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

- Create Pay Rate
- Add Pay Rates
- Edit an Existing Pay Rate
- Overlapping Pay Rates
- Max Pay Rates
- Employee Pay Rates Report
- Import

Related articles

Create Pay Rate

- 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
 - 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