

HOME HEALTH PAYROLL AND REPORTS QUICK REFERENCE GUIDE

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Table of Contents

ADD NEW VISIT ACTIVITY PAY RATE3

ADDING NON-VISIT ACTIVITY3

NEW NON-VISIT PAY RATE3

ASSIGN NON-VISIT ACTIVITY4

PAYROLL EXPORT CENTER4

PAYROLL FUNCTIONALITY5

TASK APPROVAL5


REPORT CENTER6

COMPLETED REPORTS6

HELP CENTER.....7

ADD NEW VISIT ACTIVITY PAY RATE

Admin/Lists/User

1. Search for a specific user.
2. Select .
3. Select the **Visit Activity Pay Rates** tab.
4. Select **New Visit Pay Rate**.
 - a. Choose the Insurance. **NOTE:** If Insurance is not listed, go to Payer Setup in the Admin Manual.
 - b. Choose the Visit/Task Type. **NOTE:** If the task is not listed, follow the Create Custom Note instructions below.
 - c. Choose the Pay Type.
 - d. Enter the User Rate.
 - e. Enter the Mileage Rate.
 - f. Select **Add**.

NOTE: Anything with a red asterisk (*) is required.

ADDING NON-VISIT ACTIVITY

Admin/New/Non-Visit Activity

1. Enter the Name.
2. Enter the Text.
3. Select **Save**.

NEW NON-VISIT PAY RATE

Admin/Lists/Users/Visit Activity Pay Rates

1. Select **New Non-Visit Pay Rate**
2. Choose Non-Visit Activity. **NOTE:** A Non-Visit Activity must be created. Follow the Adding Non-Visit Activity instructions above.
3. Choose the Pay Rate.
4. Enter the User Rate.
5. Enter the Mileage Rate.
6. Select **Add**.

ASSIGN NON-VISIT ACTIVITY

Admin/Non-Visit Activity Manager

1. Select **Assign Non-Visit Activity**.
2. Fill in the following:
 - a. Choose the User.
 - b. Choose the Branch.
 - c. Choose the NVA Date.
 - d. Non-Visit Activity.
 - e. Travel Start Time.
 - f. Travel End Time.
 - g. Enter the Time In and Out.
 - h. Enter the Mileage.
 - i. Enter the Comments.
3. Select **Save**.

To make updates select the following hyperlinks:

- **Edit** - to make changes.
- **Delete** - to remove.
- **Activity Logs** - to see the updates record.

PAYROLL EXPORT CENTER

Admin/Payroll Export Center



1. Use the following top filters (*option to multi-select):
 - a. Enter the Date Range.
 - b. Choose the Employees*.
 - c. Choose the Branches*.
 - d. Choose the Task Types*.
 - e. Select **+ More Filters** to see additional filters:
 - i. Insurance/Payer, Task Status, Employee Credentials, Employment Type, Visit Pay Type, and Late Tasks.
2. Select **Generate**.
3. View All, Pending Export or Export/Paid.
4. Choose Additional Columns.
 - a. Associated Mileage, Auto-Calculated Mileage, Auto-Calculated Mileage Amount, Auto-Calculated Travel Hours, EVV Hours, EVV Time, Employee Credentials, Employee Pay Type, Employment Type, Insurance/Payer, Patient MRN, Pay Rate, Payroll File/Worker

ID, Travel Hours, Visit Hours, Visit Pay Type, Visit Status and Visit Units.

PAYROLL FUNCTIONALITY

1. Choose the date range, Employees*, Branch* and Task Type* (*multi-select).
2. Select **+ More Filters** to see additional filters.
3. Select **Generate**. **NOTE:** Additional Columns menu enables users to generate (multi-select) more robust payroll data.

To make edits:

1. Select  to make edits to the Visit Time, Travel Time, Mileage Amount and Surcharge Amount.
2. Select  to save.

Reports can be generated by using the following buttons:

- Export Generated – Summary overview of the Excel file. This report provides a summary overview rather than a detailed report. It does not include any information from the Additional Columns menu.
- Export Details – Creates Excel file with up to 25 columns of data. Organizations 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.

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

TASK APPROVAL

1. In the Payroll Export Center, toggle to **Pending Approval** to view the associated tasks.
2. Enter the desired search parameters and select **Generate**.
3. Select the boxes to the left of each task and select **Approve**. The tasks are now moved to the Pending Export screen.
4. 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.

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

Reports are grouped into categories of interest. **NOTE:** Reports are based on the role users are setup as (User setup is covered in Administrative). To get more information about what data the report displays, simply hover over the report name. A gray box will appear showing more details.

1. Select the name of the report to display, fill in the criteria in the filters and select:
 - a. Generate Report – Reports that pull data right away.
 - b. Request Report – The report will be requested and can be viewed in Completed Reports.

COMPLETED REPORTS

Reports/Completed Reports

For a report to be in Completed Reports, they need to follow the subsequent workflow:

1. *Reports/Report Center* - Select the desired report.
2. Fill in the search filters based on the user's criteria.
3. Select **Request Report**.
4. *Reports/Completed Reports* - The status column will show the following descriptions:
 - a. Running – The report has been requested and is still pulling data.
 - b. Completed – The report has finished pulling all the data and is ready to view. Once the report is completed, select the report name to 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.axxess.com/help/>

