

HOSPICE PAYROLL TRAINING MANUAL

May 2023

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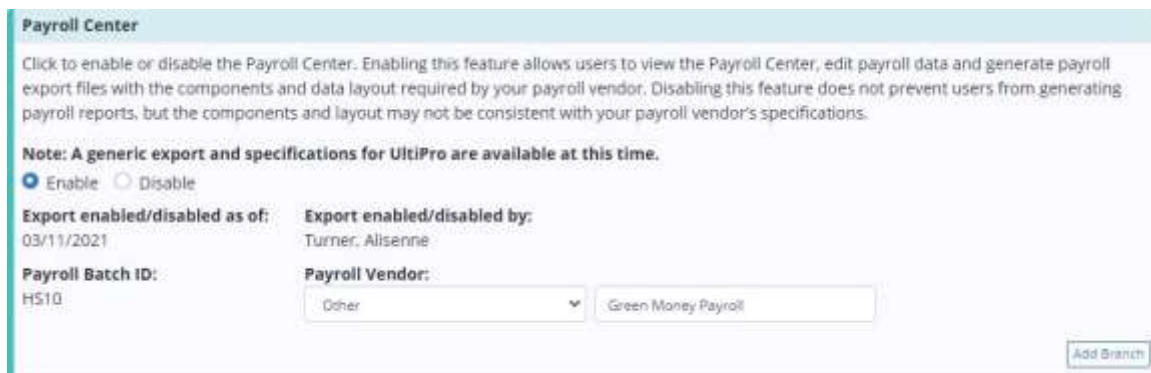
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SETUP

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.

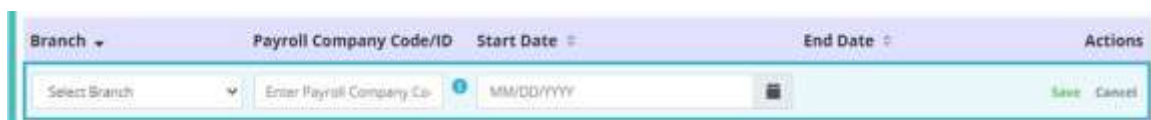
Confirm the correct provider is selected in the provider filter at the top of the screen and select **Enable** in the **Payroll Center** section.






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.



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**.

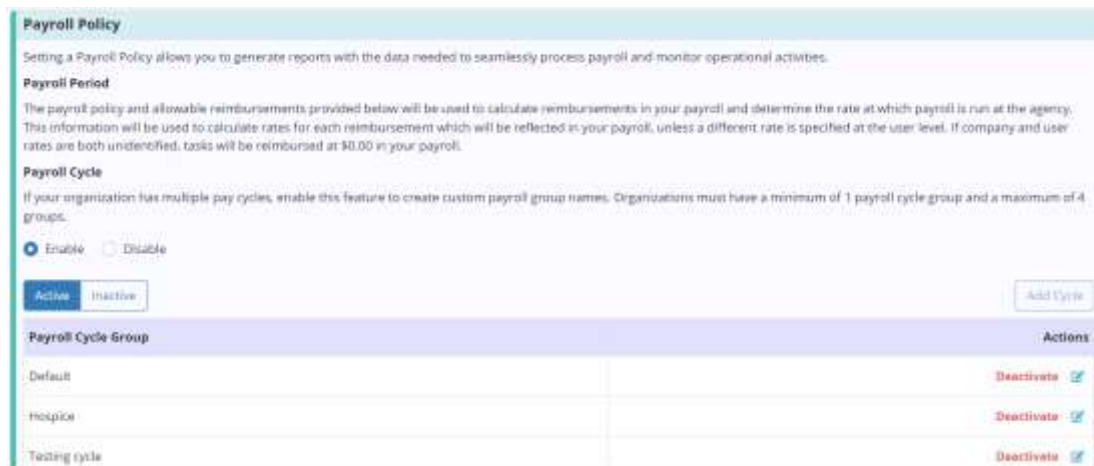





Users can edit, delete or deactivate payroll company codes/IDs using the ,  and  icons respectively under the **Actions** column. Select **Save** at the bottom of the screen to finish enabling the Payroll Center.

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.

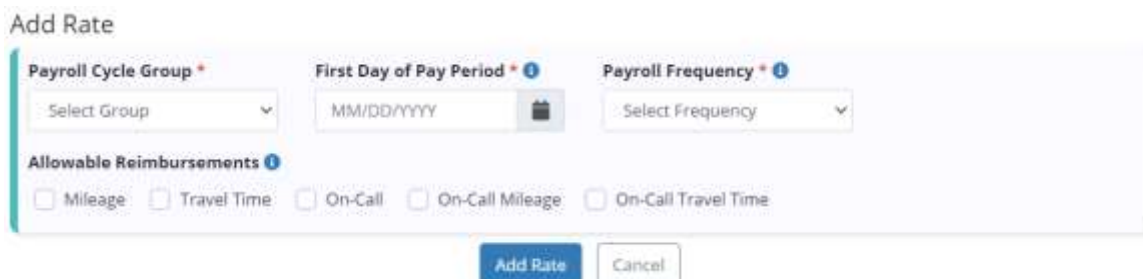
If your organization has multiple pay cycles, enable the Payroll Cycle feature to create custom payroll group names. Select the **Add Cycle** button to add a payroll cycle.



Payroll Cycle Group	Actions
Default	Deactivate 
Hospital	Deactivate 
Testing cycle	Deactivate 

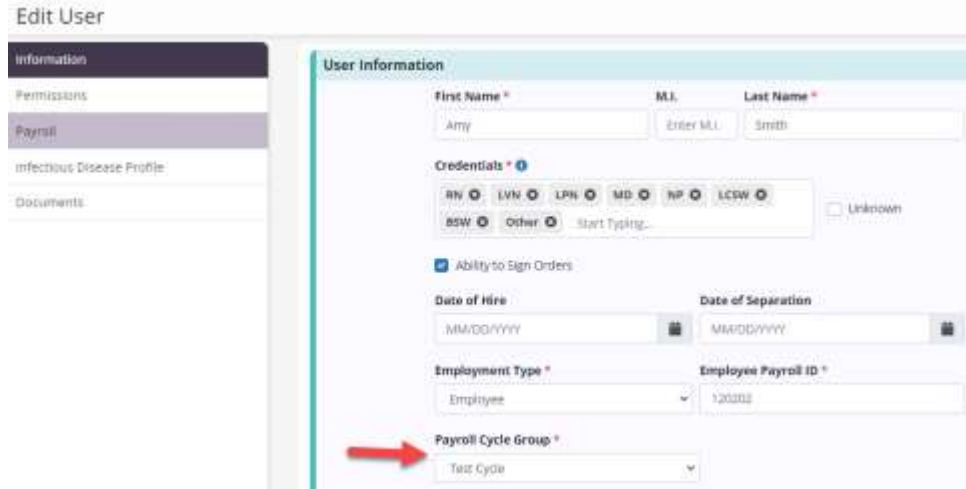
NOTE: Organizations must have a minimum of one payroll cycle group and maximum of four groups.

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.

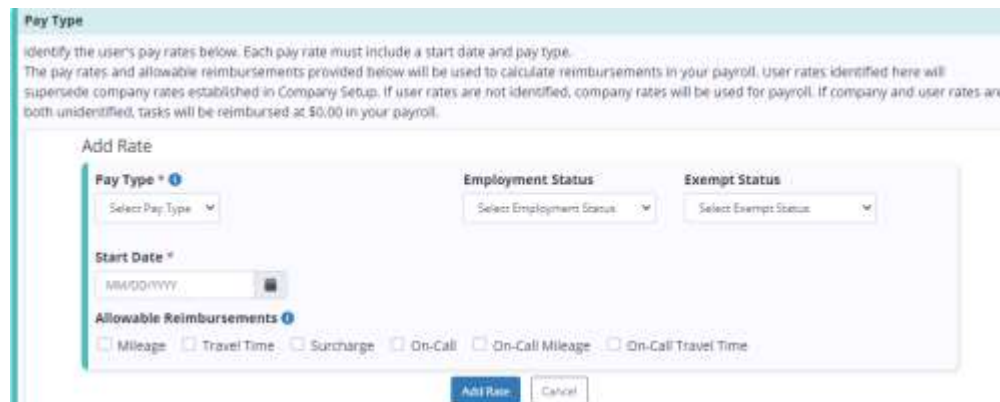


Once payroll cycles are enabled in Company Setup, a new Payroll Cycle Group filter will appear in the **Payroll Center** and on the **Payroll Report**. When a payroll group is selected, the date ranges will appear in the date range box. The list will reflect the payroll cycle groups that were created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

The screenshot shows the 'Edit User' interface with the 'Payroll' tab selected. The 'User Information' section contains fields for First Name (Amy), M.I. (Enter M.I.), and Last Name (Smith). Below these are 'Credentials' with options like RN, LVN, LPN, MD, NP, LCSW, ASW, and Other. There is a checkbox for 'Ability to Sign Orders' which is checked. Fields for 'Date of Hire' and 'Date of Separation' are present. 'Employment Type' is set to 'Employee' and 'Employee Payroll ID' is '120002'. A red arrow points to the 'Payroll Cycle Group' dropdown menu, which is currently set to 'Tax Cycle'.

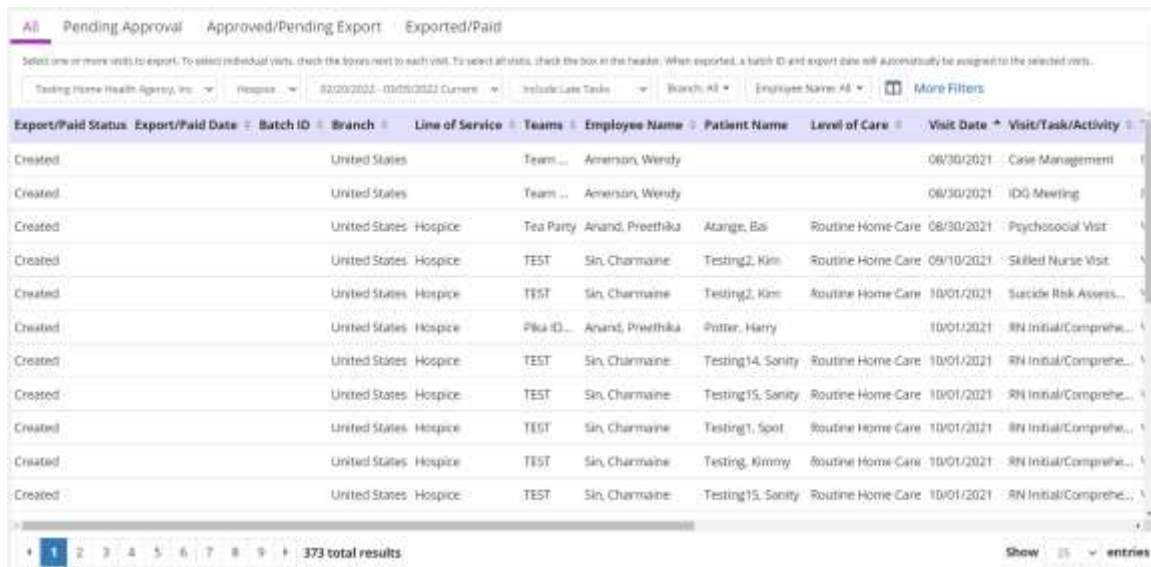
When multiple payroll cycles are enabled in Company Setup, the following optional items appear under **Pay Type** on the **Payroll** tab of user profiles: Pay Type, Employment Status and Exempt Status.

The screenshot shows the 'Pay Type' section of the user profile form. It includes a descriptive paragraph about pay rates and reimbursements. Below this is an 'Add Rate' form with three dropdown menus: 'Pay Type', 'Employment Status', and 'Exempt Status'. There is a 'Start Date' field and a section for 'Allowable Reimbursements' with checkboxes for Mileage, Travel Time, Surcharge, On-Call, On-Call Mileage, and On-Call Travel Time. 'Add Rate' and 'Cancel' buttons are at the bottom.

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.

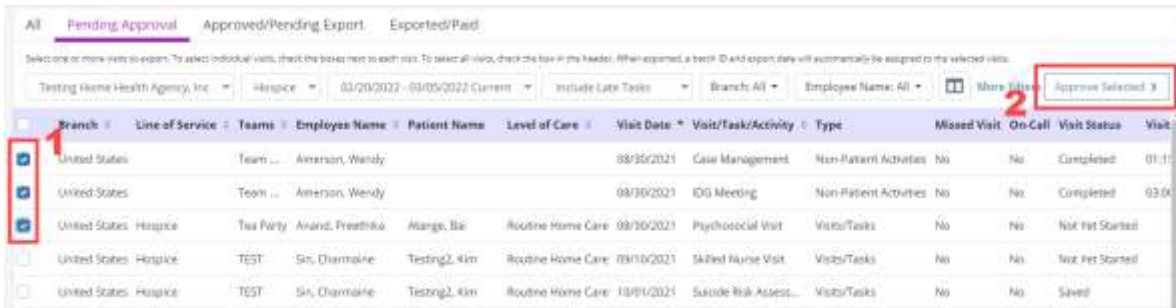


Export/Paid Status	Export/Paid Date	Batch ID	Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity
Created			United States		Team ...	Amerson, Wendy			08/30/2021	Case Management
Created			United States		Team ...	Amerson, Wendy			08/30/2021	IDG Meeting
Created			United States Hospice		Tea Party	Anand, Preetika	Atange, Bai	Routine Home Care	08/30/2021	Psychosocial Visit
Created			United States Hospice		TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	09/10/2021	Skilled Nurse Visit
Created			United States Hospice		TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	10/01/2021	Suicide Risk Assess...
Created			United States Hospice		Pika ID...	Anand, Preetika	Prater, Harry		10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sn, Charmaine	Testing14, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sn, Charmaine	Testing15, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sn, Charmaine	Testing1, Spot	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sn, Charmaine	Testing, Jimmy	Routine Home Care	10/01/2021	RN Initial/Comprehe...
Created			United States Hospice		TEST	Sn, Charmaine	Testing15, Sonity	Routine Home Care	10/01/2021	RN Initial/Comprehe...

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**.

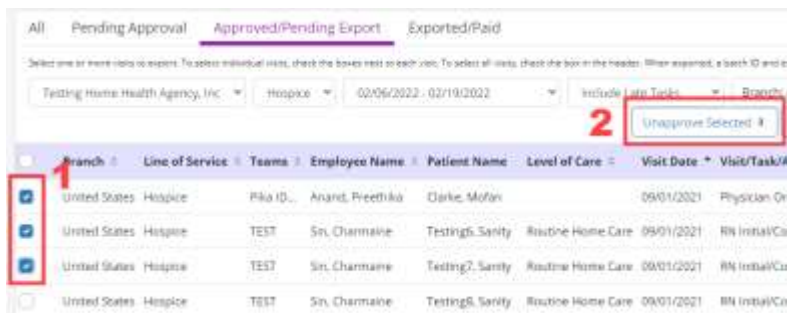


Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type	Missed Visit	On-Call	Visit Status	Visit
<input checked="" type="checkbox"/>	United States	Team ...	Amerson, Wendy			08/30/2021	Case Management	Non-Patient Activities	No	No	Completed	01:11
<input checked="" type="checkbox"/>	United States	Team ...	Amerson, Wendy			08/30/2021	IDG Meeting	Non-Patient Activities	No	No	Completed	03:04
<input checked="" type="checkbox"/>	United States Hospice	Team Party	Anand, Preethika	Atango, Bai	Routine Home Care	08/30/2021	Psychoocial Visit	Visits/Tasks	No	No	Not Yet Started	
<input type="checkbox"/>	United States Hospice	TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	08/10/2021	Skilled Nurse Visit	Visits/Tasks	No	No	Not Yet Started	
<input type="checkbox"/>	United States Hospice	TEST	Sn, Charmaine	Testing2, Kim	Routine Home Care	10/01/2021	Suicide Risk Assess...	Visits/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.



Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Act
<input checked="" type="checkbox"/>	United States Hospice	PHO ID...	Anand, Preethika	Clarke, Mofan		09/01/2021	Physician Ord
<input checked="" type="checkbox"/>	United States Hospice	TEST	Sn, Charmaine	Testing5, Sanity	Routine Home Care	09/01/2021	RN Initial/Cam
<input checked="" type="checkbox"/>	United States Hospice	TEST	Sn, Charmaine	Testing7, Sanity	Routine Home Care	09/01/2021	RN Initial/Cam
<input type="checkbox"/>	United States Hospice	TEST	Sn, Charmaine	Testing8, Sanity	Routine Home Care	09/01/2021	RN Initial/Cam

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).

All Pending Approval **Approved/Pending Export** Exported/Paid

Select one or more visits to export. To select individual visits, check the boxes next to each visit. To select all visits, check the box in the header. When exported, a batch ID and export date will automatically be assigned to the selected visits.

Testing Home Health Agency, Inc. Hospice 02/09/2022 - 02/19/2022 Include Late Tasks Branch: All Employee Name: All More Filters

Unapprove Selected **Lawson Payroll Export** Multiple Providers Payroll Export

Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type	Missed Visit	On-Call	Visit Status
<input checked="" type="checkbox"/>	United States	Hospice	Rka ID...	Anand, Preethika	Clarke, Mofan	09/01/2021	Physician Order	Visits/Tasks	No	No	Not Yet Started
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sin, Charmaine	Testing5, Sanity	Routine Home Care	09/01/2021	RN Initial/Comprehe...	Visits/Tasks	No	Completed
<input checked="" type="checkbox"/>	United States	Hospice	TEST	Sin, Charmaine	Testing7, Sanity	Routine Home Care	09/01/2021	RN Initial/Comprehe...	Visits/Tasks	No	Completed
<input type="checkbox"/>	United States	Hospice	TEST	Sin, Charmaine	Testing6, Sanity	Routine Home Care	09/01/2021	RN Initial/Comprehe...	Visits/Tasks	No	Completed
<input type="checkbox"/>	United States	Hospice	Rka ID...	Anand, Preethika	Demo, Jose	09/01/2021	RN Initial/Comprehe...	Visits/Tasks	No	No	Not Yet Started
<input type="checkbox"/>	United States	Hospice	TEST	Sin, Charmaine	Testing1, Kim	Routine Home Care	09/01/2021	RN Initial/Comprehe...	Visits/Tasks	No	Saved

NOTE: If the organization is interested in generating vendor-specific export files for a payroll vendor 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.

All Pending Approval Approved/Pending Export **Exported/Paid**

Select one or more visits to export. To select individual visits, check the boxes next to each visit. To select all visits, check the box in the header. When exported, a batch ID and export date will automatically be assigned to the selected visits.

Testing Home Health Agency, Inc. Hospice 02/09/2022 - 02/19/2022 Include Late Tasks Branch: All Employee Name: All More Filters

Export/Paid Status	Export/Paid Date	Batch ID	Branch	Line of Service	Teams	Employee Name	Patient Name	Level of Care	Visit Date	Visit/Task/Activity	Type
Paid	02/22/2022	H5514	United States	Hospice	FruitSal...	Sin, Charmaine	aaron, kusan		09/01/2021	Clinical Evaluation/L...	Visits/Ta
Paid	02/22/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing, Kim		09/01/2021	RN Initial/Comprehe...	Visits/Ta
Paid	02/22/2022	H5514	United States		Abby T...	Sin, Charmaine			09/01/2021	IDG Meeting	Non-Paid
Paid	02/22/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing2, Sanity	Routine Home Care	09/02/2021	Homemaker Visit	Visits/Ta
Paid	02/22/2022	H5514	United States	Hospice	TEST	Sin, Charmaine	Testing2, Kim	Routine Home Care	09/08/2021	Psychosocial Visit	Visits/Ta

1 5 total results Show 25 entries

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/>.

