

HOSPICE PAYROLL QUICK REFERENCE GUIDE

August 2023



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SETUP

Admin/Company Setup/Payroll/Payroll Center

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. The selected payroll vendor can be changed any time in Company Setup.

To associate a payroll company code/ID to the payroll branches within the organization:

- 1. Select Add Branch.
- 2. Select the branch.
- 3. Enter the payroll company code/ID (provided by the payroll vendor).
- 4. Enter the start date.
- 5. Select Save.

Users can edit, delete or deactivate payroll company codes/IDs using the \mathbf{C} , $\mathbf{\overline{m}}$ and \mathbf{O} icons respectively under the Actions column. 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 also 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:

- 1. Select the box(es) next to the task on the left side of the screen.
- 2. Select Approve Selected.
- 3. The selected tasks will move to the **Approved/Pending Export** tab.

To unapprove payroll tasks:

- 1. Navigate to the Approved/Pending Export tab.
- 2. Select the boxes next to the desired tasks.
- 3. Select Unapprove Selected.
- 4. 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:

- 1. Check the boxes next to the visits/tasks to be exported.
- 2. Select General Payroll Export, Lawson Payroll Export or Multiple Providers Payroll Export (options depend on the organization's vendor).

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

- 3. Select **Export** in the confirmation pop-up to finish exporting the selected visits/tasks.
- 4. When exported, a batch ID and export date will automatically be assigned to the selected visits.
- 5. The exported visits/tasks will move from the **Approved/Pending Export** tab to the **Exported/Paid** and **All** tabs.
- 6. 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.

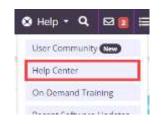


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HELP CENTER

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 <u>https://www.axxess.com/help/.</u>



OUR COMPLETE SUITE OF SOLUTIONS KNOWLEDGE BASE Get Help Anytime, Anywhere -ጰ Ċ Home Hospice Palliative Home Health Care Care s A Revenue Patient Staffing Training and Certification Cycle Engagement



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