Payroll
Process Guide
Configuring and Running Payroll

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Payroll

Overview

This category covers the **Payroll** module in the HHAeXchange (HHAX) system providing guided instructions on how to setup and use the functionality.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Customer Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

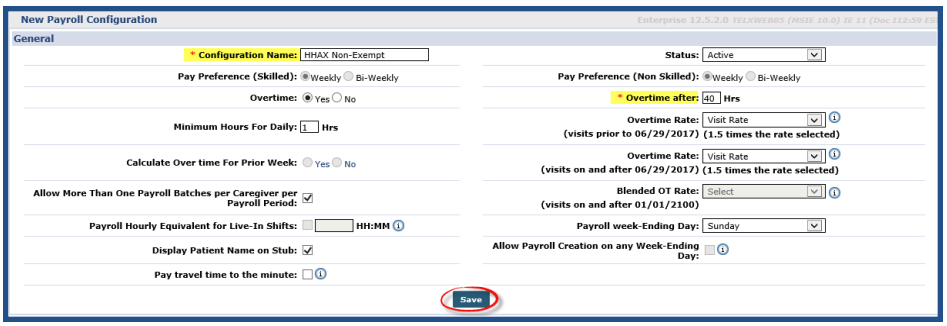
Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

Payroll Setup Page

The **Payroll Setup** page is used to create or edit existing payroll configurations. A configuration defines the parameters of an Agency's payroll structure. Agencies operating out of multiple Offices may create as many unique configurations as required to accommodate any differences in payroll structuring.

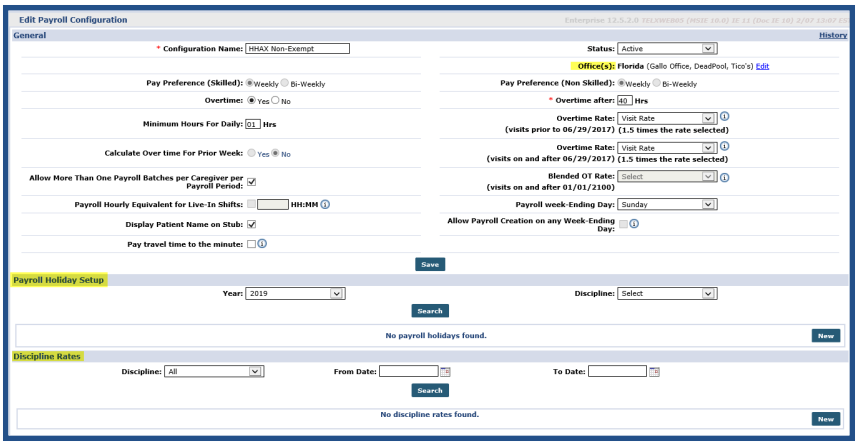
To setup a new payroll configuration, navigate to **Admin > Payroll Setup** to access the *Payroll Configuration* page. Click on the ***New*** button to open the *New Payroll Configuration* page, as illustrated in the image below.

The *New Payroll Configuration* page consists of a single section containing fields to set up basic payroll rules, such as overtime rates and the payroll week-ending date. The **Configuration Name** and **Overtime after** fields are required to save the new payroll configuration.



Payroll Setup - New Payroll Configuration

Upon saving the new payroll configuration, the page expands to include two additional sections: **Payroll Holiday Setup** and **Disciplines Rates** (as seen in the following image).

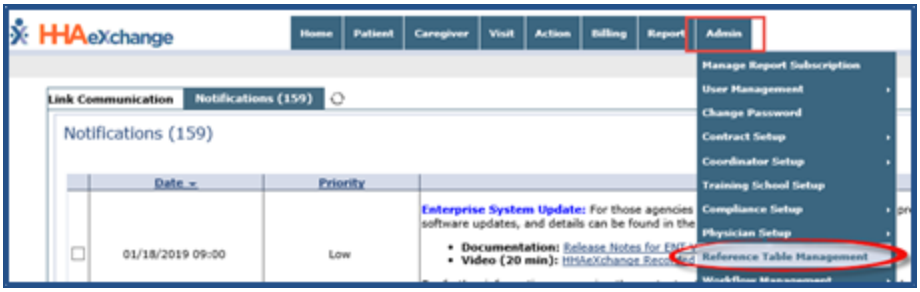
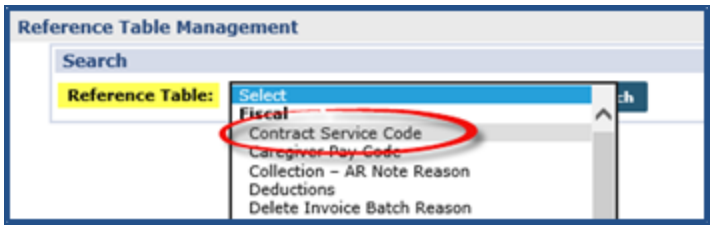
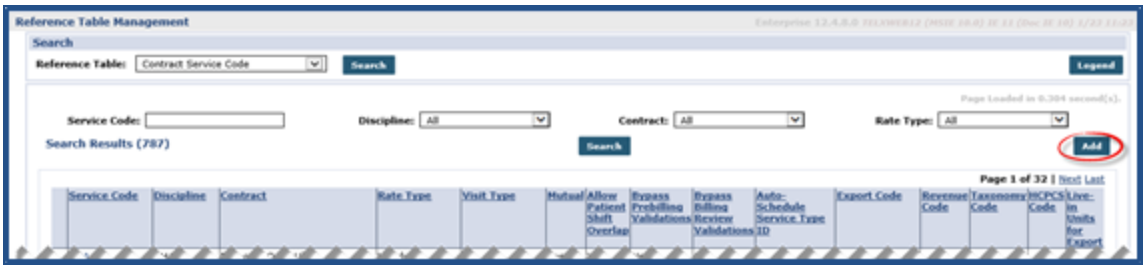


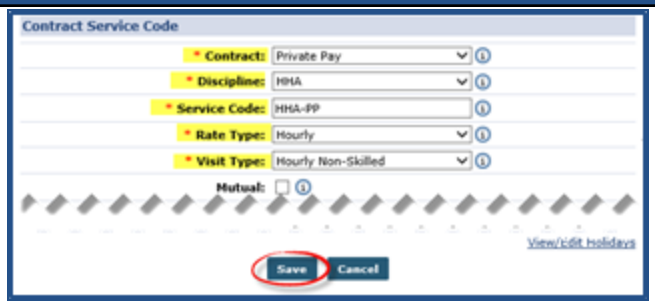
Payroll Setup - Edit Payroll Configuration

Additionally, a new field for **Office(s)** is included in the **General** section to apply the new payroll configuration to. Click on the Edit link to the right of the field to select the applicable Offices. An Office selection is required even if an Agency operates out of a single Office.

Service Codes

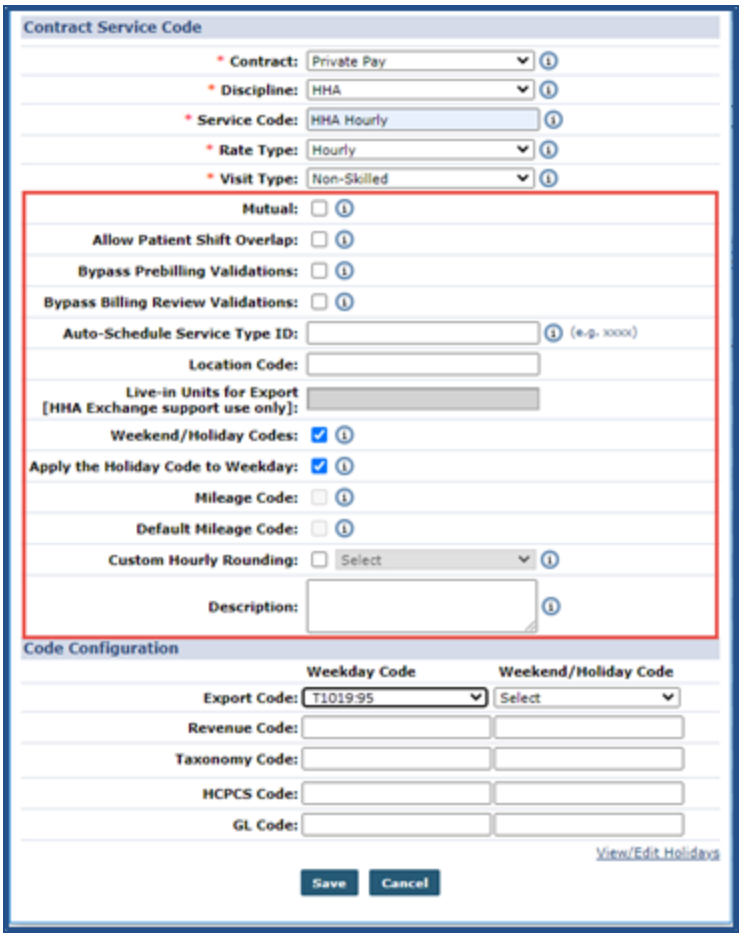
Create a Service Code

Step	Action
1	Navigate to ***Admin > Reference Table Management*** .  **Admin: Reference Table Management**
2	Select *Contract Service Code* from the **Reference Table** field and click ***Search*** to continue.  **Reference Table: Contract Service Code**
3	On the Search Results page, click on the ***Add*** button.  **Contract Service Code: Add Button**
4	On the *Contract Service Code* window, select all required fields to include a **Contract** , **Discipline**, **Service Code**, Rate Type, and **Visit Type**.

Step	Action
	 **Adding a Service Code Window**
5	Click ***Save*** to finalize.

Additional Service Code Fields

Additional Service Code fields (as illustrated in the image below) on the Contract Service Code window are used to address specific billing and scheduling scenarios (described in the table underneath the image).



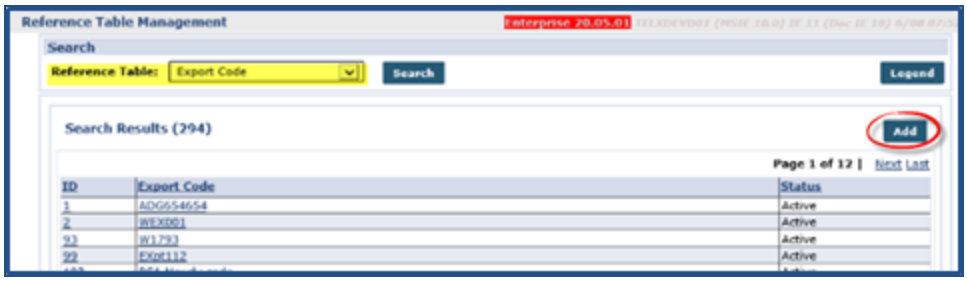
Contract Service Code: Additional Fields

Field	Description
Mutual	Select this checkbox if the **Service Code** is used for Mutual Visits. Overlapping visits scheduled with a **Mutual Service Code** may be scheduled with the same Caregiver without triggering a validation error.
Allow Patient Shift Overlap	Select this checkbox if the **Service Code** is used for visits that overlap. This allows two separate Caregivers to be scheduled for a single Patient at the same time without triggering a validation error.
Bypass Prebilling Validations	Select this checkbox to allow visits scheduled with the associated **Service Code** to bypass Prebilling validations, with the following exceptions: • Incomplete Confirmation • With TEMP Caregiver • OT/TT Not Approved • Restricted Caregiver
Bypass Billing Review Validations	Select this checkbox to allow visits scheduled with the associated **Service Code** to bypass all Billing Review validations.
Auto-Schedule Service Type ID	This field allows Agencies using the **Service-Specific EVV Confirmation** model to enter a 4-digit identifier for the **Service Code**. When a Caregiver enters this 4-digit identifier at Clock Out, the system applies the **Service Code** to the visit.
Location Code	Code based on the location (region) of the servicing Agency/Office for billing purposes.
Weekend/Holiday Codes	Select this checkbox to activate the second Weekend Holiday Code fields. Codes entered in these fields only apply to respective weekdays (with weekday code) and weekends (weekend code).
Apply the Holiday Code to Weekday	Selecting this checkbox applies Weekend/Holiday Codes on either weekends OR holidays according to the chosen Holiday Template. Authorizations selected as “Weekend/Holiday” in the authorizations section pulls from visits that occur on a weekend OR a weekday if the holiday happens to fall on a weekday (M-F).
Mileage Code	Select this checkbox to apply a mileage event on the Patient Calendar.
Default Mileage Code	Select this checkbox to display entry on the Patient and Caregiver Calendars allowing the default code to be billable and payable. Only two “Default Mileage Codes” can be enabled per Contract; apply to Other (Skilled) and Other (Non-Skilled) disciplines.
Custom Hourly Rounding	Select to apply custom hourly rounding logic to the Service Code, as follows: • **0-52 minutes:** EVV visit confirmation times between 0 to 52 minutes amount to 0 units; thereafter, billing units are calculated in increments of 59 minutes. • **0-14 minutes:** EVV visit confirmation times between 0 to 14 minutes amount to 0 units; 15 to 60 minutes are rounded up to the hour. There-

	after, 30 minutes or more are rounded up to the hour; less than 30 minutes are rounded down to the hour. Billing units are calculated accordingly. ***Note:*** *Once selected, all visits with this Service Code applied override Contract-Level Rounding Rules.*
Description	Enter content to include in the Notes section of a claim file to help support/reference the claim. ***Note:*** *If left blank, then the visit Confirmation Times are displayed on the claim.*
Code Configuration	
Export / Revenue / Taxonomy / HCPCS / Location Code	These codes are used in the actual Invoice file for Billing. The **Export** and **Weekend/Holiday Code** fields are created and managed in *the Export Code Reference Table*. Refer to the Export Code Reference Table section below.

Export Code Reference Table

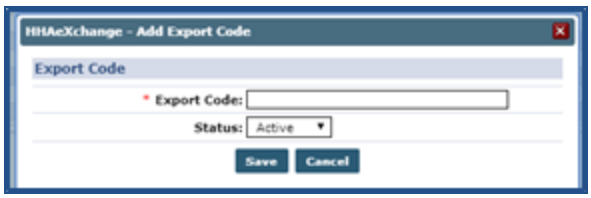
All Export Codes (including Weekday and Weekend Codes) are created and stored in the *Export Code Reference Table*. To access the table, navigate to ***Admin > Reference Table Management*** and select *Export Code* (under the *Fiscal* category) from the **Reference Table** field. Click the ***Search*** button to generate the table (as seen in the image below).



Export Code Reference Table

Creating an Export Code

To add a new value, click the ***Add*** button above the search grid (as seen in the image above). The *Add Export Code* window opens. Enter the **Export Code** in the required field (denoted with a red asterisk). The **Status** field is Active by default. Click ***Save***.

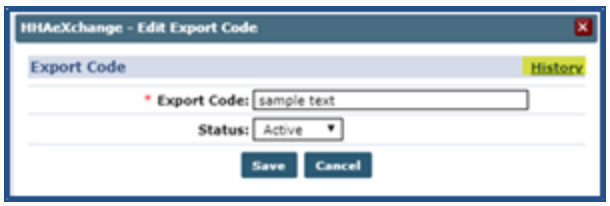


Add Export Code

Note: *Export Codes cannot be duplicated or deleted. To deactivate an Export Code, set the* ***Status*** *to Inactive.*

Editing an Export Code

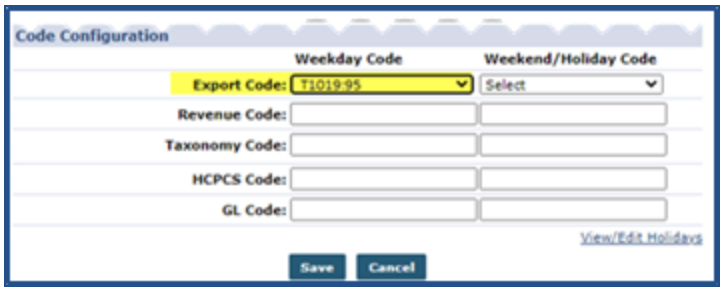
To edit an existing Export Code, click on the applicable **Export Code Name** (link) from the Export Code Reference Table. The *Edit Export Code* window opens. Edit the **Export Code** in the required field (denoted with a red asterisk). Select *Inactive* to deactivate the code; otherwise, leave as Active. Click ***Save***.



Edit Export Code

The Edit window contains a **History** link to view the past activity for the Export Code.

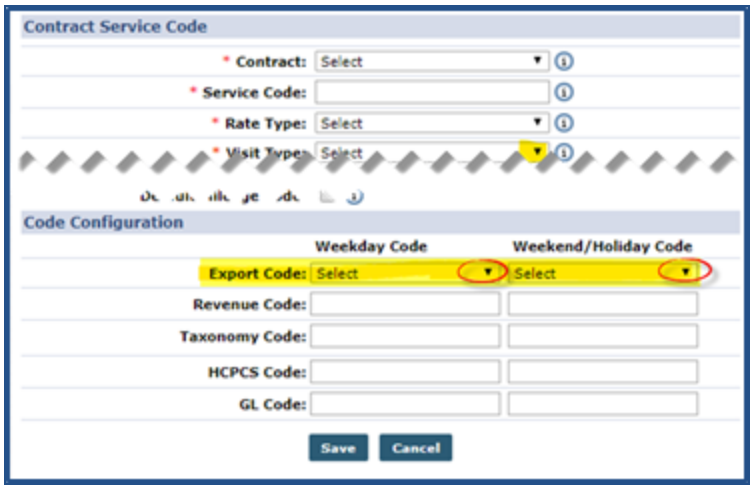
Note: *When adding a modifier to an existing Export Code, a ":" (colon) must be added after the existing code. For example, Export Code* ***T1019*** *with a modifier of* ***95*** *is entered as* ***T1019:95*** *in the* ***Export Code*** *text field.*



Adding a Modifier to the Export Code

Contract Service Code

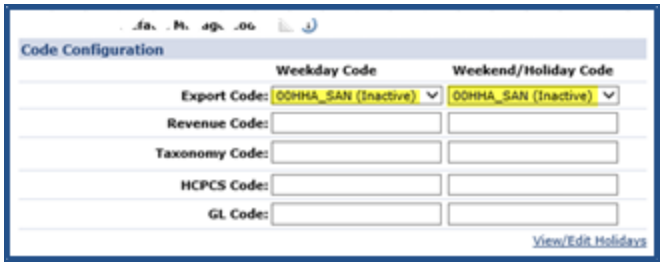
On the Contract Service Code window (Contract Setup > Search Contract >Service Code (link)), the Export Code fields (Weekday and Weekend/Holiday Codes) are dropdown fields to select from (as high-lighted in the following image).



Contract Service Window: Export Code

Inactive Export Codes

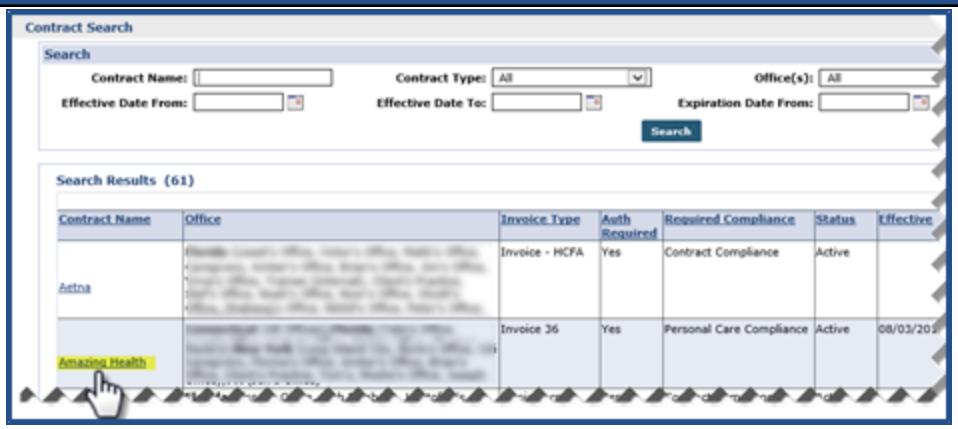
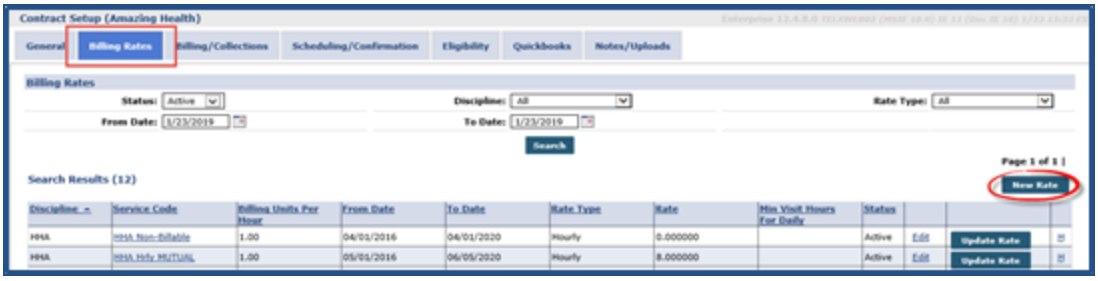
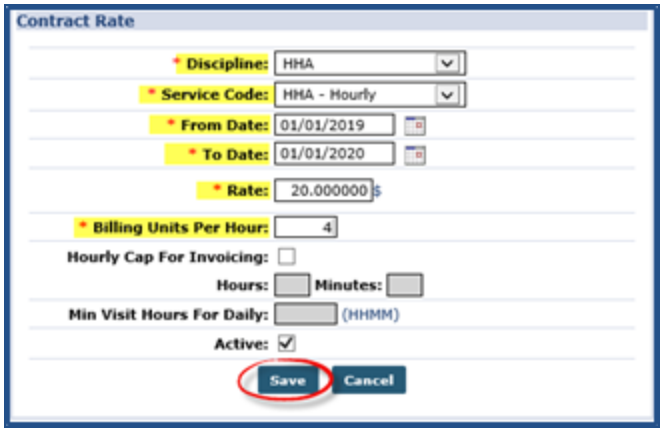
If an existing Active Export Code is made *Inactive*, then the code displays with an (Inactive) on the drop-down, as seen in the following image. *Inactive* Export Codes are unavailable selections in the *Contract Service Code* window.



Inactive Export Codes

Adding a Service Code to a Contract

Step	Action
1	Navigate to ***Admin > Contract Setup >Search Contract*** to locate the applicable contract.
2	Select the applicable contract from the search results.

Step	Action
	 **Select Contract**
3	Select the **Billing Rates** tab and click on the ***New Rate*** button.  **Billing Rates Tab: New Rate**
4	On the *Contract Rate* window, complete the required fields (denoted by red asterisk) to include: **Discipline**, **Service Code**, **From/To Date**, **Rate**, and **Billing Units Per Hour**.  **Contract Setup: Billing Rates Tab**
5	Click ***Save***.

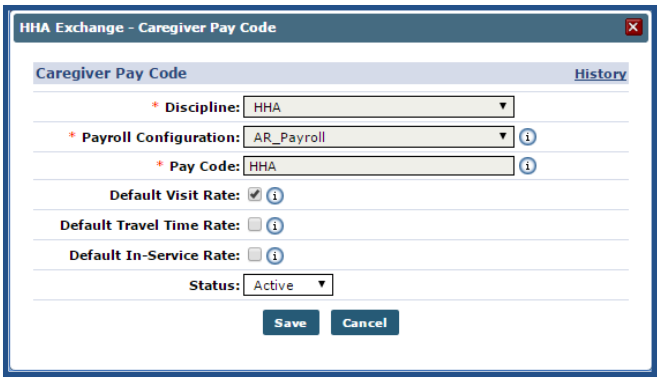
Pay Code Setup

Once a payroll configuration has been created, **Pay Codes** must be established. **Pay Codes** are used to define Caregivers pay rates for specific types of work/situations. By default, the system contains an active **Non Payable** Pay Code for every discipline. The following are Pay Code examples that an Agency may set up for HHAs:

- *HHA Standard* for a standard HHA rate.
- *HHA In Service* for an HHA Caregiver attending an In Service.
- *HHA Holiday*, for an HHA Caregiver rate applied on a designated Agency holiday.

Complete the following steps to create a new Pay Code.

Step	Action
1	Navigate to ***Admin > Reference Table Management*** and select *Caregiver Pay Code* from the Reference Table field. Click the ***Add*** button.
2	The *Caregiver Pay Code* window opens, as seen in the following image and described in the table below. Complete the required fields (denoted with a red asterisk).



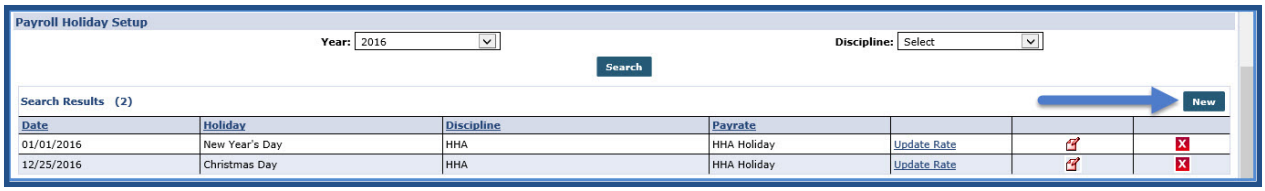
Caregiver Pay Code Window

Field	Description
***Discipline**	(Required) Select the Discipline the new Pay Code applies to.
***Payroll Configuration**	(Required) Select the Payroll Configuration the Pay Code applies to.
***Pay Code**	(Required) Enter the Pay Code Name.
Default Visit Rate	Select this checkbox to automatically apply the Pay Code to visits when a Caregiver with the associated Discipline is scheduled.
Default Travel Time Rate	Select this checkbox to automatically apply the Pay Code to new Travel Time entries when a Care-

Step	Action
	<table><tr><th>Field</th><th>Description</th></tr><tr><td></td><td>giver with the associated Discipline is scheduled.</td></tr><tr><td>Default In-Service Rate</td><td>Select this checkbox to automatically apply the Pay Code to new In-Services for Caregivers with the associated Discipline.</td></tr><tr><td>Status</td><td>Select Active to activate the Pay Code.</td></tr></table>
3	Click ***Save*** to create the new Pay Code.

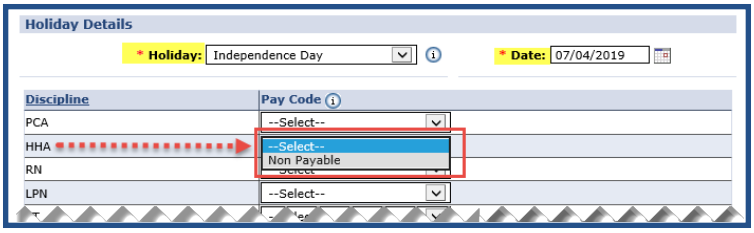
Holiday Setup

With **Pay Codes** established, navigate back to the **Payroll Setup** page to enter special rates for Holidays observed by the Agency. To create a new Holiday, click on the ***New*** button (as seen in the image below).



Payroll Holiday Setup

The *Holiday Details* window opens. On this window select the applicable holiday from the **Holiday** field and the respective **Date** for the holiday.



Holiday Details Window

Once entered, unique **Pay Codes** may be applied to each Discipline. Once saved, the system applies a Holiday rate to Disciplines with a specified Pay Code.

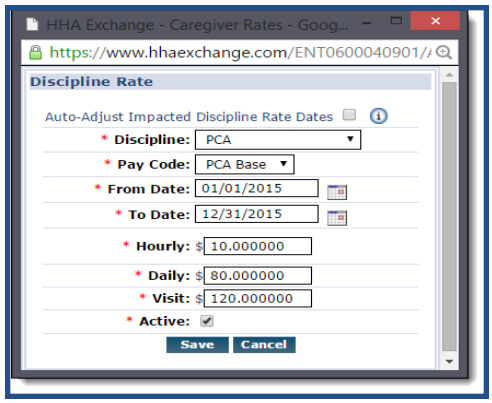
Note: *Values for the* ***Holiday*** *field are created and managed via the Payroll-Holiday Reference Table.*

To review rates set up in the Payroll Holiday Setup section, click on the ***Search*** button. The **Year** and **Discipline** fields may be used to filter search results.

Discipline Rates

Discipline Rates are used to specify the *Hourly*, *Daily*, and *Visit* (Live-In) rates for a **Pay Code**. This allows the system to apply a rate to a visit according to visit type. To create a new rate, go to the Discipline Rates section of the **Payroll Setup** page and click the ***New*** button.

The *Discipline Rate* window opens. Complete the required fields (denoted with a red asterisk), as seen in the image.



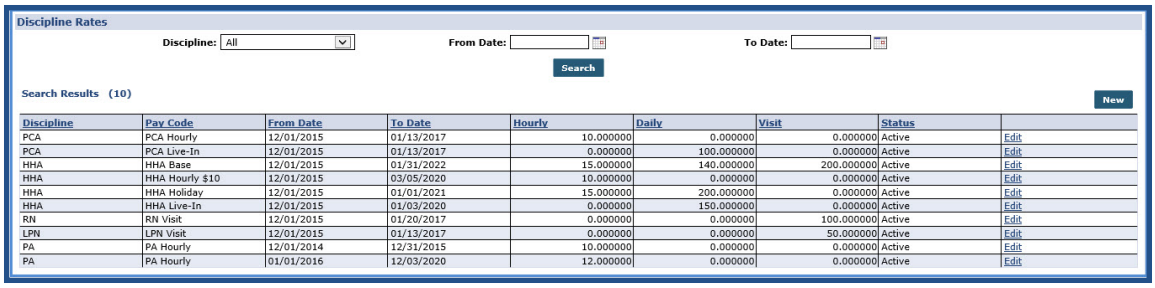
Discipline Rate Window

Each **Discipline Rate** is applied to a single discipline for a specific amount of time. Once a rate is saved, the **Discipline** and **Pay Code** fields lock in the system; however, the Dates and Pay Rates can be adjusted as needed.

Because **Pay Codes** are linked to a specific Discipline, the available values in the **Pay Code** field depend on the value in the **Discipline** field.

The **Auto-Adjust Impacted Discipline Rate Dates** checkbox (atop the fields) is selected to automatically adjust existing **Discipline Rates** eliminating any overlaps or date gaps between the new rate entered and the existing one.

Click the ***Search*** button to review or edit existing rates. The **Discipline** and **From/To Date** fields may be used to filter search results.



Discipline	Pay Code	From Date	To Date	Hourly	Daily	Visit	Status	
PCA	PCA Hourly	12/01/2015	01/13/2017	10.000000	0.000000	0.000000	Active	Edit
PCA	PCA Live-In	12/01/2015	01/13/2017	0.000000	100.000000	0.000000	Active	Edit
HHA	HHA Base	12/01/2015	01/31/2022	15.000000	140.000000	200.000000	Active	Edit
HHA	HHA Hourly $10	12/01/2015	03/05/2020	10.000000	0.000000	0.000000	Active	Edit
HHA	HHA Holiday	12/01/2015	01/01/2021	15.000000	200.000000	0.000000	Active	Edit
HHA	HHA Live-In	12/01/2015	01/03/2020	0.000000	150.000000	0.000000	Active	Edit
RN	RN Visit	12/01/2015	01/20/2017	0.000000	0.000000	100.000000	Active	Edit
LPN	LPN Visit	12/01/2015	01/13/2017	0.000000	0.000000	50.000000	Active	Edit
PA	PA Hourly	12/01/2014	12/31/2015	10.000000	0.000000	0.000000	Active	Edit
PA	PA Hourly	01/01/2016	12/03/2020	12.000000	0.000000	0.000000	Active	Edit

Discipline Rates

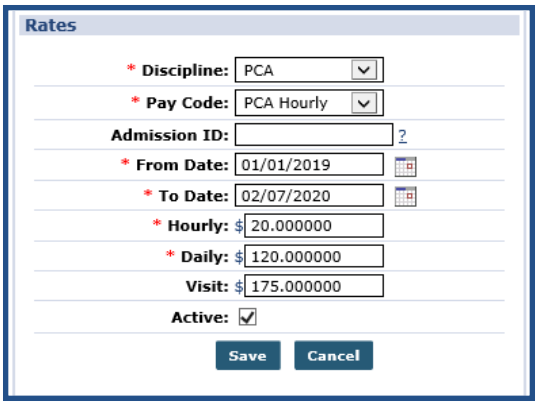
Differentials

Differentials are **Discipline Rates** adjusted at the **Caregiver** and/or **Visit** level. When a Caregiver is assigned to a visit, the system reviews any Discipline Rates that may apply to the visit, followed by rates set up for the individual Caregiver, and finally by adjustments made to the rate for the specific visit. For example:

- An HHA Caregiver is assigned to a visit. Once a **Pay Code** is selected, the system applies the appropriate Discipline Rate.
- If that HHA Caregiver has a **Differential** setup, the rate for the Caregiver is applied to the visit instead of the **Discipline Rate.**
- Finally, the user scheduling the visit can adjust the rate manually under the **Billing** tab of the visit window. If the rate is adjusted manually, the system then uses the manually entered rate instead of the Discipline Rate or the Differential entered for the specific Caregiver.

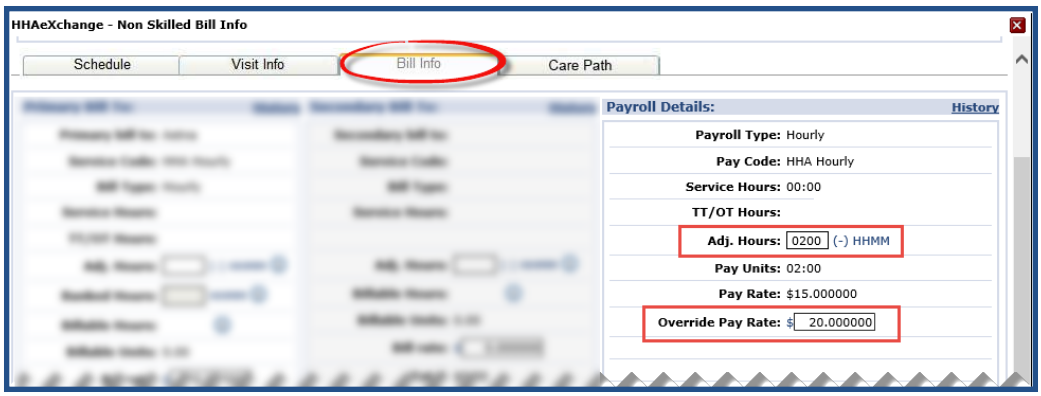
Caregiver Differential

Complete the following steps to set a Differential at the Caregiver level.

Step	Action
1	On the *Caregiver Profile*, select the Rates link from the left navigation.
2	On the Rates section, click on the **New** button.
3	The *Rates* window opens. Complete the required fields (denoted with a red asterisk) as seen in the image below. Enter a Patient **Admission ID** to apply the rate for a specific Patient. More than one rate can be set; i.e., a unique rate for each Patient can be established.  **Caregiver Level Differential**
4	Click ***Save***. When this Caregiver is assigned to a visit with this Pay Code, they are paid the rate entered here, instead of the default **Discipline Rate**.

Visit Differential

Setting a Differential at the visit level must be done manually for each individual visit. Complete the following steps to apply a Differential at the visit level.

Step	Action
1	Navigate to ***Visit > Visit Search*** to locate the visit. > **Edit > Bill Info > Override Pay Rate**.
2	On the applicable visit, click on the edit icon. Select the *Bill Info* tab.
3	In the **Payroll Details** section, enter the applicable rate in the **Override Pay Rate** field.  **Visit-Level Differential and Adjustment**
4	Click ***Save***. Overriding the Pay Rate at the visit level overwrites the original Discipline Rate, as well as the rate set at the Caregiver level.

Travel Time

The multifaceted **Travel Time (TT)** function allows Agencies to generate payable travel time records in HHAeXchange and spans across several Modules. The TT function allows user to:

- Enter TT records on a case-by-case basis on the Caregiver **Calendar** page,
- enter TT records in bulk using the new **Travel Time** page under the **Action** Module,
- setup a *Default* **Pay Code** for all TT records, and
- process TT records in Payroll.

Refer to the Travel Time category for complete details of the **Travel Time** function.

Calculating Off Duty Time in the Travel Time Module

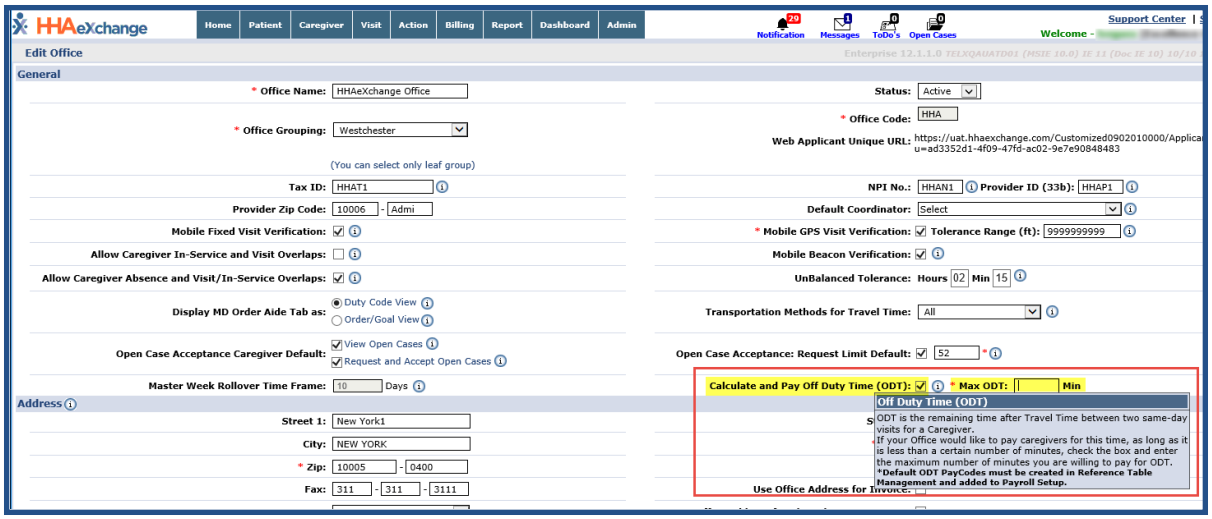
Tip: You can press **Ctrl-F** on your keyboard to search this topic.

Off Duty Time (ODT) Settings in Office Setup

Off Duty Time (ODT) refers to the time gap between visits that a Caregiver has left over after Travel Time; i.e., short periods of time not long enough to be considered personal time. Agencies can apply ODT settings to correctly pay Caregivers based on the payroll rules for an Office when creating a Travel Time batch.

In the *Office Setup* (**Admin > Office Setup > Search Office**) page, select the **Calculate and Pay Off Duty Time (ODT)** checkbox to manage ODT settings for the selected Office. When selected, the **Max ODT** field to the right of the checkbox is required to indicate the maximum number of minutes allowed for ODT. This field only accepts number characters with a 3-digit limit.

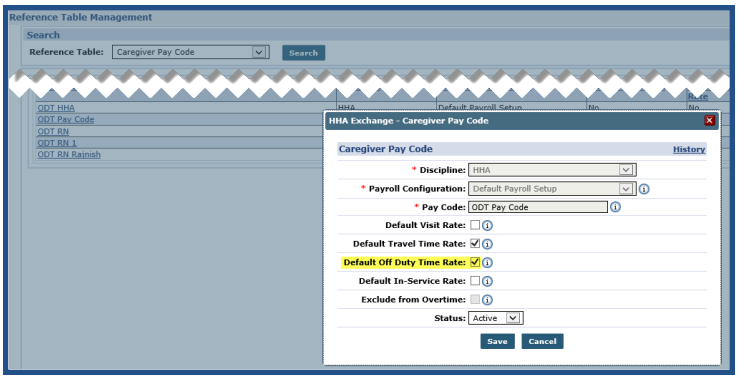
Note: *Default ODT Pay Code(s) must be created via the Reference Table Management.*



Office Setup: Calculate and Pay ODT

Default Off Duty Time Rate in Reference Table Management

Once enabled in the Office Setup, default ODT Rates are assigned when creating or editing a Caregiver Pay Code via the Reference Table Management functionality (***Admin > Reference Table Management > Caregiver Pay Code***) for each discipline. On the Caregiver Pay Code window, select the **Default Off Duty Time Rate** checkbox.



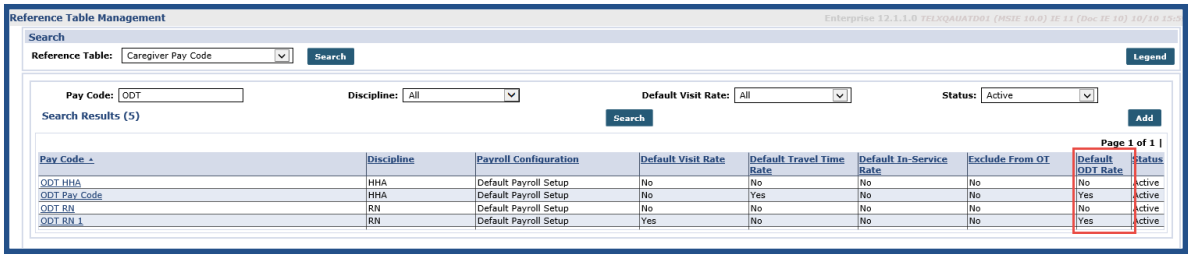
Assigning a Default Off Duty Time Rate to a Discipline

When selected, the Pay Code is defined as the default ODT rate for the discipline. Therefore, when creating a Travel Time batch for Caregivers of this discipline, the Pay Code is automatically applied. Only one Pay Code can be marked as the Default ODT rate for each discipline within each Payroll configuration.

Note: *Users with access to the Reference Table Management functionality can override this default, if/as needed. A history of changes is available to view.*

Default Off Duty Time Rate Column on the Reference Table Management Results

On the results grid of the Caregiver Pay Code Reference Table, the respective default Pay Codes are displayed under the **Default ODT Rate** column.

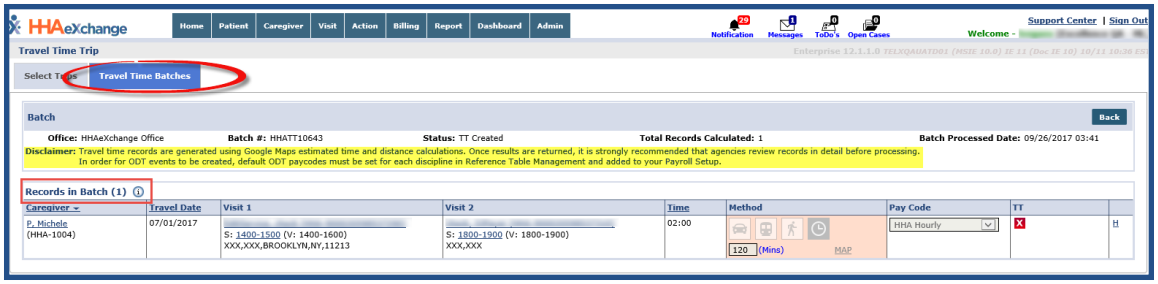


Default ODT Rate Column

Reviewing the Travel Time Batch

To avoid confusion, Agencies who use ODT must be aware that ODT events are included in the total record count when reviewing a Travel Time (TT) batch (***Action > Travel Time > Travel Time Batches*** tab).

As illustrated in the image below, the selected batch indicates the number of Travel Time records within the batch. The **Total Records Calculated** may differ if either (a) Travel Time records (previously included) have been deleted; OR (b) if the **Calculate and Pay ODT** setting is enabled.



Travel Time Batch

The **Disclaimer** includes information regarding the Default ODT Pay Code requirement.

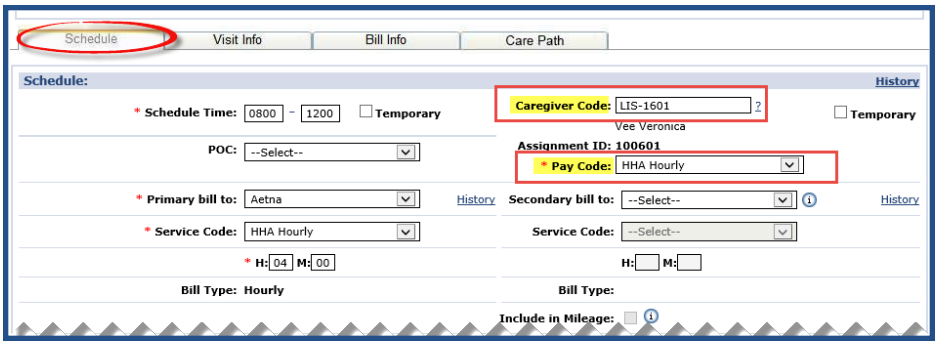
ODT Event on the Caregiver Calendar

ODT events are displayed on the Caregiver Calendar and in Payroll exactly the same way as TT. The only difference between ODT and TT on these pages is the Pay Code. If ODT is used by an Agency, users see two lines for each Travel Event (the current TT and the new ODT)

Selecting a Pay Code

Visit Pay Codes

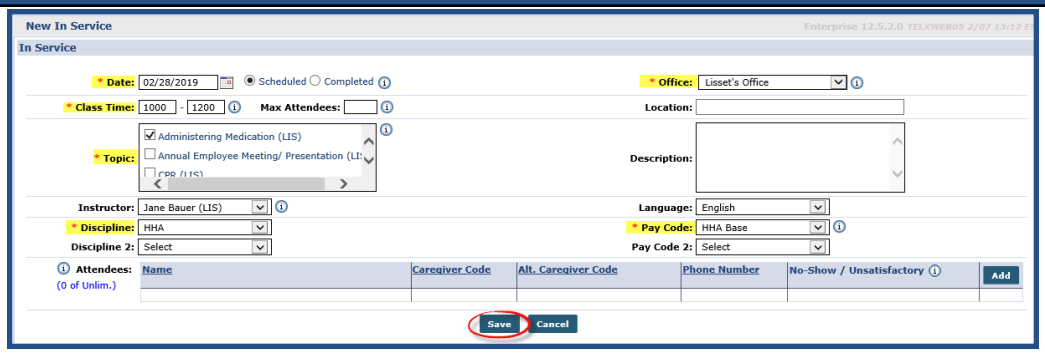
Before scheduling a visit, a Pay Code must be applied. Complete the following steps to enter a Pay Code for a visit.

Step	Action
1	Navigate to ***Patient > Patient Calendar*** to locate the visit.
2	Click the V: link to open the visit. On the Schedule tab, select the Caregiver in the **Caregiver Code** field and the applicable Pay Code from the **Pay Code** field.  **Visit Window: Schedule Tab** ***Note:*** *When a Caregiver is selected, the system automatically matches their Discipline with the corresponding Pay Codes available.*
3	Click ***Save***.

In-Service Pay Codes

Before scheduling an In-Service, a Pay Code must be applied. Complete the following steps to enter a Pay Code for an In-Service.

Step	Action
1	Navigate to ***Action > In Service > New***.
2	The *New In-Service* page opens. Complete the required fields (denoted with a red asterisk).

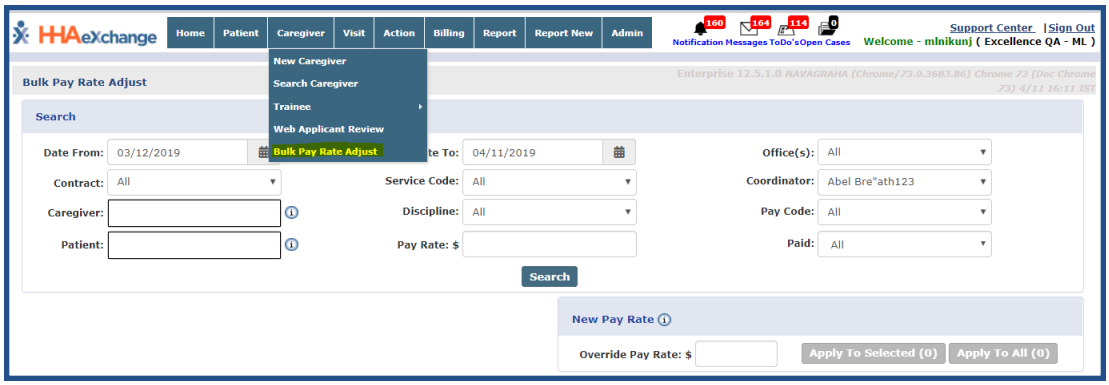
Step	Action
	 **New In Service**

Bulk Pay Rate Adjust

DISCLAIMER

The Bulk Pay Rate Adjust feature is enabled by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

The **Bulk Pay Rate Adjust** feature allows Providers to easily search through all visits and apply a Caregiver pay override to multiple visits at once. To access the page, navigate to ***Caregiver > Bulk Pay Rate Adjust*** (as seen in the image below).



Bulk Pay Rate Adjust Page

Use the search filters to search for the applicable criteria. Note that several filters (such as **Office**, **Contract**, **Caregiver**, and **Patient**) are multi-select to expand searches throughout the system. If the active user is a coordinator, then the **Coordinator** field is auto-populated.

The info bubbles in both the **Caregiver** and **Patient** fields have auto-suggest functionality as follows:

- **Caregiver**: Enter the first two characters of *Name*, *Caregiver Code*, *Assignment ID* or *SSN*.
- **Patient**: Enter the first two characters of *Name*, *Patient ID*, *Admission ID*, or *SSN*.

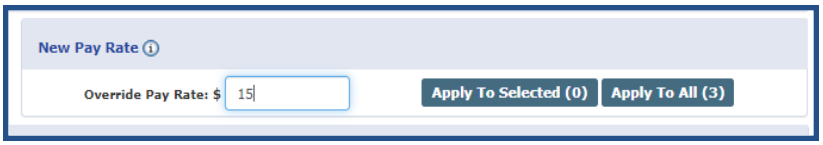
The **Service Code** filter is based on *Contract* and *Discipline*. The **Pay Code** filter provides only active Pay Code(s); associated to respective Payroll configuration for an Office.

The *Search Results* display visits sorted by date. Use the checkbox to the left-most column to select the visits to apply the Pay Rate changes to (as illustrated in the image below).

Bulk Pay Rate Adjust – Search Results

Note: *25 records are displayed per page. If moving to the next page, all selected visits are deselected.*

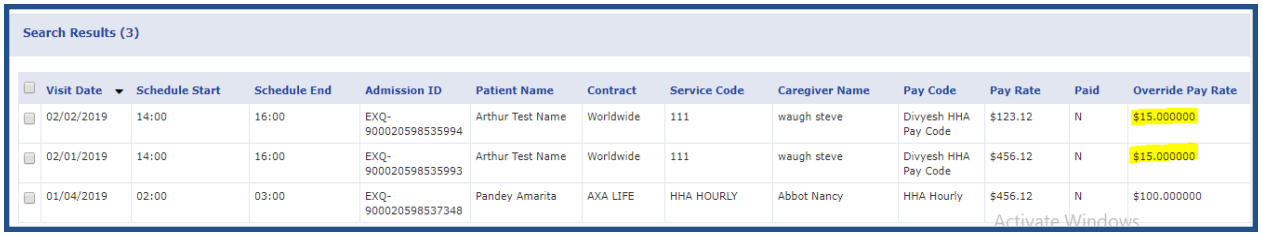
Once selected, navigate to the *New Pay Rate* window and enter the new Pay Rate in the **Override Pay Rate** field.



New Pay Rate Window

Click on the ***Apply to Selected*** button or ***Apply to All*** (in the search results) to apply the entered rate. The number in parentheses (within the button) reflect the number of visits that will be updated.

Once saved, the New Pay Rate is reflected in the Search Results under the **Override Pay Rate** column and the visit **Paid** status changes to "N" (as illustrated in the image below).



Visit Date	Schedule Start	Schedule End	Admission ID	Patient Name	Contract	Service Code	Caregiver Name	Pay Code	Pay Rate	Paid	Override Pay Rate
02/02/2019	14:00	16:00	EXQ-900020598535994	Arthur Test Name	Worldwide	111	waugh steve	Divyesh HHA Pay Code	$123.12	N	$15.000000
02/01/2019	14:00	16:00	EXQ-900020598535993	Arthur Test Name	Worldwide	111	waugh steve	Divyesh HHA Pay Code	$456.12	N	$15.000000
01/04/2019	02:00	03:00	EXQ-900020598537348	Pandey Amarita	AXA LIFE	HHA HOURLY	Abbot Nancy	HHA Hourly	$456.12	N	$100.000000

Override Pay Rate

The **Override Pay Rate** is also reflected in the *Visit Bill Info tab*.

Visit Bill Info: Override Pay Rate

Running Payroll

Two types of Payroll logic are available for Agencies to choose from, as follows:

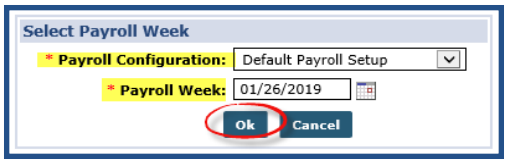
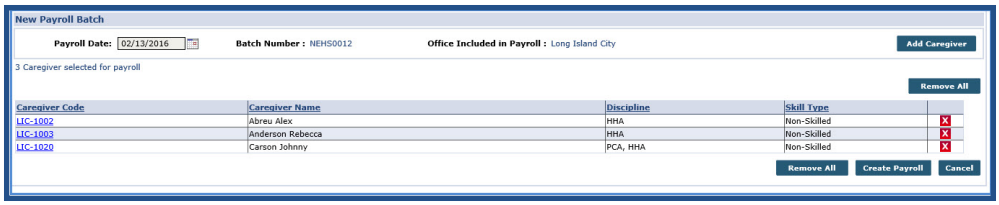
- **Specific Week-Ending Date:** Payroll is only generated on the specified **Week-Ending Date**.
- **Any Week-Ending Date:** Payroll is generated on any day, as frequently as the Agency desires. This logic uses the selected **Week-Ending Date** to calculate overtime pay.

To determine which logic a system is using, refer to the **Allow Payroll Creation on any Week-Ending Day** field on the *Edit Payroll Configuration* page. If this field is selected, then the system is using the ***Any-Week-Ending Date*** logic; otherwise, the ***Specific Week Ending Date*** is applied.

Note: *This field is for reference only. To activate/deactivate the* ***Any Week-Ending Date*** *logic, please contact HHAeXchange Technical Support.*

New Payroll Batch

Once a visit has been invoiced (outlined in the Billing category), it can be included in a Payroll batch. Complete the following steps to generate a new Payroll batch using either of the payroll logics described above.

Step	Action
1	Navigate to ***Action > Payroll > New Payroll***.
2	The *Select Payroll Week* window opens. Select the required **Payroll Configuration** and **Payroll Week** fields. Click ***OK*** to continue. ***Note:*** *When using the* ***Specific Week-Ending Day*** *logic, a designated week-ending date must be selected to run payroll; otherwise, select any date.* 
3	Click on the ***Generate Payroll for all Caregivers*** or ***Add Caregivers*** and follow the prompts. Click ***Create Payroll*** to generate Payroll.  **New Payroll Batch**
4	Navigate to **Action > Payroll > Search** (**by Batch** or **by Caregiver**) to view Payroll batches.

Payroll Mapping

Payroll Mapping is an automated process ensuring that the right Pay Code is attributed to a visit, for example:

- Switching a Pay Code used for weekday visits to one for weekend visits, and vice versa.
- Adjusting the Pay Code of a visit that is on a designated holiday.

Note: *When processing Payroll, HHAeXchange reviews all visits in the payroll batch and automatically switches the Pay Code of the visit, based on Payroll Mapping logic.*

Parallel Processing of Payroll Batch for Different Payroll Setups

DISCLAIMER

This feature is activated by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

The system can process payroll concurrently if a client has different payroll setups. This setting is activated and managed by HHAX System Administration.

Exporting Payroll

Search and Export

Navigate to **Action > Payroll > Search** (**by Batch** or **by Caregiver**) to view Payroll batches once created. The system organizes the Batch Search results in the following format:

Search

Batch Number: Week End Date:

Search

Search Results (3)

Batch #	Week Start	Week End	Req.Hours Payrollweek	Req.Amount Payrollweek	OT Hours	OT Amount	Holiday Hours	Holiday Amount	Req.Hours Priorweek	Req.Amount Priorweek	Daily Payrollweek	Daily Payrollweek Amount	Prior Week Daily	Prior Week Daily Amount	Total Amount	Export		Unexport
FRNQ0003	10/04/2015	10/10/2015	12:00	$240.00					09:00	$180.00			0		$420.00	Export	X	Unexport
FRNQ0002	10/04/2015	10/10/2015	28:00	$392.00					198:00	$2,688.00			0		$3,080.00	Export	X	Unexport
FRNQ0001	08/30/2015	09/05/2015	16:00	$224.00											$224.00	Export	X	Unexport

Payroll by Batch

Search Back

First Name: Last Name:

Batch Number: Caregiver Code:

* Payroll Date: 10/10/2015

Search

Search Results (8)

Batch Number	Caregiver Code	Caregiver Name	Week Start	Week End	Regular Hours	Amount	O.T. Hours	O.T. Amount	H. Hrs	Hol. Amount	Total Amount	Prior Week	
FRNQ0003	1008	Connors Ruth	10/04/2015	10/10/2015	21:00	$420.00	00:00		00:00		$420.00	Y	X
FRNQ0002	1007	Dickinson Chris	10/04/2015	10/10/2015	132:00	$1,848.00	00:00		00:00		$1,848.00	Y	X
FRNQ0002	1006	Doe Jane	10/04/2015	10/10/2015	06:00	$56.00	00:00		00:00		$56.00	Y	X
FRNQ0002	1009	Espinoza Carla	10/04/2015	10/10/2015	80:00	$1,120.00	00:00		00:00		$1,120.00	Y	X
FRNQ0002	1003	Fargnoli Joe	10/04/2015	10/10/2015	04:00	$56.00	00:00		00:00		$56.00	N	X
FRNQ0002	1005	Kane Lana	10/04/2015	10/10/2015	00:00		00:00		00:00		$0.00	Y	X
FRNQ0002	1001	Smith Jane	10/04/2015	10/10/2015	02:00		00:00		00:00		$0.00	Y	X
FRNQ0002	1002	Smith Mary	10/04/2015	10/10/2015	02:00		00:00		00:00		$0.00	Y	X

Payroll by Caregiver

The Caregiver Batch Search shows how much each Caregiver is earning, whereas searching by Batch summarizes the information to display the Total Amount billed.

From the Caregiver search results, click on the delete (X) icon to delete a specific Caregiver from the batch. On the batch search results, the delete icon removes all visits included in the batch. Only the most recent batch can be deleted.

To export a Payroll Batch from the HHAeXchange system, click the Export link from the Payroll by Batch.

Prior Week Daily Amount	Expenses	Total Amount	Export		Unexport
	$5,855.02	$6,042.02	Export	X	Unexport
	$1,873.80	$1,953.80	Payroll Detail		
	$40.00	$73.00	Payroll Summary		

Export Payroll Detail or Payroll Summary

The Payroll Batch is exported to the user's computer in a specific format, which can then be sent to the Agency's Payroll Provider. This document contains all the information the Provider requires to generate pay checks for your Agency.

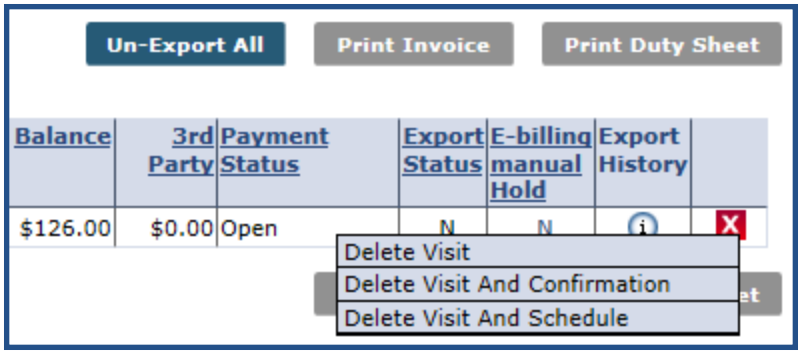
Note: *Each Payroll Export file format is different, depending on the Agency and the information required by their Payroll Provider. Export file formats are configured during the initial implementation and can only be adjusted by HHAeXchange Technical Support.*

Note: *Typically, the Payroll Export includes information about a Caregiver's work hours and Pay Codes for each visit. However, in some cases a Payroll Provider may require additional demographic information (such as the Caregiver's taxes, dependents, or wage garnishment). If this is not maintained directly in the Payroll Provider's system, then this information can be entered on the Caregiver's* ***Payroll Info*** *page, and then included in the export.*

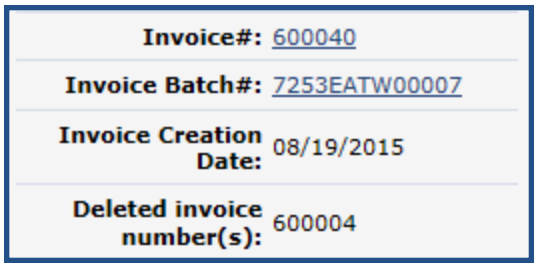
Adjustments

Making an **Adjustment** refers to altering a visit that has already gone through billing and payroll. An adjustment may be required when a clerical error is made (not caught by the system in an Exception page). To make an **Adjustment** the visit must be un-billed (removed) from an invoice.

For example, if a visit is billed for 4 hours when it actually lasted 5, then the visit can be un-billed and adjusted to reflect the proper number of hours. Once the visit has been processed in a new invoice, the system logs a payroll Adjustment of +1 hours. This hour is included in the Caregiver's next paycheck.



Un-Billing



Invoice Details on the Bill Info Tab

Reports and Other Pages

Tip: You can press **Ctrl-F** on your keyboard to search this topic.

The **Payroll Report** menu contains various reports that divide payroll information for easier review. The reports in this menu are added during the initial implementation.

Payroll Hours by Caregiver Detail

Navigate to **Report > Payroll > Payroll Hours by Caregiver Detail** to access. This report produces a highly detailed view of a Payroll by Batch and includes fields such as: **Admission ID, Service Code, Pay Hours, Pay Rate, and OT Hours**.

1 of 3 Select a format Export

HHAeXchange **Payroll Hours by Caregiver Detail** Page 1

Report Date: 10/22/2015 4:36:37

Caregiver : All **Batch:** FRNQ0002 **Week Date:**

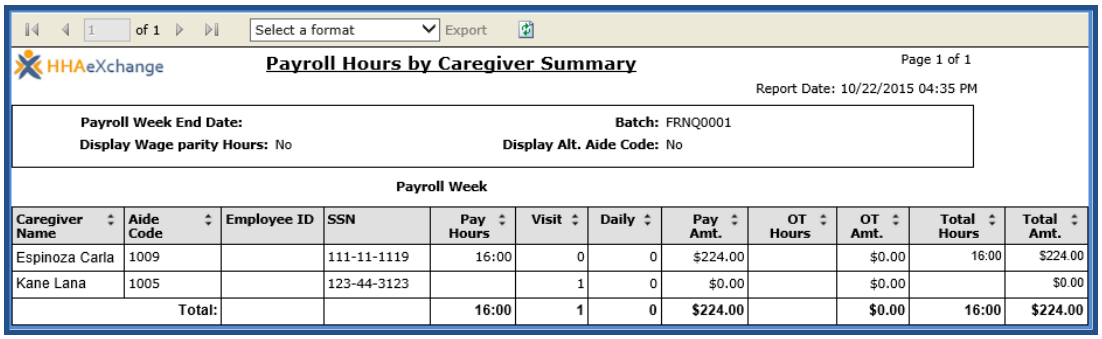
Payroll Week

Patient Name	Admission ID	Visit Date	Type	Service Code	Visit Hrs	Pay Hours	Pay Rate	Pay Amt.	OT Hrs.	OT Rate	OT A
Caregiver Code: 1006 Caregiver Name: Doe Jane Employee ID: SSN: 166-34-6854											
Archer Malary	900015	10/07/2015	H	HHA Base	04:00	04:00	$14.00	$56.00	0:00	$21.00	
Total:					**04:00**	**04:00**		**$56.00**			
Caregiver Code: 1009 Caregiver Name: Espinoza Carla Employee ID: SSN: 111-11-1119											
Archer Malary	900015	10/05/2015	H	HHA Base	04:00	04:00	$14.00	$56.00	0:00	$21.00	
Archer Malary	900015	10/06/2015	H	HHA Base	04:00	04:00	$14.00	$56.00	0:00	$21.00	
ainge danny	900008	10/07/2015	H	HHA Base	04:00	04:00	$14.00	$56.00	0:00	$21.00	

Payroll Hours Detailed

Payroll Hours by Caregiver Summary

Navigate to **Report > Payroll > Payroll Hours by Caregiver Summary** to access. This report produces a basic overview of a Payroll Batch and includes to fields such as: **Caregiver Name, SSN, and Pay Amount.**



1 of 1 Select a format Export

HHAeXchange **Payroll Hours by Caregiver Summary** Page 1 of 1

Report Date: 10/22/2015 04:35 PM

Payroll Week End Date: **Batch:** FRNQ0001
Display Wage parity Hours: No **Display Alt. Aide Code:** No

Payroll Week

Caregiver Name	Aide Code	Employee ID	SSN	Pay Hours	Visit	Daily	Pay Amt.	OT Hours	OT Amt.	Total Hours	Total Amt.
Espinoza Carla	1009		111-11-1119	16:00	0	0	$224.00		$0.00	16:00	$224.00
Kane Lana	1005		123-44-3123		1	0	$0.00		$0.00		$0.00
	Total:			16:00	1	0	$224.00		$0.00	16:00	$224.00

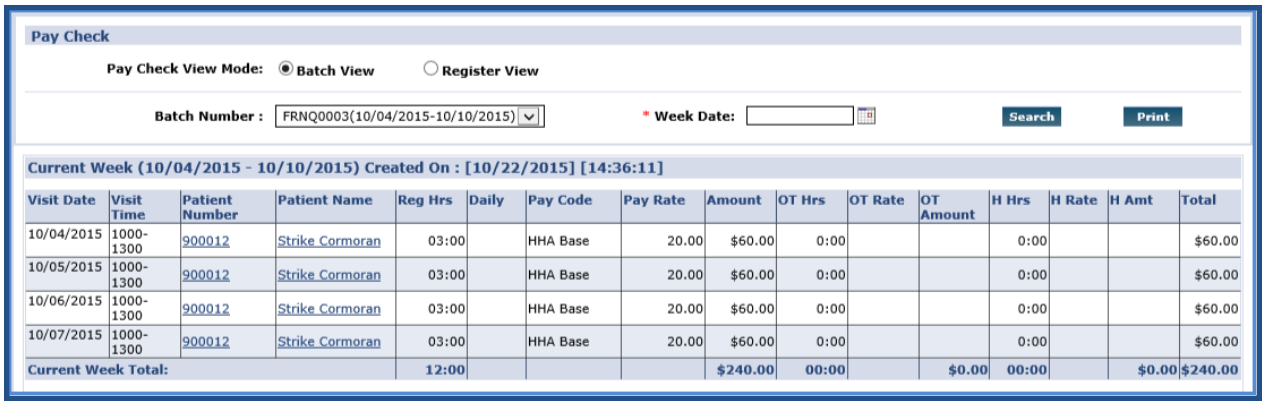
Payroll Hours Summary

Caregiver's Pay Check Page

The *Pay Check* page (***Caregiver Profile > Pay Check***) provides an overview of a Caregiver's paychecks. The summary can be opened in a **Batch View** or a **Register View**.

Batch View

The Batch View sorts paychecks by Batch number and displays information by week. Fields on this view include: **Visit Date Patient Name, Pay Code, and Pay Rate**.



Pay Check

Pay Check View Mode: Batch View Register View

Batch Number : FRNQ0003(10/04/2015-10/10/2015) * Week Date: Search Print

Current Week (10/04/2015 - 10/10/2015) Created On : [10/22/2015] [14:36:11]

Visit Date	Visit Time	Patient Number	Patient Name	Reg Hrs	Daily	Pay Code	Pay Rate	Amount	OT Hrs	OT Rate	OT Amount	H Hrs	H Rate	H Amt	Total
10/04/2015	1000-1300	900012	Strike Cormoran	03:00		HHA Base	20.00	$60.00	0:00			0:00			$60.00
10/05/2015	1000-1300	900012	Strike Cormoran	03:00		HHA Base	20.00	$60.00	0:00			0:00			$60.00
10/06/2015	1000-1300	900012	Strike Cormoran	03:00		HHA Base	20.00	$60.00	0:00			0:00			$60.00
10/07/2015	1000-1300	900012	Strike Cormoran	03:00		HHA Base	20.00	$60.00	0:00			0:00			$60.00
Current Week Total:				12:00				$240.00	00:00		$0.00	00:00		$0.00	$240.00

Pay Check Batch View

Register View

The Register View displays all paid visits in a specified date range. In addition to showing the **Hours, Amount, OT Hours, and Total**, each visit can be expanded to reveal further information, such as any adjustments that were made, the **Payroll Batch**, and the **Payroll Batch Date**.

Pay Check

Pay Check View Mode: ○ Batch View ◉ Register View

* Visit Date From: 10/01/2015 * Visit Date To: 10/31/2015 Patient:

Search Print

	Visit Date	Scheduled Time	Patient Admission ID	Patient Name	Reg Hrs	Amount	OT Hrs	OT Amount	Hol. Hrs	Hol. Amt	Total		
⊟	10/01/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
	Visit Date	**Scheduled Time**	**Patient Admission ID**	**Patient Name**	**Reg Hrs.**	**Amount**	**OT Hrs.**	**OT Amount**	**Hol. Hrs.**	**Hol. Amt**	**Total**	**Payroll Batch**	**Payroll Batch Date**
	10/01/2015	1000-1300	900012	Strike Cormoran	03:00	60.00	0:00		0:00		60.00	FRNQ0003	10/22/2015 14:36
⊞	10/02/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
⊞	10/03/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
⊞	10/04/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
⊞	10/05/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
⊞	10/06/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
⊞	10/07/2015	1000-1300	900012	Strike Cormoran	03:00	$60.00	0		0		$60.00		
	Total:				**21:00**	**420.00**	**00:00**	**$0.00**	**00:00**	**$0.00**	**$420.00**		

Pay Check Register View