PAYROLL AND REPORTS QUICK REFERENCE GUIDE

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Add Visit Activity Pay Rates

Admin/Lists/User

1. Select the user for whom you want to Add Visit Activity Pay Rates.
2. Select **Edit** on the right-hand side of the user.
3. Select the **Visit Activity Pay Rates** tab on the left-hand side of the window.

Add New Visit Pay Rate

Admin/Lists/User/Visit Activity Pay Rates/New Visit Pay Rate

Fill in the five fields:

1. Insurance – choose from drop-down menu. **NOTE**: If Insurance is not listed, go to Payer Setup in the Admin Manual.
2. Task – choose from drop-down. If task is not listed, follow the Create Custom Note. Instructions below.
3. Rate Type – choose from drop-down.
4. User Rate – type in the user rate for this task.
5. Mileage Rate – type in the mileage rate for this user.
6. Select **Add.**

NOTE: Anything with a red asterisk (*) is required.

Create Custom Note

Admin/Custom Note Manager

1. Select **Create New Custom Note.**
2. Fill in the three fields**:**
    a. Discipline Task – choose from the drop-down menu.
    b. Custom Name – write in the desired name of the task.
    c. Note Description – write in the description to be associated with this note.
3. Select **Save.**

New Non-Visit Pay Rate

Admin/Lists/Users/Visit Activity Pay Rates/New Non-Visit Pay Rate

1. Fill in the four fields:

    a. Non-Visit Activity – choose from drop-down menu. A Non-Visit Activity must be created. Follow the Adding Non-Visit Activity instructions below.
    b. Rate Type – choose from the drop-down menu.
    c. User Rate – write in the user rate for this Non-Visit Activity.
    d. Mileage Rate – write in the Mileage Rate for this user.
2. Select **Add.**

Adding Non-Visit Activity

Admin/New/Non-Visit Activity

Fill in the two fields:

1. Name – write out title for the Non-Visit Activity.
2. Text – write in any information internal users should know regarding this Non-Visit Activity.
3. Select **Save**.

Assign Non-Visit Activity

Admin/Non-Visit Activity Manager

1. Select **Assign Non-Visit Activity**.
2. Fill in the following**:**
    a. User – choose from the drop-down menu.
    b. Branch – choose from the drop-down menu.
    c. NVA Date – fill in the date this NVA took place or select the calendar and select the date.
    d. Non-Visit Activity – choose from the drop-down menu.
    e. Time In –select the time or type out the exact time the NVA started.
    f. Time Out - select the time or type out the exact time the NVA ended.
    g. Mileage – write in the number of miles traveled for this NVA.
    h. Comments – write in any internal comments for this NVA.
3. Select **Save.**

Payroll Summary

Admin/Payroll Summary

1. Fill in the following criteria**:**

   a. Date Range – type in or select the calendar and select the date.
   b. Branch – choose from the drop-down menu.
   c. Payment Status – Choose from the drop-down menu.
   d. Visit Status – Choose from the drop-down menu.
   e. Role – Choose from the drop-down menu.
2. There are multiple views that can be used in the Payroll Summary.
   a. Summary – the Summary view appears automatically when **Generate** is selected**.** This view will display one line per user, that displays a total amount of visits, visit time, and travel time.
3. Select **Generate.**
      i. Count – the total amount of activities (Visit Activity and Non-Visit Activity) this user has.
      ii. Total Visit Time – the total amount of minutes and hours that make up this user's activity.
      iii. Total Travel Time – the total amount of minutes and hours this user traveled in their activity.
      iv. Action –select **Detail** and display the individual activities that make up this specific user's activity.
   b. View Details – see all the individual activities that make up the totals in each column.
      i. Actual Visit Date – This date is pulling from the Actual Visit Date in the Visit Details in the patient's chart. **NOTE**: Editing Visit Details covered in Intake and Scheduling Manual.
      ii. Patient Name – the name of the patient that the activity was done for.
      iii. Visit/NVA – the activity that was assigned to a user.
      iv. Payer – the party financially responsible for this activity.
      v. Visit Time – the time in and time out for this activity.
      vi. Travel Time – the start and end time that was traveled in this activity.
      vii. Visit Min. – the number of minutes calculated from the Visit Time.
      viii. Travel Min. – the number of minutes calculated from the Travel Time.
      ix. Mileage – the number of miles calculated from the activity.
      x. Visit Status – the status of the activity in the workflow of the software.
      xi. Paid Status – this column states if the activity is paid or unpaid. A green checkmark is paid, and a red X is unpaid.

c. Print PDF – the Print PDF option creates a PDF version of the Payroll Summary/Detail. It will also display the total amount needed to pay each user.
d. Export to Excel – the Export to Excel option creates an Excel workbook from the data displayed.

Mark Activity As Paid

Admin/Payroll Summary

1. Select **Unpaid** in the Payment Status filter.
2. Select the activity to be paid by selecting the box on the left-hand side of the activity (select more than one if applicable).
3. Select the box next to **Select All** for multiple visits**.**
4. Once the activity(s) are verified, select **Mark as Paid.**
5. After the activity is marked as paid, it will fall off the report.

Mark Activity As Unpaid

Admin/Payroll Summary

1. Select **Paid** in the Payment Status filter.
2. Select the activity to pay by selecting the box on the left-hand side of the activity (select more than one if applicable).
3. Select the box next to **Select All** for multiple visits**.**
4. Verify activity that should be marked as unpaid is selected, select **Mark as Unpaid.**

After the activity is marked as unpaid, it will fall off the report.

Report Center

Reports/Report Center

Reports are grouped into categories of interest. **NOTE**: Reports are based on the user's role (User Setup is covered in Administrative). To get more information about what data the report displays, simply hover over the report name. A blue box will appear showing more details.

1. Select the name of the report to display, fill in the criteria in the filters, and select **Generate Report/Request Report.**

   a. Generate Report – reports that pull data right away will have a button to **Generate Report**. Once the option is selected, the report will generate on the screen right away.
   b. Request Report – reports that take longer to pull data will have a button to **Request Report.** Once the option is selected, the report will be requested and can be viewed in Completed Reports.

Completed Reports

Reports/Completed Reports

For a report to be in Completed Reports, they need to follow the subsequent workflow:

1. *Reports/Report Center* - Select desired report.
2. Fill in the search filters, based on the user's criteria.
3. Select **Request Report**. Now that the report has been requested, it will be in the Completed Reports list.
4. *Reports/Completed Reports* - The status column will show if the report is finished pulling in all the data. The following status descriptions will appear:
   a. Running – the report has been requested and is still pulling data to the report.
   b. Completed – the report has finished pulling all the data, and the final report is ready to view. Once the report is Completed**,** select the report name and the report will open.

HELP CENTER

Our Help Center is a great resource that is available 24/7. Here, you can get answers to frequently asked questions or watch videos of all of Axxess solutions. It can be accessed by going to *Help/Support & Training/Help Center* or also available at https://www.axxess.com/help/