

# HOME CARE PAYROLL & REPORTS MANUAL

January 2022

**Table of Contents**

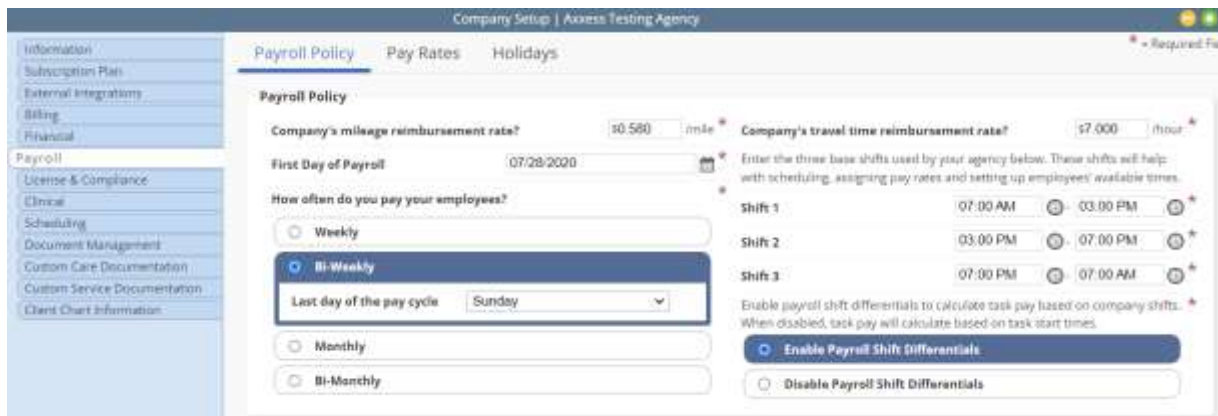
|                              |    |
|------------------------------|----|
| CREATE PAYROLL POLICY.....   | 3  |
| ADD NEW PAY RATES.....       | 5  |
| CREATE PAYROLL HOLIDAYS..... | 7  |
| PROCESSING PAYROLL .....     | 9  |
| REPORT CENTER .....          | 11 |
| COMPLETED REPORTS .....      | 12 |
| HELP CENTER.....             | 14 |

## CREATE PAYROLL POLICY

### *Admin/Company Setup*

The first step in the payroll processing functionality is to create the organization's Payroll Policy. Enter the electronic signature and select **Proceed**.

Select the tab on the left-hand side labeled **Payroll**. Users will be directed to the sub tab **Payroll Policy**. Included in this tab will be several features that will need to be filled in to apply the functionality to the organization's visits.



Mileage Reimbursement Rate - This amount will be the default mileage rate if a rate is not entered in a specific task.

Travel Time Reimbursement Rate - This amount will be the default travel time reimbursement rate if a rate is not entered in a specific task.

First Day of Payroll - Select the calendar and select the first day of the payroll.

How Often are Employees Paid - Select one of the four options to determine how frequently the software will create payroll.

Three Base Shifts - Enter the time or select the clock to display the time ranges for three shifts in the organization.

Payroll Shift Differentials - Enable or disable to calculate task pay based on company shifts

**Rounding Policies**

**Start Time Rounding** Fifteen Minutes (Nearest) ▼  
 Round to the immediately previous or subsequent 15-minute increment, whichever is closest.

**End Time Rounding** Fifteen Minutes (Nearest) ▼  
 Round to the immediately previous or subsequent 15-minute increment, whichever is closest.

**Round by Shift Time (hourly pay)**

**Task Duration Time** 15 Minutes (Nearest) ▼

**Enable Unpaid Meal Breaks**   
 The unpaid meal break feature is for use in facility staffing services. Once enabled it can be associated to payment sources with a staffing payer type and use is restricted to the staffing note.

**Meal Break Length** 30 Minutes ▼

**Shift Duration Requirements** ⓘ

Less than 8 hours not required \*

8 to 10 hours 1 meal break \*

Greater than 10 hours 2 meal breaks \*

**Payroll penalties associated to not receiving the meal break?** ⓘ

Yes  No

**Penalty is**  
30 Minutes ▼  
 This will apply to the staffing base note.

Start and End Time Rounding - Select the drop-down menu to determine how the time (visit time and travel time) is rounded.

Round by Shift Time (hourly pay) - Select the drop-down menu to determine how the shift time tasks are rounded.

Meal Breaks – Enable unpaid meal break feature for use in facility staffing services. Once enabled, determine the length from the drop-down menu.

Shift Duration Requirements – Enter the task duration limit parameter for calculating when unpaid meal breaks should be applied. Then decide if there are payroll penalties associated with not receiving the meal break.

**Maximum Time/Overtime Defaults**

**Maximum Daily Limit:** 8 Hours  
 None  Warning Message  Error & Stop Scheduling \*

**Maximum Weekly Limit:** 40 Hours  
 None  Warning Message  Error & Stop Scheduling \*

**Time-and-a-Half Daily Limit:** 9 Hours  
 None  Warning Message  Error & Stop Scheduling \*

**Time-and-a-Half Weekly Limit:** 16 Hours  
 None  Warning Message  Error & Stop Scheduling \*

**Double Time Daily Limit:** 12 Hours  
 None  Warning Message  Error & Stop Scheduling \*

**Double Time Weekly Limit:** 20 Hours  
 None  Warning Message  Error & Stop Scheduling \*

Maximum Time/Overtime Defaults - These options will determine if users are allowed (warning or error) to complete tasks over their limit (per day and week), and if so, how many hours they are allowed to be paid.

Manage Municipalities - If the organization pays a specific amount for select regions, a unique municipality can be created. The municipality will later be applied to a specific client in this area. Select the **Edit** or **Delete** hyperlink to make updates.



The screenshot shows a web interface titled "Manage Municipalities". At the top, there is a search bar labeled "Filter by Text" with the placeholder text "Start Typing" and a blue button labeled "Add Municipality". Below this is a table with the following data:

| Name                  | Code | Pay Rate | Actions       |
|-----------------------|------|----------|---------------|
| 75418- Dallas         | 01   | \$25.00  | Edit   Delete |
| Addison Branch        | 12   | \$27.00  | Edit   Delete |
| Dade                  | Dad  | \$15.00  | Edit   Delete |
| Delaware Municipality | 000  | \$20.00  | Edit   Delete |

To create a municipality, select the **Add Municipality** button.



The screenshot shows a "New Municipality" form. It includes the following fields:

- Agency Branch: A dropdown menu with the text "-- Select Branch(es) --".
- Code: A text input field.
- Municipality Name: A text input field.
- Minimum Hourly Pay Rate: A text input field with a dollar sign icon.
- Comments: A large text area.

At the bottom of the form, there are two buttons: "Save & Exit" and "Cancel".

Choose the Branch, Enter the Name and Minimum Hourly Pay Rate. Then select **Save & Exit** when complete.

Select **Save** to keep all updates made to the Payroll Policy page.

## **ADD NEW PAY RATES**

*Admin/Company Setup/Payroll/Pay Rates*

Payroll Policy **Pay Rates** Holidays

Branch \*  Employee

Payment Source  Client

Task status

Default Rate  Specific Rate A rate will override this in the future Future rate has been applied

| Task                                  | Sun                              | Mon           | Tue           | Wed           | Thu           | Fri           | Sat                             |
|---------------------------------------|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------------------------|
| AA - Compliance training              | \$22.00/hour                     | \$22.00/hour  | \$22.00/hour  | \$22.00/hour  | \$22.00/hour  | \$22.00/hour  | \$22.00/hour                    |
| AH HHA NOTE                           | \$16.00/hour                     | \$16.00/hour  | \$16.00/hour  | \$16.00/hour  | \$16.00/hour  | \$16.00/hour  | \$16.00/hour                    |
| Aide Visit Note-Training              | \$10.00/hour                     | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour                    |
| alex's                                | \$19.00/visit                    | \$19.00/visit | \$19.00/visit | \$19.00/visit | \$19.00/visit | \$19.00/visit | \$19.00/visit                   |
| Amicus Infusion 60day Recertification | \$12.00/visit<br>7:30 am-3:30 pm |               |               |               |               |               |                                 |
| Anusha HHA Custom visit               | \$12.00/hour<br>7:00 pm-7:00 am  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$10.00/hour  | \$12.00/hour<br>7:00 pm-7:00 am |
| ASAP HHA visit note                   | \$11.50/hour                     | \$11.50/hour  | \$11.50/hour  | \$11.50/hour  | \$11.50/hour  | \$11.50/hour  | \$11.50/hour                    |

Select **New**, and the window below will open, allowing users to create a New Pay Rate.

### New Pay Rate

Branch \*  Task \*

Rate \*   Effective Date

Employee  All

Payment Source  All

Client   All

Shifts \*  Days of the Week \*

Mileage Rate - If not selected, the agency's default rate of 0.58/mile will be used.

Travel Time Rate - If not selected, the agency's default rate of 7/hr will be used.

Select the required criteria to apply to the New Pay Rate:

- Branch(es) - Select one or more if applicable.
- Task - Select the drop-down and choose the task assigned to this rate.
- Rate - Type in the rate that will apply to this task and select the unit from the drop-down.

- Effective Date - Select the calendar or enter the date this rate will begin to take effect.
- Choose Employee - Select the employee(s) this rate will apply to by selecting the box(es). Search or scroll to find employee(s).
- Choose Payment Source - Select the payer(s) this rate will apply to by selecting the box(es). Search or scroll to find payer(s).
- Choose Client - Select the client(s) this rate will apply to by selecting the box(es). Search or scroll to find client(s).
- Choose Shifts - Select the shift(s) this rate will apply to by selecting the box(es). Search or scroll to find shift(s).
- Choose Days of the Week - Select the day(s) this rate will apply to by selecting the box(es). Search or scroll to find day(s).
- Mileage Rate - If a specific mileage rate applies to this task, select the box on the left-hand side. A box will appear, allowing a specific rate to be entered. If a rate is not entered, the default rate from the Payroll Policy will be applied.
- Travel Time - If a specific travel time rate applies to this task, select the box on the left-hand side. A box will appear, allowing a specific rate to be entered. If a rate is not entered, the default rate from the Payroll Policy will be applied.

Select **Save & Close** to complete or select **Save & Add Another** to keep your progress and input more rates.

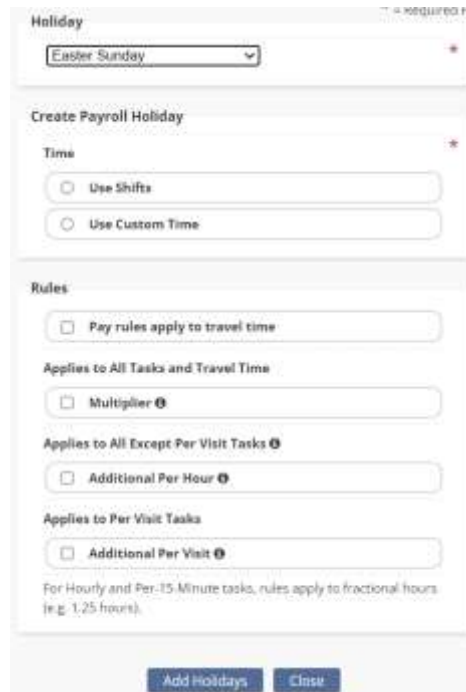
## **CREATE PAYROLL HOLIDAYS**

*Admin/Company Setup/Payroll/Holidays*

| Name                                  | Shifts          | Occurrence Rule                               | Next Date - Travel Time                       | Actions                    |
|---------------------------------------|-----------------|---|---|----------------------------|
| New Year's Day                        | One, Two, Three | Every January 1                               | 1/1/2023 <span style="color: red;">✘</span>   | Edit   Delete   Deactivate |
| Christmas Day                         | One, Two, Three | Every December 25                             | 12/25/2022 <span style="color: red;">✘</span> | Edit   Delete   Deactivate |
| Christmas Eve                         | One, Two, Three | Every December 24                             | 12/24/2022 <span style="color: red;">✘</span> | Edit   Delete   Deactivate |
| Test Holiday                          | One             | Every December 24                             | 12/24/2022 <span style="color: red;">✘</span> | Edit   Delete   Deactivate |
| Day After Thanksgiving (Black Friday) | One, Two, Three | The Fourth Thursday in November, 1 Day Offset | 11/25/2022 <span style="color: red;">✘</span> | Edit   Delete   Deactivate |
| Thanksgiving Day                      | One, Two, Three | The Fourth Thursday in November               | 11/24/2022 <span style="color: red;">✘</span> | Edit   Delete   Deactivate |


To set up a Payroll Holiday, select the **New** or **Add Default Holidays** buttons.

**Add Default Holidays** - Axxess will provide a list of holidays commonly used. Select one of these holidays and a window will open, allowing the user to select the criteria wanted to apply to this Payroll Holiday. Select the **Edit**, **Delete** or **Deactivate** hyperlinks to make updates to the current list.



Create Payroll Holiday - Depending on if **Use Shifts** or **Use Custom Time** is selected, Axxess will require further time descriptions to be entered.

Rules - If specific rules apply to this holiday, select the box on the left-hand side and a checkmark will appear.

**NOTE:** If not sure what each rule means, hover over the info  icon next to the rule and a short description will appear.

Once the criteria are chosen, select **Add Holidays**.

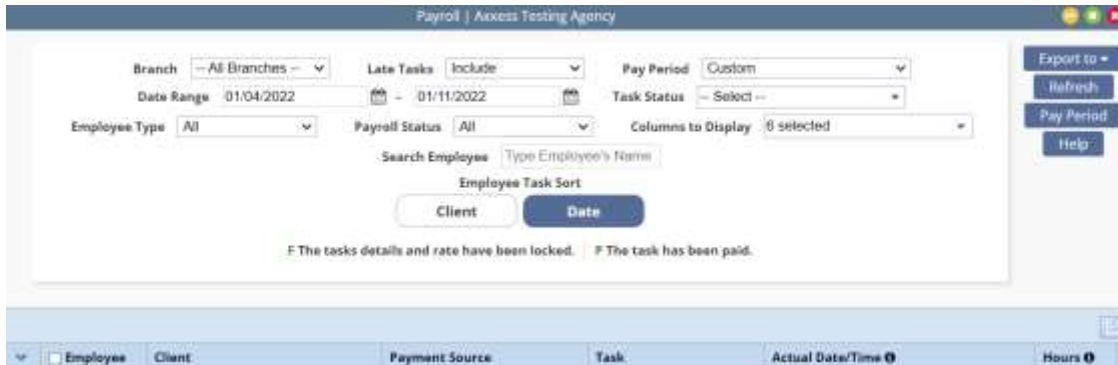
**New** - This will allow organizations to create a customized Payroll Holiday that is not currently listed in Axxess. Once **New** is selected, the same functionality will apply to creating a unique Payroll Holiday.



## PROCESSING PAYROLL

### *Employees/Payroll*

The box below will appear, allowing a search to be completed from specific criteria.



The screenshot shows a web application interface for payroll processing. At the top, it says "Payroll J Axxess Testing Agency". Below this are several filter sections: "Branch" (dropdown: All Branches), "Late Tasks" (dropdown: Include), "Pay Period" (dropdown: Custom), "Date Range" (calendar: 01/04/2022 - 01/11/2022), "Task Status" (dropdown: Select), "Employee Type" (dropdown: All), "Payroll Status" (dropdown: All), and "Columns to Display" (dropdown: 0 selected). There is a "Search Employee" field with a placeholder "Type Employee's Name". Below that are "Employee Task Sort" buttons for "Client" and "Date". At the bottom of the filter area, there are two status indicators: "The tasks details and rate have been locked." and "The task has been paid." On the right side, there are buttons for "Export to", "Refresh", "Pay Period", and "Help". At the very bottom, there is a table header with columns: Employee, Client, Payment Source, Task, Actual Date/Time, and Hours.

- Branch - Select a specific branch from the drop-down list (if more than one).
- Late Tasks - Select if late tasks will be included in this search from the drop-down list.
- Pay Period – Choose custom which requires a date range or choose periods from the drop-down list.
  - If the Pay Period is not listed, select the **Pay Period** button, enter the Start and End Date and then select **Create**.
- Task Status - Select one or multiple statuses from the drop-down list.
- Employee Type - Select one or multiple employee types from the drop-down list.
- Payroll Status - Select one or multiple payroll statuses from the drop-down list.
- Columns to display - Select one or multiple columns to display from the drop-down list.
- Search Employee - Type in the name of the employee this Payroll Report is being created for.

**NOTE:** Axxess will not allow Pay Periods to overlap, so if this date range is already covered in another Pay Period, an error message will appear.

Once all the Payroll Report filters are displaying the correct search criteria, select **Refresh** to generate the Payroll.

To mark the task as Paid, it must first be Finalized. Follow the steps below:

1. **Edit Payroll** - Before Finalizing Payroll, users can Edit the details. Select the box on the left-hand side of the Client/Employee task to be edited. Then select the **Edit Payroll** button at the bottom of the screen.



When **Edit Payroll** is selected, users will be able to make changes to the actual date/time of the task. Once edits are completed, select the **Save** button.



2. **Finalize Payroll** - After edits have been made, select the box to the left side of the client/employee name and select the **Finalize Payroll** button.



A green **F** will appear next to the client's name. Choose to **Un-Finalize Payroll** or **Mark as Paid**. Users cannot edit tasks that have already been finalized. They would need to be un-finalized and then edited.

3. **Mark as Paid** - Once a task has been finalized, select **Mark as Paid**. A green **P** will appear next to the client's name. Once the task is marked as paid, select the **Send Paystub(s)** button.

| Employee                | Client          | Payment Source    | Task                  | Actual Date/Time               | Hours |
|-------------------------|-----------------|-------------------|-----------------------|--------------------------------|-------|
| Abbot, Matt RN (46w456) |                 |                   |                       |                                |       |
| 1                       | ABRAMS, JUANITA | Private(Self) Pay | Custom Visit - Mobile | 07/13/2020 03:00 PM - 07:00 PM | 4.00  |

Total: 1 of 512 Checked

[Edit Payroll](#)
[Un-Finalize Payroll](#)
[Finalize Payroll](#)
[Mark as Paid](#)
[Send Paystub\(s\)](#)

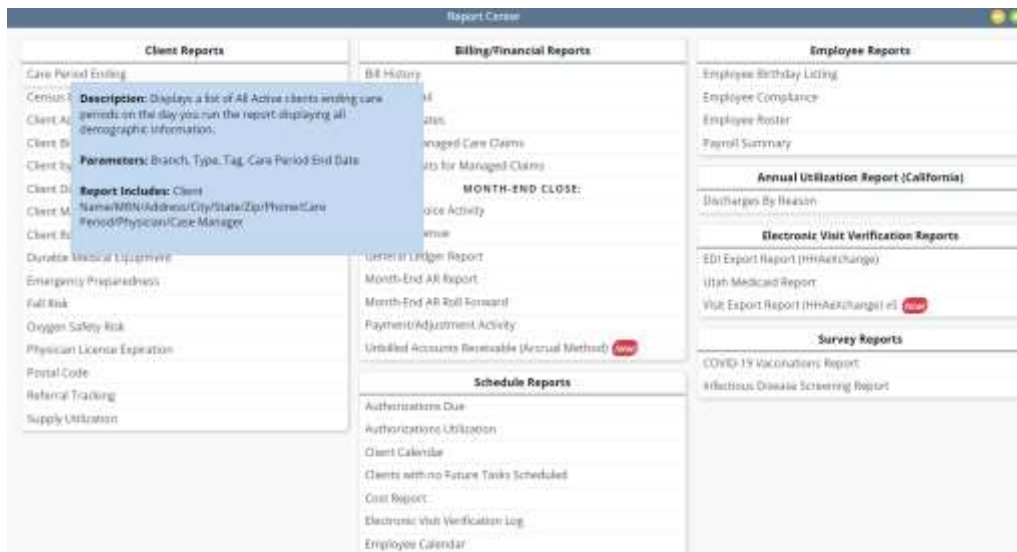
A green confirmation box will appear in the upper right-hand corner of the screen displaying the following message:



## REPORT CENTER

### Reports/Report Center

Select the Report Center. The Report Center list multiple reports that can pull an organization’s data. The reports are grouped into sections based on the type of information they display.



**NOTE:** Viewable reports are based on the user roles (User setup is covered in Admin Overview).

For more information about what data the report is displaying, hover over the report name. A blue box will appear, giving more details. Select the name of the report and a new window will open allowing users to generate the report.

Client Roster | Report Center

Branch: Dallas | Status: Active | Generate | Excel Export | Reports Home

Tags: -- Select -- | Payment Source: -- Select --

Type: All | Columns to Display: 8 selected

Matching Criteria: -- Select --

| MRN         | Client -        | Type        | Address   | Email Address      | Status | SOC        | DOB        |
|-------------|-----------------|-------------|---|--------------------|--------|------------|------------|
| GD611192030 | ABABA, JESS L.  | Non-Medical | 16000 Dallas Parkway, Suite 700N Dallas, TX 75248 |                    | Active | 07/22/2021 | 03/12/1990 |
| AA74800     | ABEL, AMY       | Medical     | 2001 Custer Rd.                                   |                    | Active | 09/01/2020 | 02/01/1955 |
| 0A071421    | ABJO, TOFUNMI   | Medical     | 1717 E Belt Line Road                             |                    | Active | 07/14/2021 | 03/17/1980 |
| 11222       | ABRAMS, JUANITA | Non-Medical | 2101 Laurel St                                    |                    | Active | 10/11/2017 | 12/14/2001 |
| love123     | ADAM, BILDAD    | Medical     | 200 Majestic Eagle Dr                             | ssobush@axxess.com | Active | 01/04/2018 | 01/01/1920 |
| 00003       | ADAM, MARCIE    | Medical     | 2101 Laurel St                                    |                    | Active | 05/16/2017 | 03/12/1990 |
| KE082721    | ADAMS, JACK     | Non-Medical | 352 N Hwy 67                                      |                    | Active | 04/05/2021 | 09/01/1955 |

Once the desired criteria has been chosen, select **Generate**. 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. 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 *Reports/Report Center* and select the report to create.
- Fill in the search criteria, then select **Generate Report**.

Schedule Summary | Report Center

Branch: Dallas | Payment Source: -- Select -- | Generate Report | Reports Home

Date Range: [ ] - [ ] | Summary Type: -- Select --

Client: -- Select -- |  Include Revenue

\* Note: Tasks scheduled with no time will default to 1 hour.

- Now that the report has been requested, it will be in the Completed Reports list. Select the **Refresh** button in the top right or icon in the bottom left to update the window.

The status column will show when a report has finished pulling 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 has “Completed,” select the report **Name** and the report will open.

To view the report, select the hyperlink text listed under the **Name** column. To remove the report, select the **Delete** hyperlink to the far right under the Action column. To remove multiple hyperlinks, check the box(es) next to the report and select the **Delete** button.

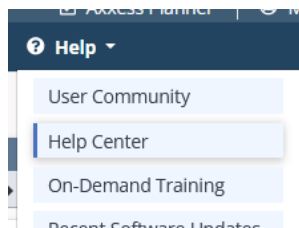


| <input type="checkbox"/>            | Name                             | Format | Status    | Requested By  | Started               | Completed             | Action |
|-------------------------------------|----------------------------------|--------|-----------|---------------|-----------------------|-----------------------|--------|
| <input checked="" type="checkbox"/> | <a href="#">Schedule Summary</a> | Excel  | Completed | Cj Pierson RN | 1/11/2022 04:14:35 PM | 1/11/2022 04:14:36 PM | Delete |
| <input type="checkbox"/>            | <a href="#">Schedule Summary</a> | Excel  | Completed | Cj Pierson RN | 11/2/2021 09:27:14 AM | 11/2/2021 09:27:15 AM | Delete |
| <input type="checkbox"/>            | <a href="#">Schedule Summary</a> | Excel  | Completed | Cj Pierson RN | 7/27/2020 10:28:59 AM | 7/27/2020 10:28:59 AM | Delete |

## HELP CENTER

### *Help/Help Center*

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all of Axxess' products. It can be accessed by going to:



Or also available at <https://www.axxess.com/help/>

