

HOME CARE PAYROLL & REPORTS MANUAL

August 2020

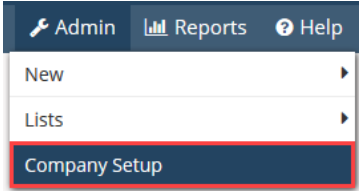
Table of Contents

CREATE PAYROLL POLICY.....	3
ADD NEW PAY RATES.....	5
CREATE PAYROLL HOLIDAYS.....	7
PROCESSING PAYROLL	8
REPORT CENTER	11
COMPLETED REPORTS	13
HELP CENTER.....	15

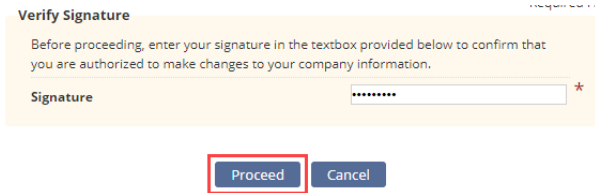
CREATE PAYROLL POLICY

Admin/Company Setup

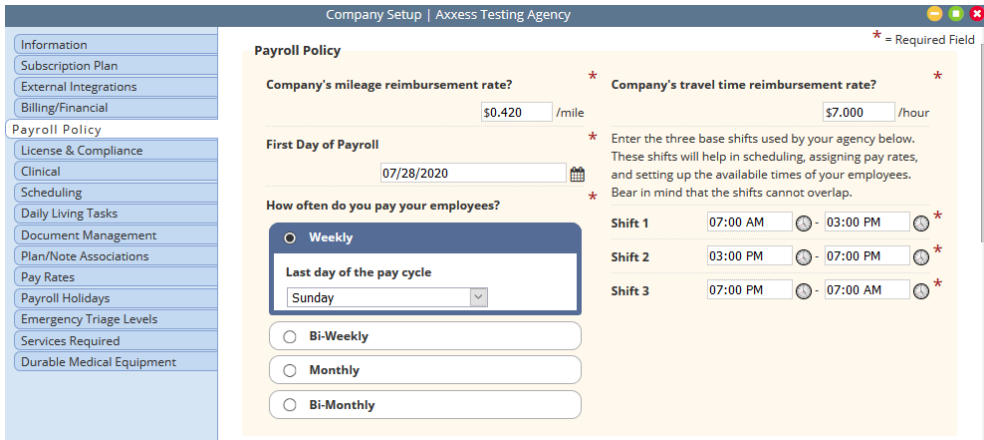
The first step in the payroll processing functionality is to create the organization's Payroll Policy.



Enter the electronic signature and select **Proceed**:


 A screenshot of a 'Verify Signature' form. The form has a title 'Verify Signature' and a sub-header 'Before proceeding, enter your signature in the textbox provided below to confirm that you are authorized to make changes to your company information.' Below this is a text input field labeled 'Signature' with a red asterisk indicating it is a required field. At the bottom of the form are two buttons: 'Proceed' (highlighted with a red border) and 'Cancel'.

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.


 A screenshot of the 'Payroll Policy' configuration page in a web application. The page title is 'Company Setup | Axxess Testing Agency'. On the left is a sidebar menu with various tabs, including 'Payroll Policy' which is selected. The main content area is titled 'Payroll Policy' and contains several fields:

- 'Company's mileage reimbursement rate?' with a value of '\$0.420 /mile' and a red asterisk.
- 'Company's travel time reimbursement rate?' with a value of '\$7.000 /hour' and a red asterisk.
- 'First Day of Payroll' with a date of '07/28/2020' and a red asterisk.
- 'How often do you pay your employees?' with radio buttons for 'Weekly' (selected), 'Bi-Weekly', 'Monthly', and 'Bi-Monthly'.
- 'Last day of the pay cycle' with a dropdown menu showing 'Sunday'.
- Three shift configurations:
 - Shift 1: 07:00 AM to 03:00 PM
 - Shift 2: 03:00 PM to 07:00 PM
 - Shift 3: 07:00 PM to 07:00 AM

 A legend at the top right indicates '* = Required Field'.

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

Start Time Rounding: End Time Rounding:

Round to the immediately previous 15-minute increment. Round to the immediately previous 15-minute increment.

Maximum Time/Overtime Defaults

<p>Maximum Daily Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>	<p>Maximum Weekly Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>
<p>Time-and-a-Half Daily Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>	<p>Time-and-a-Half Weekly Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>
<p>Double Time Daily Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>	<p>Double Time Weekly Limit: <input type="text"/> Hours</p> <p> <input type="radio"/> None <input type="radio"/> Warning Message <input type="radio"/> Error & Stop Scheduling * </p>

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.

Manage Municipalities

Filter by Text:

Name ▾	Code	Pay Rate	Actions
75418- Dallas	01	\$25.00	Edit Delete
Texas	TEX	\$20.00	Edit Delete

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

New Municipality

Agency Branch *

Code

Municipality Name *

Minimum Hourly Pay Rate *

Comments

You have 250 characters remaining

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

Company Setup | Axxess Testing Agency

- Information
- Subscription Plan
- External Integrations
- Billing/Financial
- Payroll Policy
- License & Compliance
- Clinical
- Scheduling
- Daily Living Tasks
- Document Management
- Plan/Note Associations
- Pay Rates**
- Payroll Holidays
- Emergency Triage Levels
- Services Required
- Durable Medical Equipment

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
Abby's Visits	\$50.00/hour 7:00 am-3:00 pm	\$50.00/hour 7:00 am-3:00 pm	\$50.00/hour 7:00 am-3:00 pm	\$50.00/hour 7:00 am-3:00 pm	\$50.00/hour 7:00 am-3:00 pm	\$50.00/hour 7:00 am-3:00 pm	\$50.00 7:00 am-3:00 pm
AIDE Visit - DS	\$40.00/visit	\$40.00/visit	\$40.00/visit	\$40.00/visit	\$40.00/visit	\$40.00/visit	\$40.00
Aide Visit Note-Training	\$10.00/hour	\$10.00/hour	\$10.00/hour	\$10.00/hour	\$10.00/hour	\$10.00/hour	\$10.00
Anusha's PT Visit Note	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00
ASAP HHA visit note	\$10.50/hour	\$10.50/hour	\$10.50/hour	\$10.50/hour	\$10.50/hour	\$10.50/hour	\$10.50
AWE- psych	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00/visit	\$50.00


Select **New**, and the window below will open, allowing users to create a New Pay Rate.

* = Required Field

New Pay Rate

Task: *

Rate: *

Effective Date: 

Choose Employee *

All

- Abby Igiebor CNA 2
- Abby Kassebaum RN
- Abigail Escoto RN
- Adrian Gonzalez RN

Choose Payment Source *

All

- Private(Self) Pay
- Self Pay
- Ima Nonmedical
- Self Pay
- Other Payment

Choose Client *

All

- AARON, LUCILLE
- ABRAMS, JUANITA
- ADDISON, NONMEDICAL

Choose Shifts *

Check all Uncheck all

- Shift 1 (7:00 AM-3:00 PM)
- Shift 2 (3:00 PM-11:00 PM)
- Shift 3 (11:00 PM-7:00 AM)

Choose Days of the Week *

Check all Uncheck all

Weekends

- Sunday
- Saturday

Weekdays

- Monday
- Tuesday

Mileage Rate - If not selected, the agency's default rate of \$0.42/mile will be used.

Travel Time Rate - If not selected, the agency's default rate of \$7.00/hr will be used.

Select the required criteria to apply to the New Pay Rate:

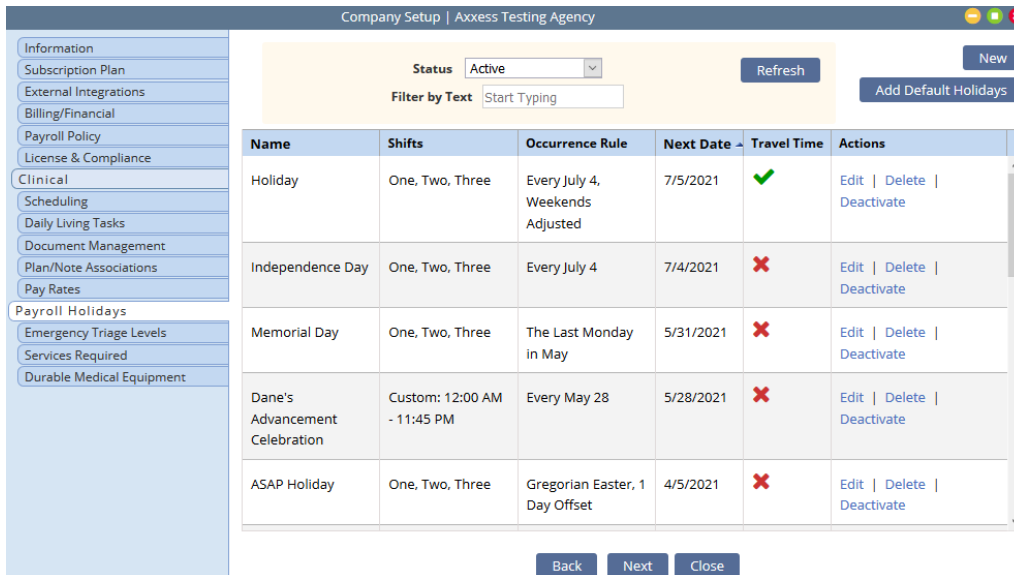
- **Task** - Select the drop-down, and choose the task assigned to this rate.
- **Rate** - Type in the rate that will apply to this task and select the unit from the drop-down.
- **Effective Date** - Select the calendar or enter the date this rate will begin to take effect.
- **Choose Employee** - Select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



Company Setup | Axxess Testing Agency

Status: Active

Filter by Text:

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.

Holiday

Washington's Birthday *

Create Payroll Holiday

Time *

Use Shifts

Use Custom Time

Rules

Pay rules apply to travel time

Applies to All Tasks and Travel Time

Multiplier ⓘ

Applies to All Except Per Visit Tasks ⓘ

Additional Per Hour ⓘ

Applies to Per Visit Tasks

Additional Per Visit ⓘ

For Hourly and Per-15-Minute tasks, rules apply to fractional hours (e.g. 1.25 hours).

Add Holidays

Close

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.

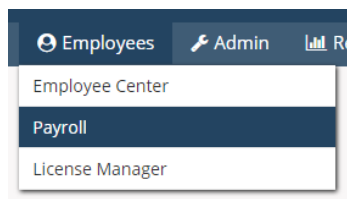
NOTE: If not sure what each rule means, hover over the info ⓘ icon next to the rule and a short description will appear.

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

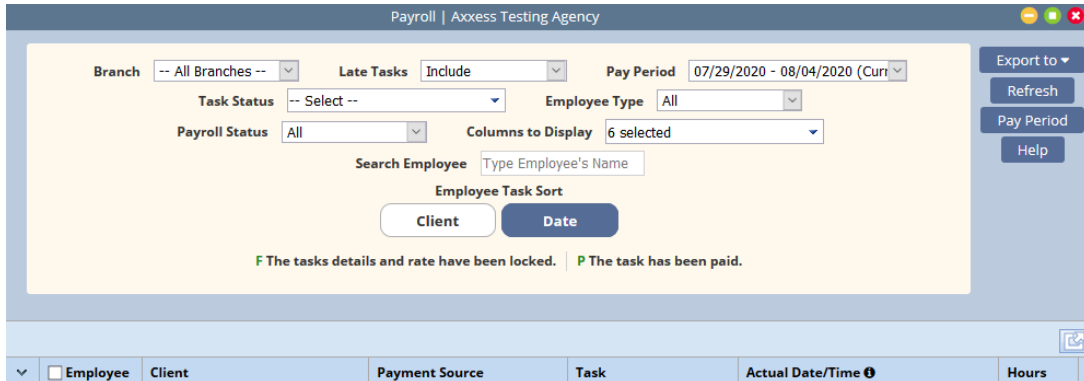
New - This will allow organizations to create a customized Payroll Holiday that is not currently listed in Axxess. Once **New** is selected, the same functionality will apply to creating a unique Payroll Holiday.

PROCESSING PAYROLL

Employees/Payroll



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

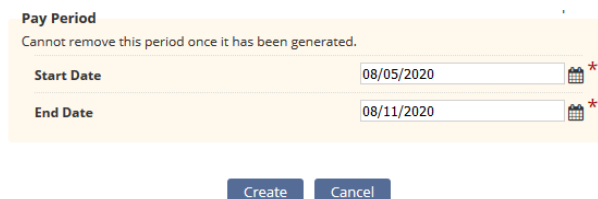


The screenshot shows a web application interface for payroll management. At the top, it says "Payroll | Axxess Testing Agency". Below this are several filter sections:

- Branch:** A dropdown menu set to "-- All Branches --".
- Late Tasks:** A dropdown menu set to "Include".
- Pay Period:** A date range dropdown set to "07/29/2020 - 08/04/2020 (Curr)".
- Task Status:** A dropdown menu set to "-- Select --".
- Employee Type:** A dropdown menu set to "All".
- Payroll Status:** A dropdown menu set to "All".
- Columns to Display:** A dropdown menu set to "6 selected".
- Search Employee:** A text input field with the placeholder "Type Employee's Name".
- Employee Task Sort:** Two buttons labeled "Client" and "Date".

 On the right side, there are buttons for "Export to", "Refresh", "Pay Period", and "Help". Below the filters, there are two status indicators: "F The tasks details and rate have been locked." and "P The task has been paid." At the bottom, a table header is visible with columns: Employee, Client, Payment Source, Task, Actual Date/Time, and Hours.

- 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**.

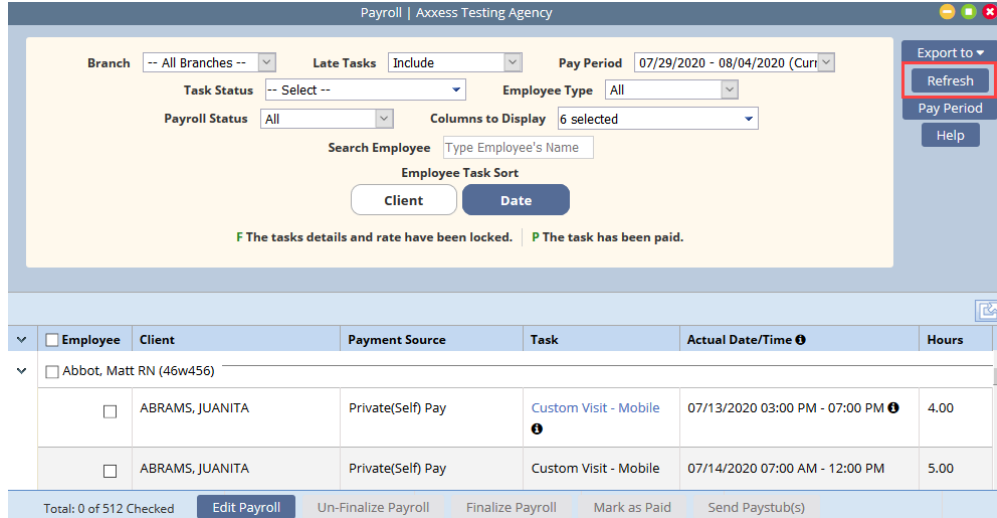


The screenshot shows a "Pay Period" dialog box. It contains the following text and fields:

- Header: "Pay Period"
- Message: "Cannot remove this period once it has been generated."
- Field: "Start Date" with the value "08/05/2020" and a calendar icon.
- Field: "End Date" with the value "08/11/2020" and a calendar icon.
- Buttons: "Create" and "Cancel" at the bottom.

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.



Payroll | Access Testing Agency

Branch: -- All Branches -- | Late Tasks: Include | Pay Period: 07/29/2020 - 08/04/2020 (Curr)

Task Status: -- Select -- | Employee Type: All

Payroll Status: All | Columns to Display: 6 selected

Search Employee: Type Employee's Name

Employee Task Sort: Client | Date

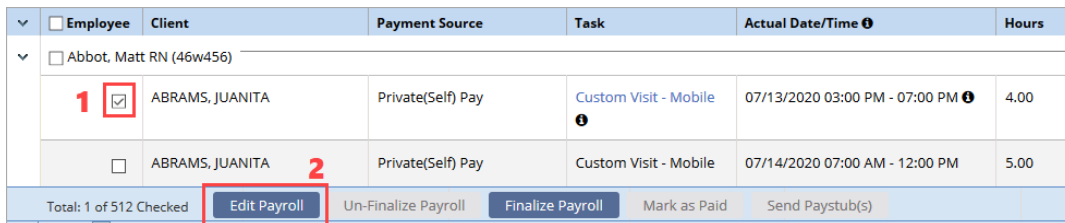
F The tasks details and rate have been locked. | P The task has been paid.

<input type="checkbox"/> Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
<input type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM - 07:00 PM	4.00
<input type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/14/2020 07:00 AM - 12:00 PM	5.00

Total: 0 of 512 Checked | Edit Payroll | Un-Finalize Payroll | Finalize Payroll | Mark as Paid | Send Paystub(s)

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

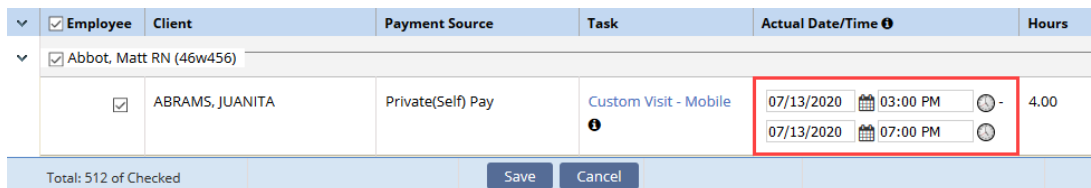
1. **Edit Payroll** - Before Finalizing Payroll, users can Edit the details. Select the box on the left-hand side of the Client/Employee task to be edited. Then select the **Edit Payroll** button at the bottom of the screen.



<input type="checkbox"/> Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
<input checked="" type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM - 07:00 PM	4.00
<input type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/14/2020 07:00 AM - 12:00 PM	5.00

Total: 1 of 512 Checked | Edit Payroll | Un-Finalize Payroll | Finalize Payroll | Mark as Paid | Send Paystub(s)

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.



<input checked="" type="checkbox"/> Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
<input checked="" type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM	4.00
				07/13/2020 07:00 PM	

Total: 512 of Checked | Save | Cancel

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.

Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
1 <input checked="" type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM - 07:00 PM	4.00
<input type="checkbox"/>	ABRAMS, JUANITA	Private(Self) Pay	2 Custom Visit - Mobile	07/14/2020 07:00 AM - 12:00 PM	5.00

Total: 1 of 512 Checked Edit Payroll Un-Finalize Payroll **Finalize Payroll** Mark as Paid Send Paystub(s)

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.

Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
1 <input checked="" type="checkbox"/> F	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM - 07:00 PM	4.00

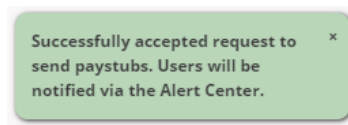
Total: 1 of 512 Checked Edit Payroll **Un-Finalize Payroll** Finalize Payroll Mark as Paid Send Paystub(s)

- 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.

Employee	Client	Payment Source	Task	Actual Date/Time	Hours
Abbot, Matt RN (46w456)					
1 <input checked="" type="checkbox"/> P	ABRAMS, JUANITA	Private(Self) Pay	Custom Visit - Mobile	07/13/2020 03:00 PM - 07:00 PM	4.00

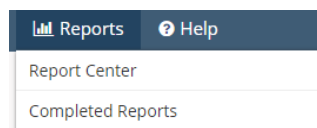
Total: 1 of 512 Checked Edit Payroll Un-Finalize Payroll Finalize Payroll Mark as Paid **Send Paystub(s)**

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

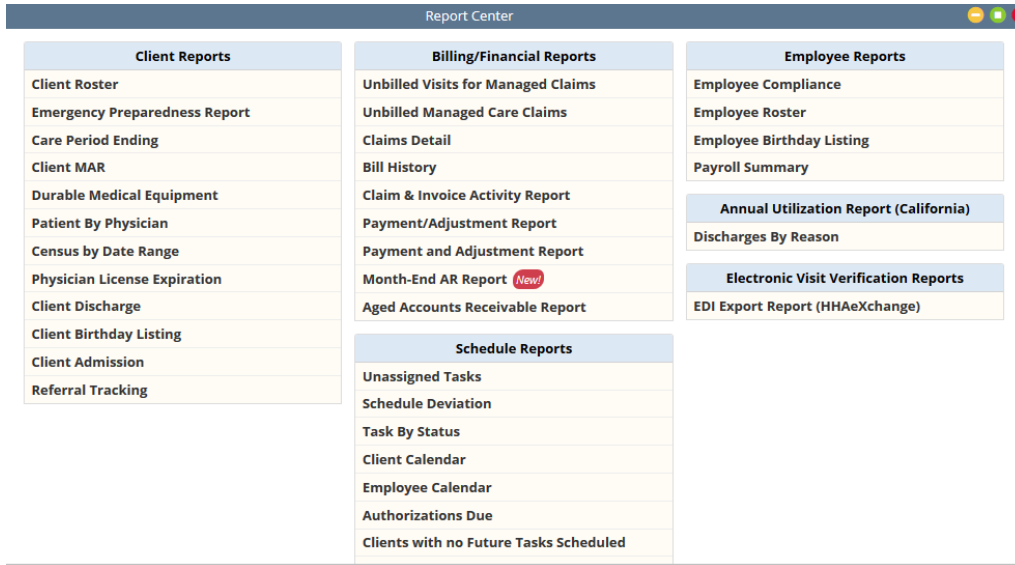


REPORT CENTER

Reports/Report Center

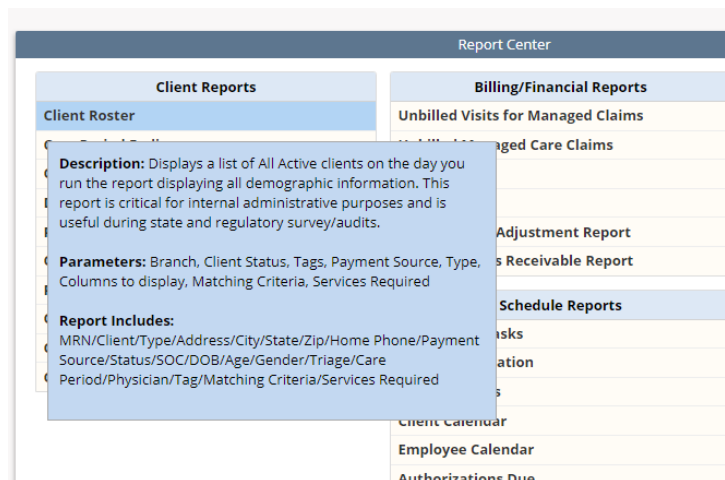


Select the Report Center. The Report Center lists multiple reports that can pull up an organization's data. The reports are grouped into sections based on the type of information they display.

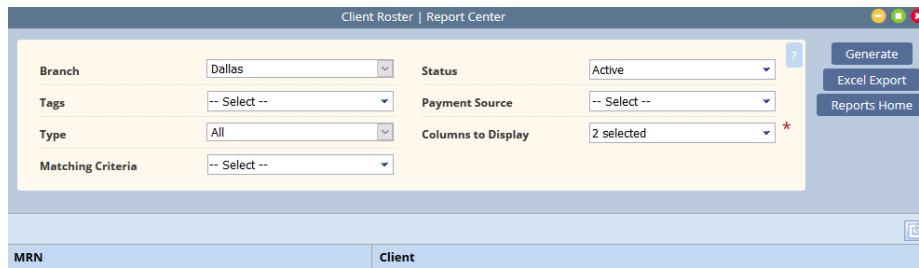


NOTE: Viewable reports are based on the user roles (User Setup is covered in Admin Overview).

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.

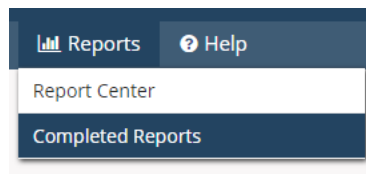


Once the desired criteria have been chosen, select **Generate**. The report will display on the bottom of the screen.

COMPLETED REPORTS

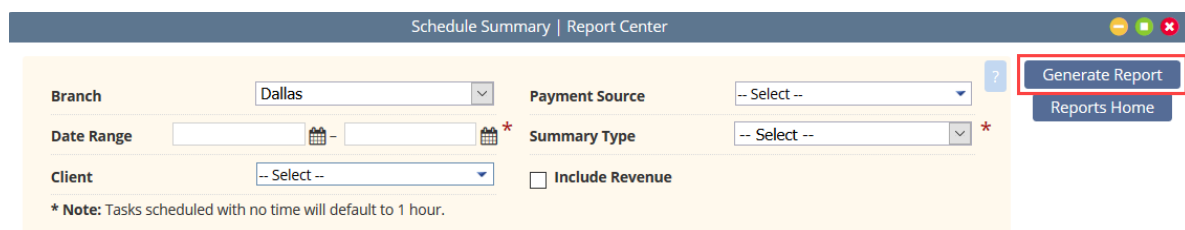
Reports/Completed Reports

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.

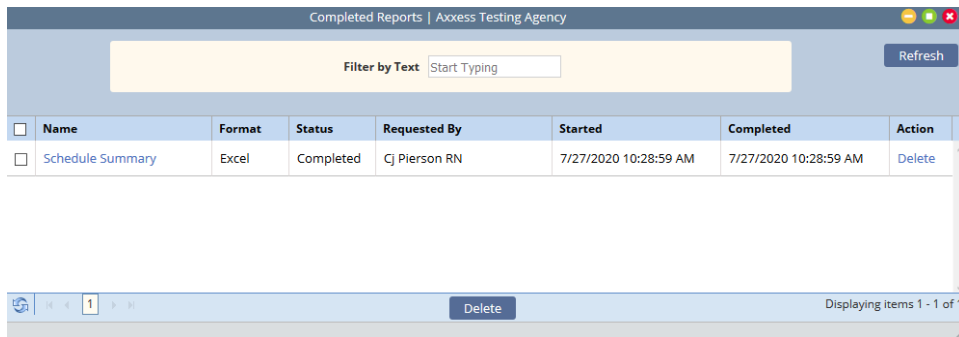


For a report to appear in the Completed Reports section, they will need to follow the following workflow:

- 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.



<input type="checkbox"/>	Name	Format	Status	Requested By	Started	Completed	Action
<input type="checkbox"/>	Schedule Summary	Excel	Completed	Cj Pierson RN	7/27/2020 10:28:59 AM	7/27/2020 10:28:59 AM	Delete

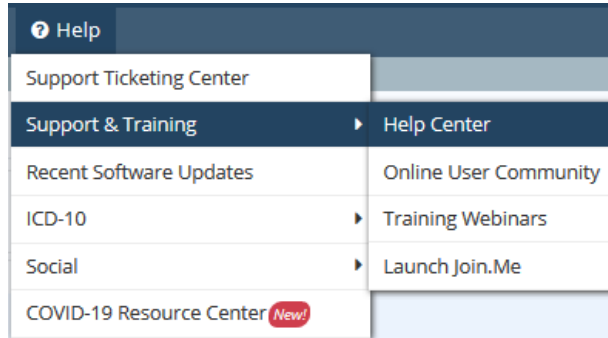
The status column will show when a report is finished pulling in all the data. The following status descriptions will appear:

- 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 is “Completed” select the report **Name**, and the report will open.

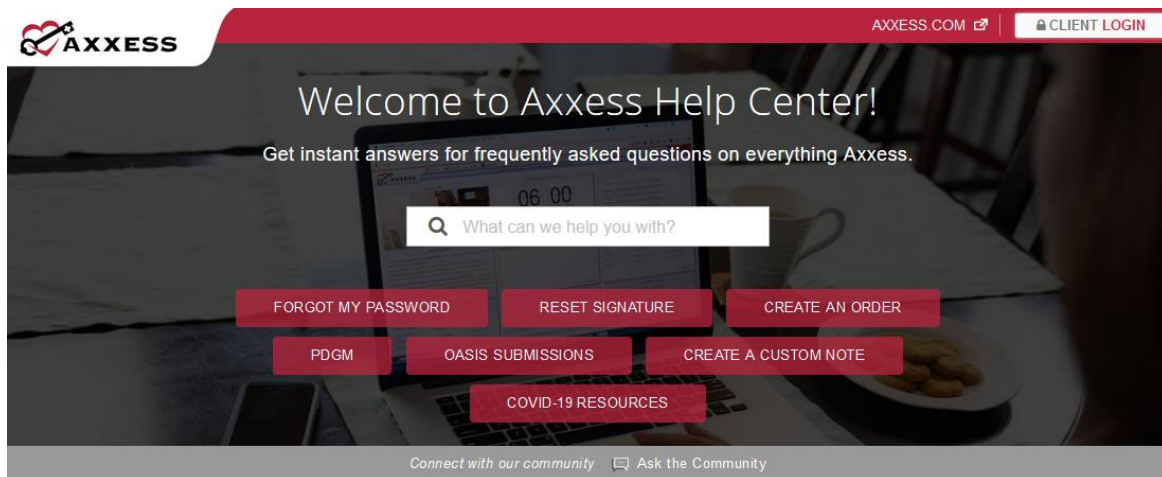
HELP CENTER

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/>



Get Help Anytime, Anywhere!

