AXXESS

HOME CARE PAYROLL & REPORTS MANUAL
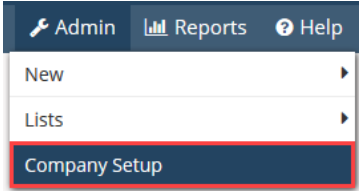## August 2020
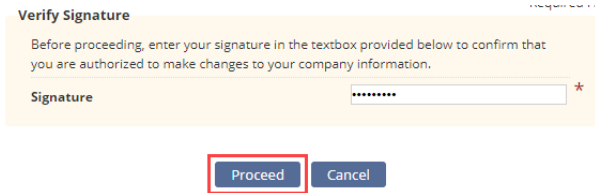
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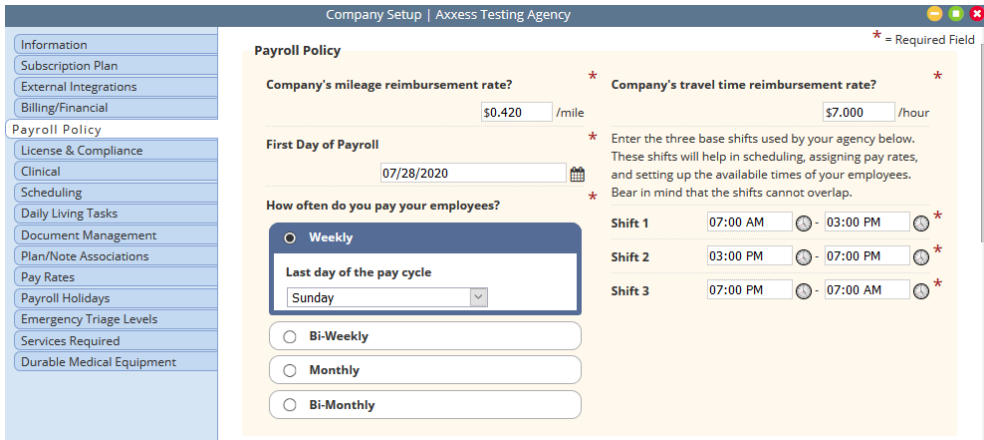# CREATE PAYROLL POLICY
Admin/Company Setup

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-hand side, labeled **Payroll Policy**. Included in this tab will be several features that will need to be filled in, to apply the functionality to the organization's visits.

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

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

How Often Are Employees Paid - Select one of the four options to determine how frequently the software will create payroll.

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

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

Maximum Time/Overtime Defaults - These options will 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.

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Choose the Branch, Enter the Name and Minimum Hourly Pay Rate. Then select **Save & Exit** when complete.

Select **Save** to keep all updates made to the Payroll Policy page.

ADD NEW PAY RATES
Admin/Company Setup/Pay Rates

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:
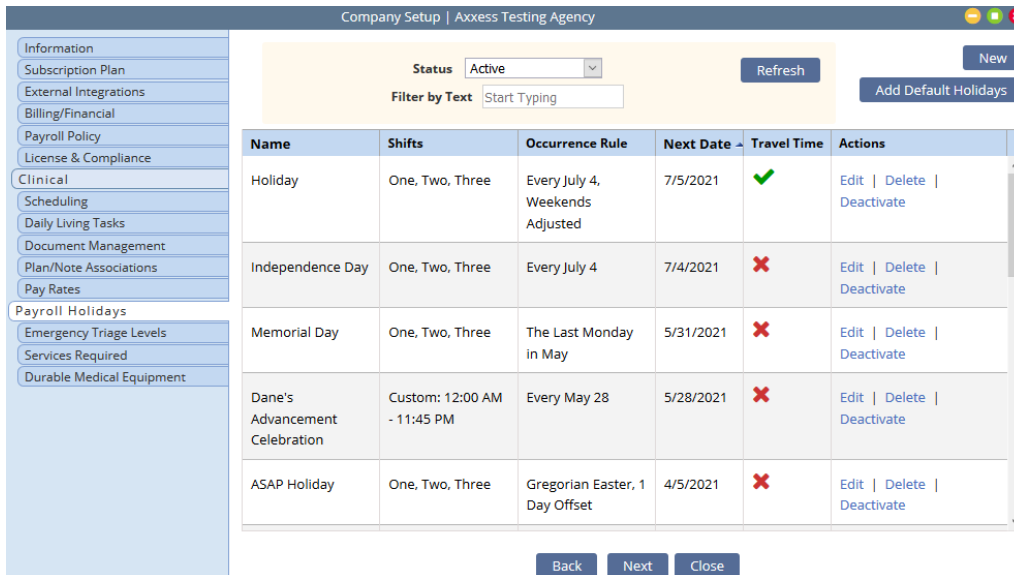
- <u>Task</u> - Select the drop-down, and choose the task assigned to this rate.
- <u>Rate</u> - Type in the rate that will apply to this task and select the unit from the drop-down.
- <u>Effective Date</u> - Select the calendar or enter the date this rate will begin to take effect.
- <u>Choose Employee</u> - Select the employee(s) this rate will apply to by selecting the box(es). Search or scroll to find employee(s).
- <u>Choose Payment Source</u> - Select the payer(s) this rate will apply to by selecting the box(es). Search or scroll to find payer(s).
- <u>Choose Client</u> - Select the client(s) this rate will apply to by selecting the box(es). Search or scroll to find client(s).
- <u>Choose Shifts</u> - Select the shift(s) this rate will apply to by selecting the box(es). Search or scroll to find shift(s).

- Choose Days of the Week - Select the day(s) this rate will apply to by selecting the box(es). Search or scroll to find day(s).
- Mileage Rate - If a specific mileage rate applies to this task, select the box on the left-hand 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 this task, select the box on the left-hand 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 the New Pay Rate process.

CREATE PAYROLL HOLIDAYS
Admin/Company Setup/Payroll Holidays

Name	Shifts	Occurrence Rule	Next Date ▲	Travel Time	Actions
Holiday	One, Two, Three	Every July 4, Weekends Adjusted	7/5/2021	✔	Edit | Delete | Deactivate
Independence Day	One, Two, Three	Every July 4	7/4/2021	✘	Edit | Delete | Deactivate
Memorial Day	One, Two, Three	The Last Monday in May	5/31/2021	✘	Edit | Delete | Deactivate
Dane's Advancement Celebration	Custom: 12:00 AM - 11:45 PM	Every May 28	5/28/2021	✘	Edit | Delete | Deactivate
ASAP Holiday	One, Two, Three	Gregorian Easter, 1 Day Offset	4/5/2021	✘	Edit | Delete | Deactivate

To set up a Payroll Holiday, select the **New** or **Add Default Holidays** buttons.

Add Default Holidays - Axxess will provide 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.
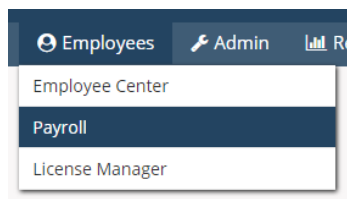
NOTE: If not sure what each rule means, hover over the info ⓘ icon next to the rule and a short description will appear.

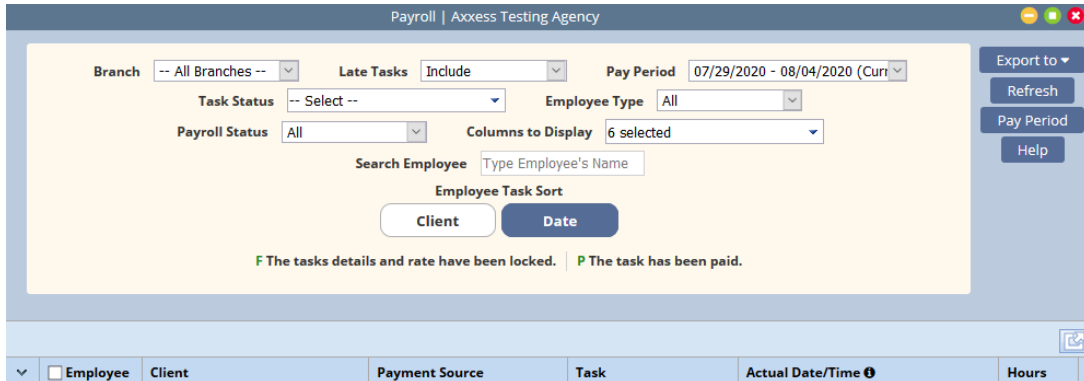Once the criteria are chosen, select **Add Holidays**.

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

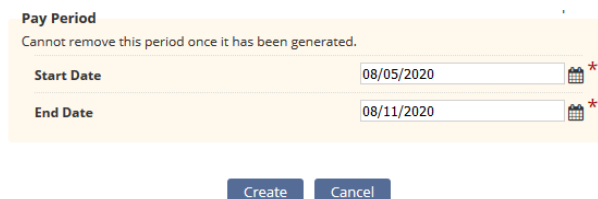The box below will appear, allowing a search to be completed from specific criteria.

- 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.
- 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.
- Payroll Status - Select one or multiple Payroll Status 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 this Payroll Report is being created for.
- Pay Period - Select the Pay Period from the drop-down list that payroll is being created for.
  - If the Pay Period is not listed, select the **Pay Period** button, enter the Start and End Date, and then select **Create**.
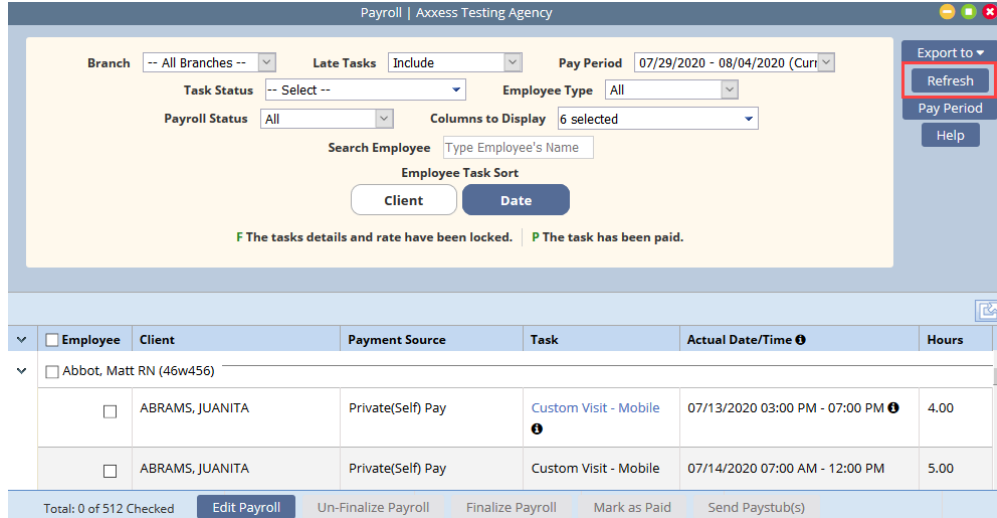

NOTE: Axxess will not allow Pay Periods to overlap, so if this date range is already covered in another Pay Period, an error message will appear.

Once all the Payroll Report filters are displaying the correct search criteria, select **Refresh** to generate the Payroll.

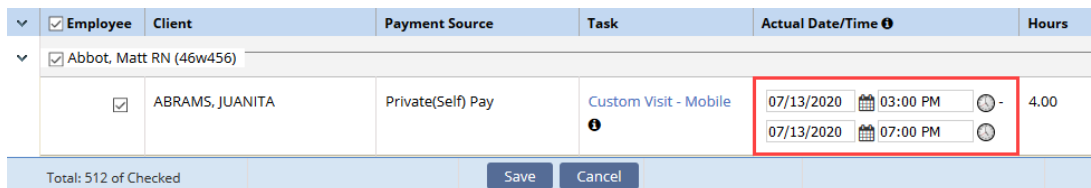To mark the task as Paid, it must first be Finalized. Follow the steps below:

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/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 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:

Successfully accepted request to send paystubs. Users will be notified via the Alert Center.
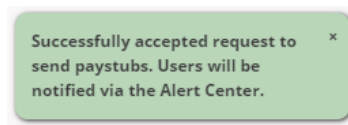
REPORT CENTER
Reports/Report Center
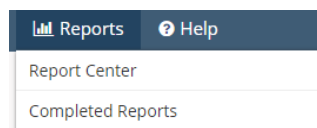
Select the Report Center. The Report Center lists multiple reports that can pull up an organization's data. The reports are grouped into sections based on the type of information they display.

NOTE: Viewable reports are based on the user roles (User Setup is covered in Admin Overview).
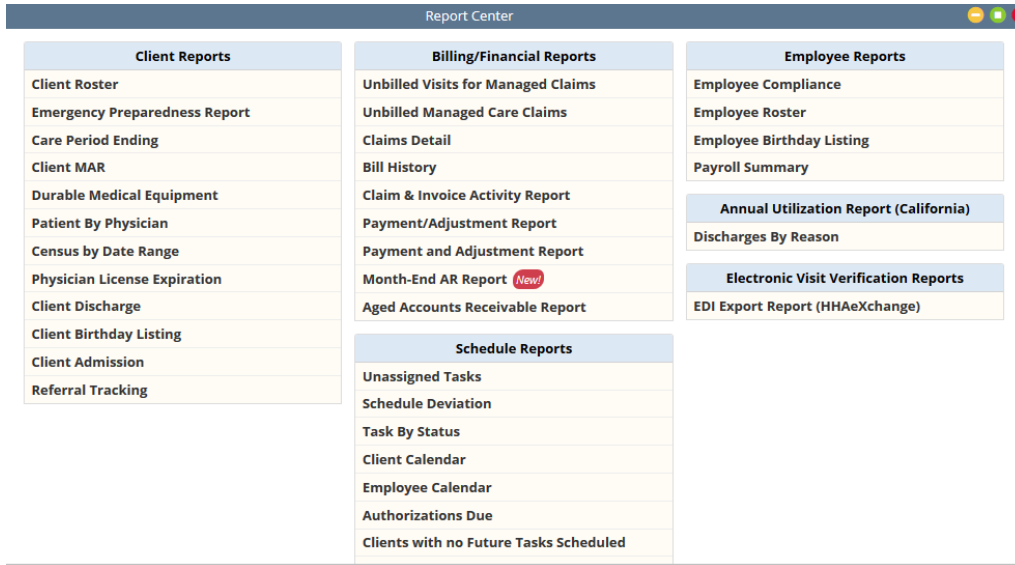
For more information about what data the report is displaying, hover over the report name. A blue box will appear, giving more details.
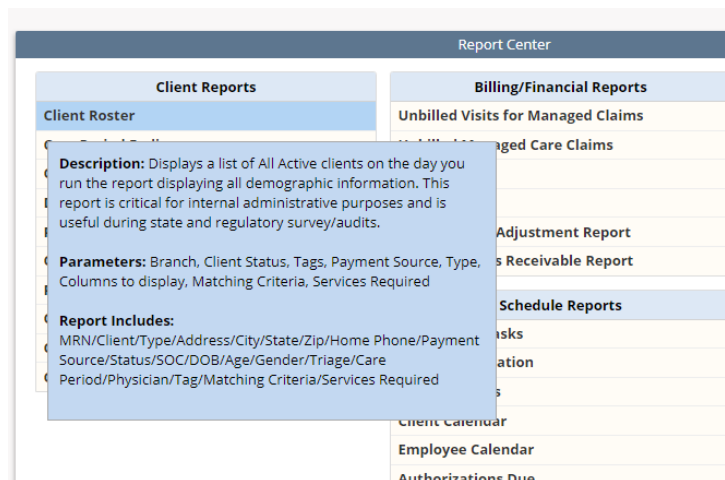
Select the name of the report and a new window will open allowing users to generate the report.

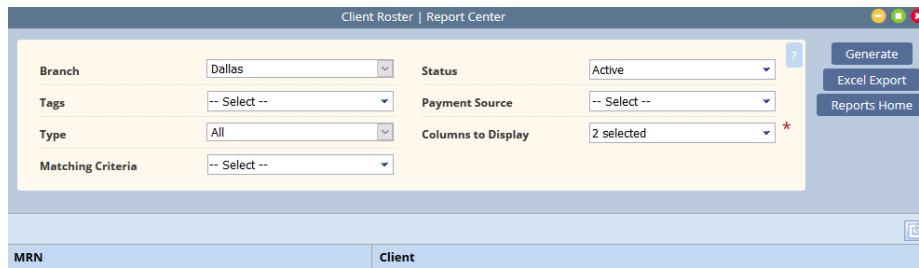Once the desired criteria have been chosen, select **Generate**. The report will display on the bottom of the screen.
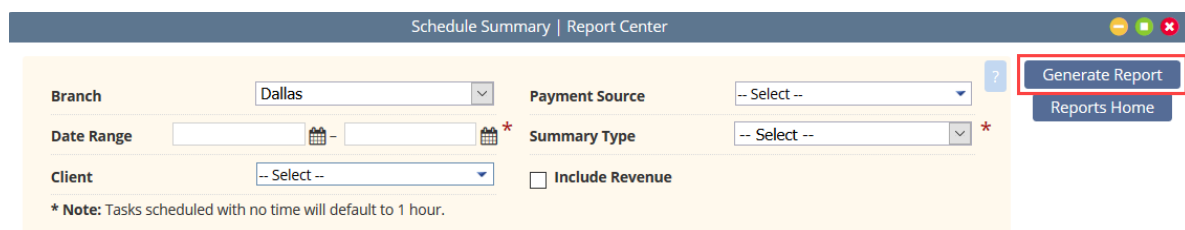
COMPLETED REPORTS
Reports/Completed Reports

Some reports in the Report Center will need to be requested, rather than generated. Once a report is requested, the data will begin pulling, and once it is finished, the report will be in the Completed Reports section.
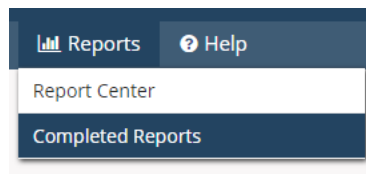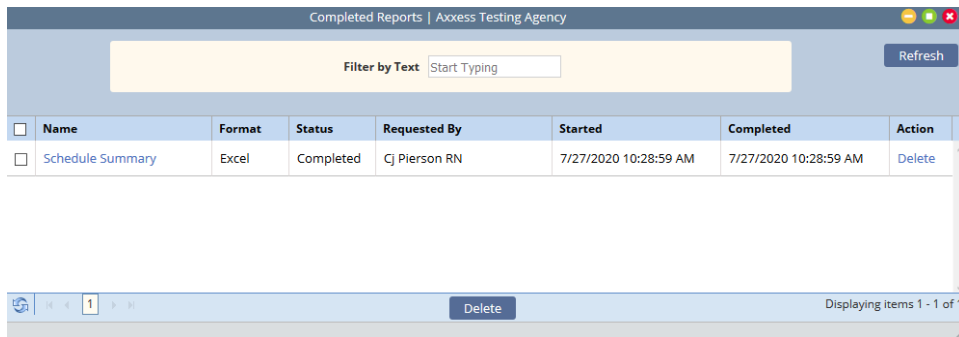

For a report to appear in the Completed Reports section, they will need to follow the following workflow:

- Go into 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.
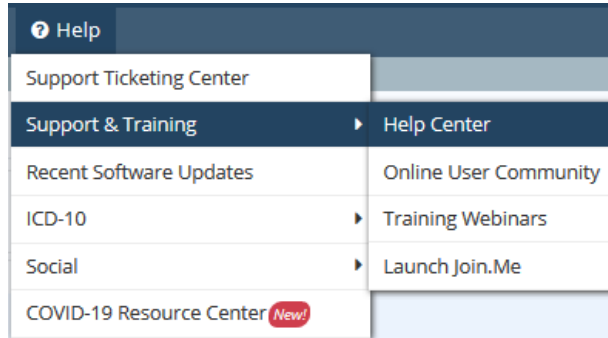
The status column will show when a report is finished pulling in all the data. The following status descriptions will appear:

- <u>Running</u> - The report has been requested and is still pulling the data to the report.
- <u>Completed</u> - The report has finished pulling all the data, and users can view the Final report. Once the report is "Completed" select the report **Name,** and the report will open.
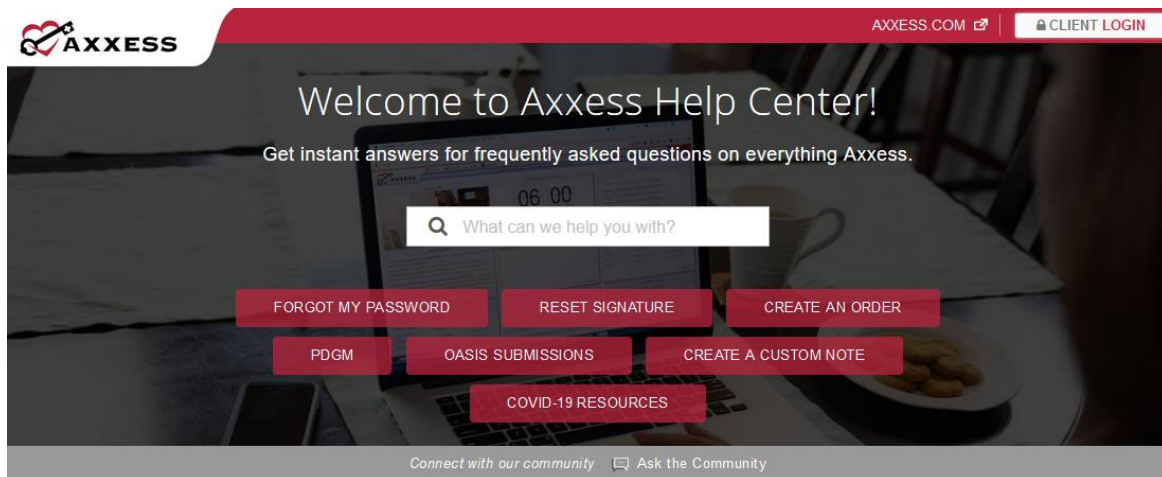
HELP CENTER

Help/Support & Training/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/