

# HOME HEALTH PAYROLL AND REPORTS TRAINING MANUAL

August 2022

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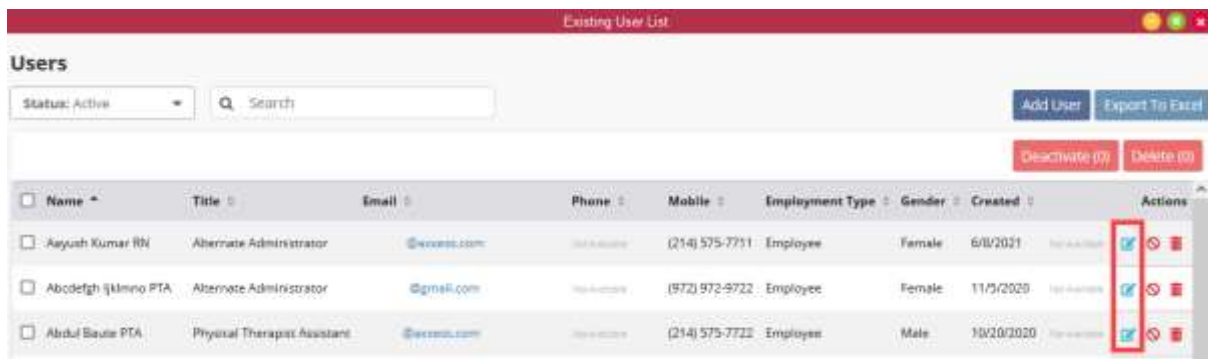
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## ADD VISIT ACTIVITY PAY RATES

*Admin/Lists/Users*

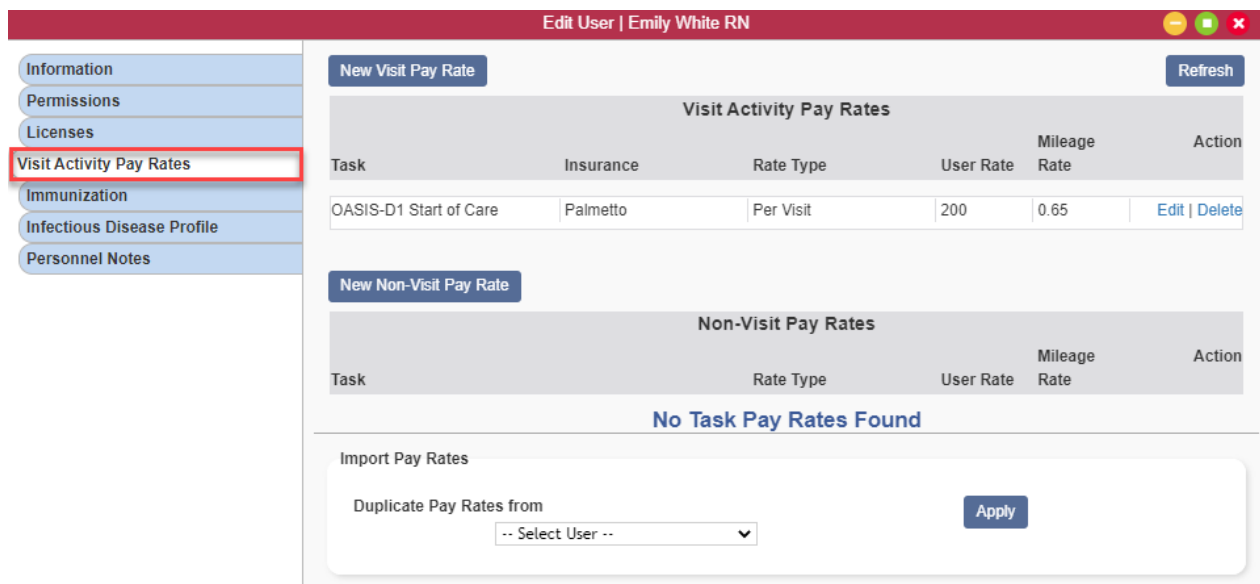
The first step in the payroll processing functionality is to assign **Visit Pay Rates** and **Non-Visit Pay Rates** to each of the users.

Find the user's name to add Visit Rates and select **Edit** on the right-hand side of the screen.



Name	Title	Email	Phone	Mobile	Employment Type	Gender	Created	Actions
Aayush Kumar RN	Alternate Administrator	@axxess.com	(972) 972-9722	(214) 575-7711	Employee	Female	6/11/2021	[Edit] [Deactivate] [Delete]
Abcdefgh ijklmno PTA	Alternate Administrator	@gmail.com	(972) 972-9722	(972) 972-9722	Employee	Female	11/5/2020	[Edit] [Deactivate] [Delete]
Abdul Baqir PTA	Physical Therapist Assistant	@axxess.com	(972) 972-9722	(214) 575-7722	Employee	Male	10/20/2020	[Edit] [Deactivate] [Delete]

The user's profile window will open, select the **Visit Activity Pay Rates** tab on the left-hand side of the screen.



- Information
- Permissions
- Licenses
- Visit Activity Pay Rates
- Immunization
- Infectious Disease Profile
- Personnel Notes

New Visit Pay Rate
Refresh

Task	Insurance	Rate Type	User Rate	Mileage Rate	Action
OASIS-D1 Start of Care	Palmetto	Per Visit	200	0.65	<a href="#">Edit</a>   <a href="#">Delete</a>

New Non-Visit Pay Rate

Task	Rate Type	User Rate	Mileage Rate	Action
No Task Pay Rates Found				


Import Pay Rates

Duplicate Pay Rates from
 

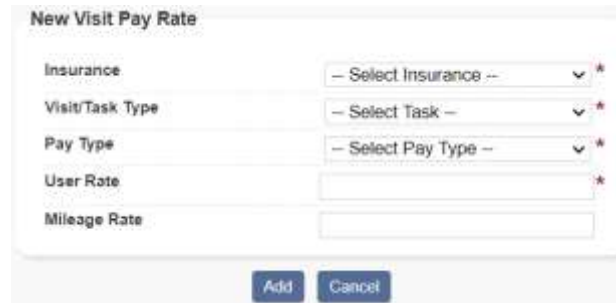
-- Select User --

Apply

axxess.com


 /Axxess

## ADD NEW VISIT PAY RATE



The form titled "New Visit Pay Rate" contains the following fields:

- Insurance: A dropdown menu with "-- Select Insurance --" and a red asterisk.
- Visit/Task Type: A dropdown menu with "-- Select Task --" and a red asterisk.
- Pay Type: A dropdown menu with "-- Select Pay Type --" and a red asterisk.
- User Rate: A text input field with a red asterisk.
- Mileage Rate: A text input field.

At the bottom of the form are two buttons: "Add" and "Cancel".

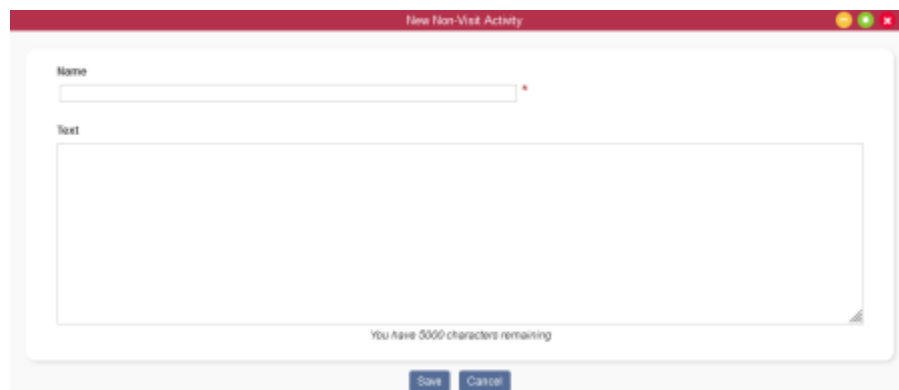
- Insurance - Select an insurance from the list of insurances set up by your organization.
- Visit/Task Type - Select a task from the drop-down list of all visit tasks.
- Pay Type - Select Per Visit, Per Hour or Single Payment to identify how the user will pay for the specific visit.
- User Rate - Enter a dollar amount to pay the user. Relative to the Pay Type selected above.
- Mileage Rate - This is not a required field but can be used to specify a different mileage reimbursement rate than the established Company Mileage Reimbursement Rate. If a rate is not entered here, the company rate will be used.

Then select the **Add** button. **NOTE: Anything with a red asterisk (\*) is required.**

## ADDING NON-VISIT ACTIVITY

*Admin/New/Non-Visit Activity*

The box below will appear, allowing for entry of Non-Visit Activity details. Enter the Name and Text. Once completed, select the **Save** button.



The form titled "New Non-Visit Activity" contains the following fields:

- Name: A text input field with a red asterisk.
- Text: A large text area with a character count at the bottom: "You have 5000 characters remaining".

At the bottom of the form are two buttons: "Save" and "Cancel".

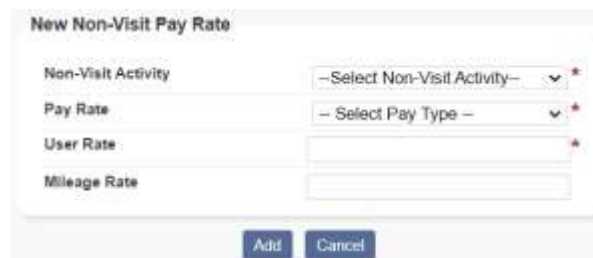
## NEW NON-VISIT PAY RATE

*Admin/Lists/Users/Visit Activity Pay Rates*

To assign a rate to a New Non-Visit Activity in a user's profile, pull up the user and make sure the **Visit Activity Pay Rates** tab is selected. Select **New Non-Visit Pay Rate**.



The New Non-Visit Pay Rate window will appear. Enter the information then select the **Add** button.



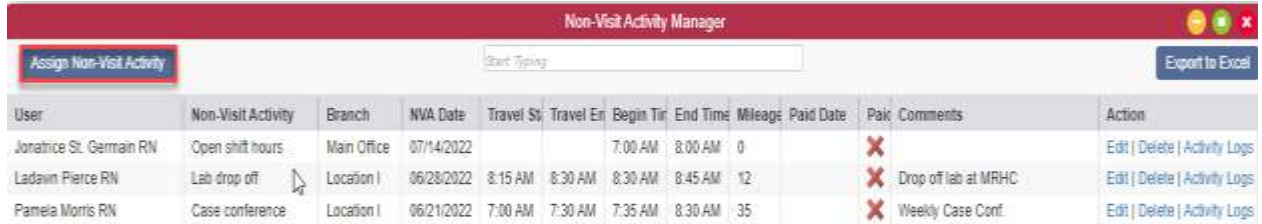
- Non-Visit Activity - Select a task from the drop-down list of all non-visit tasks.
- Pay Rate - Select Per Visit, Per Hour or Single Payment to identify how the user will be paid for the specific visit.
- User Rate - Enter a dollar amount to pay the user, relative to the Pay Type selected above.
- Mileage Rate - This is not a required field but can be used to specify a different mileage reimbursement rate than the established Company Mileage Reimbursement Rate. If a rate is not entered here, the company rate will be used.

Select the **Add** button when complete. Now that Non-Visit Pay Rate has been added to the user, assign the Non-Visit Activity to a user. This is the process that will pull to the Payroll Summary Report.

## ASSIGN NON-VISIT ACTIVITY

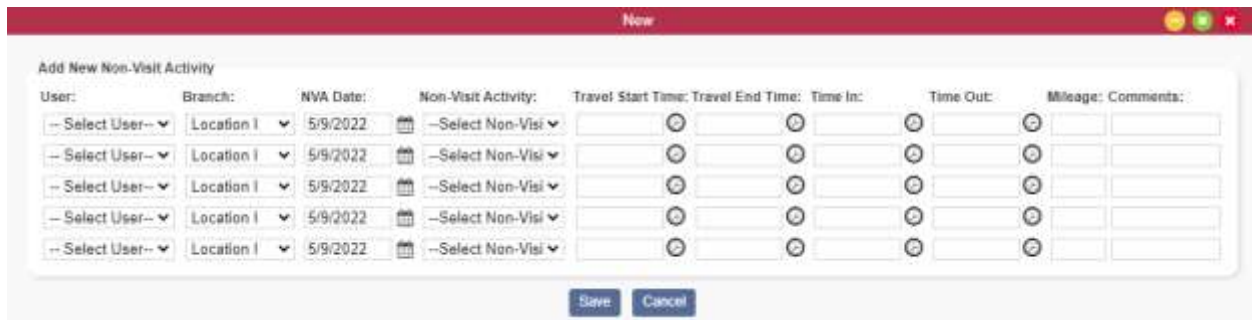
*Admin/Non-Visit Activity Manager*

The Non-Visit Activity Manager will open. Select **Assign Non-Visit Activity**.



User	Non-Visit Activity	Branch	NVA Date	Travel St	Travel En	Begin Tim	End Time	Mileage	Paid Date	Paic	Comments	Action
Jonatrice St. Germain RN	Open shift hours	Main Office	07/14/2022			7:00 AM	8:00 AM	0		X		Edit   Delete   Activity Logs
Ladawn Pierce RN	Lab drop off	Location I	06/28/2022	8:15 AM	8:30 AM	8:30 AM	8:45 AM	12		X	Drop off lab at MRHC	Edit   Delete   Activity Logs
Pamela Morris RN	Case conference	Location I	06/21/2022	7:00 AM	7:30 AM	7:35 AM	8:30 AM	35		X	Weekly Case Conf.	Edit   Delete   Activity Logs

Once the button is selected the window below will open.



**New**

Add New Non-Visit Activity

User:	Branch:	NVA Date:	Non-Visit Activity:	Travel Start Time:	Travel End Time:	Time In:	Time Out:	Mileage:	Comments:
-- Select User --	Location I	5/9/2022	-- Select Non-Visi						
-- Select User --	Location I	5/9/2022	-- Select Non-Visi						
-- Select User --	Location I	5/9/2022	-- Select Non-Visi						
-- Select User --	Location I	5/9/2022	-- Select Non-Visi						
-- Select User --	Location I	5/9/2022	-- Select Non-Visi						

Save Cancel

Select the User, Branch, NVA Date, Non-Visit Activity, Travel Start Time, Travel End Time, Time in, Time Out, Mileage and any Comments that may pertain to this entry. After entering all criteria, select **Save**. Then the user's Non-Visit Activity will pull the rate set up and appear in the Payroll Summary. Select the **Edit** hyperlink to make changes or select the **Delete** hyperlink to remove. Select the **Activity Logs** hyperlink to see a record of any updates made.

## PAYROLL EXPORT CENTER

*Admin/Payroll Export Center*



**Payroll Export Center**

06/07/2022 TO 07/07/2022 Branch: Select option Employee: Select option Task Type: Select option

Insurance/Payer: Select opt. Task Status: Select opt. Employee Credentials: Sel Employment Type: Select o Visit Pay Type: Select option Low Tasks: Select option

Additional Columns: All Pending Approval Pending Export Exported/Paid Selected

Export Generated Export Details AOP Payroll Export

The following are the filter options at the top of the window:

- Date Range - Enter the date range to generate payroll details. Payroll is often run on a weekly, bi-weekly, semi-monthly or monthly basis.
- Branches - This field defaults to All and enables users to select from a list of the organization's branches.
- Employees - This field defaults to All and enables users to select from a list of the organization's active and inactive employees.
- Task Types - This field defaults to All and enables users to select from a list of tasks.

Select the **+ More Filters** button in the top right corner to view the following additional filters:

- Insurance/Payer - Search and/or choose a specific payer. More than one can be selected. Once selected, payers will be bolded.
- Task Status - Search and/or choose the task statuses. More than one can be selected. Once selected, statuses will be bolded.
- Employee Credentials - Search and/or choose credentials. More than one can be selected. Once selected, credentials will be bolded.
- Employment Type - Choose from contractor, employee, student/trainee, volunteer or all. More than one can be selected. Once selected, employment types will be bolded.
- Visit Pay Type - Choose from hourly, none, per visit, salary or all. More than one can be selected. Once selected, pay types will be bolded.
- Late Tasks - Choose to include, exclude, or show only late tasks.

Once the criteria is selected, select **Generate**. A summary will display on the screen.

Additional Columns								
Export/Paid Status	Export/Paid Date	Batch ID	Employer Name	Branch	Patient Name	Visit Date	Visit/RVA Task Type	Visit Time
Exported/Paid	01/11/2020	AX54	Rojas, Lyseth	Location 2	Rojas, Juvia	12/15/2019	PT Assessment/Evaluation	02:00 AM - 0
Exported/Paid	01/08/2020	AX52	Rojas, Lyseth	Location 2	Rojas, Juvia	12/15/2019	OT Assessment/Evaluation	02:00 AM - 0
<input type="checkbox"/> Pending Export			Gonzalez, Martha	Location 2	Jones, Mary	12/16/2019	Skilled Nurse Visit	02:00 AM - 02:30
<input type="checkbox"/> Pending Export			Hirpara, Divyesh	Location 2	HIRPARA, ROCK	12/16/2019	Skilled Nurse Visit	
Exported/Paid	01/11/2020	AX54	Rojas, Lyseth	Location 2	Rojas, Alex	12/16/2019	OASIS-D Discharge	02:00 AM - 0
<input type="checkbox"/> Pending Export			Caudel, Jeremiah	Location 2	Pressure, Blood	12/17/2019	OASIS-D1 Start of Care	02:15 AM - 02:11
<input type="checkbox"/> Pending Export			Caudel, Jeremiah	Location 2	Check, Ades	12/17/2019	OASIS-D1 Discharge	02:00 AM - 02:30

Change from a summary view to look at just the pending export or export/paid entries by selecting either option.

Under the payroll parameter filters, the **Additional Columns** menu enables users to generate more robust payroll data. Users can select any or all the 18 additional column options:

<b>Additional Columns</b>	<b>Description</b>
Associated Mileage	Generates the value noted in the visit documentation.
Auto-Calculated Mileage	Displays the number of miles driven as determined by the system's automated calculation of the distance between the starting and ending visit addresses. (This calculation only populates for visits with completed statuses.)
Auto-Calculated Mileage Amount	Displays the mileage reimbursement amount as determined by the auto-calculated mileage above and the reimbursement rate entered in the user/company profile.
Auto-Calculated Travel Hours	Displays the average travel time to and from the point of care based on the user and patient addresses in the system. (This calculation only populates for visits with completed statuses.)
EVV Hours	Displays hours generated by Electronic Visit Verification during visits.
EVV Time	Displays times generated by Electronic Visit Verification during visits.
Employee Credentials	Displays employee credentials entered in the user profile.
Employee Pay Type	Displays either Salary, Hourly or Per Visit.
Employment Type	Displays employment type entered in the user profile.
Insurance/Payer	Displays insurance/payer affiliated with the episode and visit information.
Patient MRN	Displays patient Medical Record Number (MRN) entered in the patient profile.
Pay Rate	Displays pay rate entered in the user profile.
Payroll File/Worker ID	Displays payroll file/worker ID entered in the user profile.
Travel Hours	Generates the value noted in the visit documentation.
Visit Hours	Payroll hours calculated based on the visit time in and visit time out components entered in the visit documentation.
Visit Pay Type	Displays either Per Visit, Per Hour or Single Payment.
Visit Status	Displays the visit's current status in the Schedule Center.
Visit Units	Displays the number of units tied to visit.



## PAYROLL FUNCTIONALITY

**Edit** functionality enables the payroll processor to change values in specific fields as needed. Modifications can be made in the following four fields:

Editable Field	Description
Visit Time	Displays the visit time in and visit time out as noted in the visit. Any edits made to these times in the Payroll Export Center will automatically update the visit time information in the visit and visit log (both of which can be accessed through the Schedule Center).
Travel Time	Displays the number of miles driven as determined by the system's automated calculation of the distance between the starting and ending visit addresses. This calculation only populates for visits with completed statuses.
Mileage Amount	Displays the mileage reimbursement amount as determined by the auto-calculated mileage above and the reimbursement rate entered in the user/company profile.
Surcharge Amount	Displays the average travel time to and from the point of care based on the user and patient addresses in the system. (This calculation only populates for visits with completed statuses.)

Select the pencil icon to edit a field and the save icon to save changes.

Employee Name	Visit Time	Travel Time	Mileage Amount
Pana, Krystal	09:00 AM - 10:00 AM  <b>EDIT</b>	08:30 AM to 9:00 AM  <b>SAVE</b>	7.50
Shittu, Taofiq	07:30 AM - 07:45 AM 		0.00

Reports can be generated in the **Payroll Export Center** by using the following buttons:

**Export Generated** – Generates an Excel file with basic payroll information for the selected time frame. This report provides a summary overview rather than a detailed report. It does not include any information from the Additional Columns menu.

**Export Details** – Generates an Excel file with over 25 columns of data, including items selected from the Additional Columns menu. Agencies that do not use ADP

or Paychex as a payroll vendor can use this report to manually create an export file that meets their vendor's specific requirements.

**Payroll Export** – Generates a .csv file applicable to the vendor (chosen by organization) for processing payroll.

**NOTE:** There is a box selection specifically for ADP Payroll Export if using ADP as your payroll vendor.

Select the checkbox(es) of individual payroll entries and select an Export button or select the select all checkbox in the blue header to export all pending entries.

<span>Export Generated</span> <span>Export Details</span> <span>ADP Payroll Export</span>					
<input type="checkbox"/>	Employee Name	Branch	Patient Name	Visit Date	Visit/NVA Task Type
<input checked="" type="checkbox"/>	Pana, Krystal	Location II	Pratt, Michaela	05/22/2021	OASIS-D1 Discharge
<input checked="" type="checkbox"/>	Shittu, Taofiq	Main Office	Elerujonron, Agbonkolor	05/22/2021	PT Assessment/Evaluation
<input type="checkbox"/>	Shittu, Taofiq	Main Office	Santos, Romeo	05/23/2021	OASIS-D1 Recertification
<input type="checkbox"/>	Chavis, Kimberly	Main Office	Mennow, Rachel	05/24/2021	OASIS-D1 Start of Care

## TASK APPROVAL

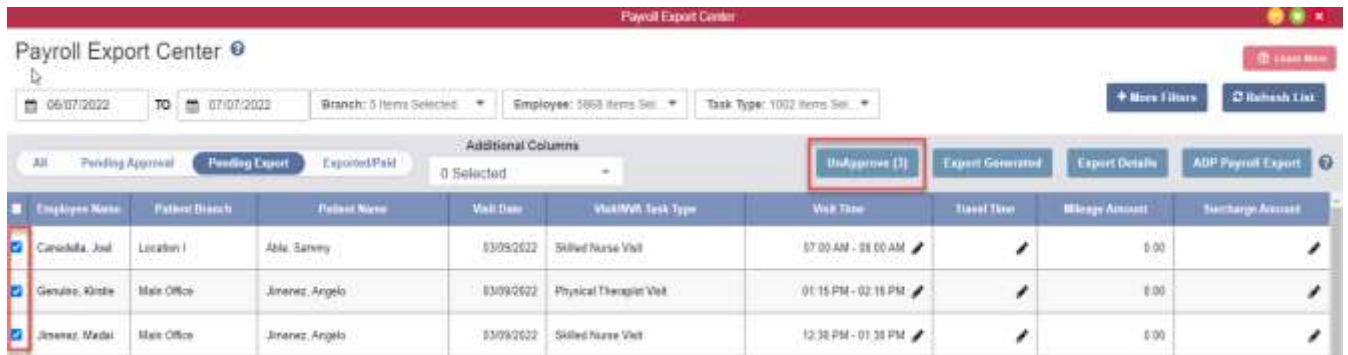
To view tasks that are pending approval, toggle to **Pending Approval** at the top of the **Payroll Export Center**. Enter the desired search parameters in the appropriate filters and select **Generate**.

Once generated, the table will populate with all unpaid visits within the selected parameters. To approve tasks, select the boxes to the left of each task and select **Approve**. The selected tasks will then move to the **Pending Export** screen to review and generate an export file. Only users with the **Generate Payroll Export** permission can generate the export file.



Employee Name	Patient Branch	Patient Name	Visit Date	Visit/Work Task Type	Visit Time	Travel Time	Mileage Amount	Surcharge Amount
Canadella, Joel	Location 1	Able, Sammy	03/09/2022	Skilled Nurse Visit	07:30 AM - 08:00 AM		0.00	
Genaro, Kristle	Main Office	Jimenez, Angelo	03/09/2022	Physical Therapist Visit	11:15 PM - 02:15 PM		0.00	
Jimenez, Medel	Main Office	Jimenez, Angelo	03/09/2022	Skilled Nurse Visit	12:30 PM - 01:30 PM		0.00	

If tasks were accidentally approved, select the tasks on the **Pending Export** screen and select **Unapprove**. The tasks will then transfer back to the **Pending Approval** tab for review or to revise information other than what's editable in the Payroll Export Center.



Employee Name	Patient Branch	Patient Name	Visit Date	Visit/Work Task Type	Visit Time	Travel Time	Mileage Amount	Surcharge Amount
Canadella, Joel	Location 1	Able, Sammy	03/09/2022	Skilled Nurse Visit	07:30 AM - 08:00 AM		0.00	
Genaro, Kristle	Main Office	Jimenez, Angelo	03/09/2022	Physical Therapist Visit	01:15 PM - 02:15 PM		0.00	
Jimenez, Medel	Main Office	Jimenez, Angelo	03/09/2022	Skilled Nurse Visit	12:30 PM - 01:30 PM		0.00	

Once all tasks have been approved, reviewed and selected on the **Pending Export** screen, users with the **Generate Payroll Export** permission can select their desired **Export** button to download the .CSV file.

## REPORT CENTER

### Reports/Report Center

Select the **Report Center**. The Report Center lists multiple reports that can pull up organization data. The reports are grouped into sections based on the type of information it displays.

Patient Reports	Billing/Financial Reports	Statistical Reports
60 Day Summary By Patient	<b>MONTH-END CLOSE</b>	Admission
Average Length Of Stay	AR Roll Forward	Census By Primary Insurance
CAHPS	Claim Activity Report	Employee Visit History
COVID-19 Vaccinations Report	Claims Analysis Report	HIVBP Advanced Care Plan
Discharge Patients	Earned Revenue (1 Over X Daily Method)	HIVBP Influenza Vaccine for Employees
Emergency Contact Listing	Earned Revenue (Completed Visit Method)	HIVBP Shingles Vaccine for Patients
Emergency Preparedness Patient List	Earned Revenue (Final Bill Method)	Infectious Disease Screening
Expiring Authorizations	General Ledger	Medicare Cost
Infection Surveillance Report	HHRG/LUPA Report	Patient Admissions By Internal Referral Source
Patient Address Listing	Managed Care Earned Revenue (Completed Visit Method)	Patient by Discipline Duplicated And Unduplicated
Patient Birthday Listing	Month End AR	Patient Visit History
Patient By Physician Listing	Payment/Adjustment Activity	Productivity Report
Patient By Responsible Case Manager Listing	Payment/Adjustment Activity Summary	Supply Report
Patient By Responsible Employee Listing	Unbilled AR (Accrual Method) <b>New</b>	Unduplicated Census Report By Date Range
Patient List	<b>MEDICARE/ MEDICARE HMO</b>	Unduplicated Census Report by Start Of Care Date
Patient Roster	Actual Submitted Claims	Visits And Charge Detailed
Patient Start Of Care Certification Period Listing	Billed and Unbilled Revenue	Visits And Charge Summary
Patient Vital Sign	Expected Submitted Claims	Visits By Payor
Referral Log	Medicare/Medicare HMO Payment	<b>Annual Survey Report (Missouri)</b>
Referral Report	Medicare/Medicare HMO Unbilled Billing Periods	PPS Charge Information
Survey Census	Outstanding Claims	
	Potential Claim Auto Cancel	

**NOTE:** Viewable reports are based on the role users are setup as (User setup is covered in Administrative).

For more information about what data the report is displaying, hover over the report name. A gray box will appear, providing more details.

**Payroll Reports**

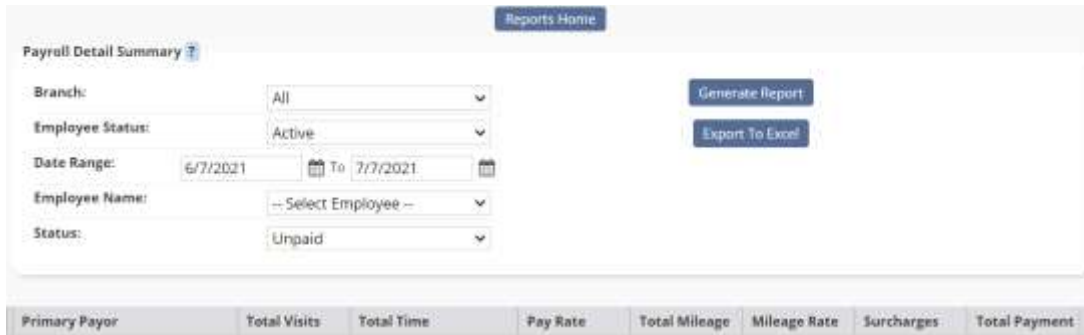
Payroll Detail Summary


**Description:** Generates a report displaying an employee's payroll by task. The report is helpful in identifying any discrepancies, locate missing, inaccurate or incomplete information in the summary.

**Parameters:** Date Range, Employee Name, Status (Paid/Unpaid)

**Report Includes:** Task/Primary Payor/Total Visits/Total Time/Pay Rate/Total Mileage/Mileage Rate/Surcharges/Total Payment

The **Payroll Detail Summary Report** is selected, and the gray box appears. Select the name of the report and a new window will open.



The name of the report will be listed in the upper, left-hand part of the screen. Next to the name of the report will be the  icon. While hovering over this icon, a report description will display.



Once desired criteria have been chosen, select **Generate Report**. 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, it will need to follow the following workflow:

- Go to the Report Center (Reports/Report Center) and select the report to create.
- Fill in the search criteria then select **Request Report**.



Now that the report has been requested, it will be in the **Completed Reports** list.

List of Reports						
Name	Format	Status	Requested By	Started	Completed	Action
AR Roll Forward Report	Excel	Running	Wendell Geli RN	08/22/2021 07:43:46 PM		Delete
CAHPS Report	Excel/CSV	Completed	Wendell Geli RN	08/27/2020 04:25:06 PM	08/27/2020 04:25:16 PM	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

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axcess.com/help/>

