

# **HOME CARE PAYROLL AND REPORTS QUICK REFERENCE GUIDE**

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## **CREATE PAYROLL POLICY**

*Admin/Company Setup/Payroll/Payroll Policy*

The first step in the payroll processing functionality is to create the organization's Payroll Policy. The following items must be filled out to apply the functionality to the organization's visits:

1. Enter the company's mileage reimbursement rate that will be the default mileage rate (if a task rate is not entered).
2. Enter the company's travel time reimbursement rate that will be the default travel time rate (if a task rate is not entered).
3. Enter the first day of the payroll date.
4. Choose how often employees are paid.
5. Enter three base shifts for the organization.
6. Choose to enable to calculate tasks pay based on the company shifts.
7. Choose how the start and end times are rounded.
8. Decide if and how hourly work should round by shift time.
9. Choose to enable unpaid meal breaks then determine the length.
10. Enter the task duration parameter for calculating when unpaid meal breaks should be applied then decide if there are payroll penalties associated with not receiving the meal break.
11. Determine if users can (warning or error) complete tasks over their limit (per day and week). If so, how many hours.
12. Manage Municipalities – Select **Edit** or **Delete** for updates.
  - a. Select **Add Municipality** if the organization pays a specific amount for select regions.
  - b. Choose the branch, enter the name and minimum hourly pay rate.
  - c. Select **Save & Exit**.
13. Select **Save**.

## **ADD NEW PAY RATES**

*Admin/Company Setup/Payroll/Pay Rates*

1. Select **New**.
2. Choose the branch (if more than one).
3. Choose the task.
4. Enter the rate and choose a unit.
5. Enter the effective date.


For the following items, choose one or multiple by selecting the checkbox(es).  
Check All or select Check all to choose all items in the list.

6. Choose the employee(s).
7. Choose the payment source(s).
8. Choose the client(s).
9. Choose the shift(s).
10. Choose the days of the week.
11. Enter the mileage rate and/or travel time rate (if applicable). If not selected, the organization's default rate will be used.
12. Select **Save & Close** to finish or select **Save & Add Another** for additional rates.

## **CREATE PAYROLL HOLIDAYS**

*Admin/Company Setup/Payroll/Holidays*

For Default Holidays:

1. Select **Add Default Holidays**.
2. Choose the holiday.
3. Decide to **Use Shifts** or **Use Custom Time**.
4. Select the rule(s).
5. Select **Add Holidays**. **NOTE:** Hover over the info  icon next to the rule and a short description will appear.

For New Holidays:

1. Select **New**.
2. Enter the name.
3. Choose the occurrence and time.
4. Select the rule(s).
5. Select **Save**.

**Edit, Delete** or **Deactivate** to update holidays.

## **PROCESSING PAYROLL**

*Employees/Payroll*

1. Enter the specific search criteria.
  - a. Choose branch (if more than one), to include late tasks, pay period, date range, task status, employee type, payroll status and/or columns.

- b. Enter the employee's first or last name to search.
- c. Sort by the clients or date.
- d. Choose the Pay Period.
  - i. If the Pay Period is not listed, select the **Pay Period** button.
    1. Enter the start and end date.
    2. Select **Create**.
- e. Select **Refresh** to generate payroll.

**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.

## **MARK TASK AS PAID**

### *Employees/Payroll*

1. Edit Payroll
  - a. Select the checkbox next to client/employee task to be edited.
  - b. Select **Edit Payroll**.
  - c. Make changes to actual date/time.
  - d. Select **Save**.
2. Finalize Payroll
  - a. Select the checkbox next to the client/employee task.
  - b. Select **Finalize Payroll**.
  - c. A green "**F**" will appear next to the client's name. Choose to **Un-Finalize Payroll** or **Mark as Paid**. **NOTE:** Users cannot edit payroll for tasks that have already been finalized. they would need to be un-finalized and then edited.
3. Mark as Paid
  - a. Select the checkbox next to the client/employee task.
  - b. Select **Mark as Paid**. A green "**P**" will appear next to the client's name.
  - c. Select the checkbox next to client/employee task.
  - d. Select **Send Paystub(s)**.

## **REPORT CENTER**

### *Reports/Report Center*

The reports are grouped into sections based on the type of information they generate. Hover over a report name to show what will display.

1. Select the report.
2. Choose search parameters/criteria.
3. Select **Generate**.

**NOTE:** Viewable reports are based on the roles and permissions a user is assigned (User setup is covered in Admin Overview).

## **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.

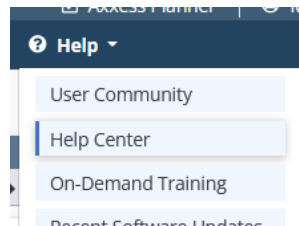
1. Go to *Reports/Report Center*.
2. Select the desired report.
3. Fill in the search criteria.
4. Select **Generate Report**.
5. Go to *Reports/Completed Reports*.
6. Select **Refresh**.
7. Select the report name hyperlink.

The status column will show when a report is finished generating. The “Running” status means it is still pulling data. “Completed” means the report is ready to view. To remove individual reports, select the **Delete** hyperlink to the right. To remove multiple reports, select the check boxes to the left of the reports and selecting the **Delete** button at the bottom.

## HELP CENTER

### *Help/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/>

