

# **PAYROLL AND REPORTS MANUAL**

July 2020

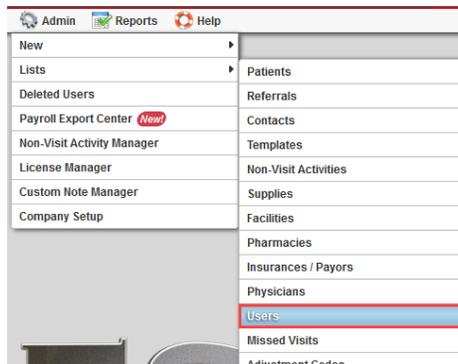
**Table of Contents**

ADD VISIT ACTIVITY PAY RATES .....	3
ADD NEW VISIT PAY RATE .....	4
ADDING NON-VISIT ACTIVITY .....	4
NEW NON-VISIT PAY RATE .....	5
ASSIGN NON-VISIT ACTIVITY .....	6
PAYROLL EXPORT CENTER .....	7
PAYROLL FUNCTIONALITY .....	9
REPORT CENTER .....	11
COMPLETED REPORTS .....	12
HELP CENTER.....	14

## 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.

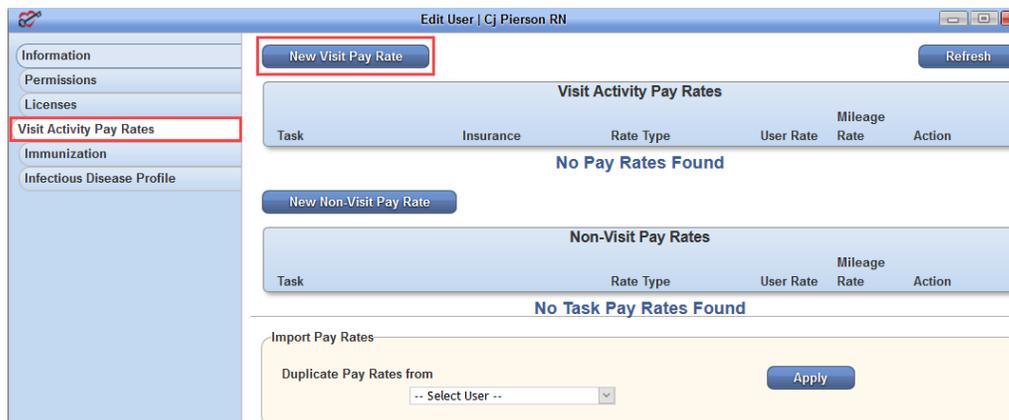


Find the user's name to add Visit Rates to and select **Edit** on the right-hand side of the screen.



Name	Title	Email	Phone	Mobile	Employment	Status	Gender	Created	Action
<input type="checkbox"/> 1Paul Lukose RN	Director of Nursing	plukose92@gmail.com		(469) 358-0891	Employee	Active	Male	08/06/201	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Delete</a>
<input type="checkbox"/> Aaron Test LVN	LVN/LPN	test@test2.com		(123) 545-1258	Contractor	Active	Male	09/04/201	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Delete</a>
<input type="checkbox"/> Abby Marie RN	Registered Nurse	abby@yahoo.com		(636) 327-5533	Employee	Active	Female	06/14/201	<a href="#">Edit</a>   <a href="#">Deactivate</a>   <a href="#">Delete</a>

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



Information  
Permissions  
Licenses  
**Visit Activity Pay Rates**  
Immunization  
Infectious Disease Profile

**New Visit Pay Rate** Refresh

**Visit Activity Pay Rates**

Task	Insurance	Rate Type	User Rate	Mileage Rate	Action
No Pay Rates Found					

**New Non-Visit Pay Rate**

**Non-Visit Pay Rates**

Task	Rate Type	User Rate	Mileage Rate	Action
No Task Pay Rates Found				

Import Pay Rates

Duplicate Pay Rates from  
 -- Select User -- **Apply**

## ADD NEW VISIT PAY RATE

**New Visit Pay Rate**

Insurance	Medicare(Palmetto GBA) <span style="float: right;">*</span>
Visit/Task Type	Skilled Nurse Visit <span style="float: right;">*</span>
Pay Type	Per Visit <span style="float: right;">*</span>
User Rate	150 <span style="float: right;">*</span>
Mileage Rate	<input type="text"/>

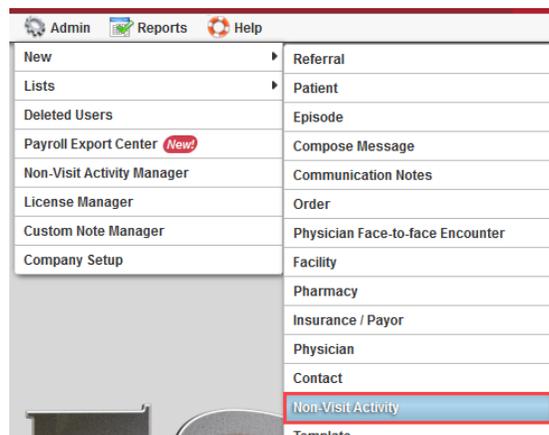
Add
Cancel

- 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.

**Name**

**Text**

You have 4976 characters remaining

## 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**.

Edit User | Cj Pierson RN

- Information
- Permissions
- Licenses
- Visit Activity Pay Rates
- Immunization

**Visit Activity Pay Rates**

Task	Insurance	Rate Type	User Rate
No Pay Rates Found			

**Non-Visit Pay Rates**

Task	Rate Type	User Rate

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

**New Non-Visit Pay Rate**

Non-Visit Activity  \*

Pay Rate  \*

User Rate  \*

Mileage Rate

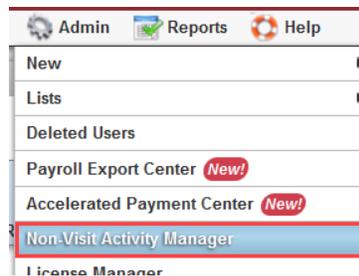
- Non-Visit Activity – Choose from dropdown menu.

- 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*

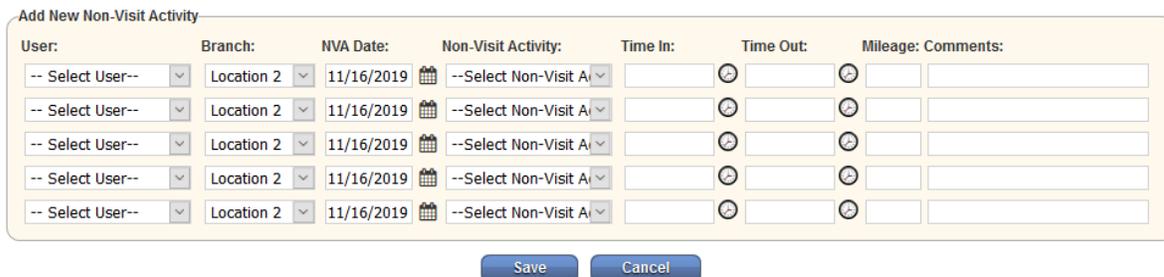


The Non-Visit Activity Manager will open. Select **Assign Non-Visit Activity**.


 A screenshot of the 'Non-Visit Activity Manager' window for 'Testing Home Health Agency'. The 'Assign Non-Visit Activity' button is highlighted with a red box. Below the button is a table with columns: User, Non-Visit Activity, Branch, NVA Date, Begin Time, End Time, Mileage, Paid Date, Paid, Comments, and Action.
 

User	Non-Visit Activity	Branch	NVA Date	Begin Time	End Time	Mileage	Paid Date	Paid	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.

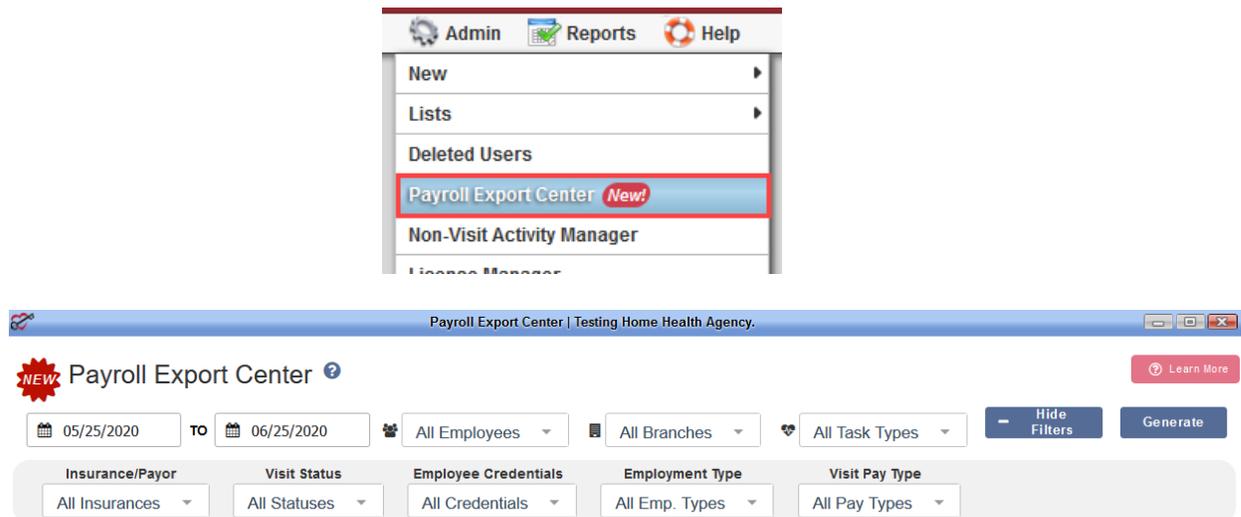

 A screenshot of the 'Add New Non-Visit Activity' form. It contains several input fields: User (dropdown), Branch (dropdown), NVA Date (calendar icon), Non-Visit Activity (dropdown), Time In (time picker), Time Out (time picker), Mileage (text input), and Comments (text input). There are five rows of these fields. At the bottom are 'Save' and 'Cancel' buttons.

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.

All		Pending Export		Exported/Paid		Additional Columns			Export Generated		Export Details		ADP Payroll Export	
0 Selected														
<input type="checkbox"/>	Export/Paid Status	Export/Paid Date	Batch ID	Employee Name	Branch	Patient Name	Visit Date	Visit/NVA Task Type	Visit Time					
<input type="checkbox"/>	Exported/Paid	01/11/2020	AX54	Rojas, Lysbeth	Location 2	Rojas, Juvia	12/15/2019	PT Assessment/Evaluation	02:00 AM - 0					
<input type="checkbox"/>	Exported/Paid	01/09/2020	AX52	Rojas, Lysbeth	Location 2	Rojas, Juvia	12/15/2019	OT Assessment/Evaluation	02:00 AM - 0					
<input type="checkbox"/>	Pending Export			Gonzalez, Martha	Location 2	Jones, Mary	12/16/2019	Skilled Nurse Visit	02:00 AM - 02:30					
<input type="checkbox"/>	Pending Export			Hirpara, Divyesh	Location 2	HIRPARA, ROCK	12/16/2019	Skilled Nurse Visit						
<input type="checkbox"/>	Exported/Paid	01/11/2020	AX54	Rojas, Lysbeth	Location 2	Rojas, Alex	12/16/2019	OASIS-D Discharge	02:00 AM - 0					
<input type="checkbox"/>	Pending Export			Caudell, Jeremiah	Location 2	Pressure, Blood	12/17/2019	OASIS-D1 Start of Care	02:15 AM - 03:15					
<input type="checkbox"/>	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.

Employee Name	Visit Time	Travel Time	Mileage Amount
Gonzalez, Martha	02:00 AM - 02:30 AM 	02:00 AM to 03:30 AM 	0.00
Hirpara, Divyesh	<b>EDIT</b> 	<b>SAVE</b> 	0.00

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.

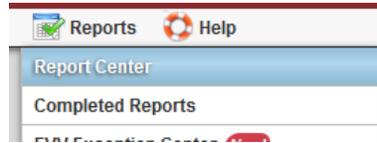
**Payroll Export** - Generates a .csv file as applicable to the vendor (chosen by agency) for processing payroll.

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.

<input type="checkbox"/>	Employee Name	Branch	Patient Name	Visit Date	Visit/NVA Task Type
<input checked="" type="checkbox"/>	Gonzalez, Martha	Location 2	Jones, Mary	12/16/2019	Skilled Nurse Visit
<input checked="" type="checkbox"/>	Hirpara, Divyesh	Location 2	HIRPARA, ROCK	12/16/2019	Skilled Nurse Visit
<input type="checkbox"/>	Caudell, Jeremiah	Location 2	Pressure, Blood	12/17/2019	OASIS-D1 Start of Care
<input type="checkbox"/>	Caudell, Jeremiah	Location 2	Check, Admi	12/17/2019	OASIS-D1 Discharge

## REPORT CENTER

### Reports/Report Center

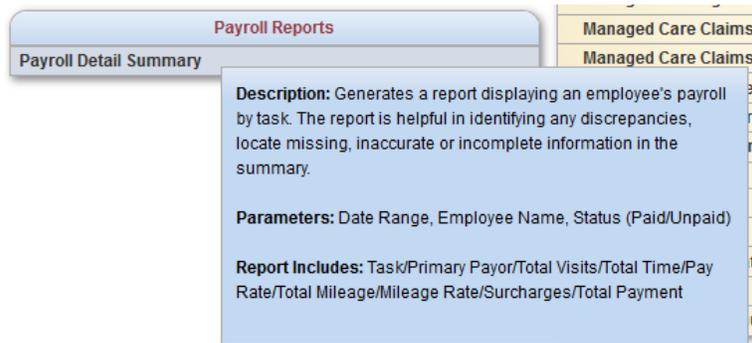


Select the **Report Center**. The Report Center lists multiple reports that can pull up agency data. The reports are grouped into sections based on the type of information it displays.

Patient Reports	Billing/Financial Reports	Statistical Reports
<ul style="list-style-type: none"> <li>Average Length Of Stay</li> <li>Patient Roster</li> <li>Emergency Contact Listing</li> <li>Emergency Preparedness Patient List</li> <li>Patient Birthday Listing</li> <li>Patient Address Listing</li> <li>Patient By Physician Listing</li> <li>Patient Start Of Care Certification Period Listing</li> <li>Patient By Responsible Employee Listing</li> <li>Patient By Responsible Case Manager Listing</li> <li>Expiring Authorizations</li> <li>Survey Census</li> <li>Patient Vital Sign</li> <li>60 Day Summary By Patient</li> <li>Discharge Patients</li> <li>Referral Log</li> <li>Patient List</li> <li>Survey Census (By Date Range)</li> <li>Infection Surveillance Report</li> </ul>	<ul style="list-style-type: none"> <li><b>PDGM:</b></li> <li>LUPA Report (PDGM)</li> <li><b>MONTH-END CLOSE:</b></li> <li>AR Roll Forward</li> <li>Earned Revenue (1 over X Daily Method)</li> <li>Earned Revenue (Completed Visit Method)</li> <li>Earned Revenue (Final Bill Method)</li> <li>Managed Care Earned Revenue (Completed Visit Method)</li> <li>Month End AR</li> <li>Payment/Adjustment Activity</li> <li>Payment/Adjustment Activity Summary</li> <li><b>MEDICARE/ MEDICARE HMO:</b></li> <li>Actual Submitted Claims</li> <li>Billed and Unbilled Revenue</li> <li>Earned and Unearned Revenue</li> <li>Earned Revenue (1/60 Method)</li> <li>Episodic Revenue And Payment</li> <li>Expected Submitted Claims</li> <li>HHRG</li> <li>Low Utilization Payment Adjustment Report</li> <li>Medicare/Medicare HMO Aged Accounts Receivable</li> <li>Medicare/Medicare HMO Aged AR Expanded</li> <li>Medicare/Medicare HMO Payment</li> <li>Medicare/Medicare HMO Unbilled Episode</li> <li>Outstanding Claims</li> <li>Potential Claim Auto Cancel</li> <li>PPS Final Claims Needed</li> <li>PPS RAP Claims Needed</li> <li>Pre-Claim Review</li> <li><b>MANAGED CARE:</b></li> <li>Managed Care Aged Accounts Receivable</li> <li>Managed Care Claims Accounts Receivable</li> <li>Managed Care Claims History By Status</li> <li>Managed Care Payment</li> </ul>	<ul style="list-style-type: none"> <li>Productivity Report</li> <li>Patient Visit History</li> <li>Employee Visit History</li> <li>Census By Primary Insurance</li> <li>Unduplicated Census Report by Start Of Care Date</li> <li>Unduplicated Census Report By Date Range</li> <li>Medicare Cost</li> <li>Patient Admissions By Internal Referral Source</li> <li>Visits By Payor</li> <li>Visits And Charge Summary</li> <li>Visits And Charge Detailed</li> <li>Admission</li> <li>Patient by Discipline Duplicated And Unduplicated</li> <li>HHVBP Advanced Care Plan</li> <li>HHVBP Influenza Vaccine for Employees</li> <li>HHVBP Shingles Vaccine for Patients</li> <li>Supply Report</li> </ul>
<ul style="list-style-type: none"> <li><b>Clinical Reports</b></li> <li>Open OASIS</li> <li>Missed Visit</li> <li>Orders To Be Sent</li> <li>Orders Pending Signature</li> <li>Physician Order History</li> <li>Plan of Care History</li> <li>Therapy Management</li> <li>13th And 19th Therapy Visit Exception</li> <li>13th Therapy Re-evaluation Exception</li> <li>19th Therapy Re-evaluation Exception</li> </ul>		<ul style="list-style-type: none"> <li><b>Annual Survey Report (Missouri)</b></li> <li>PPS Episode Information</li> <li>PPS Visit Information</li> <li>PPS Payment Information</li> <li>PPS Charge Information</li> </ul>
<ul style="list-style-type: none"> <li><b>Payroll Reports</b></li> <li>Payroll Detail Summary</li> </ul>		<ul style="list-style-type: none"> <li><b>Annual Utilization Report (California)</b></li> <li>Patients And Visits By Age</li> <li>Discharges By Reason</li> <li>Primary Payment Source</li> <li>Type of Staff Report</li> <li>Admissions By Referral Source</li> <li>Principal Diagnosis</li> </ul>
		<ul style="list-style-type: none"> <li><b>Employee Reports</b></li> <li>Employee Roster</li> <li>Employee License Listing</li> <li>All Employee License Listing</li> </ul>

**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.



**Payroll Reports**

Managed Care Claims

Managed Care Claims

**Payroll Detail Summary**

**Description:** Generates a report displaying an employee's payroll by task. The report is helpful in identifying any discrepancies, locate missing, inaccurate or incomplete information in the summary.

**Parameters:** Date Range, Employee Name, Status (Paid/Unpaid)

**Report Includes:** Task/Primary Payor/Total Visits/Total Time/Pay Rate/Total Mileage/Mileage Rate/Surcharges/Total Payment

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.

[Reports Home](#)

Payroll Detail Summary ?

Branch: All

Employee Status: Active

Date Range: 5/24/2020 To 6/23/2020

Employee Name: -- Select Employee --

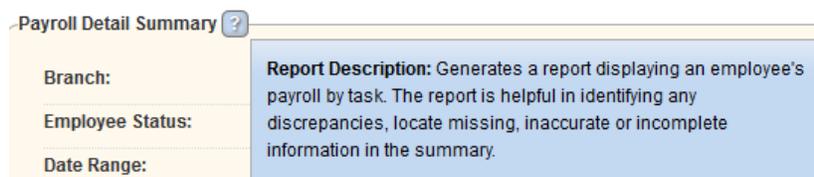
Status: Unpaid

[Generate Report](#)

[Export To Excel](#)

Branch	Task	Primary Payor	Total Visits	Total Time	Pay Rate	Total Mileage	Mileage Rate	Surcharges	Total Payment
--------	------	---------------	--------------	------------	----------	---------------	--------------	------------	---------------

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.



Payroll Detail Summary ?

Branch:

Employee Status:

Date Range:

**Report Description:** Generates a report displaying an employee's payroll by task. The report is helpful in identifying any discrepancies, locate missing, inaccurate or incomplete information in the summary.

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**.

[Reports Home](#)

ArRollForward ?

Branches: Enterprise - Jupiter Request Report

Payors: 9 selected

Date Range: 12/17/2019 To 1/15/2020

Payor Classes: Episodic, Per Visit

Include Total Charges: Yes  No

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

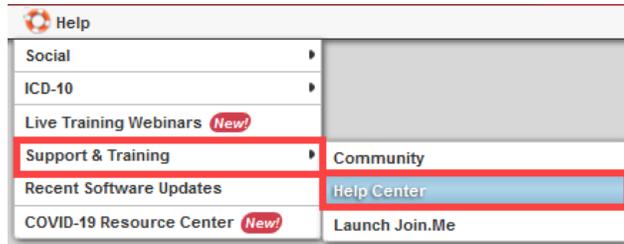
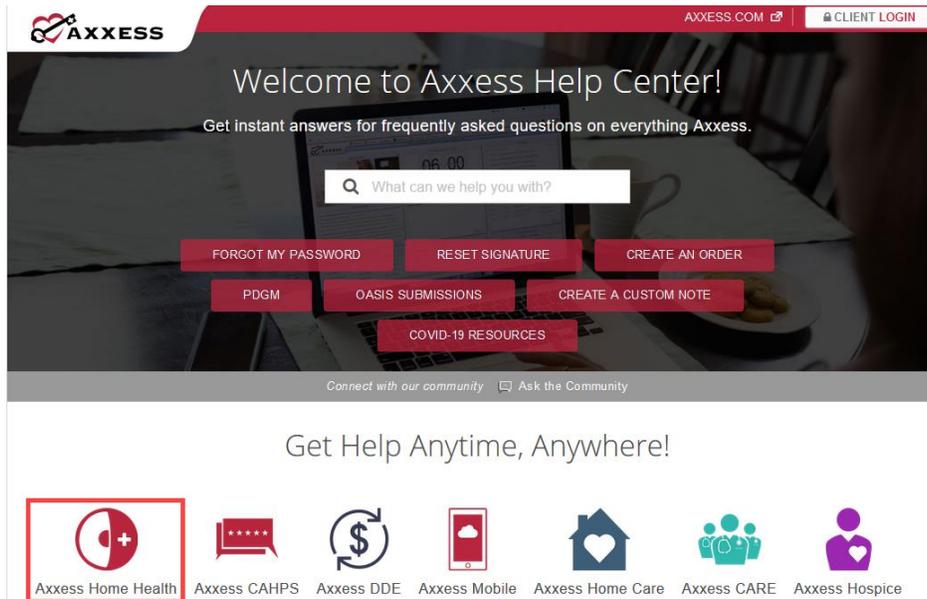
List of Reports   Testing Home Health Agency.						
Start Typing						
Name	Format	Status	Requested By	Started	Completed	Action
<a href="#">AR Roll Forward Report</a>	Excel	Completed	Cj Pierson RN	06/24/2020 04:59:13 PM	06/24/2020 04:59:22 PM	<a href="#">Delete</a>
<a href="#">Month-End AR Report</a>	Excel	Running	Cj Pierson RN	06/24/2020 04:58:51 PM		<a href="#">Delete</a>
<a href="#">CAHPS Report</a>	Excel/CSV	Completed	Cj Pierson RN	09/04/2018 12:44:28 PM	09/04/2018 12:44:30 PM	<a href="#">Delete</a>
<a href="#">Open Oasis Report</a>	Excel	Completed	Cj Pierson RN	07/30/2018 10:25:28 AM	07/30/2018 10:25:40 AM	<a href="#">Delete</a>

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/>

AXXESS.COM CLIENT LOGIN

## Welcome to Axxess Help Center!

Get instant answers for frequently asked questions on everything Axxess.

What can we help you with?

FORGOT MY PASSWORD RESET SIGNATURE CREATE AN ORDER

PDGM OASIS SUBMISSIONS CREATE A CUSTOM NOTE

COVID-19 RESOURCES

Connect with our community Ask the Community

### Get Help Anytime, Anywhere!

 Axxess Home Health
  Axxess CAHPS
  Axxess DDE
  Axxess Mobile
  Axxess Home Care
  Axxess CARE
  Axxess Hospice