Generating an Employee Payroll Export

For the **Generate Payroll** feature to work properly you must have payrate(s) in the employee profiles associated for billable and non-billable services. Non-billable items must be set up in Pavillio so that the employee can clock into the non-billable services. Refer to the *Understand Admin Time/Non-billable Time* FAQ in the help area. All records must be Finalized in Approve Visits for service records and non-billable records.

One time setup by your Pavillio Agency Admin
- Go to **Administration** > **Masters** > **Configurations**
  - Payroll will be computed based on this scheme – choose either
    - BYQUARTERHOUR
    - BYMINUTE
  - Start day of the Week
    - Set this to be the start day of the week for your payroll cycle
- Go to **Administration** > **Masters** > **Holidays**
    - Select the year and add your agency's recognized holidays

Generate an employee payroll export file

- Click **Financials > Generate Payroll > Employee** tab
- Select the **Service Line**
- Enter the **Start Date** and **End Date** of the period that you want to work with
- Leave **All Employees** checked – unless you are running this for one specific employee
- Leave **Include records not computed prior to Start Date checked** – this will include any late time that was entered but not yet computed
- Click **Compute** – Pavillio will gather all records for the period indicated with the Start and End dates.
  a. Records that were computed in a batch will not be computed (pulled) into another again. There are steps in the help area if you need to delete a computed batch.
  b. Do not click compute again or the batch will be empty
  c. This process does take a little time as Pavillio is gathering each record(s) for every date of working during the period for every client.
  d. If the batch returns pink with a + you must fix any payrate errors that returned. These records will not be in the computed batch. (see *Recompute Employee Payroll Batch* for instructions on how to recompute a payroll batch)
- Once the computing is complete click the eye icon in **Actions**
- In the **View Computed Batch Details** screen select the records
- Click **Select all Records in this batch**
- Click **Export**
  a. Enter a **Pay Date**
  b. Select the **Format** - this will be an excel export file. We have many templates set up but reach out if customization is required to match your payroll system.
  c. Click **Export**
- When the export is finished in **Actions** click the download icon to download an excel file with payroll details