PAYROLL AND REPORTS MANUAL

July 2020

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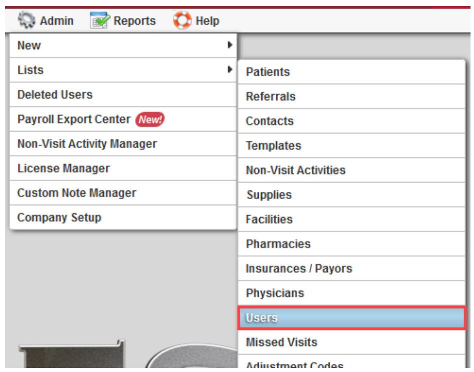
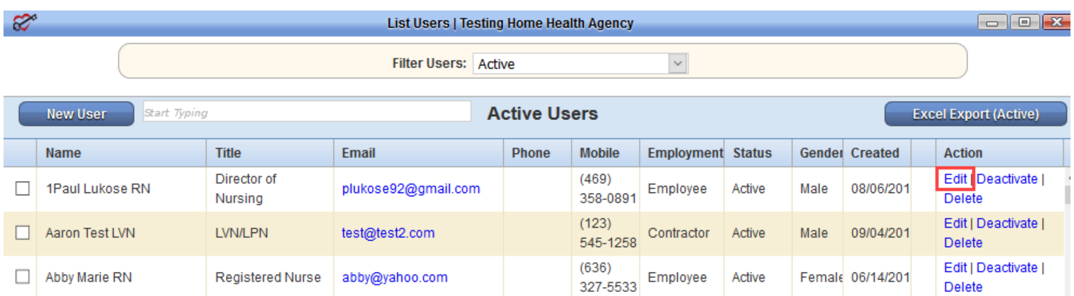
ADD VISIT ACTIVITY PAY RATES

Admin/Lists/Users

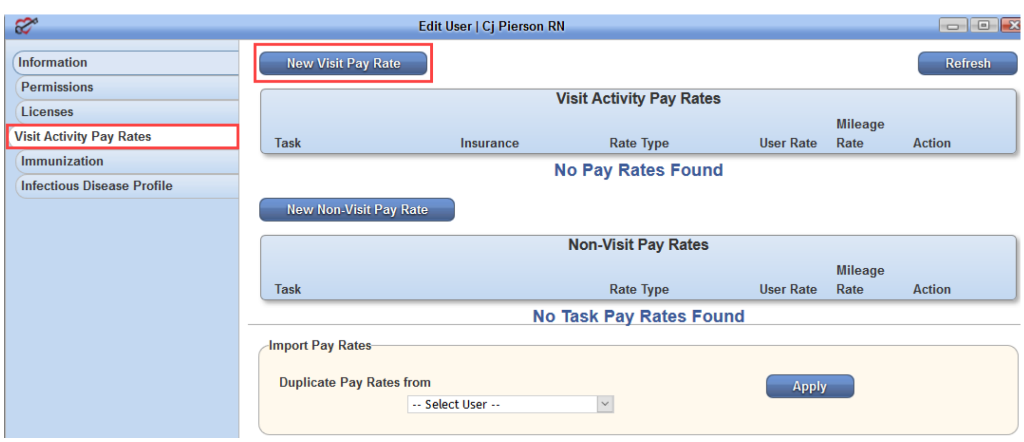
The first step in the payroll processing functionality is to assign **Visit Pay Rates** and **Non-Visit Pay Rates** to each of the users.



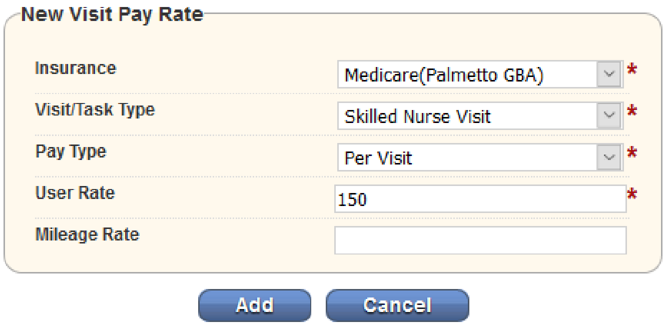
Find the user's name to add Visit Rates to and select **Edit** on the right-hand side of the screen.



The user's profile window will open, select the **Visit Activity Pay Rates** tab on the left-hand side of the screen.



ADD NEW VISIT PAY RATE

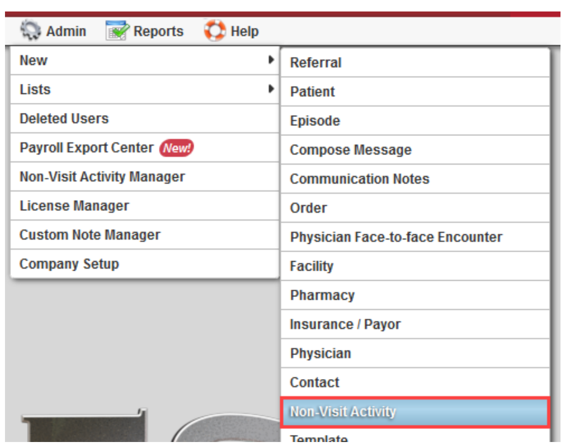


- Insurance – Choose from dropdown menu.
- Visit/Task Type – Choose from dropdown menu.
- Pay Type – Choose from dropdown menu.
- User Rate – Enter.
- Mileage Rate – Enter.

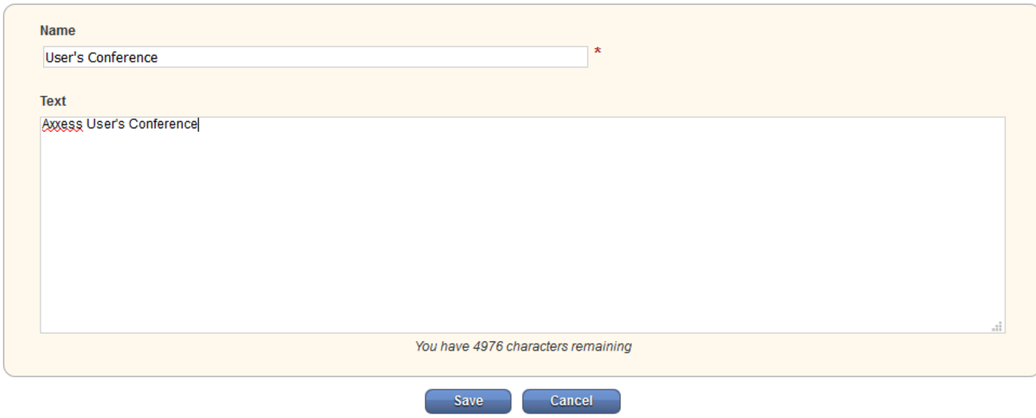
Then select the **Add** button. NOTE: Anything with a red asterisk (*) is required.

ADDING NON-VISIT ACTIVITY

Admin/New/Non-Visit Activity



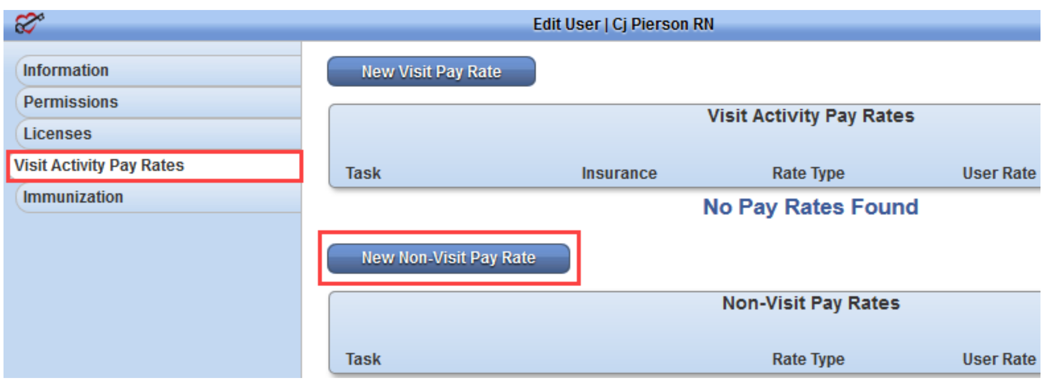
The box below will appear, allowing for entry of Non-Visit Activity details. Enter the Name and Text. Once completed, select the **Save** button.



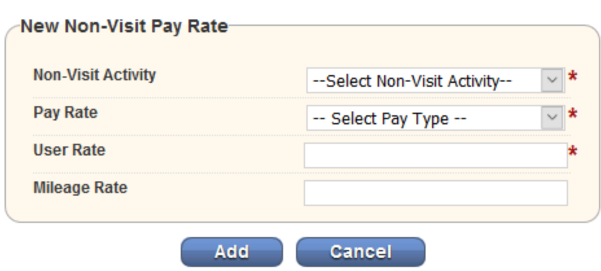
NEW NON-VISIT PAY RATE

Admin/Lists/Users/Visit Activity Pay Rates

To assign a rate to a New Non-Visit Activity in a user's profile, pull up the user and make sure the **Visit Activity Pay Rates** tab is selected. Select **New Non-Visit Pay Rate**.



The New Non-Visit Pay Rate window will appear. Enter the information then select the **Add** button.



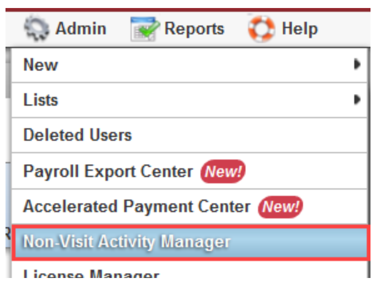
- Non-Visit Activity – Choose from dropdown menu.

- Pay Rate – Choose from dropdown.
- User Rate – Enter.
- Mileage Rate – Enter.

Select the **Add** button when complete. Now that Non-Visit Pay Rate has been added to the user, assign the Non-Visit Activity to a user. This is the process that will pull to the Payroll Summary Report.

ASSIGN NON-VISIT ACTIVITY

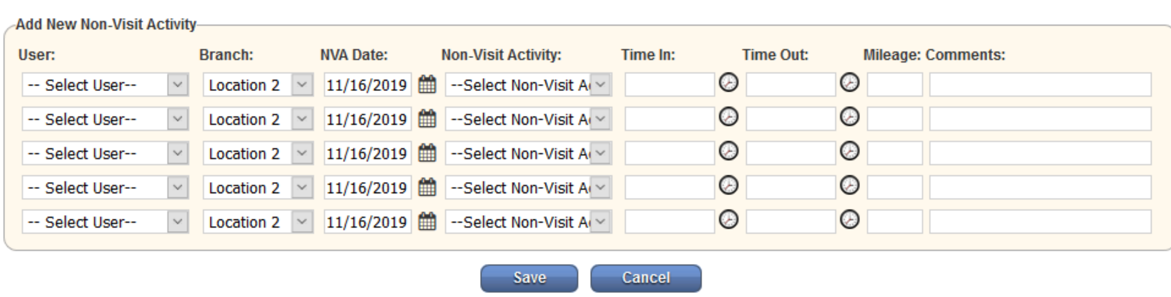
Admin/Non-Visit Activity Manager



The Non-Visit Activity Manager will open. Select **Assign Non-Visit Activity**.

User	Non-Visit Activity	Branch	NVA Date	Begin Tin	End Time	Mileage	Paid Date	Paic	Comments	Action
Tiffany Moczygemba RN	Complete Case Conference	Location 2	01/13/2020	8:00 AM	9:00 AM	0	01/13/2020	✔	testing	Edit | De
Akhila Polineni RN	Complete Hourly Rate	Location 2	01/13/2020	1:00 PM	5:00 PM	0		✘		Edit | De
Tiffany Moczygemba RN	Complete Hourly Rate	Location 2	01/13/2020	9:30 AM	12:00 PM	0	01/13/2020	✔		Edit | De
Abby Marie RN	Hourly Employee	Location 2	01/13/2020	8:00 AM	12:00 PM	0		✘		Edit | De

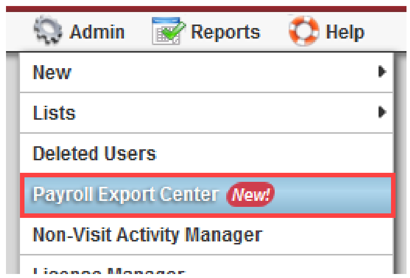
Once the button is selected the window below will open.

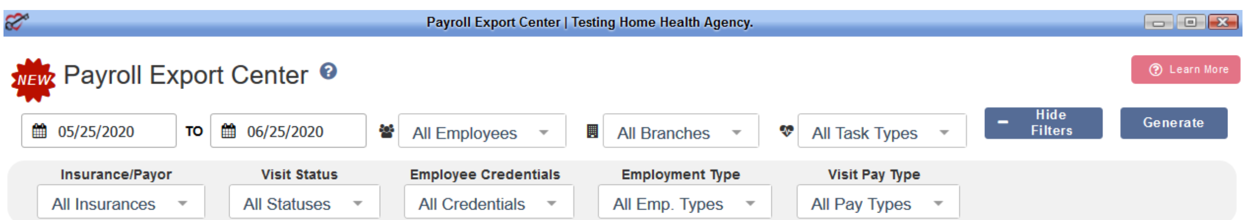


Select the User, Branch, NVA Date, Non-Visit Activity, Time in, Time Out, Mileage and any Comments that may pertain to this entry. After entering all criteria, select **Save**. Then the user's Non-Visit Activity will pull the rate set up and appear in the Payroll Summary. Select the **Edit** hyperlink to make changes or select the **Delete** hyperlink to remove. Select the **Activity Logs** hyperlink to see a record of any updates made.

PAYROLL EXPORT CENTER

Admin/Payroll Export Center





The following are the filter options at the top of the window:

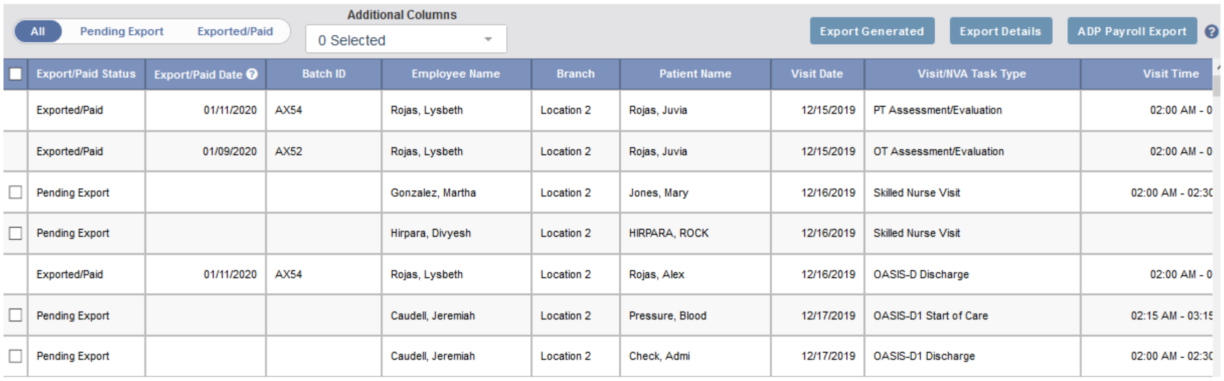
- Date Range – Enter or select the calendar icon.
- Employees – Search and/or choose a specific employee. More than one can be selected. Once selected, employees will be bolded.
- Branch – Choose from the dropdown menu (if more than one).
- Task Type - Search and/or choose a specific task type. More than one can be selected. Once selected, types will be bolded.

To see additional filters, select the **+ More Filters** button:

- Insurance/Payer – Search and/or choose a specific payer. More than one can be selected. Once selected, payers will be bolded.
- Visit Status – Search and/or choose the visit statuses. More than one can be selected. Once selected, statuses will be bolded.
- Employee Credentials - Search and/or choose credentials. More than one can be selected. Once selected, credentials will be bolded.

- Employment Type – Choose from Contractor, Employee and Student/Trainee or Volunteer or All. More than one can be selected. Once selected, employment types will be bolded.
- Visit Pay Type - Choose from Hourly, None, Per Visit, Salary or All. More than one can be selected. Once selected, pay types will be bolded.

Once the criteria has been chosen, select **Generate**. A Summary will display on the screen.



Export/Paid Status	Export/Paid Date	Batch ID	Employee Name	Branch	Patient Name	Visit Date	Visit/NVA Task Type	Visit Time
Exported/Paid	01/11/2020	AX54	Rojas, Lysbeth	Location 2	Rojas, Juvia	12/15/2019	PT Assessment/Evaluation	02:00 AM - 0
Exported/Paid	01/09/2020	AX52	Rojas, Lysbeth	Location 2	Rojas, Juvia	12/15/2019	OT Assessment/Evaluation	02:00 AM - 0
Pending Export			Gonzalez, Martha	Location 2	Jones, Mary	12/16/2019	Skilled Nurse Visit	02:00 AM - 02:30
Pending Export			Hirpara, Divyesh	Location 2	HIRPARA, ROCK	12/16/2019	Skilled Nurse Visit	
Exported/Paid	01/11/2020	AX54	Rojas, Lysbeth	Location 2	Rojas, Alex	12/16/2019	OASIS-D Discharge	02:00 AM - 0
Pending Export			Caudell, Jeremiah	Location 2	Pressure, Blood	12/17/2019	OASIS-D1 Start of Care	02:15 AM - 03:15
Pending Export			Caudell, Jeremiah	Location 2	Check, Admi	12/17/2019	OASIS-D1 Discharge	02:00 AM - 02:30

Change from a Summary (All) view to look at just the Pending Export or Export/Paid entries by selecting either option.

Under the payroll parameter filters, the **Additional Columns** menu enables users to generate more robust payroll data. Users can select any or all of the 18 additional column options:

Additional Columns	**Description**
Associated Mileage	Generates the value noted in the visit documentation.
Auto-Calculated Mileage	Displays the number of miles driven, as determined by the system's automated calculation of the distance between the starting and ending visit addresses. (This calculation only populates for visits with completed statuses.)
Auto-Calculated Mileage Amount	Displays the mileage reimbursement amount, as determined by the auto-calculated mileage above and the reimbursement rate entered in the user/company profile.
Auto-Calculated Travel	Displays the average travel time to and from the point of care, based on the user and patient addresses in the system. (This calculation only populates for visits with completed statuses.)

Employee Credentials	Displays employee credentials entered in the user profile.
Employee Pay Type	Displays either Salary, Hourly or Per Visit.
Employment Type	Displays employment type entered in the user profile.
EVV Hours	Displays hours generated by Electronic Visit Verification during visits.
EVV Time	Displays times generated by Electronic Visit Verification during visits.
Insurance/Payer	Displays insurance/payer affiliated with the episode and visit information.
Patient MRN	Displays patient Medical Record Number (MRN) entered in the patient profile.
Pay Rate	Displays pay rate entered in the user profile.
Payroll File/Worker ID	Displays payroll file/worker ID entered in the user profile.
Travel Hours	Generates the value noted in the visit documentation.
Visit Hours	Payroll hours calculated based on the visit time in and visit time out components entered in the visit documentation.
Visit Pay Type	Displays either Per Visit, Per Hour or Single Payment.
Visit Status	Displays the visit's current status in the Schedule Center.
Visit Units	Displays the number of units tied to visit.

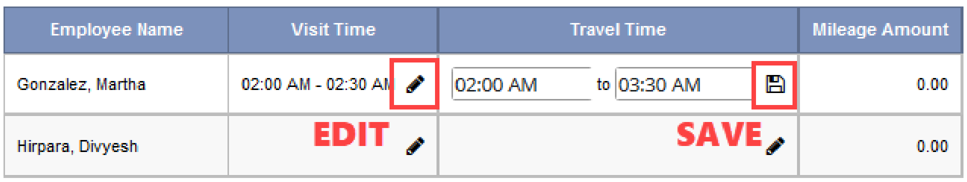
PAYROLL FUNCTIONALITY

Edit functionality enables the payroll processor to change values in specific fields as needed. Modifications can be made in the following four fields:

Editable Field	Description
Visit Time	Displays the visit time in and visit time out as noted in the visit. Any edits made to these times in the Payroll Export Center will automatically update the visit time information in the visit and visit log (both of which can be accessed through the Schedule Center).
Travel Time	Displays the number of miles driven, as determined by the system's automated calculation of the distance between the starting and ending visit addresses. This calculation only populates for visits with completed statuses.

Associated Mileage	Displays the mileage reimbursement amount, as determined by the auto-calculated mileage above and the reimbursement rate entered in the user/company profile.
Surcharge Amount	Displays the average travel time to and from the point of care, based on the user and patient addresses in the system. This calculation only populates for visits with completed statuses.

Select the pencil icon to edit a field and the save icon to save changes.



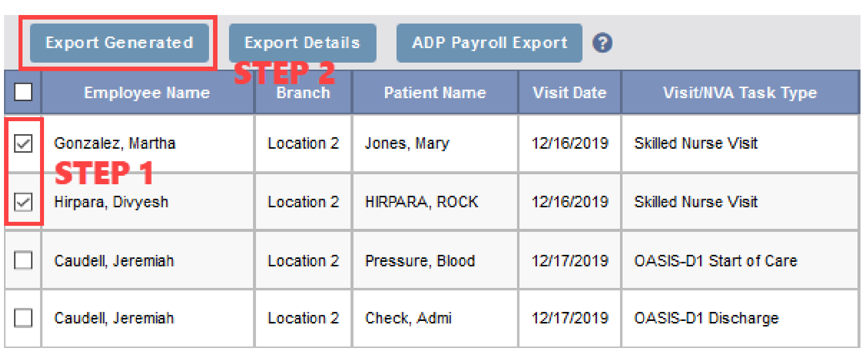
Reports can be generated in the **Payroll Export Center** by using the following buttons:

Export Generated - Populates, in an Excel file, the basic information for the toggle you've selected (All, Pending, Exported/Paid) as well as any additional columns you've chosen to populate.

Export Details - Populates, in an Excel file, the basic information for the toggle you've selected (All, Pending, Exported/Paid) as well as all content found within additional columns regardless if the user has chosen to populate that data.

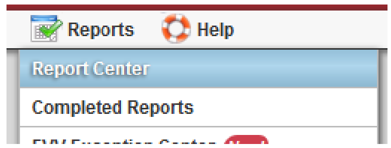
Payroll Export – Generates a .csv file as applicable to the vendor (chosen by agency) for processing payroll.

Select the checkbox(es) of individual payroll entries and select an Export button or select the select all checkbox in the blue header to export all pending entries.

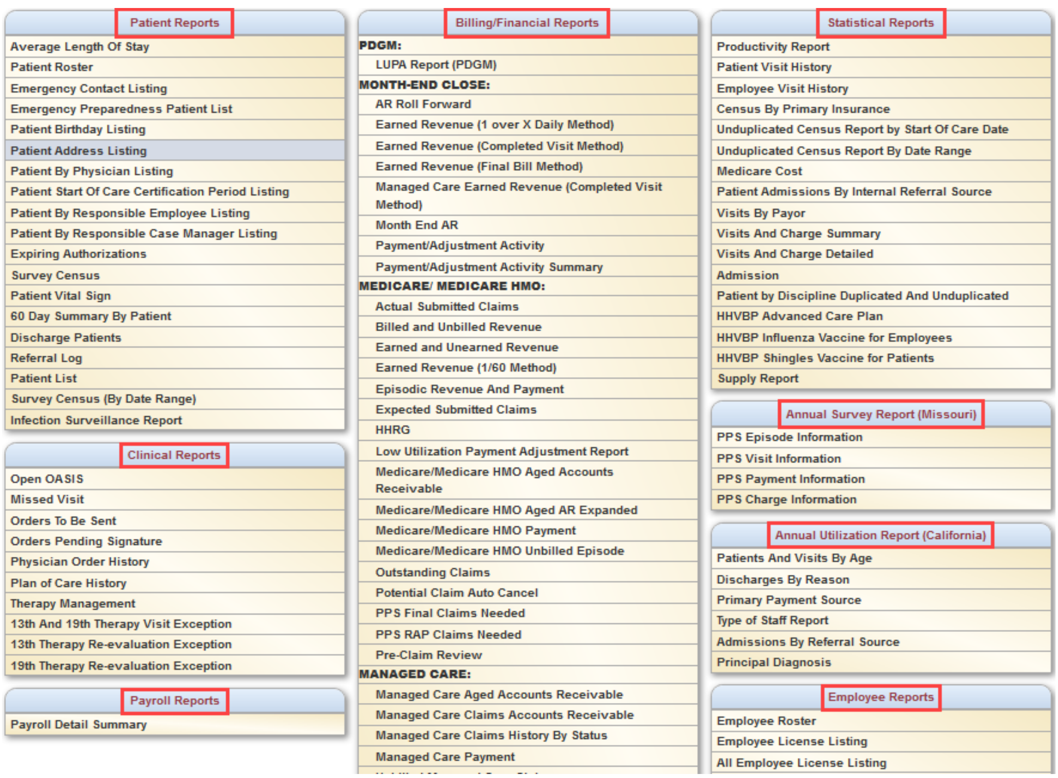


REPORT CENTER

Reports/Report Center

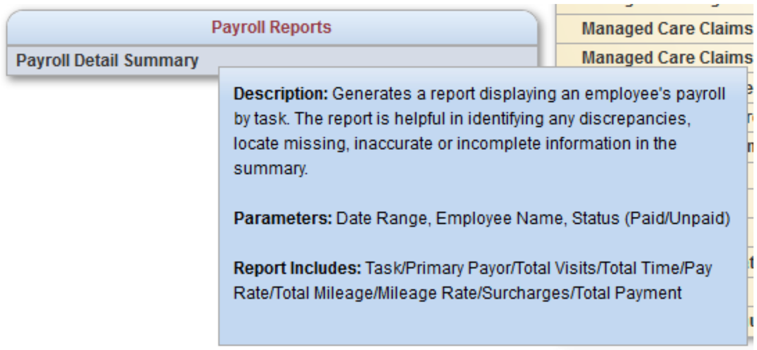


Select the **Report Center**. The Report Center lists multiple reports that can pull up agency data. The reports are grouped into sections based on the type of information it displays.

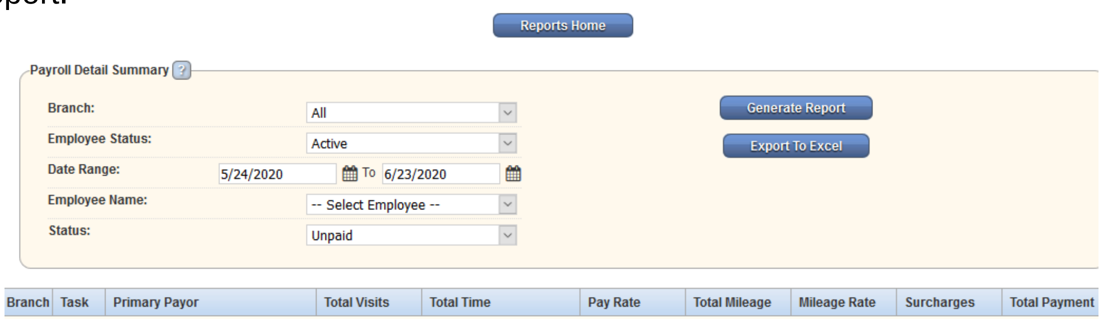


NOTE: Viewable reports are based on the role users are setup as (User Setup is covered in Administrative).

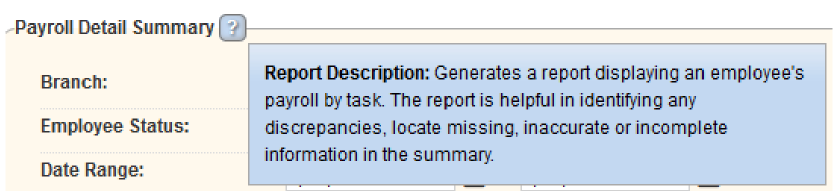
For more information about what data the report is displaying, hover over the report name. A blue box will appear, providing more details.



The **Patient Roster Report** is selected, and the blue box appears. Select the name of the report, and a new box will open, allowing users to **Generate** the report.



The name of the report will be listed in the upper, left-hand part of the screen. Next to the name of the report will be the ? icon. While hovering over this icon a report description will display.



Once desired criteria have been chosen, select **Generate Report**. The report will display on the bottom of the screen.

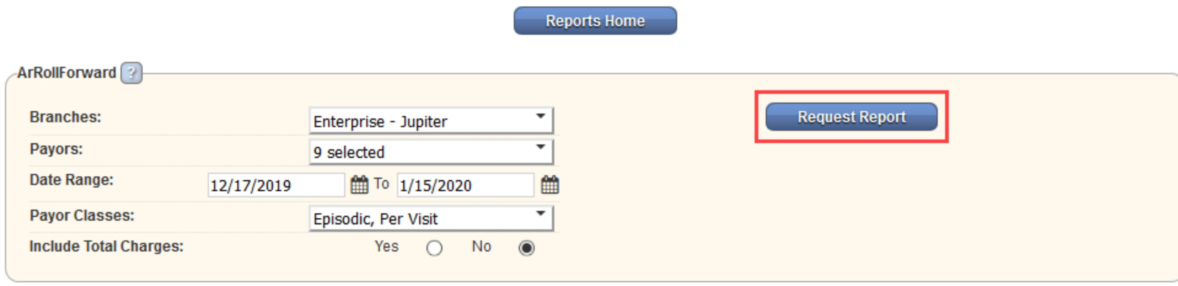
COMPLETED REPORTS

Reports/Completed Reports

Some reports in the **Report Center** will need to be requested, rather than generated. Once a report is requested, the data will begin pulling, and once it is finished the report will be in the Completed Reports section.

For a report to appear in the **Completed Reports** section, they will need to follow the following workflow:

- Go into the Report Center (Reports/Report Center) and select the report to create.
- Fill in the search criteria, then select **Request Report**.



Now that the report has been requested, it will be in the **Completed Reports** list.


List of Reports | Testing Home Health Agency.

Start Typing

Name	Format	Status	Requested By	Started	Completed	Action
AR Roll Forward Report	Excel	Completed	Cj Pierson RN	06/24/2020 04:59:13 PM	06/24/2020 04:59:22 PM	Delete
Month-End AR Report	Excel	Running	Cj Pierson RN	06/24/2020 04:58:51 PM		Delete
CAHPS Report	Excel/CSV	Completed	Cj Pierson RN	09/04/2018 12:44:28 PM	09/04/2018 12:44:30 PM	Delete
Open Oasis Report	Excel	Completed	Cj Pierson RN	07/30/2018 10:25:28 AM	07/30/2018 10:25:40 AM	Delete

The status column will show when a report is finished pulling in all the data. The following status descriptions will appear:

- Running – The report has been requested and is still pulling the data to the report.
- Completed – The report has finished pulling all the data, and users can view the Final report. Once the report is Completed select the report name, and the report will open.

HELP CENTER

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Support & Training/Help Center* or https://www.axxess.com/help/