

# HOSPICE PAYROLL TRAINING MANUAL

<u>May 2023</u>

axxess.com

This manual is for training purposes only and should not be used for official purposes as the Axxess solutions are continuously subject to updates, improvements and enhancements.



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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, which is permissions based.

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

Payroll Center					
	ind data layout required by you ts and layout may not be consis	r payroll stent with	vendor. Disabling this feature your payroll vendor's specifi	r, edit payroll data and generate payr does not prevent users from genera cations.	
Export enabled/disabled as of: 03/11/2021	Export enabled/disabled by Turner, Alisenne	y:			
Payroll Batch ID:	Payroll Vendor:				

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.

Payroll Vendor:			
Other	~	Green Money Payroli	

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**.

Branch +	Payroll Company Code/ID Start Date =	End Date	Actions
Select Branch	Enter Payroll Company Co.      MM/DD/YYYY		Save Cancel





Users can edit, delete or deactivate payroll company codes/IDs using the  $\mathbf{C}$ ,  $\mathbf{m}$  and  $\mathbf{O}$  icons respectively under the **Actions** column. Select **Save** at the bottom of the screen to finish enabling the Payroll Center.

NOTE: The Payroll Earning Codes section will appear when the Payroll Center is enabled and UltiPro is selected as the payroll vendor. See the Axxess Help Center for the specific set up of this vendor.

Enable the Multilocation Payroll feature to pull cross-location visits to the employee's primary location for payroll approval.

If your organization has multiple pay cycles, enable the Payroll Cycle feature to create custom payroll group names. Select the **Add Cycle** button to add a payroll cycle.

Payroll Policy	
Setting a Payroll Policy allows you to generate reports with the data needed to seamlessly process payroll and monitor of	erational activities.
Payroli Period	
The payrolit policy and allowable reimbursements provided below will be used to calculate reimbursements in your payro This information will be used to calculate rates for each reimbursement which will be reflected in your payroli, unless a dr rates are both undertofiled, tasks will be reimbursed at \$0.00 in your payroli.	전 것은 것 같은 것을 하는 것을 하는 것을 것을 알았는 것을 가지 않는 것을 가지 않는 것을 하는 것을 수가 있다. 것을 하는 것을 하는 것을 하는 것을 하는 것을 수가 없는 것을 하는 것을 수가 없다. 것을 하는 것을 하는 것을 하는 것을 수가 없는 것을 하는 것을 수가 없다. 것을 하는 것을 수가 없는 것을 수가 없다. 것을 하는 것을 수가 없는 것을 수가 없다. 것을 하는 것을 수가 없는 것을 수가 없다. 것을 하는 것을 수가 없다. 것을 것을 수가 없다. 것을 것을 수가 없다. 것을 것을 것을 수가 없다. 것을
Payroll Cycle	
If your organization has multiple pay cycles, enable this feature to create custom payroll group names. Organizations mu groups.	it have a minimum of 1 payroll cycle group and a maximum of 4
C Enable C Disable	
Active Inactive	Add Dyne
Payroll Cycle Group	Actions
Default	Déstivate 2
nespice	Deactivate 12
Testing cycla	Deortivete of

# NOTE: Organizations must have a minimum of one payroll cycle group and maximum of four groups.

To add a pay rate, select **Add Rate** and enter the first day of the pay period, select the payroll frequency, and select any allowable reimbursements. Select **Add Rate** again to finish adding the pay rate.

ayroll Cycle Group *		First Day of Pay Peri	iod * O	Payroll Frequency * 🕕	
Select Group	~	MM/DD/YYYY	-	Select Frequency	~
Allowable Reimburser	nents 🛈				

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Once payroll cycles are enabled in Company Setup, a new Payroll Cycle Group filter will appear in the **Payroll Center** and on the **Payroll Report.** When a payroll group is selected, the date ranges will appear in the date range box. The list will reflect the payroll cycle groups that were created in Company Setup.

Once multiple payroll cycles are enabled in Company Setup, organizations can assign active users to each payroll cycle group. To assign a user to a payroll cycle group, edit the user's profile and navigate to the **Payroll** tab. Select a group from the **Payroll Cycle Group** menu and click **Save.** This can be achieved by going to *People/People Center/Edit/Payroll/Payroll Cycle Group*. The list of groups in the **Payroll Cycle Groups** menu reflects the list of groups set up in Company Setup. When an employee is a contractor, volunteer or student/trainee, the payroll group designation is optional.

Edit User						
Information	User Information					
Permissions	First Name * N	MJ,		Last Name	*	
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infectious Disease Profile	Credentials * 0					
Documents.	IN O LVN O LPN O MD O BSW O Other O Start Typing	NP C		csw O	Unknown	
	<ul> <li>Ability to Sign Orders</li> <li>Date of Hire</li> </ul>		Date	of Separation		
	MM/BD/YYY		M	WWW.dow		
	Employment Type *		Emp	loyee Payroll I	ID *	
	Employee	Ŷ	12	qaati		
	Payroll Cycle Group *					
	Test Cycle	.*				

When multiple payroll cycles are enabled in Company Setup, the following optional items appear under **Pay Type** on the **Payroll** tab of user profiles: Pay Type, Employment Status and Exempt Status.

	bursements provided below wi shed in Company Setup. If use	If be used to calculate reimbursements ( rates are not identified, company rates		
Add Rate				
Fay Type * O		Employment Status	Exempt Status	
Select Pap Type 💌		Select Employment Status 🛛 👻	Select Exempt Status 🔍 👻	
Start Date *				
MINDOWNY				
Allowable Reimburse	And the second second second second	n-Call 🗍 On-Call Mileage 🗍 On-Cal	I Travel Time	

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# **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.

Select one or more with to export. To select individual with, thick	the boosts reset to a	with york. The select all of	sts. thirth the	box in the health. When i	reported, a twitch ID and	opert date the action of a	uty be angreet to	o the perior bid works.	
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Export/Paid Status Export/Paid Date 🗄 Batch ID 🕸	Branch =	Line of Service	Teams 1	Employee Name	Patient Name	Level of Care =	Visit Date *	Visit/Task/Activity	
Created.	United States		Team_	American, Werety			06/30/2021	Case Management	11
Created .	United States		Tearn	American, Wenity			08/38/2021	IDG Meeting	1
Created	United States	Hospice	Tea Party	Arvand, Preethika	Atange, Bai	Routine Home Care	06/30/2021	Psychosocial Visit	1
Created	United States	Hospice	TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	09/10/2021	Skilled Nurse Visit	Q.
Created	United States	Hospice	7857	Sin. Charmaine	Testing2, Kim	Routine Home Care	10/01/2021	Surcicle Risk Assens	
Created	United States	Hospice	P8(410	Anand, Preethika	Ontter, Harry		10/01/2021	RN Initial/Comprehe.	
Created	United States	Hospine	TEST	Sin, Charmaine	Testing14. Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe.	-
Greated	United States	Hospice.	TEST	Sin, Charmaine	Testing 15, Sanity	Routine Home Care	10/01/2021	RNI Initial/Comprehe.	-
Created	United States	Hospice	TEST	Sin, Charmaine	Testing1, Spot	Routine Home Care	10/01/2021	IN Initial/Comprehe.	đ
Created	United States	Hospine	7857	Sin, Charmaine	Testing, Kimmy	Boutine Home Care	10/01/2021	8N Initial/Comprehe.	. 1
Ensated	United States	Hospice	TEST	Sin, Charmaine	Testing 15, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe.	63

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, type of activity and task. 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**.





Ŀ.	Tenting Home He	alth Agency, Inc	Hingo	· · · · · · · · · · · · · · · · · · ·	-03/05/2022 Curren	n	o Telès	Branch: All +	Employee Name: All +	III Mars	141-1	Approve Selected	4.8
	Branch I	Line of Service	Teams 3	Employee Name 1	Patient Name	Level of Care 1	Visit Date *	Visit/Task/Activity	Туре	Mased Visit	On-Call	Visit Statue	Via
1	United States		Team	Amerson, Wandy			88/35/2021	Case Management	Nun-Patiant Advetes	No	Ni	Considered	Ű1
l	United States		Teon	Amerson, Wendy			08/30/2021	IDG Meeting	Non-Patient Activities	No	No	Completed	03
	Ovided States	Haupon	Tes Party	Anand, Prestina	Atarge, Bai	Routine Home Care	08/10/2021	Psychosocial Wsit	Visits/Tanks	No	No	Not Fet Started	
	United States	Hotpice	TEST	9n, Diamaine	Testing2, 4im	Routine Rome Care	09/10/2021	Skilled Nurse Visit	Visits/Tasks	No	No	Not Pet Started	
	United States	Hospice	TEST	Sin Diamoine	Testing2, tim	Routine Home Care	10/01/2024	Suicide Risk Assess	Visito/Tasks	No	No	Saved	

The selected tasks will move to the **Approved/Pending Export** tab.

Mark tasks as non-payable by following the same process except selecting the **Mark as Non-Payable** button once the desired selected tasks have been chosen.

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.

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	Feiting Huma Ha	atth Agency, I/c 🔹	Hmpto	o ~ 02	406/2022 02	19/2022		include La	to Tasks	- Brands
								2	Unapprove Se	sected 8
2,	Branch 1	Line of Service	Teams 1	Employee	Name I Pet	lent Name	Level of	Care =	Visit Date *	Visit/Task/
2	United States	Hospice	Pearlp.	Anant, Prei	ethika Da	rke Motari			09/01/2021	Physician Or
0	United States	Hospite	TEST	Sri, Olarma	Nie Tes	tings Sanity	Bristine	Home Care	09/01/2021	RN Initial/Co
•	Unmed Gianes	Hospice	1257	Sn. Charm	tive Tes	ting?. Samily	Restme	Home Care	09/01/2021	RN Inmai/Co
-	United States	Hendice	T617	Sin, Channa	nice Tet	tings. Sanity	Routice	Home Care	09/01/2021	IN INBAICO

# **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 to be exported and select **General Payroll Export**, **Lawson Payroll Export**, **Utilipro Payroll Export** or **Multiple Providers Payroll Export** (options depend on the organization's vendor).

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7	etting Home He	ith Agency, ins - •	Hoops	s = 02/06/2022	1 12/19/2022	* Include La	te Tasks	Branch: All	Employee Nar	ne Al +	D Mor	e Filters
							Unapprove 3	ifett 2 134005	PayraEEsport	<ul> <li>Waltip</li> </ul>	e Provide	es Payroli Espa
	Branch 1	Line of Service	Teams 1	Employee Name	Petient Name	Level of Care ÷	Visit Data *	Visit/Tank/Activity	Туре	Missed Vait	Do-Cell	Visit Status
ľ	United States	Hospice	Pika (D.,	Anand, Preethika	Clarke, Motan		09/01/2021	Physician Order	Voits/Tasks	No	No.	Not Yet Starte
	Sinted States	Hospice	TEST	Sin, Charmane	Testing6, Sanity	Boutine Home Care	99/01/2021	AN Initial/Comprehe	Visits/Tasks	No	No	Completed
	United States	Hespice	1657	Sin, Charmaine	Tenting7, Sanity	Routine Home Care	09/01/2021	IN Initial/Comprehe	Wors/Tanks	No	No	Completed
E	United States	Hospice	1651	Sn. Charmaine	TestingS, Sanity	Routine Home Care	09/01/2021	RN Initial/Comprehe.	Voits/Tesks	No	No.	Cumpleted
	United States	Hospice	79ka (D.,	Ahand, Preethika	Oema, Jose		09/01/2021	RN Initial/Comprehe	Visits/Tasks	No.	NO.	Not Fet Starte
	United Station	Municipal	TEST	Sin: Charmaine	Tauting 1, Kim	Routine Home Care	09/01/2021	RN Inttal/Corrorates	Weterfactor	No	Inc.	Sevent

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.

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.

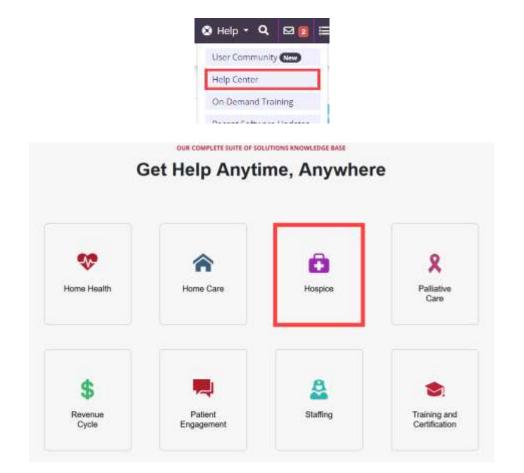
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Testing Home Health Agency, Inc *		Hospice - 92/86/2022-02/19/2022				Include Late Tasks	* Branch	All • Employee	Nome: All +	More Filters	
Export/Paid Status	Esport/Paid Date =	Batch ID	Branch 1	Line of Service	Teams =	Employee Name 1	Patient Name	Level of Care =	Visit Date *	Visit/Task/Activity =	Туре
Paid	02/22/2022	NS514	United States	Hospice	FrutSal	Sin, Charmaine	aarori, kusas		09/01/2021	Cirrical Evaluation/L	Visits/Ta
Paid	02/22/2022	H\$514	United States	Hospice	itist	Sn, Charmaine	Testing Alm		01401/2021	RN Initial/Comprehe-	Visite/Te
Paut	02/22/2022	HSS14	United Status		Abby T_	Sin, Charmanie			00/01/2021	IDG Meeting	Non-Pat
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Paid	02/22/2022	HS514	United States	Hospice	TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	09/08/2021	Psychosocial Visit	Visito/Ta





### **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. To access the Help Center, navigate to the **Help** tab and select **Help Center** or go to https://www.axxess.com/help/.



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