

# **HOSPICE PAYROLL TRAINING MANUAL**

March 2022

**Table of Contents**

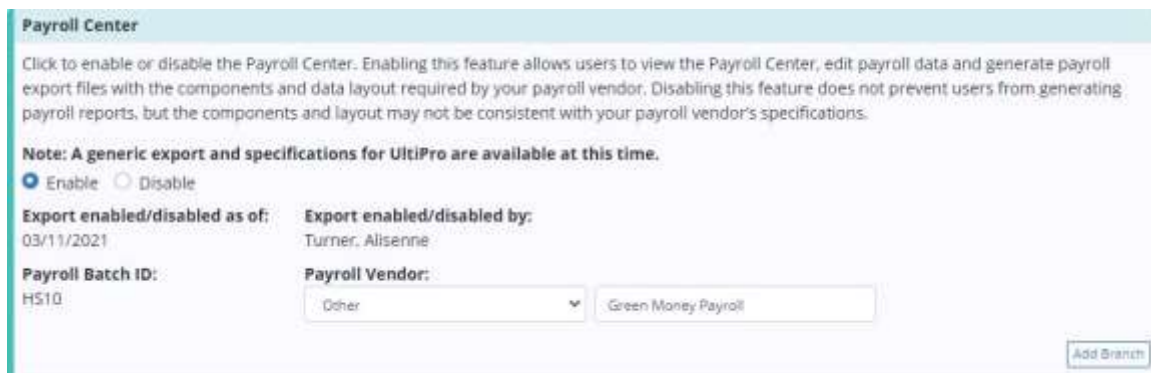
SETUP .....	3
PAYROLL CENTER .....	4
PENDING APPROVAL.....	4
APPROVED/PENDING EXPORT.....	5
EXPORTED/PAID .....	6
HELP CENTER.....	7

## 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.

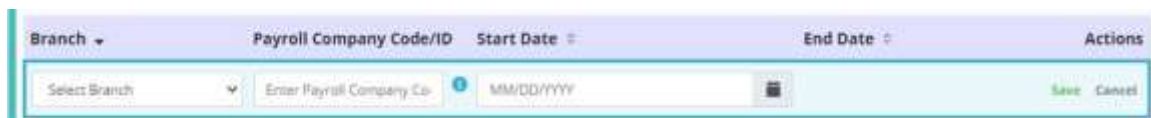
Confirm that the correct provider is selected in the provider filter at the top of the screen and select **Enable** in the Payroll Center section.






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**.

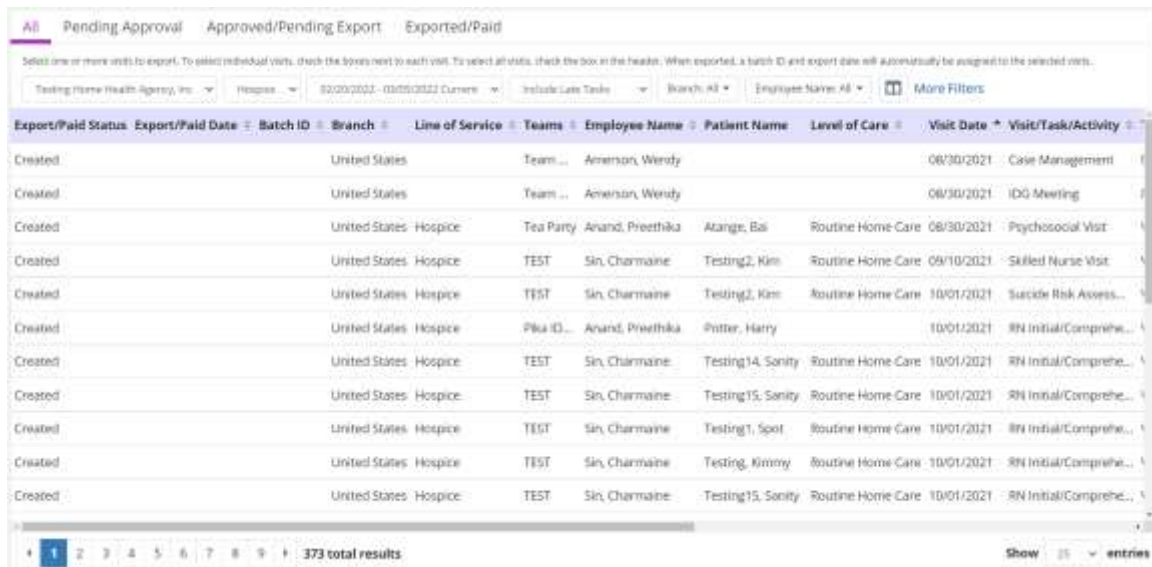


Users can edit, delete or deactivate payroll company codes/IDs using the ,  and  icons under Actions. Select **Save** at the bottom of the screen to finish enabling the Payroll Center.

## 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.

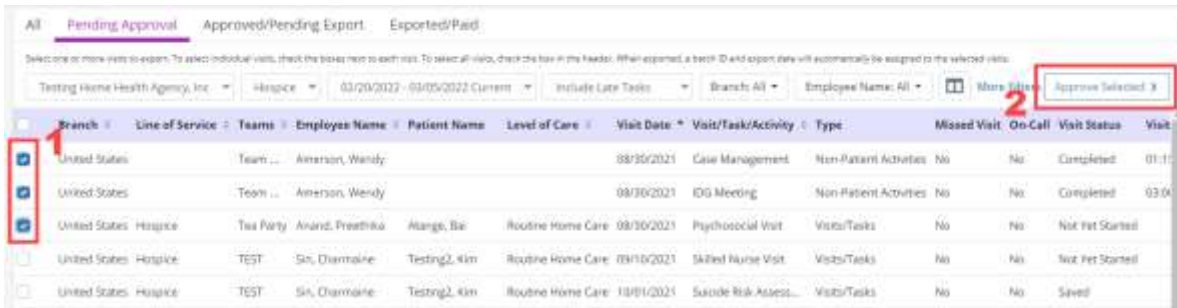


Export/Paid Status	Export/Paid Date	Batch ID	Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity
Created			United States		Team ...	Amerson, Wendy			08/30/2021	Case Management
Created			United States		Team ...	Amerson, Wendy			08/30/2021	IDQ Meeting
Created			United States Hospice		Tea Party	Anand, Preethika	Atange, Bill	Routine Home Care	08/30/2021	Psychosocial Visit
Created			United States Hospice		TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	09/10/2021	Skilled Nurse Visit
Created			United States Hospice		TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	10/01/2021	Suicide Risk Assess...
Created			United States Hospice		Pika ID...	Anand, Preethika	Prater, Harry		10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sin, Charmaine	Testing14, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sin, Charmaine	Testing15, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sin, Charmaine	Testing1, Spot	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sin, Charmaine	Testing, Jimmy	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sin, Charmaine	Testing15, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...

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.

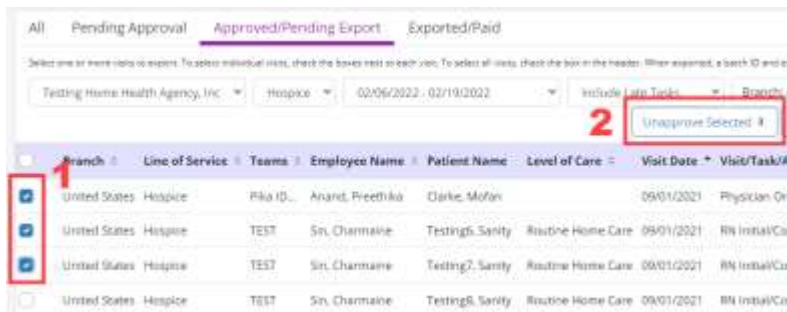
## PENDING APPROVAL

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**.



Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type	Missed Visit	On-Call	Visit Status	Visit
<input checked="" type="checkbox"/>	United States	Team ...	Amerson, Wendy			08/30/2021	Case Management	Non-Patient Activities	No	No	Completed	01:15
<input checked="" type="checkbox"/>	United States	Team ...	Amerson, Wendy			08/30/2021	IDG Meeting	Non-Patient Activities	No	No	Completed	03:04
<input checked="" type="checkbox"/>	United States	Hospice	Tea Party Anand, Preethika	Atango, Bai	Routine Home Care	08/30/2021	Psychosocial Visit	Visits/Tasks	No	No	Not Yet Started	
<input type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	08/10/2021	Skilled Nurse Visit	Visits/Tasks	No	No	Not Yet Started
<input type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	10/01/2021	Suicide Risk Assess...	Visits/Tasks	No	No	Saved

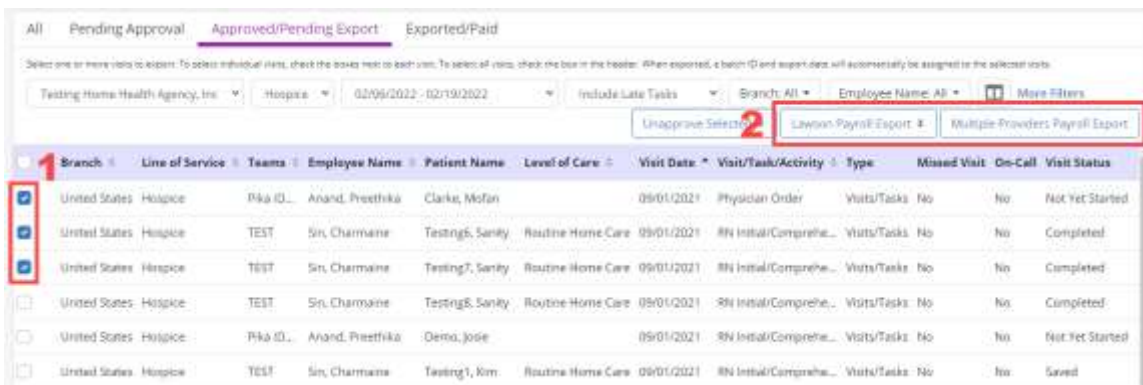
The selected tasks will move to the **Approved/Pending Export** tab. To unapprove payroll tasks, navigate to the **Approved/Pending Export** tab in the Payroll Center. Select the boxes next to the desired tasks and select **Unapprove Selected**. The selected tasks will move back to the **Pending Approval** tab.



Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type	Missed Visit	On-Call	Visit Status	Visit
<input checked="" type="checkbox"/>	United States	Hospice	Pka ID...	Anand, Preethika	Clarke, Mofan	08/01/2021	Physician Order	Visits/Tasks	No	No	Not Yet Started	
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing5, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing7, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	
<input type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing8, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	

## APPROVED/PENDING EXPORT

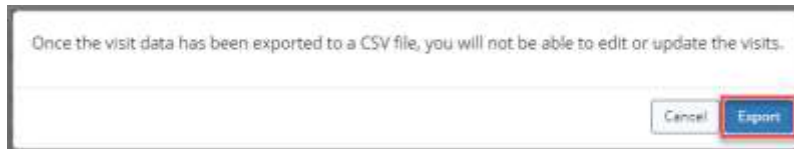
Users can export visits and non-patient activities from the **All** and **Approved/Pending Export** tabs. To export visits or NPA tasks, check the boxes next to the visits/tasks you want to export and select **General Payroll Export**, **Lawson Payroll Export** or **Multiple Providers Payroll Export**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



Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type	Missed Visit	On-Call	Visit Status	Visit
<input checked="" type="checkbox"/>	United States	Hospice	Pka ID...	Anand, Preethika	Clarke, Mofan	08/01/2021	Physician Order	Visits/Tasks	No	No	Not Yet Started	
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing5, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing7, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	
<input type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing8, Sanity	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Completed	
<input type="checkbox"/>	United States	Hospice	Pka ID...	Anand, Preethika	Demo, Josee	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	No	Not Yet Started	
<input type="checkbox"/>	United States	Hospice	TEST	Sn, Charmaine	Testing1, Kim	Routine Home Care	08/01/2021	RN Initial/Compre...	Visits/Tasks	No	Saved	

**NOTE:** If your organization is interested in generating vendor-specific export files for a payroll vendor 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.

Export/Paid Status	Export/Paid Date	Batch ID	Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type
Paid	02/22/2022	H5514	United States	Hospice	FruiteSal...	Sin, Charmaine	aaron, kusan		09/01/2021	Clinical Evaluation/L...	Visits/Ta
Paid	03/03/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing, Kim		09/01/2021	RN Initial/Comprehe...	Visits/Ta
Paid	02/22/2022	H5514	United States		Abby T...	Sin, Charmaine			09/01/2021	IDG Meeting	Non-Pat...
Paid	03/02/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing2, Sarity	Routine Home Care	09/02/2021	Homecare Visit	Visits/Ta
Paid	02/02/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	09/08/2021	Psychosocial Visit	Visits/Ta

5 total results

Show 25 entries

## 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/>

