

Heartland

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 grant an employee Self-Service access, either at the time of hire or at a later date. Self-Service is added 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 email address will be used to log into Employee Self-Service (ESS).
2. Toggle *Enable Self-Service Access* to Yes.



The screenshot shows a form with three fields. The first field is 'Work Email Address *' with a yellow background and the text 'employee@gmail.com' and '18/100' characters. The second field is 'Suppress Pay Stub Email Alert' with a toggle switch set to 'No'. The third field is 'Enable Self-Service Access' with a toggle switch set to 'Yes', which is highlighted by a red arrow pointing to it from the right.

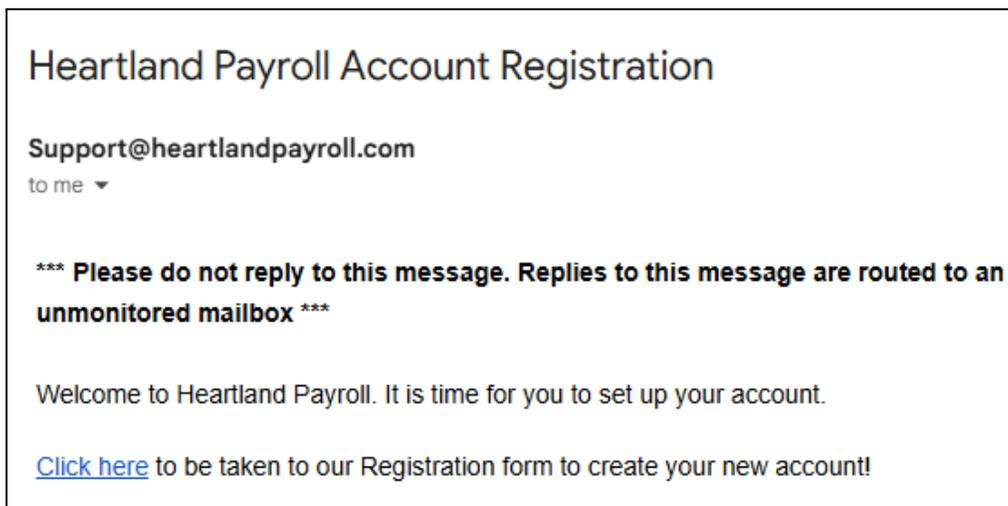
The *Suppress Pay Stub Email Alert* toggle determines if the employee receives an email letting them know when their stub is available to view.

Yes = no email alert

No = receive email alert

Once you have completed all new hire information and selected Save, a system-generated email is automatically sent to your employee, prompting them to register for their self-service account.

Direct them to the [Employee Guide to Self-Service](#), which illustrates how to set up their account.



 For security purposes, the Payroll Specialists at Heartland cannot speak with employees.

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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 *Enable 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 when your employee's data is synced in Heartland Time. Syncs occur at 1am, 9am, 2pm, and 7pm ET, but you can manually perform this action if access is needed immediately.

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.

The screenshot displays the 'Account Information' page for an employee named '7789 QA Test'. The page is divided into two main sections: a left-hand navigation menu and a main content area. The navigation menu includes 'Profile', 'Time & Attendance', and 'History', with 'Account Information' selected. The main content area is split into two columns. The left column lists 'Personal Info', 'Contact Info', 'Employment Info', and 'Compensation Info', each with a green checkmark icon. The right column is titled 'Account Information' and contains a message: 'Account registration is now determined by ESS status within Payroll. Please make any changes within Payroll'. Below this message is a table with the following data:

Registration Email	testeaccount@gmail.com
ESS Enabled in Payroll	Yes
Date Last Changed	12/15/2023

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Existing Employee: Set Up Self-Service Access

Employees → General → Hire Information tab

On the right under *Other Employee Information*, you will see the *Work Email Address* field and the *Enable Self-Service Access* toggle.

1. Enter your employee's work or personal email address in the *Work Email Address* field.
2. The *Enable Self-Service Access* toggle will change to Yes allowing you to Save.

💡 The email entered in the *Work Email Address* field is associated with the self-service account. It can be the employee's work or personal email, depending on preference.

Other Employee Information

SSN: XXX-XX-8888 No Show

[Update SSN](#)

SSN Verification Status: Not Verified

[Request Verification](#)

Work Email Address * 19/100

Suppress Pay Stub Email Alert No

Enable Self-Service Access Yes [Reset MFA Factor](#)

Once you have selected Save, a system-generated email is automatically sent to your employee, prompting them to register for their self-service account.

Direct them to the [Employee Guide to Self-Service](#), which illustrates how to set up their account.

Heartland Payroll Account Registration

Support@heartlandpayroll.com
to me ▾

***** Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox *****

Welcome to Heartland Payroll. It is time for you to set up your account.

[Click here](#) to be taken to our Registration form to create your new account!

🚫 For security purposes, the Payroll Specialists at Heartland cannot speak with employees.

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Information for your Employees

Employee Guide to Self-Service

The [Employee Guide to Self-Service](#) has detailed information regarding how employees set up their self-service accounts and access their pay stubs and W-2s.

Please provide this guide to your employees using Self-Service.

Employee Self-Service Help Center Articles

The following help center articles provide brief explanations of common self-service features.

[Employee Self-Service \(ESS\): How to Log In](#)

[Employee Self-Service \(ESS\): Paychecks](#)

[Employee Self-Service \(ESS\): W-2 Forms](#)

[Employee Self-Service \(ESS\): Set Up Your Account](#)

[Employee Self-Service \(ESS\): Frequently Asked Questions \(FAQ\)](#)

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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 Find Registration Email

Have them go to <https://m.heartlandcheckview.com> and choose the *Register Now* link to set up their password and Multi-Factor Authentication (MFA). The email address is the one that you, the employer, used to set up their access.

Employee Cannot Access Self-Service

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

Account Login

Email Address

Email Address

Password **Forgot your password?** ← Show

Password

Continue As Employee

Don't have an account? Register Now

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.

- On the right, select *Reset MFA Factor* and *Save*.
- This will now allow the employee to reset their MFA Factor. Once they enter their email address and password on the login screen, they'll be prompted to select a new authentication method.

Work Email Address employee@gmail.com 29/100

Suppress Pay Stub Email Alert No

Enable Self-Service Access Yes

Reset MFA Factor

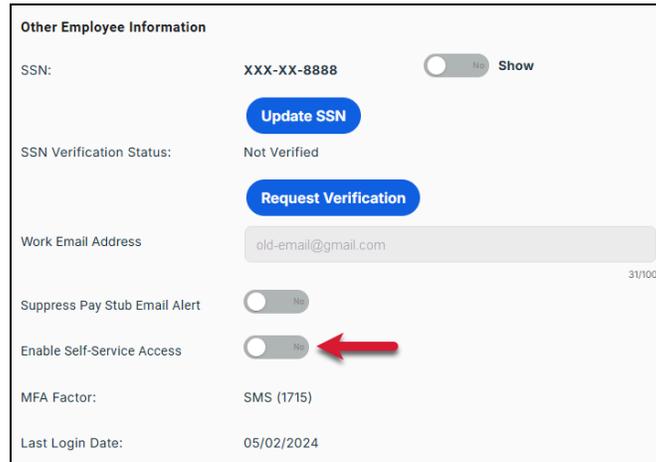
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Employee Needs to Change their Email Address

Employees → General → Hire Information tab

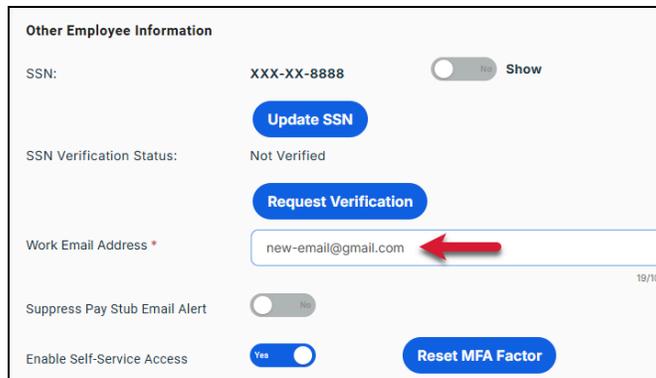
If an employee would like to change their email address, they need to request that change through you, their employer. You will need to update the *Work Email Address* field.

- Change *Enable Self-Service Access* to *No*, then *Save*.



The screenshot shows the 'Other Employee Information' form. The 'Enable Self-Service Access' toggle is currently set to 'No', indicated by a red arrow pointing to the toggle switch. Other fields include SSN (XXX-XX-8888), SSN Verification Status (Not Verified), Work Email Address (old-email@gmail.com), Suppress Pay Stub Email Alert (No), MFA Factor (SMS (1715)), and Last Login Date (05/02/2024).

- This will now allow you to enter their desired email address into the *Work Email Address* field. Once the email is entered, *Enable Self-Service Access* changes to *Yes*, allowing you to *Save*.



The screenshot shows the 'Other Employee Information' form after the email address has been updated. The 'Work Email Address' field now contains 'new-email@gmail.com', indicated by a red arrow. The 'Enable Self-Service Access' toggle is now set to 'Yes'. A 'Reset MFA Factor' button is also visible. Other fields remain the same as in the previous screenshot.

 The [Employee Guide to Self-Service](#) has detailed information regarding how employees set up their self-service accounts and access their pay stubs and W-2s. Please provide this guide to your employees using Self-Service.