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Client Guide to Employee Self-Service Access

Employee Self-Service allows your employees to set up online access to view their information and print their own pay stubs and W-2s/1099s.

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Set up your Employees with Self-Service Access

You can add an employee to Self-Service access, either at the time of hire or during their tenure with you. Your Payroll Support Team can add Self-Service to your account at no extra cost.

New Employee: Set Up Self-Service Access
Employees → Employee Quick Hire or Employee Wizard

1. Enter your employee's work or personal email address in the *Work Email Address* field. This will be the address they use to log into Self-Service.
2. Toggle *Enable Self-Service Access* to *Yes*.

The *Suppress Pay Stub Email Alert* toggle determines if the employee receives an email letting them know when their stub is available to view.

Yes = no email alert
No = receive email alert

Once you have completed all new hire information and selected *Save*, a system-generated email will automatically be sent to your employee to prompt them to activate their access.

Direct them to the [Employee Guide to Self-Service](#) which illustrates how to activate their access.

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Accounts with both Payroll and Time & Attendance Services

Your employee's access is streamlined!

When you add a new employee in Payroll, ensure that Self-Service access is toggled to Yes. This will send an email to the employee, prompting them to register for their self-service account. Once this is done, their Time & Attendance access will be granted automatically. No additional action is required.

Client users will also see the following message on the employee's *Account Information* page in Time & Attendance to inform them that registration is determined by ESS status in Payroll.

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Existing Employee: Set Up Self-Service Access
Employees → General → Hire Information tab

1. Select the existing employee from the list. In the right column, you will find the *Work Email Address* field and the *Enable Self-Service Access* toggle.
2. Enter your employee's work or personal email address in the *Work Email Address* field. The toggle will change to *Yes* and select *Save.*
   💡 *The email input in the Work Email Address field is the one associated with the account. This can be the employee's work or personal email, depending on company preference.*

Once you have selected *Save*, a system-generated email will automatically be sent to your employee to prompt them to activate their access. Direct them to the Employee Guide to Self-Service that will walk them through how to activate their access.

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Troubleshooting Self-Service Access

Employees may come to you regarding their Self-Service access if they have been locked out of their account or cannot remember their password. Here is how you can resolve those situations.

Employee Cannot Access the Self-Service Portal

Instruct the Employee to go to https://m.heartlandcheckview.com, select *Forgot your password?* and follow the prompts.

Employee Needs to Change the MFA Factor Type

Employees → General → Hire Information tab

If an employee would like to change their MFA Factor (Multi-Factor Authentication) to/from the Authentication App or Text Code, you will only need to Reset the MFA Factor for the employee.

- Access the employee, in the right column there will be a *Reset MFA Factor* button.
- Select the button and *Save*.
- This will now allow the employee to access the Self-Service portal. Once they have input the username and password, they will be prompted to select a new authentication method.
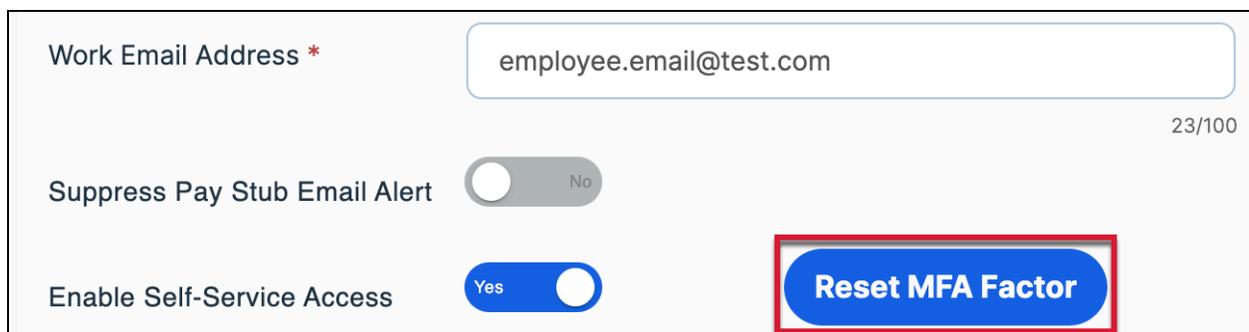
This employee section information is also available in the *Employee Guide to Self-Service* that you can provide to your employee(s). If you would like a copy of this guide, your Payroll Support Team can provide this to you upon request.

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Employee Setup: Email Registration and Login

Information to know about Self-Service

- If you receive a message that your account is locked, please contact your employer.
- If you forget your password, you can reset it on the login screen. If you are unable to reset your password, please contact your employer for assistance.
- Need assistance with Self-Service? Contact your employer's payroll department. For security purposes, the Payroll Specialists at Heartland cannot speak with employees directly.

Employee Setup: Activating the Self-Service Access

- When set up for Self-Service access, you will receive an email that looks like the one below.
- If you have not received your welcome email within an hour or so, check your junk/spam email folder. If the email is not received, let your employer know.
- Upon receipt of the email, select *Click here to begin the login process,* taking note of the temporary password.
- The link is only valid to *activate your access*. Visit https://m.heartlandcheckview.com to access your Self-Service portal after activation; we recommend bookmarking this link.
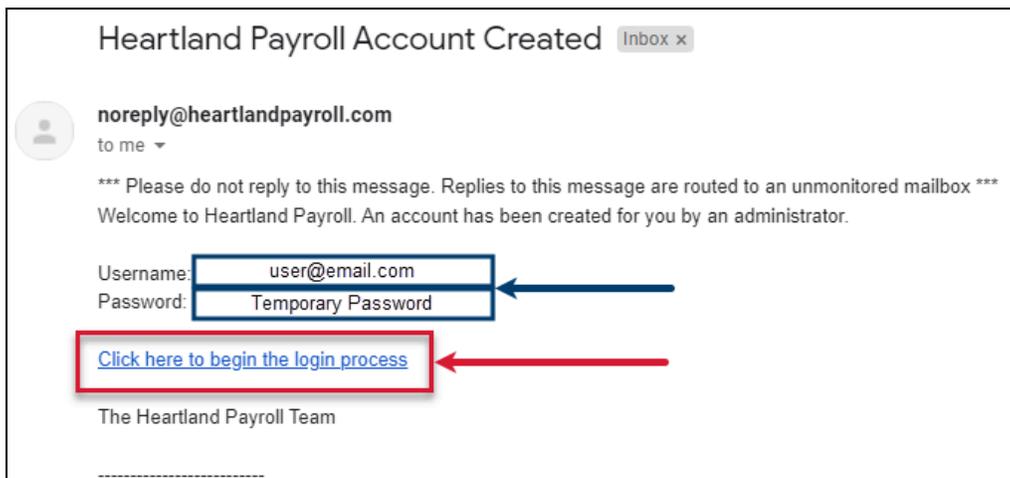
Your activation link will bring you to the Self-Service landing page to begin registration, as shown below.
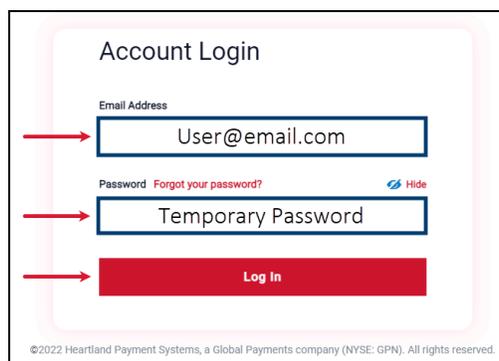
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Input the email used during registration, copy and paste the temporary password, select *Log In*.

You will first be prompted to Create a New Password.
- The password must be 8 characters long.
- AND contain a letter, number, and at least one special character such as !@#$%^&*()

Return to your inbox and locate a new email that will contain a verification code.
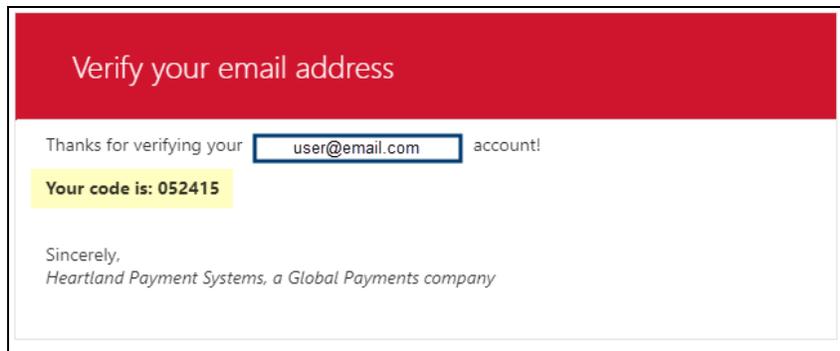
Input the verification code from the email, and *Verify*. The registration process has been completed.
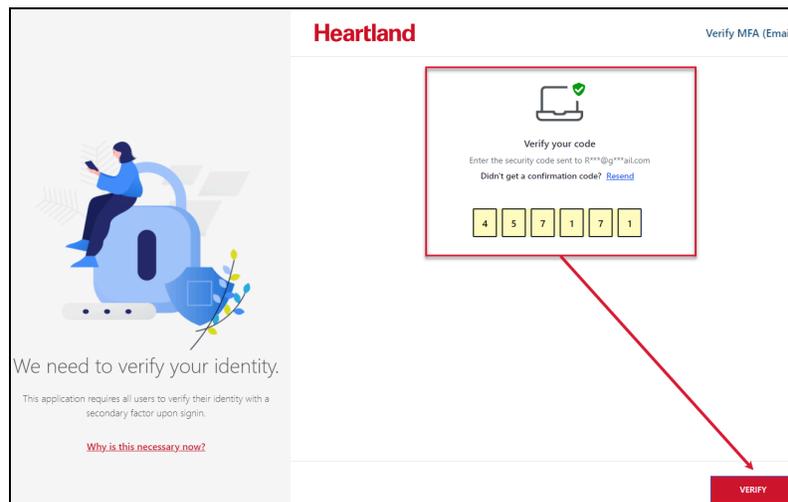
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Employee Setup: Multi-Factor Authentication

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

Multi-Factor Authentication allows for an additional layer of security for employees, employers, and Heartland representatives. Multi-Factor Authentication, or MFA, has two available verification methods - Authenticator App or Text Message (SMS).

- Authenticator App: Such as Authy, Google Authenticator, or Microsoft Authenticator are our available options for this type of authentication.
  - The app will retrieve a code on your device for you to input into the system.

- Text Message (SMS): For this type, the employee will input a device number that accepts text messaging. When accessing the system, a one-time code will text directly to the device.

MFA Factor: Authenticator App

Select the Authenticator App option, and Continue.
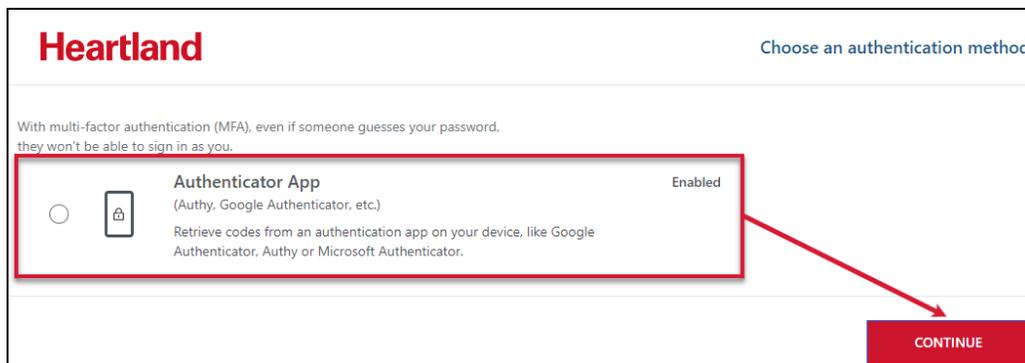
Step 1: Download an authenticator app

- There are active links to access each type of authenticator available. Once you have completed the download and setup of the app account, complete step two.
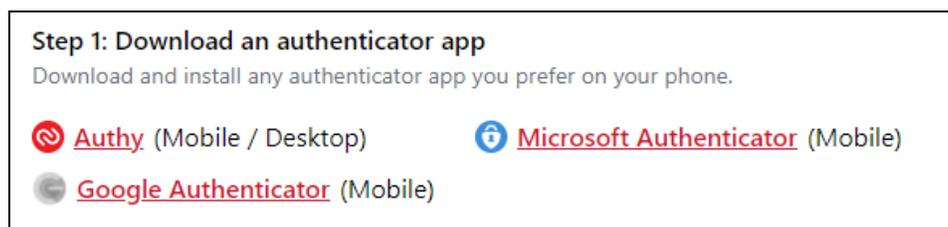
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Step 2: Scan the QR Code or enter the text code directly into the app.

- The right image below is a screen capture of a Google Authenticator. The 6-digit code is set on a timer located on the right; the codes are time sensitive for entry verification.
- Select the Plus sign to add a new account if you have an existing authenticator account.
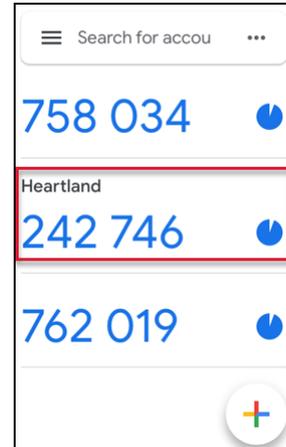
Step 3: Verify your code

- Input the 6 digit code and select *Verify*.
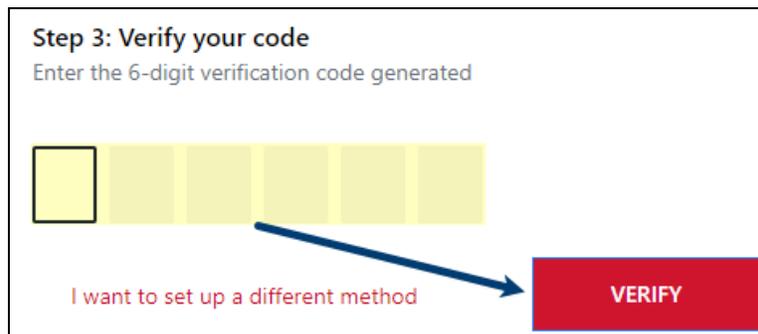
MFA Factor: Text Message (SMS)

For the Text Message (SMS) MFA option, you will select the *Get Started* button after creating a new password.

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Select the Text Message (SMS) option and choose *Continue*.

Step 1: Input the device telephone number

- This must be a device that can accept SMS [Short Message Service] text messages.
- Input the 10 digit number associated with the device and select *Send Code*.

Step 2: Verify your code

- You will receive a text message from a 5 digit number that will contain your verification code.
- The image below is a sample text message.
- Input the code and select *Verify*.
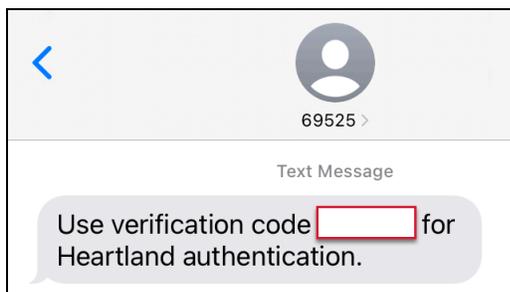
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Once you have selected verify, the home page, like the image below, will appear.
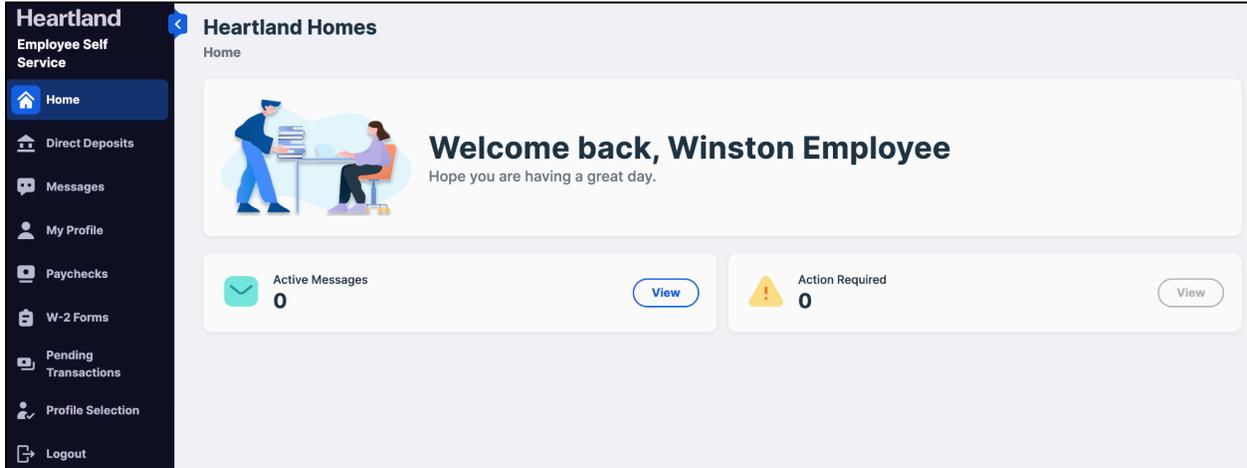
Employee Login to Self-Service (after account activation)

Navigate to: https://m.heartlandcheckview.com

- **User name:** Enter your email address associated with the Self-Service access.
- **Password:** Enter the password you created during the activation process and select *Log In*.

- Access the *authenticator app* or *the text message* for the 6-digit verification code. Select *Verify*.

Employee Navigation

- *Paychecks:* View your pay stubs as they become available.
- *W-2 Forms:* View current and past W-2s and 1099s.
- *Home:* The page you will see when you first log in.
- *My Profile:* This will display your employee data.
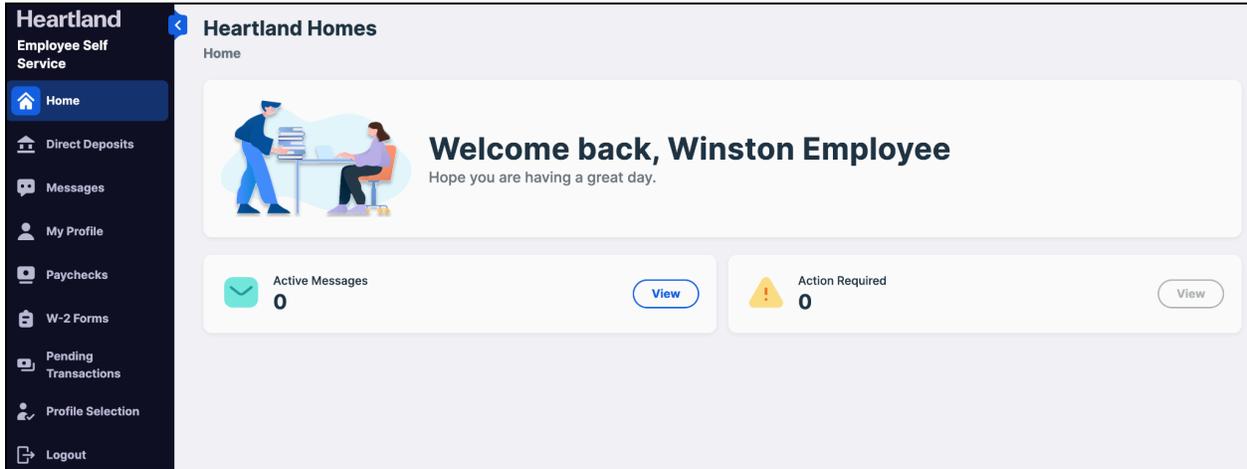
Paychecks

- Provides a listing of all checks recorded for you in the Heartland system.
- To view and/or print, select *Pay Stub* on the right for the desired date.
- You can then either download or print the stub.
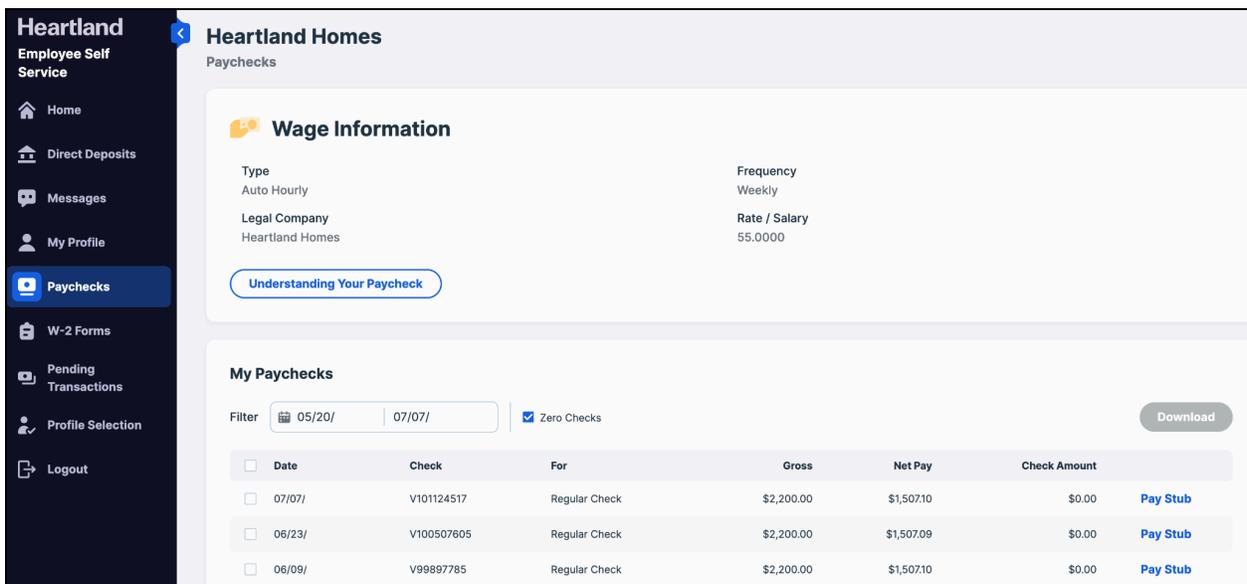
W-2 Forms

- Select *View PDF* on the right for the desired year.
- You can then either download or print the form.

Need assistance with Self-Service? You can reset your password on the login screen as needed. If you cannot reset your password or get locked out of your account, contact your employer's payroll department. For security purposes, the Payroll Specialists at Heartland cannot speak with employees directly.