# HOSPICE PAYROLL TRAINING MANUAL

May 2023

## **Table of Contents**
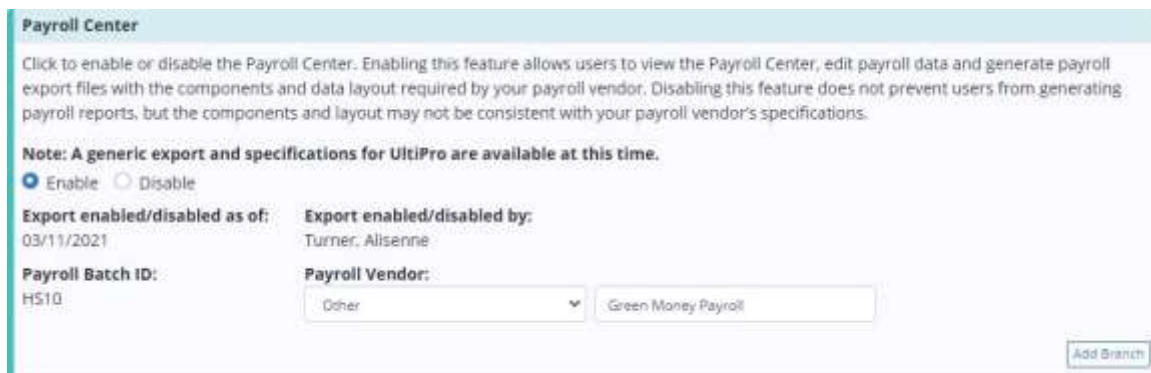
/Axxess

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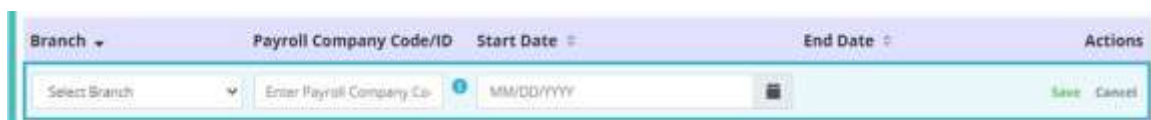
Confirm the correct provider is selected in the provider filter at the top of the screen and select **Enable** in the **Payroll Center** section.



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**.
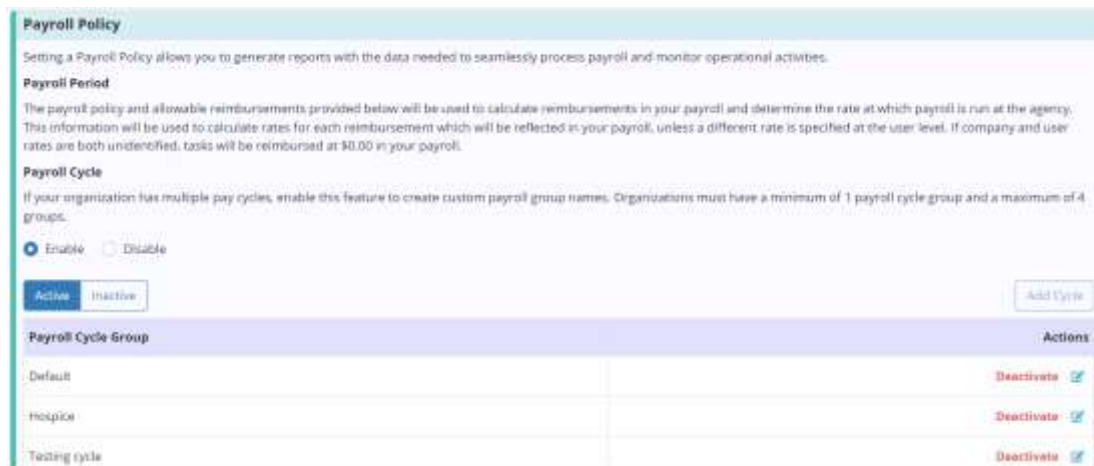
/Axxess

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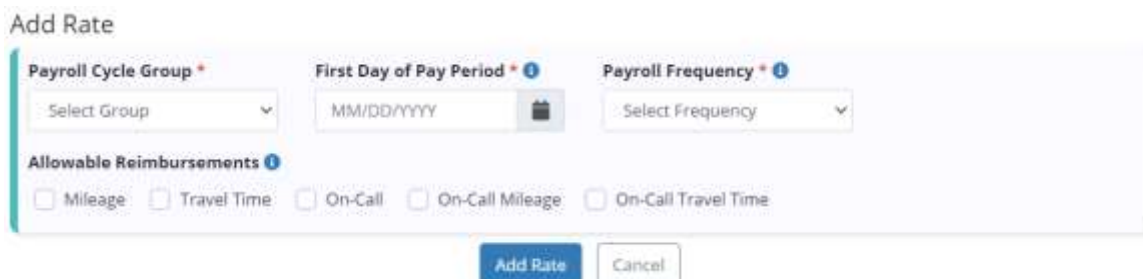
If your organization has multiple pay cycles, enable the Payroll Cycle feature to create custom payroll group names. Select the **Add Cycle** button to add a payroll cycle.
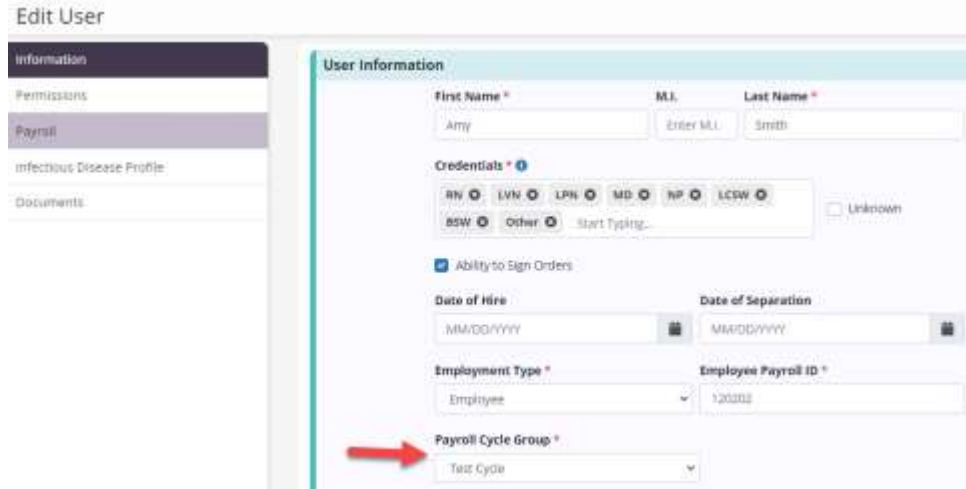


NOTE: Organizations must have a minimum of one payroll cycle group and maximum of four groups.

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.
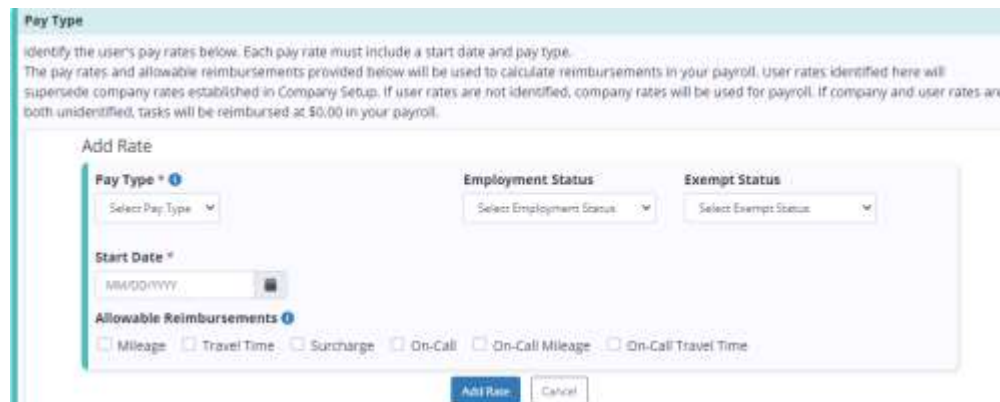
/Axxess

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.
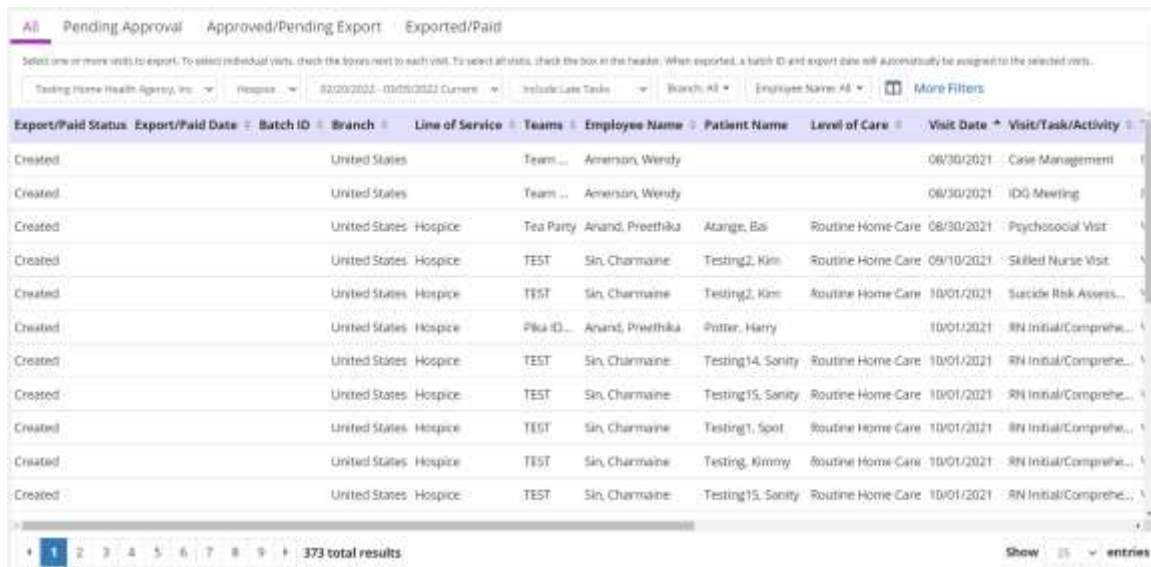


When multiple payroll cycles are enabled in Company Setup, the following optional items appear under **Pay Type** on the **Payroll** tab of user profiles: Pay Type, Employment Status and Exempt Status.

/Axxess

## 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.



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.**
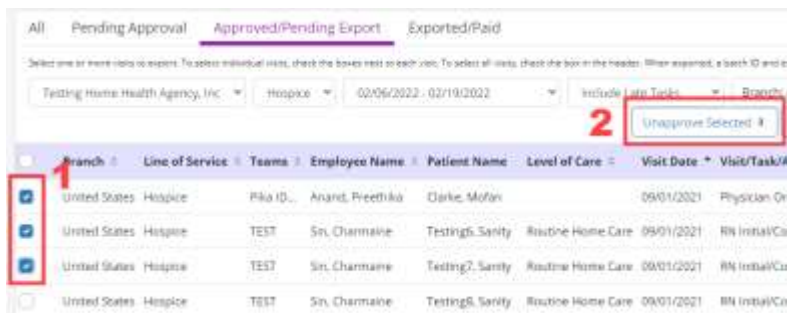
/Axxess

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.



## 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).

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.

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.

/Axxess

## 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/.





OUR COMPLETE SUITE OF SOLUTIONS KNOWLEDGE BASE

**Get Help Anytime, Anywhere**

Home Health

Home Care

Hospice

Palliative Care

Revenue Cycle

Patient Engagement

Staffing

Training and Certification

/Axxess