# Pay - Pay Rates

**Description:** In this topic, the user will learn about pay rates. The pay rates functionality allows a user to add a new pay rate and specify the date range for which the pay rate is valid. Pay rates can overlap if enabled. Rates that are set with no end date will be effective until an end date is specified. The end date for a current pay rate will auto-populate when a new pay rate is added.

**Role Required:** Super User, Supervisor

**Permission Required:** Funding Source Admin, Import Admin

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## Create Pay Rate

1. Log in to profile
2. Select **Settings** from the main menu
3. Select **Custom Drop Down** from the submenu
4. Click **Actions**
5. Select **Add New Custom Drop Down Item** from the drop-down menu
6. Complete the Add New Custom Drop Down Item form wizard
   a. Item Type: Select **Pay Rate**
   b. Pay Rate Name: **Create a name** (e.g., night/weekend, emergency)
   c. Status: Select **Active** or **Inactive**
7. Click **Save** and **Yes** to confirm

This pay rate is now available to be added to service accounts.

## Add Pay Rates

1. Log in to profile
2. Select **Home** from the main menu
3. Select **Employees** from the submenu
4. Use the filters to locate the employee and click **Search**
5. **Click anywhere in the employee row** to view the employee details
6. Select the **Accounts tab**
7. Use the filters to locate the **employee service account**
8. **Click anywhere in the service account row** to view the account details
9. Click the **Rates tab**
10. Click **Actions**
11. Select **Add New Rate** from the drop-down menu
12. Complete the Add New Rate form wizard

   i. Pay Rates can be created for the future or in the past
   ii. After the new pay rate is added, if there was a previous pay rate without an end date specified, the system will automatically adjust the end date on the previous pay rate to end the day before the new pay rate starts.
   i. The rate the employee will see at clock in
   ii. Used when the employee has overlapping pay rates
      1. If the employee has more than one rate available, they click the drop-down to select the rate for the shift. The primary rate will display as the default.
   a. Pay Rate Name: Select from drop-down
   b. Rate: Dollar amount
   c. Effective date: The date the rate starts
   d. End date: Optional field
   e. Primary: Click the checkbox to mark the rate as the primary rate. *Tip - Set the primary (default) to Standard as it is used most often
13. Click **Save** and **Yes** to confirm

*Please note:

- When a new pay rate is created, the rate will not affect historical punches; only new punches made for that service period will be adjusted.
- The new pay rate will not save if it exceeds the max pay rate set for that service
- If a punch splits (overnight), the resulting generated punches will receive the correct pay rate for the specified dates, unless the service code is configured to cross midnight.

## Edit an Existing Pay Rate

1. Log in to profile
2. Select **Home** from the main menu

3. Select **Employees** from the submenu
4. Use the filters to locate the employee and click **Search**
5. **Click anywhere in the employee row** to view the employee details
6. Click the **Accounts tab**
7. Use the filters to locate the **employee service account**
8. **Click anywhere in the service account row** to view the account details
9. Click the **Rates tab**
10. **Click anywhere in the pay rate row** to view the rate details
11. Click **Actions**
12. Select **Edit Rate** from the drop-down menu
13. Complete edits as needed on the Edit Rate form wizard
14. Click **Save** and **Yes** to confirm

## Overlapping Pay Rates

The system allows pay rates to overlap, meaning if an employee has more than one pay rate available for a shift, they will be able to select the appropriate pay rate name from the pay rate name drop-down when entering time. This field only appears for a service account with overlapping pay rates enabled. This feature is typically used for non-standard visit types such as emergency or night/weekend. If a non-standard pay rate is selected by an employee, the punch will be flagged for review in the Pending Entries table. Users may hover over the red eye icon to see the message Non Standard Pay Rate selected. This allows users to manage employee use of overlapping pay rates.

1. Log in to profile
2. Select **Home** from the main menu
3. Select **Employees** from the submenu
4. Use the filters to locate the employee and click **Search**
5. **Click anywhere in the employee row** to view the employee details
6. Click the **Accounts tab**
7. Use the filters to locate the **employee service account**
8. **Click anywhere in the service account row** to view the account details
9. Click **Actions**
10. Select **Edit Account** from the drop-down menu
11. Check the box to **Allow Overlapping Pay Rates**
12. Click **Save** and **Yes** to confirm

## Max Pay Rates

Setting a max pay rate constricts pay rates so that employees cannot exceed the specified amount for a particular service.

1. Select **Settings** from the main menu
2. Select **Funding Sources** from the submenu
3. Use the filters to locate the funding source and click **Search**
4. **Click anywhere in the funding source row** to view the details
5. Click the **Service Codes tab**
6. **Click anywhere in the service code row** to view the details
7. Click **Actions**
8. Select **Edit Service Code** from the drop-down menu
9. In the Edit Service Code form wizard, click the blue **plus sign (+)** to open Payroll Details
10. Select **Yes** in the Has Max Pay Rate field
11. Enter the **Max Pay Rate** in dollars
12. Click **Save** and **Yes** to confirm

## Employee Pay Rates Report

1. Select **Reports** from the main menu
2. Select **Management Reports** from the submenu
3. Select **Employee Pay Rates Report** from the flyout menu
4. Use the filters to refine the criteria then click **Search**
5. Reorder the columns as needed and/or click **Download** to open the Download Report Wizard
   a. Select the columns to download and click **Next**
   b. Choose the file format
      i. If PDF is chosen, select Orientation for the download.
   c. Optionally save the report download preference by selecting the checkbox
   d. Click **Download** and **Yes** to confirm

## Import

Pay Rates can be imported into DCI. To learn how to complete imports, see the appropriate Admin Guide: Import Formats in the DCI Help Center.

# Related articles

- Import Formats - Admin Guide
- Reports Guide
- System Set-Up - Admin Guide
- Billing Module - Admin Guide
- Payroll Module - Admin Guide