HOME CARE
PAYROLL AND REPORTS
TRAINING MANUAL

December 2022

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CREATE PAYROLL POLICY

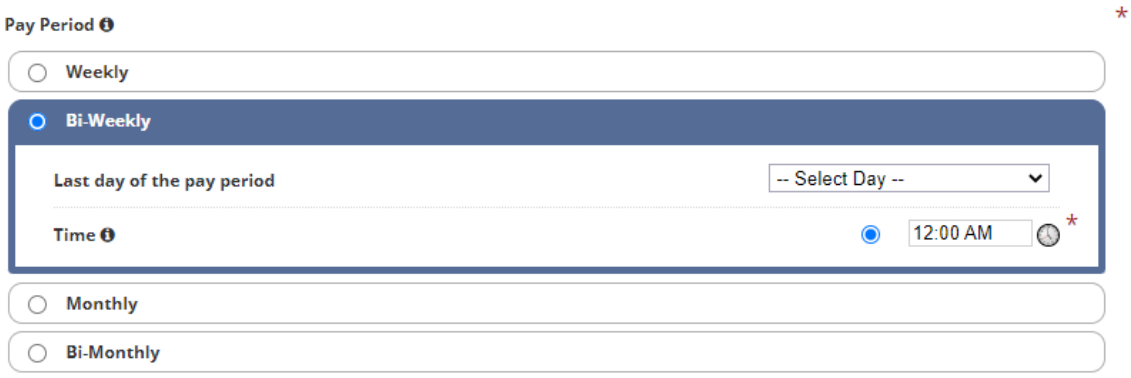
Admin/Company Setup/Payroll

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.



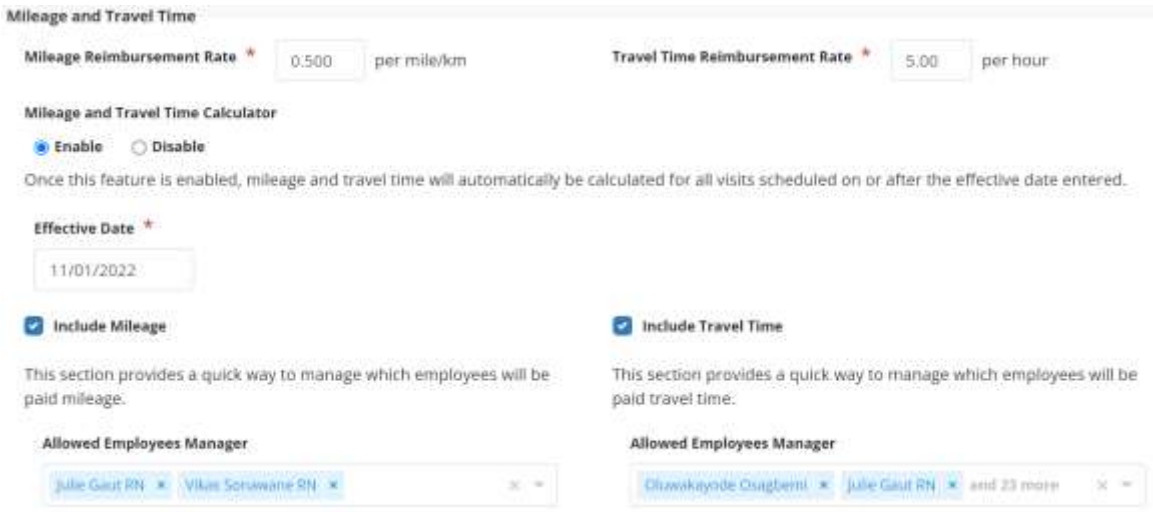
Three Base Shifts - Enter the time or select the clock to display the time ranges for three shifts in the organization.

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

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.

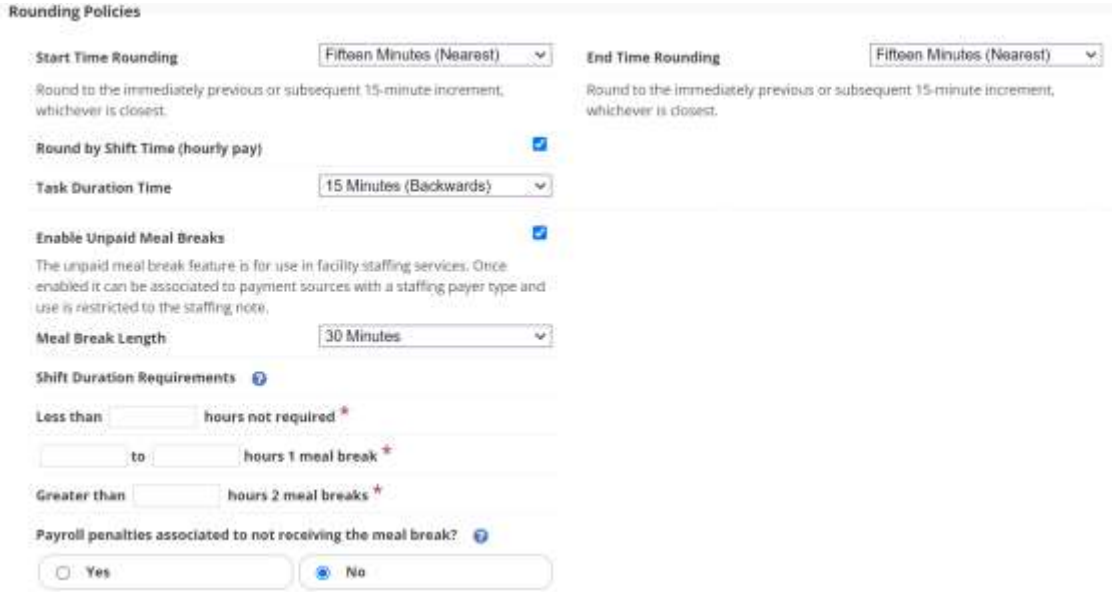


Start and End Time Rounding - Select the drop-down menu to determine how the time (visit time and travel time) is rounded.

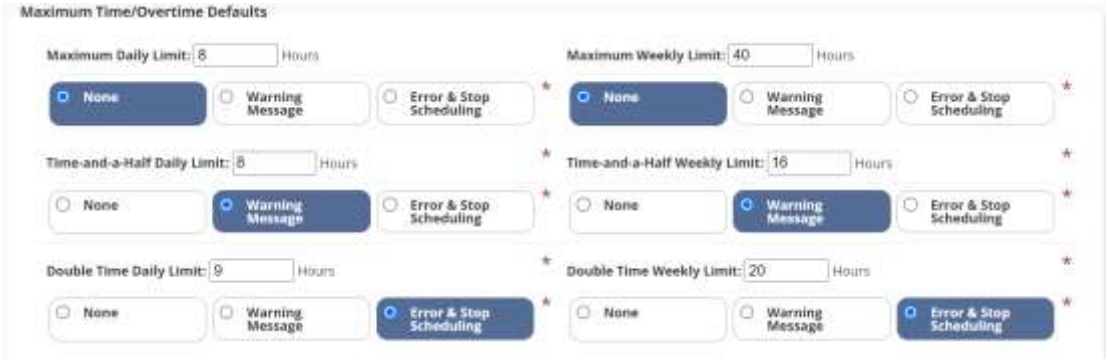
Round by Shift Time (hourly pay) - Select the drop-down menu for task duration time to determine how the shift time tasks are rounded.

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.



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.



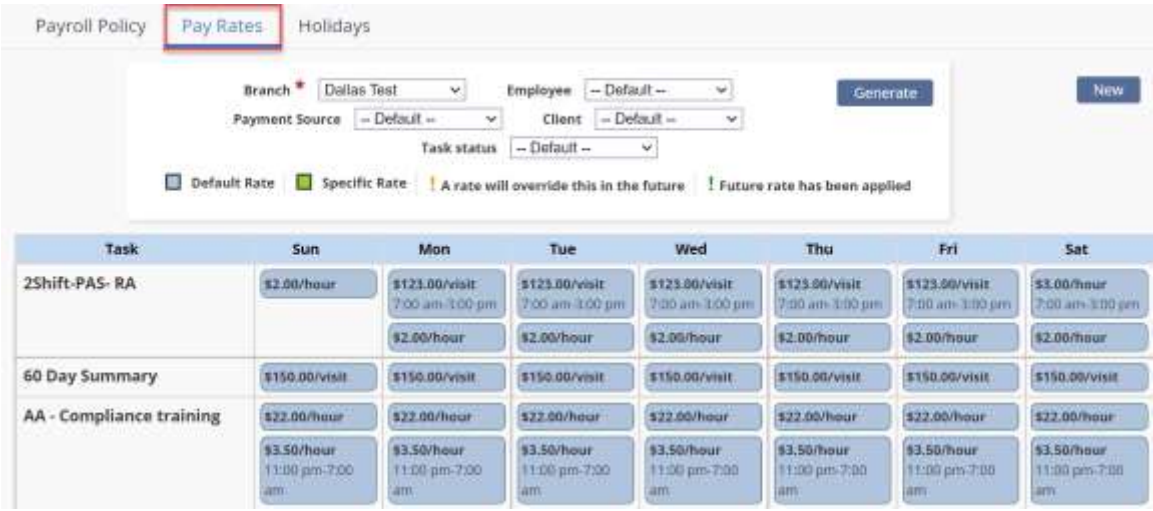
Manage Municipalities - If the organization pays a specific amount for select regions, a unique municipality can be created. The municipality will later be applied to a specific client in this area. Select the **Edit** or **Delete** hyperlink to make updates. To create a municipality, select the **Add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

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.

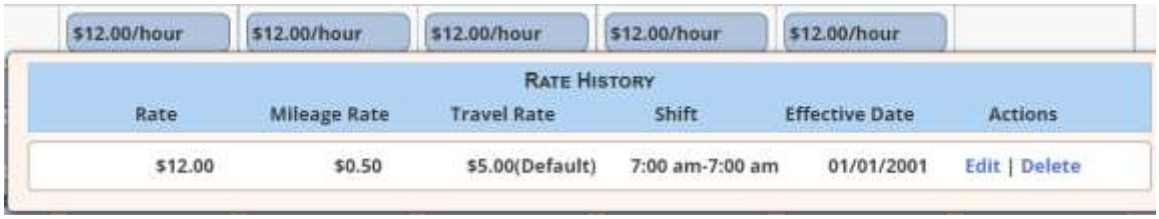
ADD NEW PAY RATES

Admin/Company Setup/Payroll/Pay Rates

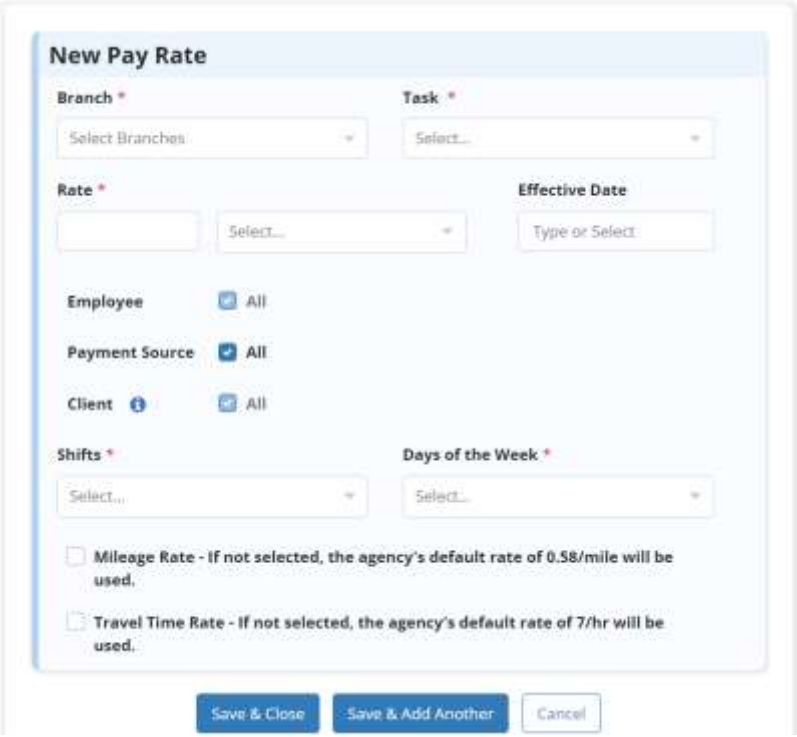
Select **Pay Rates** at the top of the page. Users can filter by branch, employee, payment source, client, and task status for previously entered pay rates. Select **Generate** to reload pay rates.



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



Select **New,** and the window below will open, allowing users to create a new pay rate.



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.

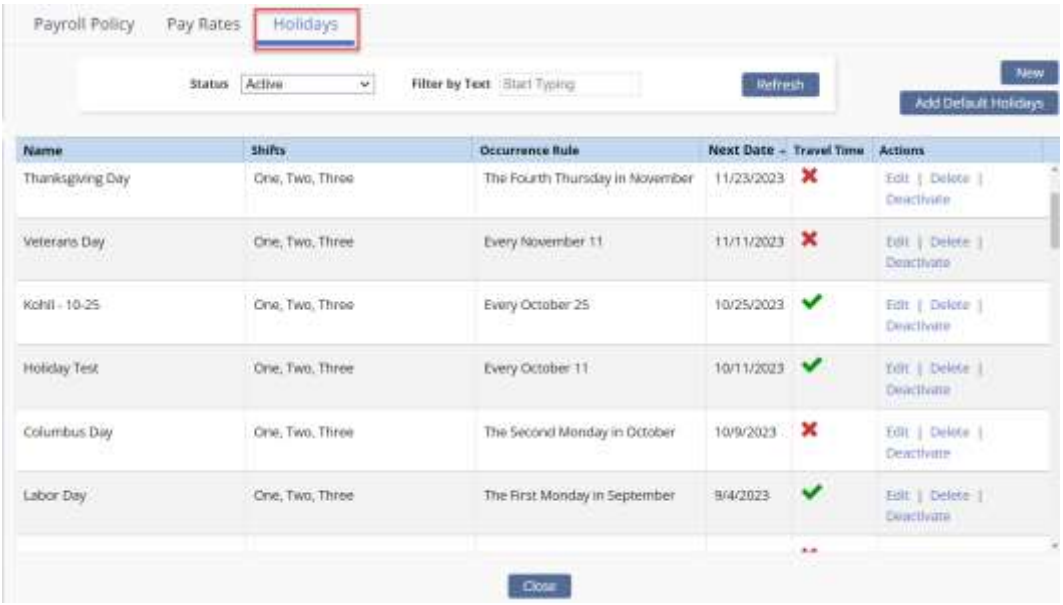
- Travel Time - If a specific travel time rate applies to the task, select the box on the left side. A box will appear, allowing a specific rate to be entered. If a rate is not entered, the default rate from the payroll policy will be applied.

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

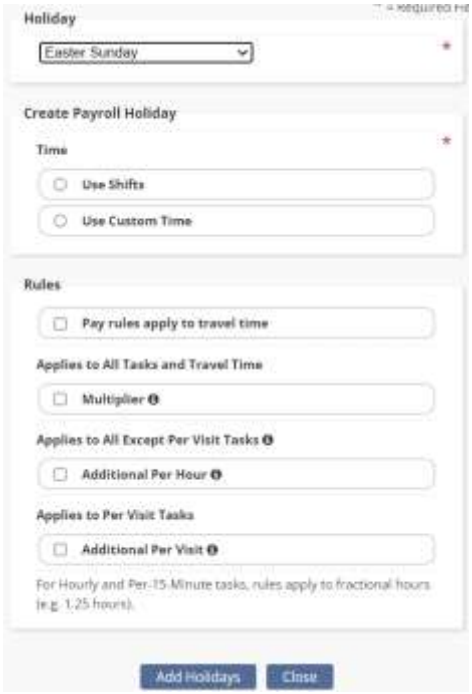
CREATE PAYROLL HOLIDAYS

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, occurance rules, the next day of occurance, 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.



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.

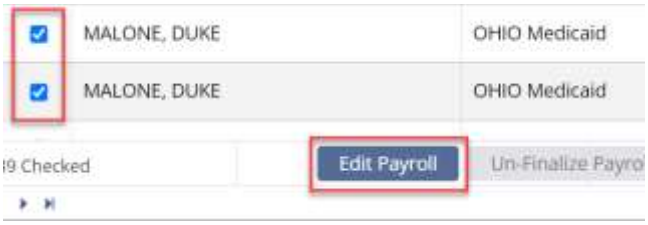
- Branch - Select a specific branch from the drop-down list (if more than one).
- Late Tasks - Select if late tasks will be included in this search from the drop-down list.
- Pay Period - Choose periods from the drop-down list. Current pay period is set by default.
    - If the pay period is not listed, 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.



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.

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

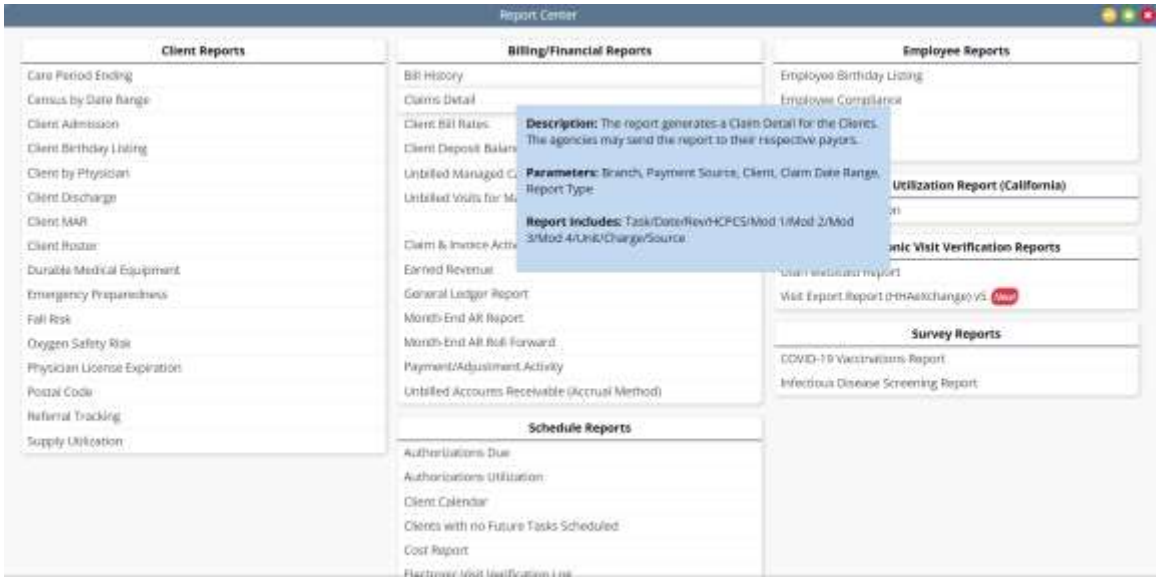
3. Mark as Paid - Once a task has been finalized, select **Mark as Paid**. A green **P** will appear next to the client's name. Once the task is marked as paid, select the **Send Paystub(s)** button.

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

REPORT CENTER

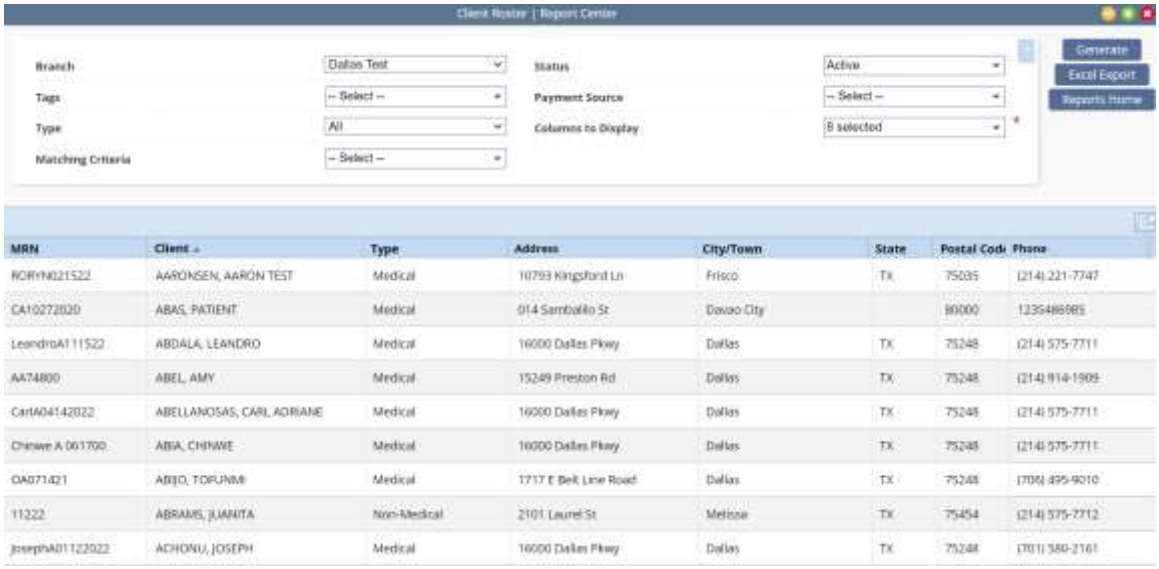
Reports/Report Center

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.



Once the desired criteria have been chosen, select **Generate**. The report will display on the bottom of the screen.

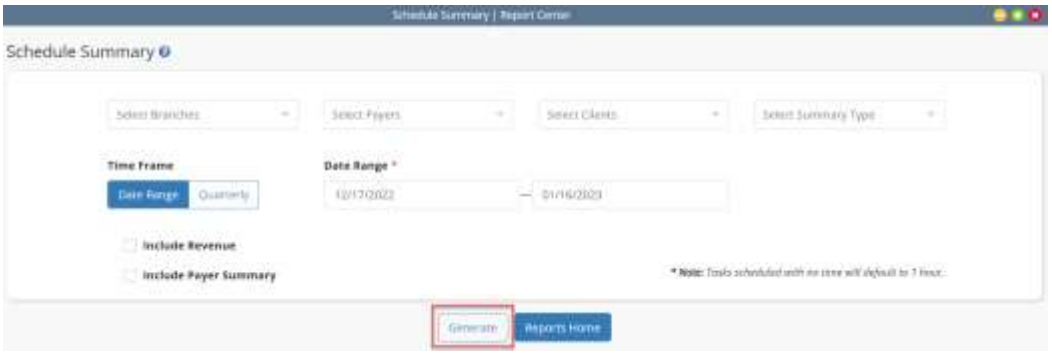
COMPLETED REPORTS

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**.

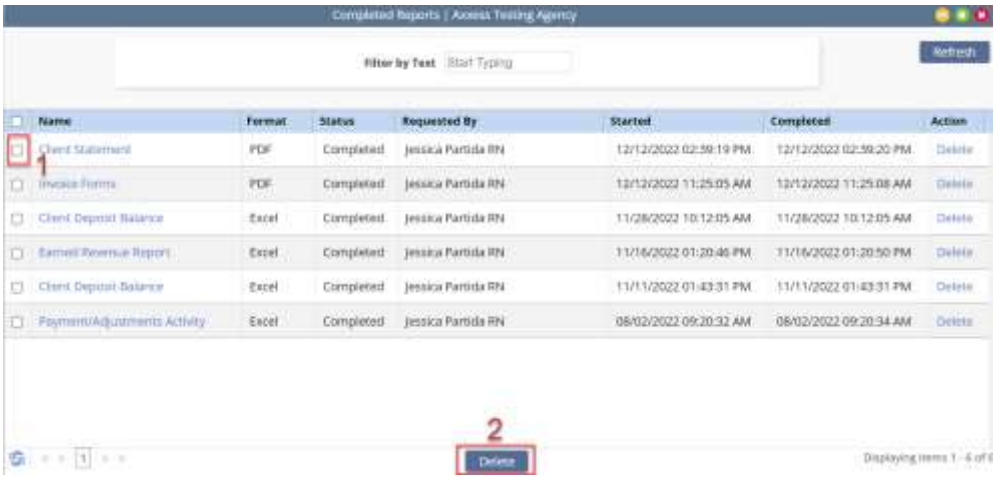


- Now that the report has been requested, it will be in the Completed Reports list. Select the **Refresh** button in the top right or icon in the bottom left to update the window.

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.

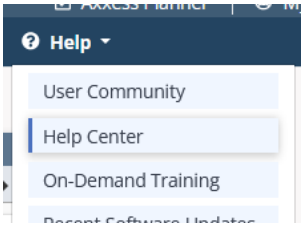
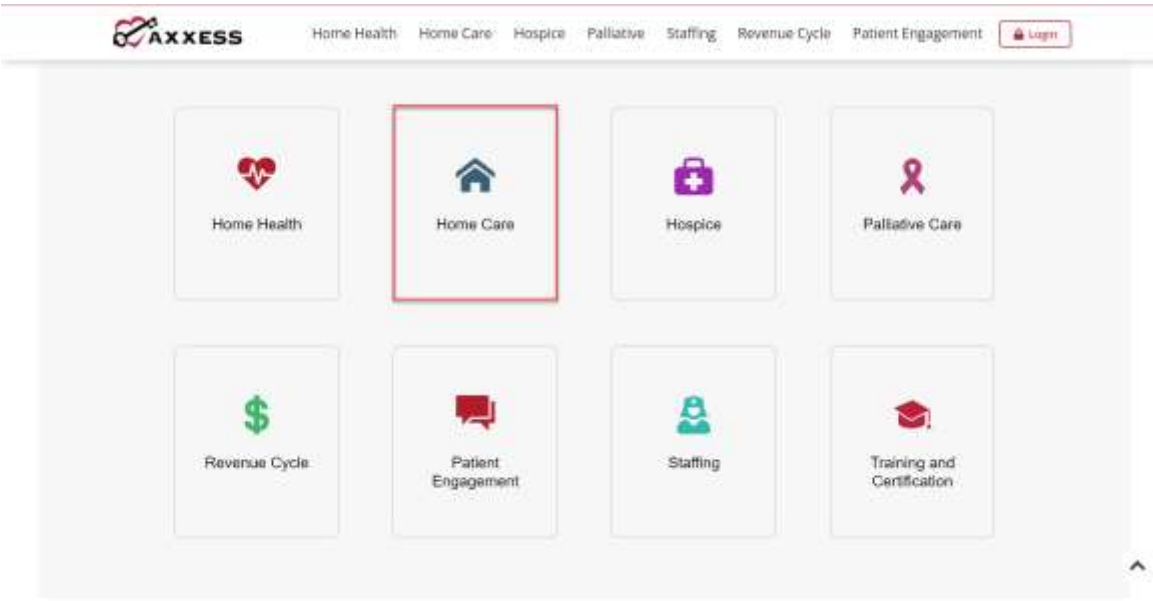
To view the report, select the hyperlink text listed under the **Name** column. To remove the report, select the **Delete** hyperlink to the far right under the Action column. To remove multiple hyperlinks, check the box(es) next to the report and select the **Delete** button.



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/