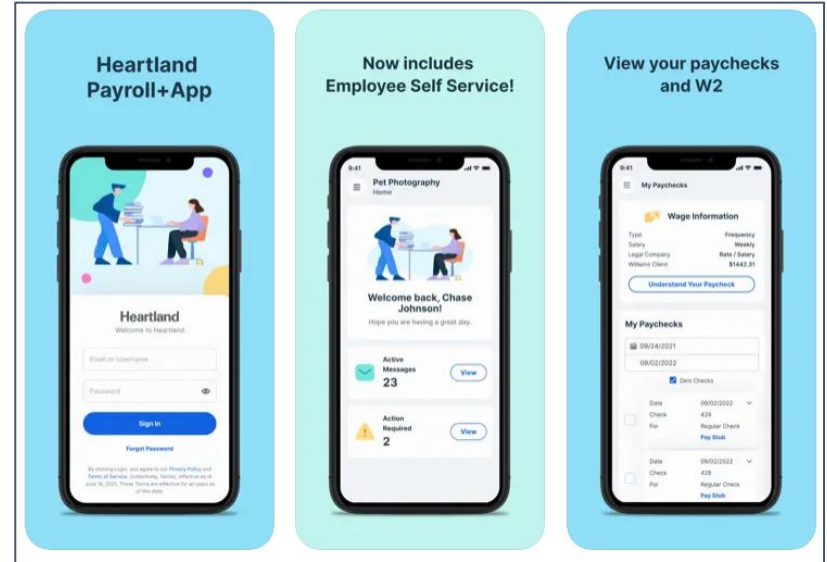


To login after registering, access the mobile site:
<https://m.heartlandcheckview.com>

Or download the
Heartland Payroll+ app:

IOS: [Apple App store](#)
Android: [Google Play](#)

View and download pay stubs, W-2s, update personal info, direct deposit and more.



Need assistance with Self-Service?

- ***Forgot your password?*** You can reset your password on the login screen, choose the *Forgot Your Password* link.
- ***Got locked out?*** Successive attempts lock the account for longer time periods. Wait for at least 30 minutes, and reattempt or select *Forgot Your Password* on the login screen to create a new password.
- ***Can't find your activation email?*** Navigate to <https://m.heartlandcheckview.com> and choose the *Forgot Your Password* link to set up your password and MFA authentication. Your username is the email address that your employer set up in your profile. It could be either a work email address or a personal email address.
- ***Is the MFA going to be required every time I log in?*** Users will only be required to re-authenticate every 45 days if the *Don't ask me again for 45 days on this browser* is selected. Users will have to authenticate all new devices or when the cache/cookies have been cleared from the current device.
- ***Need to change your MFA authentication?*** Whether you changed cell phone numbers or you'd like to change your authentication option (App or Text), please contact your employer. They can reset your MFA Factor. The next time you log in, our system will prompt you to set up MFA again, allowing you to change numbers or methods.
- The Payroll Specialists at Heartland are not able to speak with employees directly. Please contact your employer for further assistance.