# Administrator Quick Start Guide

This article is designed to be a quick start for Heartland Time administrators for sending employees their initial registration emails.

## Administrator Log In

- 1. Log into your Heartland Payroll account at <u>https://www.heartlandpayroll.com</u>
- 2. Select **HR Solutions** from the left menu and select **Heartland Time**.



Employer: Employee Setup Order

We recommend using the following order to ensure a streamlined setup experience. Below are the main areas.

- 1. Use <u>Onboarding</u> or <u>Payroll</u> to add the employee to set up their profile.
- 2. Log into **Heartland Time** to send the registration email.
  - This is where employees clock in and out, review punch cards, and request PTO.
- 3. Assign a timesheet template to the employee.

### 4. Heartland Payroll: Employee Self-Service (ESS)

1. This is where employees view their personal information, tax information, and pay stubs.

2. This may be enabled when the employee is set up in payroll.

Navigate through the screens to select the onboarding documents to share with the new employee. Once sent, check the new hire status by going to Onboarding  $\rightarrow$  View Employees.

After an employee has completed their onboarding and you have completed the employer portion of the I-9, the employee data will migrate to Heartland Time & Heartland Payroll. For Heartland Hire assistance, email <u>plusteampayroll@e-hps.com</u>.

## Heartland Time: Employee Registration

In Heartland Time, navigate to Administration - Employees on the left navigation menu.

1. Once loaded, an Options button will be available to the right of the employee search field. Click the Options to generate the Send Registration Email window.

Ø	DASHBOARD									
			Employees							
<b>1</b> 01	TEAM ^ MANAGEMENT ^		Q Smith						X Options	
۲	PREPARE FOR PAYROLL		Show Filter					Sene	d Registration Email	
								Sync	c From Payroll	
~	REPORTS		1-3 of 3 employees							۵
			Name ↓‡	Status	Job Title	Personal Email	Pay Group	<b>Registration Status</b>	Time	she
20			Andy Smith	Active	QA		Monthly	Not Registered	Durat	tion
	Company		Andy Smith	Active			Annualy	Not Registered		
	Employees		Joe Smith	Active			Annualy	Registered	Durat	tion
	Employee Templates		٢							>
	Approvers								< 1	>

The Send Bulk Registration window will contain two tabs.

• Employees With Email Addresses that have yet to register

- Employees Without Email Addresses
- 2. For employees with emails, you may click on the individual employee's box to send their registration email or select the box beside Name to select all employees. When ready, select Send Registration Emails.

Х

Employees With Email Addresses	Employees Without Email Addresses	
Ռ		Send Registration Emails (61)
V Name	Details	Status
	Never Sent	Not Registered

## Send Bulk Registration

3. Employees will receive an email from a no-reply sender.

Note: Employees registered for the Employee Self-Service (ESS) with Heartland Payroll must use the same username and password associated with that site.

4. New Employees will select Create Account



5. The employees will add their birthdate and the last 4 digits of their social security number on the following page. Finalize the setup by creating a password and selecting Create Account.

# Let's create your account!

#### Company ID (Provided by HR)

B Company ID

#### Date of Birth

Date of Birth (mm/dd/yyyy)

#### Last 4 Digits of SSN

**#** Last 4 Digits

#### Email

🖾 Email

#### Password

Create New Password

#### **Confirm Password**

Confirm Password

**Create Account** 

By clicking Create Account, you agree to our Privacy Policy and Terms of Service.

### Sign in as an existing user?



6. Once registered, they will be automatically directed to the Heartland Time dashboard.

Employees with web access to clock in/out will be red	directed to select a job and clock in.
---	--

ð	MY DATA ~
	Clock In & Out
	Schedule
	Timesheets
	Time Off

You can access the site at <a href="http://heartlandhcm.com/">http://heartlandhcm.com/</a>

## Set up Timesheets

On the Employee page, select the **Time & Attendance** tab.

On the **Overview** tab, under **Assign an existing T&A template for this employee**, select **Assign a Template**,

Profile Benefits	Time & Attendance	History			
Overview		Enable Time & Attendance Select which time and attendance features are applicable to this user			
Timesheets $\bigcirc$ Pay Rules and Rates $\bigcirc$		Assign an existing T&A template for this employee?			
Time Off	$\odot$	O Assign a template			
Shift Schedules 📀		Timesheets	Payroll and Statutory Rules		

Select the appropriate timesheet template, and enter an effective date and select Save



The employee will then show on the Team Timesheets tab for the respective pay periods.

## Heartland Payroll: Employee Self-Service (ESS) Registration

To register an employee for Employee Self-Service (ESS), log into the Payroll application. Select the **Employee** tab, and choose **General**.

Heartland					
<b>^</b>	Dashboard				
*	Client ~				
*	Employees ^				
	Accruals				
	Benefits				
	Employee Change Log				
	Employee Pay				
	Employment				
	General				
	Job Titles				

Select the employee you wish to invite to the system, and select the Hire Information tab.



Enter a valid email address into the **Work Email Address** field.

Other Employee Information			
SSN:	XXX-XX-2177	No Show	
	Update SSN		
SSN Verification Status:	Not Verified		
	Request Verifica	tion	
Work Email Address *	sample@example.co	om	
			18/100

When an employer enters an email in this field and saves it, the employee will receive a noreply email with login credentials and a registration link to complete the registration. They will then need to finalize their account by creating a new password and selecting a Multi-Factor Authentication (MFA) method.

Once registration is complete, the employee should bookmark <u>m.heartlandcheckview.com</u> to return to Employee Self-Service.

Once set, you cannot change the work email address directly in Time & Attendance. To do so you will need to change it in the <u>Heartland Payroll system</u>.