HOSPICE PAYROLL TRAINING MANUAL
March 2022

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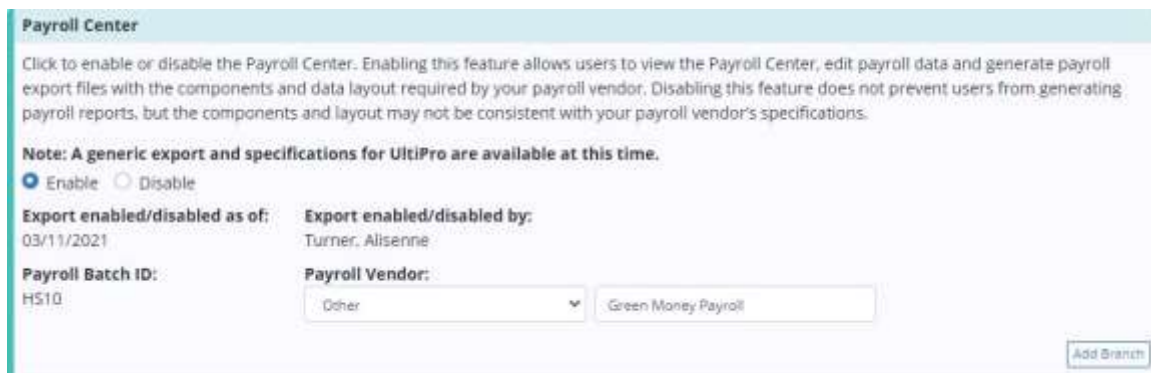
SETUP

Admin/Company Setup/Payroll/Payroll Center

Axxess Hospice provides a robust Payroll Center that enables users to generate payroll export files with the data elements and formatting required by the organization's payroll vendor. The Payroll Center must be enabled in the organization's Company Setup payroll settings.
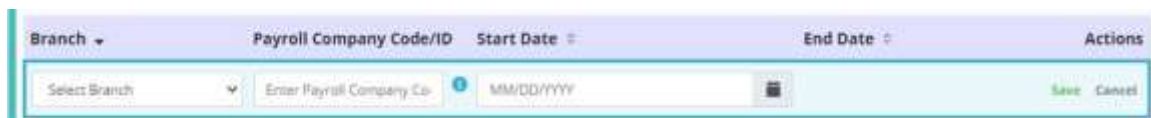
Confirm that the correct provider is selected in the provider filter at the top of the screen and select **Enable** in the Payroll Center section.

Select the appropriate vendor in the payroll vendor drop-down menu. The selected payroll vendor will determine the format and specifications included in payroll file exports. Vendor-specific export files are available for vendors listed in the payroll vendor menu. If the organization's payroll vendor is not present in the drop-down menu, select other and enter the name of the payroll vendor in the text field next to the payroll vendor menu. The selected payroll vendor can be changed any time in Company Setup.

Select **Add Branch** to associate a payroll company code/ID to the payroll branches within the organization. Select the branch, enter the payroll company code/ID (provided by the payroll vendor) and enter the start date. Then select **Save**.
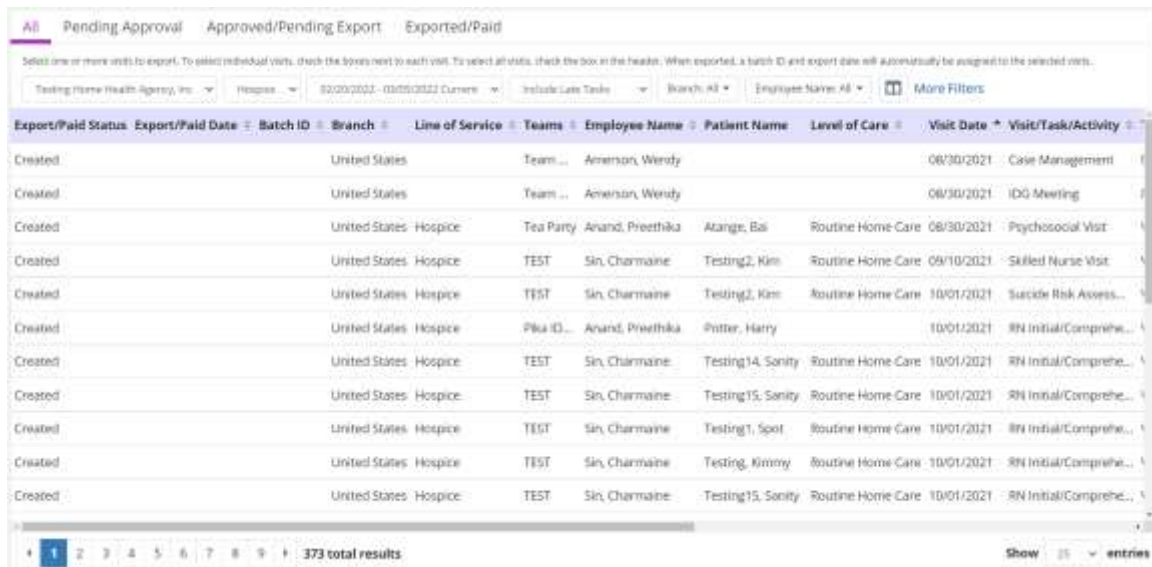
Users can edit, delete or deactivate payroll company codes/IDs using the ✏️, 🗑️ and 🚫 icons under Actions. Select **Save** at the bottom of the screen to finish enabling the Payroll Center.

PAYROLL CENTER
People/Payroll Center

To access the Payroll Center, users must have permission to view, add and edit company payroll. Users can toggle between the **All**, **Pending Approval, Approved/Pending Export** and **Exported/Paid** tabs at the top of the Payroll Center. The **All** tab shows visits and non-patient activity (NPA) tasks in all statuses. The **Pending Approval** tab shows visits and NPA tasks that need to be approved. The **Approved/Pending Export** tab shows visits and NPA tasks that have not been exported. The **Exported/Paid** tab shows visits and NPA tasks that have been exported and marked as paid.

On each tab, users can filter by provider, service line, date range, whether to include late tasks, branch and employee name. Select **More Filters** to expand the filter options by payer, credentials, employment type, visit pay type, visit status and type of activity. Select **Less Filters** to collapse the extra filters.
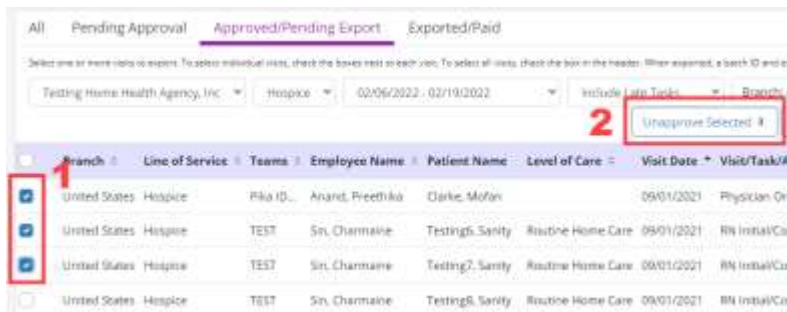
PENDING APPROVAL
To approve a payroll task, select the box next to the task on the left side of the screen. Once all desired tasks have been selected, select **Approve Selected.**
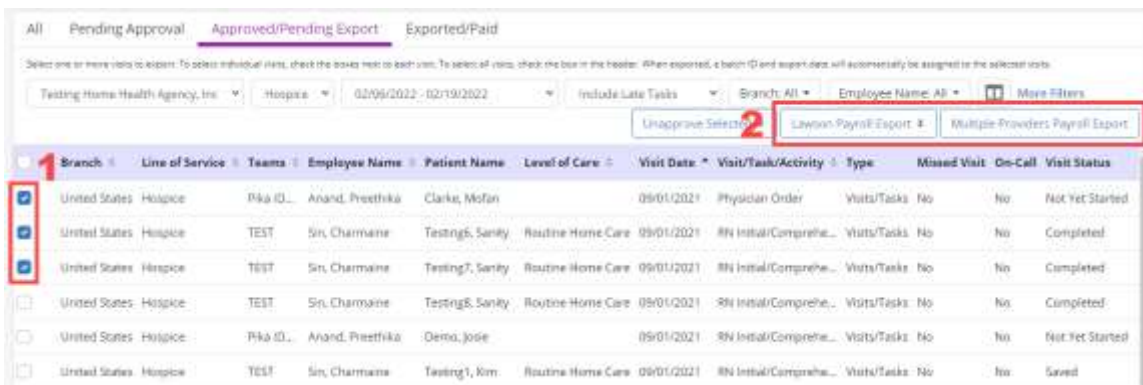
The selected tasks will move to the **Approved/Pending Export** tab. To unapprove payroll tasks, navigate to the **Approved/Pending Export** tab in the Payroll Center. Select the boxes next to the desired tasks and select **Unapprove Selected**. The selected tasks will move back to the **Pending Approval** tab.
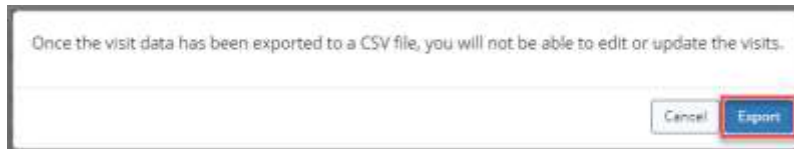

APPROVED/PENDING EXPORT

Users can export visits and non-patient activities from the **All** and **Approved/Pending Export** tabs. To export visits or NPA tasks, check the boxes next to the visits/tasks you want to export and select **General Payroll Export**, **Lawson Payroll Export** or **Multiple Providers Payroll Export** (options depend on the organization's vendor).

NOTE: If your organization is interested in generating vendor-specific export files for a payroll vender other than UltiPro or Lawson, contact your Axxess account manager or sales representative, or enter an enhancement ticket through our Support Ticketing Center.

Select **Export** in the confirmation pop-up to finish exporting the selected visits/tasks.

When exported, a batch ID and export date will automatically be assigned to the selected visits. The exported visits/tasks will move from the **Approved/Pending Export** tab to the **Exported/Paid** and **All** tabs. The system will generate a payroll export CSV file that the user can save and edit.

EXPORTED/PAID

The **Exported/Paid** tab shows all the exported visits/tasks with the updated status of paid, the export/paid date and batch ID.

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 on all our Axxess products. Our Help Center can be accessed by selecting *Help/Help Center* or https://www.axxess.com/help/