

# **HOME CARE PAYROLL AND REPORTS TRAINING MANUAL**

December 2022

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## CREATE PAYROLL POLICY

*Admin/Company Setup/Payroll*

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 side labeled **Payroll**. Users will be directed to the subtab **Payroll Policy**. Included in this tab are several features that need to be filled in to apply the functionality to the organization’s visits.



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

Pay Period - Identifies how often employees are paid. Select one of the four options to determine how frequently the software will create payroll and select the last day of the pay period. Select the bubble icon next to Time and enter a time to split any visits that occur on the last day of the pay period into two separate pay periods.

Pay Period ⓘ \*

Weekly

Bi-Weekly

Last day of the pay period

Time ⓘ  12:00 AM \*

Monthly

Bi-Monthly

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.

Enter the three base shifts used by your agency below. These shifts will help with scheduling, assigning pay rates and setting up employees' available times.

Shift 1	07:00 AM	-	03:00 PM	*
Shift 2	03:00 PM	-	11:00 PM	*
Shift 3	11:00 PM	-	07:00 AM	*

Enable payroll shift differentials to calculate task pay based on company shifts. When disabled, task pay will calculate based on task start times. \*

Enable Payroll Shift Differentials

Disable Payroll Shift Differentials

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

Mileage and Travel Time Calculator - Choose whether to automatically calculate mileage, travel time, or both, and which users should receive mileage and or travel time calculations for reimbursement. Enter a date in the effective date field to indicate which visits should be calculated. Check the boxes to include mileage, travel time, or both. Under "Include Mileage" and "Include Travel Time" select employees by title or individually in the "Allowed Employees Manager" field to indicate which employees should be reimbursed for mileage and or travel time.

Mileage and Travel Time

Mileage Reimbursement Rate \* 0.500 per mile/km

Travel Time Reimbursement Rate \* 5.00 per hour

Mileage and Travel Time Calculator

Enable  Disable

Once this feature is enabled, mileage and travel time will automatically be calculated for all visits scheduled on or after the effective date entered.

Effective Date \* 11/01/2022

Include Mileage

This section provides a quick way to manage which employees will be paid mileage.

Allowed Employees Manager

Julie Gaut RN, Vikas Sorawane RN

Include Travel Time

This section provides a quick way to manage which employees will be paid travel time.

Allowed Employees Manager

Oluzakayode Osugbemi, Julie Gaut RN and 23 more

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 for task duration time 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 parameter for calculating when unpaid meal breaks should be applied. Then decide if there are payroll penalties associated with not receiving the meal break.

**Rounding Policies**

<b>Start Time Rounding</b> Fifteen Minutes (Nearest) ▼ <small>Round to the immediately previous or subsequent 15-minute increment, whichever is closest.</small>	<b>End Time Rounding</b> Fifteen Minutes (Nearest) ▼ <small>Round to the immediately previous or subsequent 15-minute increment, whichever is closest.</small>
<b>Round by Shift Time (hourly pay)</b> <input checked="" type="checkbox"/>	
<b>Task Duration Time</b> 15 Minutes (Backwards) ▼	
<b>Enable Unpaid Meal Breaks</b> <input checked="" type="checkbox"/> <small>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.</small>	
<b>Meal Break Length</b> 30 Minutes ▼	
<b>Shift Duration Requirements</b> ⓘ	
Less than <input type="text"/> hours not required *	
<input type="text"/> to <input type="text"/> hours 1 meal break *	
Greater than <input type="text"/> hours 2 meal breaks *	
Payroll penalties associated to not receiving the meal break? ⓘ	
<input type="radio"/> Yes <input checked="" type="radio"/> No	

Maximum Time/Overtime Defaults - These options 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.

**Maximum Time/Overtime Defaults:**

<b>Maximum Daily Limit:</b> 8 Hours <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling *	<b>Maximum Weekly Limit:</b> 40 Hours <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling *
<b>Time-and-a-Half Daily Limit:</b> 8 Hours <input type="radio"/> None <input checked="" type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling *	<b>Time-and-a-Half Weekly Limit:</b> 16 Hours <input type="radio"/> None <input checked="" type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling *
<b>Double Time Daily Limit:</b> 9 Hours <input type="radio"/> None <input type="radio"/> Warning Message <input checked="" type="radio"/> Error & Stop Scheduling *	<b>Double Time Weekly Limit:</b> 20 Hours <input type="radio"/> None <input type="radio"/> Warning Message <input checked="" type="radio"/> Error & Stop Scheduling *

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

Manage Municipalities

Filter by Text  [Add Municipality](#)

Name -	Code	Pay Rate	Actions
75418- Dallas	01	\$7.25	<a href="#">Edit</a>   <a href="#">Delete</a>
Addison Branch	12	\$52.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Dallas H	15	\$10.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Denton County		\$21.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Far out patient	GG	\$12.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Grand Prairie	03	\$27.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Lagos		\$20.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Test	123	\$33.00	<a href="#">Edit</a>   <a href="#">Delete</a>
Texas	TEX	\$20.00	<a href="#">Edit</a>   <a href="#">Delete</a>

[Save](#) [Close](#)

Choose the branch, code, municipality name and minimum hourly pay rate. Then select **Save & Exit** to complete. Select **Save** to keep all updates made to the Payroll Policy page.

New Municipality

Agency Branch

Code

Municipality Name

Minimum Hourly Pay Rate

Comments

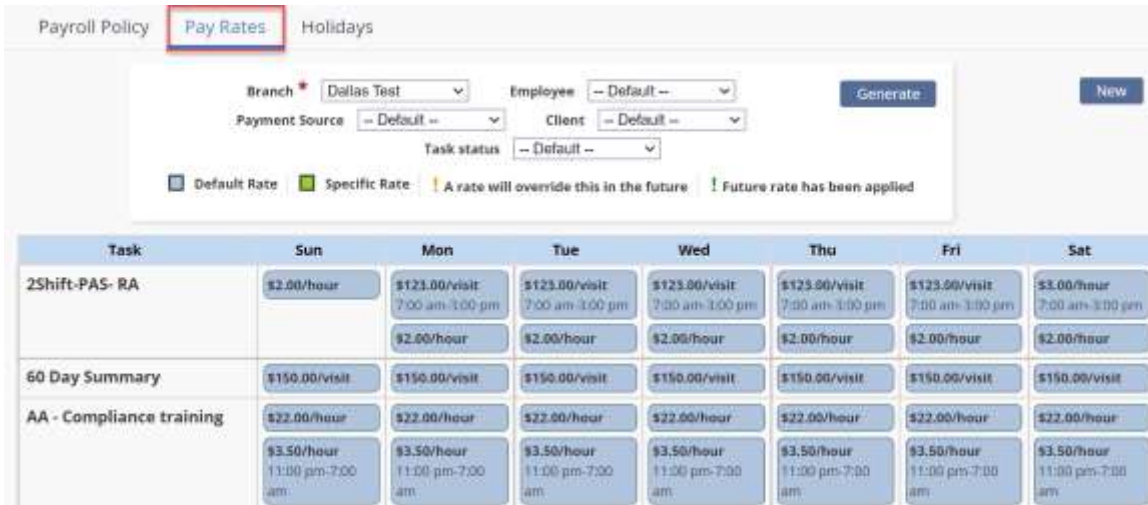
You have 250 characters remaining

[Save & Exit](#) [Cancel](#)

## ADD NEW PAY RATES

*Admin/Company Setup/Payroll/Pay Rates*

Select **Pay Rates** at the top of the page. Users can filter by branch, employee, payment source, client, and task status for previously entered pay rates. Select **Generate** to reload pay rates.



Payroll Policy **Pay Rates** Holidays

Branch:  Employee:

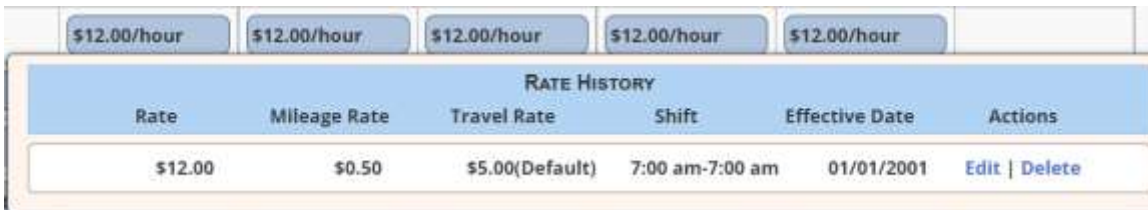
Payment Source:  Client:

Task status:

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

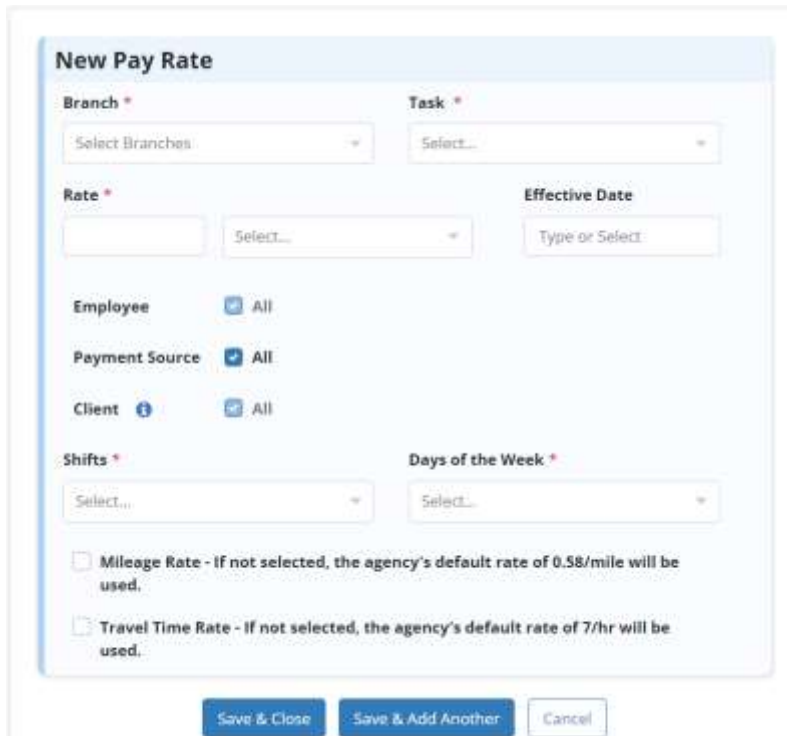
Task	Sun	Mon	Tue	Wed	Thu	Fri	Sat
2Shift-PAS- RA	\$2.00/hour	\$123.00/visit 7:00 am-3:00 pm	\$123.00/visit 7:00 am-3:00 pm	\$123.00/visit 7:00 am-3:00 pm	\$123.00/visit 7:00 am-3:00 pm	\$123.00/visit 7:00 am-3:00 pm	\$3.00/hour 7:00 am-3:00 pm
60 Day Summary	\$150.00/visit	\$150.00/visit	\$150.00/visit	\$150.00/visit	\$150.00/visit	\$150.00/visit	\$150.00/visit
AA - Compliance training	\$22.00/hour	\$22.00/hour	\$22.00/hour	\$22.00/hour	\$22.00/hour	\$22.00/hour	\$22.00/hour
	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am	\$3.50/hour 11:00 pm-7:00 am

Hover over the existing pay rates to review the rate history, select **Edit** or **Delete**.



Rate	Mileage Rate	Travel Rate	Shift	Effective Date	Actions
\$12.00	\$0.50	\$5.00(Default)	7:00 am-7:00 am	01/01/2001	<a href="#">Edit</a>   <a href="#">Delete</a>

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 the rate.
- Rate - Type in the rate that will apply to the task and select the unit from the drop-down.
- Effective Date - Select the calendar or enter the date the rate will begin to take effect.
- Employee - Select the employee(s) the rate will apply by typing their name and selecting the box or choose to select all.
- Payment Source - Select the payer(s) the rate will apply to by selecting the box(es). Search or scroll to find payer(s) or choose to select all.
- Client - Select the client(s) the rate will apply to by typing their name and selecting the box(es) or choose to select all.
- Shifts - Select the shift(s) the rate will apply to by selecting the box(es). Search or scroll to find shift(s).
- Days of the Week - Select the day(s) the rate will apply to by selecting the box(es). Search or scroll to find the day(s).
- Mileage Rate - If a specific mileage rate applies to the task, select the box on the left 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.

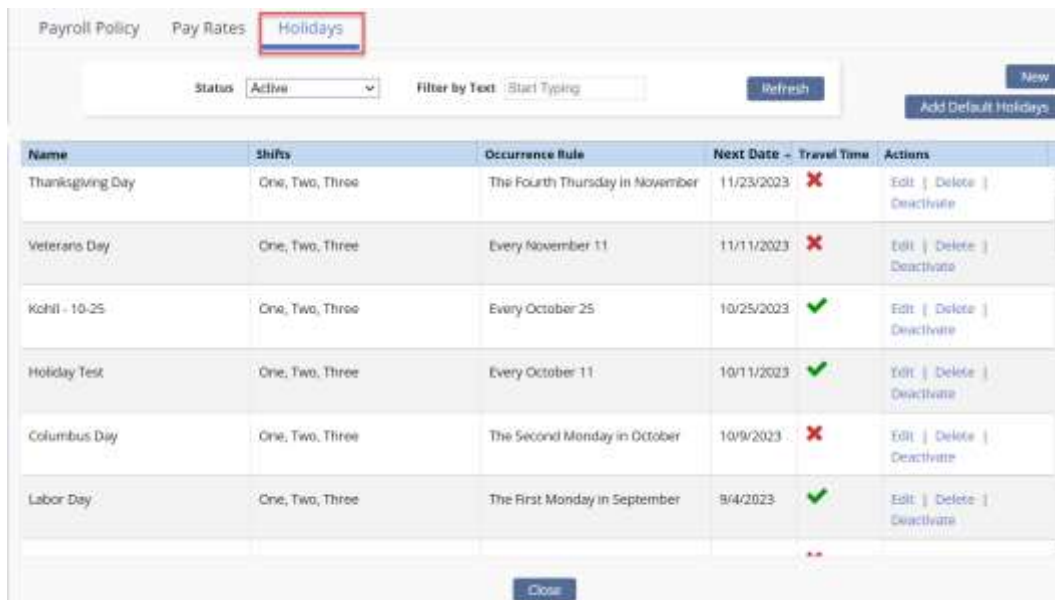
- **Travel Time** - If a specific travel time rate applies to the task, select the box on the left side. A box will appear, allowing a specific rate to be entered. If a rate is not entered, the default rate from the payroll policy will be applied.

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

## **CREATE PAYROLL HOLIDAYS**

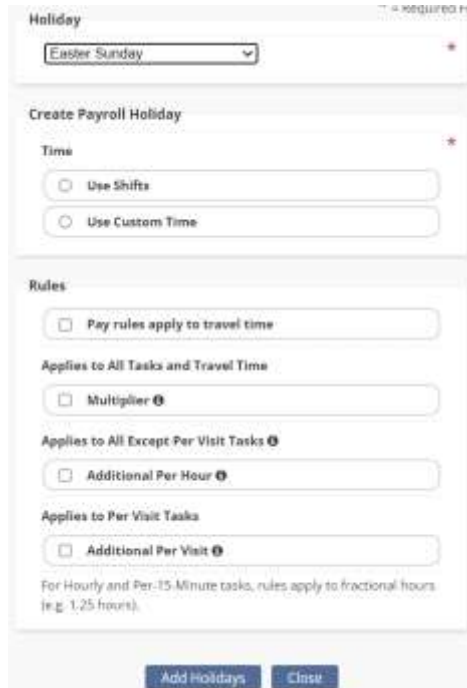
*Admin/Company Setup/Payroll/Holidays*

Select **Holidays** from the top of the page. The list shows the name of the holiday, the shift(s) it applies to, occurrence rules, the next day of occurrence, if travel time applies and actions to **Edit**, **Delete** or **Deactivate**. To set up a payroll holiday, select the **New** or **Add Default Holidays** buttons.




Name	Shifts	Occurrence Rule	Next Date	Travel Time	Actions
Thanksgiving Day	One, Two, Three	The Fourth Thursday in November	11/23/2023	✗	Edit   Delete   Deactivate
Veterans Day	One, Two, Three	Every November 11	11/11/2023	✗	Edit   Delete   Deactivate
Kohll - 10-25	One, Two, Three	Every October 25	10/25/2023	✓	Edit   Delete   Deactivate
Holiday Test	One, Two, Three	Every October 11	10/11/2023	✓	Edit   Delete   Deactivate
Columbus Day	One, Two, Three	The Second Monday in October	10/9/2023	✗	Edit   Delete   Deactivate
Labor Day	One, Two, Three	The First Monday in September	9/4/2023	✓	Edit   Delete   Deactivate

**Add Default Holidays** - Axxess provides 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*

Select **Payroll** from the **Employees** navigation bar. The box below will appear, allowing a search to be completed from specific criteria.



The screenshot shows the 'Payroll' interface for 'Axxess Testing Agency'. It features several filter sections:
 

- Branch:** Dallas Test
- Late Tasks:** Include
- Pay Period:** 11/17/2022 - 12/17/2022 (Current)
- Task Status:** -- Select --
- Employee Type:** All
- Pay Type:** All
- Payroll Status:** All
- Columns to Display:** 6 selected
- Search Employee:** Type Employee's Name
- Employee Task Sort:** Client, Date

 On the right side, there are buttons for 'Export to', 'Refresh', 'Pay Period', and 'Help'. At the bottom, there is a legend: 'F The tasks details and rate have been locked. P The task has been paid.'

- **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 periods from the drop-down list. Current pay period is set by default.
  - 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.
- **Pay Type** – Select one or multiple pay 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 the payroll report is being created for.
- **Employee Task Sort** – Sort tasks by client or date.

**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.

<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid
<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid
19 Checked		<input type="button" value="Edit Payroll"/> <input type="button" value="Un-Finalize Payroll"/>

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

Payment Source	Task	Actual Date/Time
invoice mitali demo	service plan-mit	1 11/17/2022 12:45 AM
		11/17/2022 01:45 AM
	PT Pediatric Discharge	11/17/2022 09:45 AM
		11/17/2022 10:45 AM
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

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

<input checked="" type="checkbox"/> Employee	Client	Payment Source	Task
<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid	Custom
<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid	Custom
<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid	Custom
<input checked="" type="checkbox"/>	MALONE, DUKE	OHIO Medicaid	Custom
Total: 239 of 239 Checked		<input type="button" value="Edit Payroll"/> <input type="button" value="Un-Finalize Payroll"/> <input type="button" value="Finalize Payroll"/>	

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.

<input type="checkbox"/> Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Greehan, Maura RN					
<input checked="" type="checkbox"/> 1	HAMMON- AXCESS ACADEMY, BECKY	Dept Of Veterans Affairs West	HHA Note	11/21/22 08:00 AM - 09:01 AM	1.02
<input type="checkbox"/> P	HAMMON- AXCESS ACADEMY, BECKY	Dept Of Veterans Affairs West	Non-OASIS Start of Care	11/21/22 08:00 AM - 10:15 AM	2.25
<input type="checkbox"/> P	HAMMON- AXCESS ACADEMY, BECKY	Dept Of Veterans Affairs West	HHA Note	11/28/22 03:15 PM - 03:46 PM	0.52
Total: 1 of 239 Checked		<input type="button" value="Edit Payroll"/> <input type="button" value="Un-Finalize Payroll"/> <input type="button" value="Finalize Payroll"/> <input type="button" value="Mark as Paid"/> <input type="button" value="Send Paystub(s)"/>			

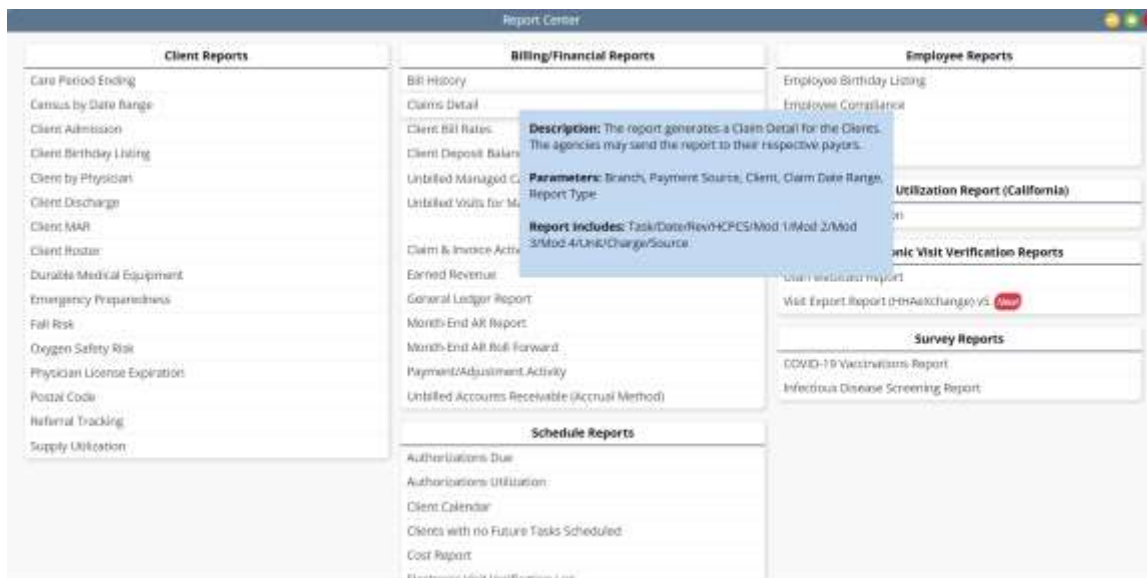
A green confirmation box will appear in the upper right-hand corner of the screen displaying the following message:



## REPORT CENTER

### Reports/Report Center

The Report Center lists 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 Test | Status: Active  
 Tags: -- Select -- | Payment Source: -- Select --  
 Type: All | Columns to Display: 8 selected  
 Matching Criteria: -- Select --

Generate  
 Excel Export  
 Reports Home

MRN	Client	Type	Address	City/Town	State	Postal Code	Phone
R079M021522	AARONSEN, AARON TEST	Medical	10793 Kingsford Ln	Frisco	TX	75035	(214) 221-7747
CA10272020	ABAS, PATIENT	Medical	014 Samballo St	Dallas City		80000	1235486965
LeandroA111522	ABDALA, LEANDRO	Medical	16000 Dallas Pkwy	Dallas	TX	75248	(214) 575-7711
AA74800	ABEL, AMY	Medical	15249 Preston Rd	Dallas	TX	75248	(214) 914-1909
CarlA04142022	ABELLANOSAS, CARL ADRIANE	Medical	16000 Dallas Pkwy	Dallas	TX	75248	(214) 575-7711
Chinwe A 061700	ABIA, CHINWE	Medical	16000 Dallas Pkwy	Dallas	TX	75248	(214) 575-7711
CA071421	ABJO, TOPUNMI	Medical	1717 E Bell Line Road	Dallas	TX	75248	(706) 495-9210
11222	ABRAMS, JUANITA	Non-Medical	2101 Laurel St	Melrose	TX	75454	(214) 575-7712
JosephA01122022	ACHONU, JOSEPH	Medical	16000 Dallas Pkwy	Dallas	TX	75248	(701) 580-2161

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

Schedule Summary | Report Center

Schedule Summary

Select Branches: -- | Select Payers: -- | Select Clients: -- | Select Summary Type: --

Time Frame:  Date Range  Quarterly

Date Range: 10/17/2022 - 01/16/2023

Include Revenue  
 Include Payer Summary

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

Generate Reports Home

- 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. User running the report will receive a notification email once the report is completed. The following status descriptions will appear:

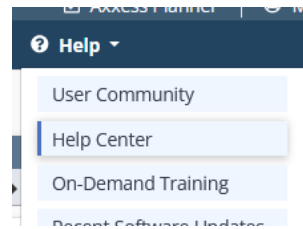
- Running - The report has been requested and is still pulling the data to the report.
- Completed - The report has finished pulling all the data and users can view the Final report. Once the report has “Completed,” select the report **Name** and the report will open.

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.



**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/>

