

Working with Mileage & Adjustments in CareFree

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Using CareFree to Calculate Mileage Payments/Charges

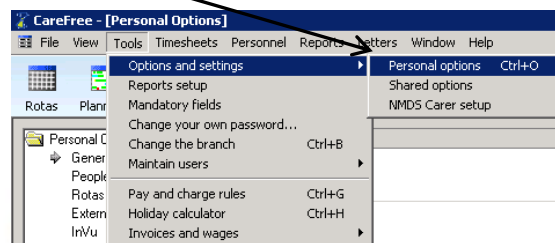
It is possible for Carefree to interface with mapping software in order to automatically calculate distances between calls, journey times and to apply subsequent charges/payments to client invoices/carer wages. CareFree currently works with either Google Maps or Microsoft MapPoint to calculate the necessary data. This section will describe how to configure CareFree to calculate distances using mapping software and then how to apply mileage payments to carer wages. The process for applying charges to client invoices is very similar.

Configuring Mileage/Travel Time Calculations

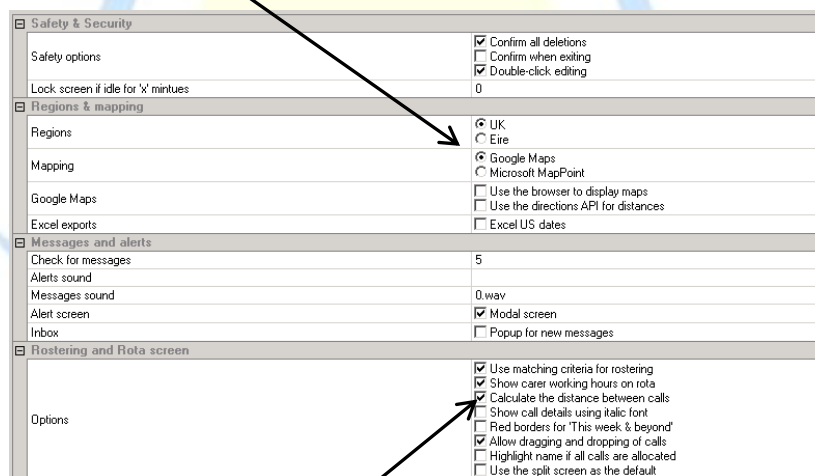
If you are using CareFree on our hosted platform, you have free access to Microsoft MapPoint on our servers and we would recommend using this software (rather than Google Maps) to calculate your mileage data. If you have purchased or rent CareFree and host it locally, you will either need to purchase Microsoft MapPoint or use Google Maps to perform your calculations. There are some options which must be configured in both the **Personal** and **Shared Options** for CareFree.

Configure the Personal Options for Mileage

- Go to the **Tools** menu
- Hover over **Options & Settings**
- Select **Personal Options**



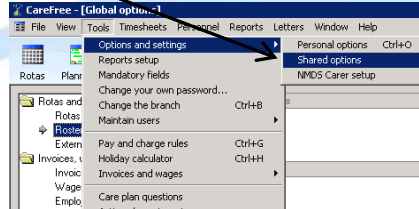
- Select the mapping software you wish to use



- Ensure **Calculate the distance between calls** is ticked

Configure the Shared Options for Mileage

- Go to the **Tools** menu
- Hover over **Options & Settings**
- Select **Shared Options**



- Select **Mileage** in the menu on the left hand side of the screen

A screenshot of the CareFree software interface showing the 'Mileage' configuration screen. The left-hand navigation pane has 'Mileage' selected. The main area displays various options and settings for mileage, organized into sections: 'Default options', 'Mileage limits', and 'MapPoint options'.

Default options	
Type	By Mile
Rate	£0.10
Unpaid	£0.00
Travel gap	30
Alternative postcode	Extra field 05
Journey options	
	<input type="checkbox"/> Include calls from home
	<input checked="" type="checkbox"/> Include calls back home
	<input checked="" type="checkbox"/> Carer goes home for breaks
Break time	180
Other options	
	<input checked="" type="checkbox"/> Warn about bad postcodes
	<input type="checkbox"/> Use 'Pick up and take home'
	<input type="checkbox"/> Ignore break if same run
	<input type="checkbox"/> Except for overnight calls
	<input type="checkbox"/> Ignore all run changes for breaks
	<input checked="" type="checkbox"/> Check for missing routes
	<input type="checkbox"/> Include back-to-back calls
	<input type="checkbox"/> Exclude late timesheets
Single calls	Yes
Double-up calls	Yes
GoogleMaps API Key	Alza5y6DQ0qTrKbCqZ0utq3k8hThqCargoc-g
Mileage limits	
Limit on wages	£0.00
Limit per day	0
Disallowed per day	0
Limit from/to home	0
MapPoint options	
Routing options	<input checked="" type="radio"/> Quickest route <input type="radio"/> Shortest route

- Configure the options on the right hand side of the screen
 - For an explanation of what each option does, click on each one in turn

A screenshot of the CareFree software interface showing the 'Mileage limits' section. The 'Limit on wages' option is highlighted, and a tooltip is displayed below it, explaining that this is the limit of total mileage paid on each wage sheet.


Mileage limits	
Limit on wages	£0.00
Limit per day	0
Disallowed per day	0
Limit from/to home	0
MapPoint options	
Routing options	<input checked="" type="radio"/> Quickest route <input type="radio"/> Shortest route

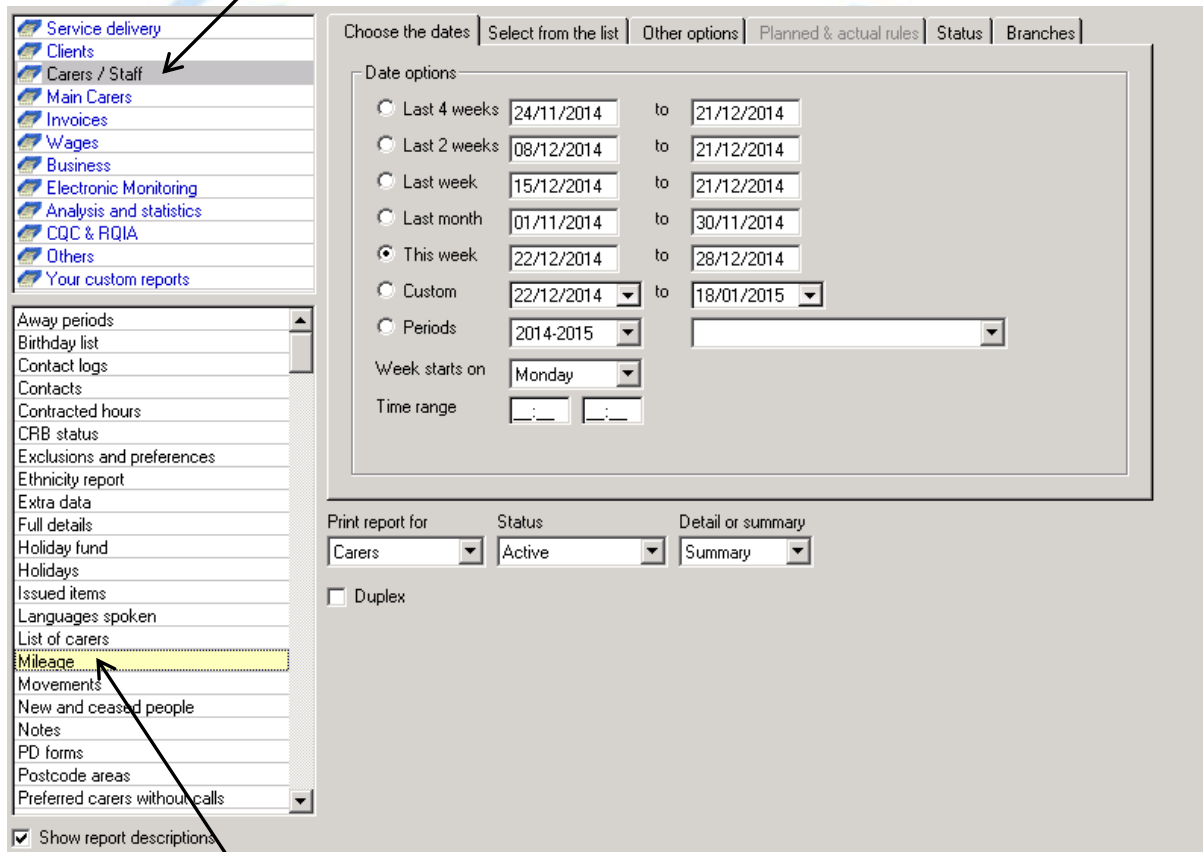
Limit on wages
This is the limit of total mileage paid on each wage sheet

Calculating Mileage for the First Time

In order to begin displaying mileage/travel time on the rota and using the data to add travel expenses to carer wages/client invoices, a Mileage Report must be generated.

To run a mileage report:

- Click on the  Reports icon to open the Reports screen
- Select the **Carers** report group (to run a mileage report for Carers)



The screenshot shows the 'Reports' screen in CareFree. On the left, a tree view lists various report categories. Under 'Carers / Staff', the 'Mileage' report is highlighted. On the right, the 'Choose the dates' tab is active, showing date selection options. The 'This week' option is selected, with dates 22/12/2014 to 28/12/2014. Below this, there are dropdowns for 'Print report for' (set to Carers), 'Status' (set to Active), and 'Detail or summary' (set to Summary). A 'Duplex' checkbox is also visible.


- Select the **Mileage** report
- Select a date range using the **Choose the dates** tab
- Leave all Carers selected in the **Select from List** tab
- Click the **Preview** button to calculate the mileage

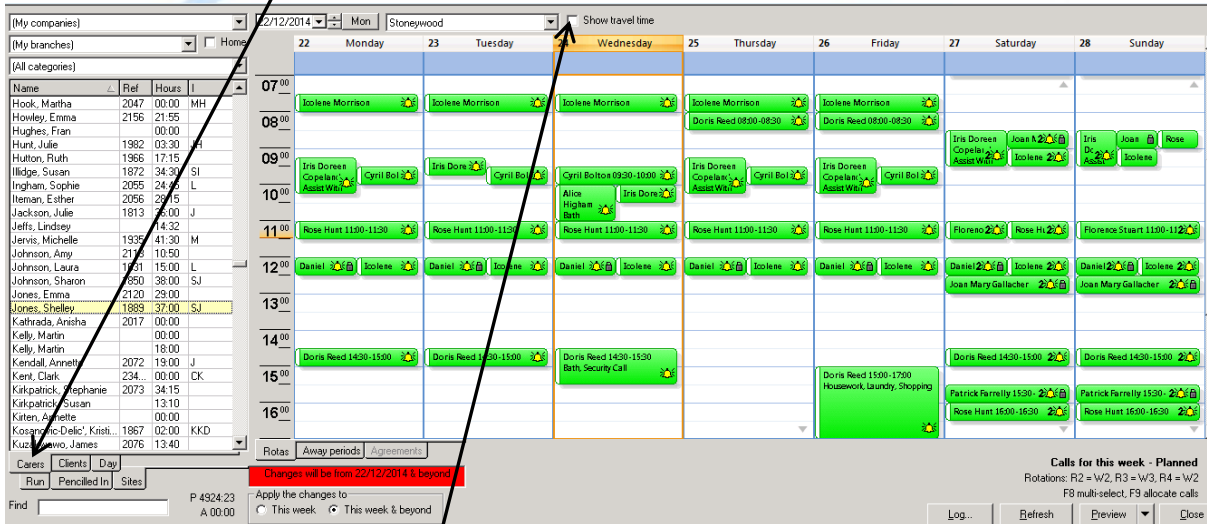
This will perform mileage calculations for all the journeys your carers are scheduled to make between the dates you selected. Once the distances and travel times for these journeys have been calculated, the information will be stored in CareFree.

It is good practice to run a mileage report on a weekly basis, once the rotas have been prepared for sending to carers.

Display Distances & Travel Times on Rotas

Once a mileage report has been generated, it is possible to display distances and travel times on the Carers' Rota screen:

- Click the  icon to access the Rota screen
- Click on the **Carers** tab to display the Carers' Rotas



The screenshot shows the CareFree Rota interface. On the left is a list of carers with their names, reference numbers, and hours. The main area is a grid of calls for each day of the week. A 'Show travel time' checkbox is located at the top right of the grid. A red banner at the bottom of the grid area reads 'Changes will be from 22/12/2014 & beyond'. At the bottom of the screen, there are buttons for 'Run', 'Pencilled In', 'Sites', and 'Find', along with a status bar showing 'P 4324.23 A 00:00' and 'Apply the changes to' options.

- Place a tick in the **Show Travel Time** box
- Travel times and distances will be displayed in white bubbles between calls




This close-up view shows several call cards from the Rota grid. Each card displays the carer's name, the call time, and the call type. Between the call cards, white bubbles display the travel time and distance for the route between calls. For example, between Brenda Holgate's call (08:00-08:30) and Vita Maria Jankinskyj's call (08:15-08:45), the bubble shows '2 m ins, 0.6'. Other bubbles show '2 m ins, 0.4', '3 m ins, 0.7', and '4 m ins, 1.3'.

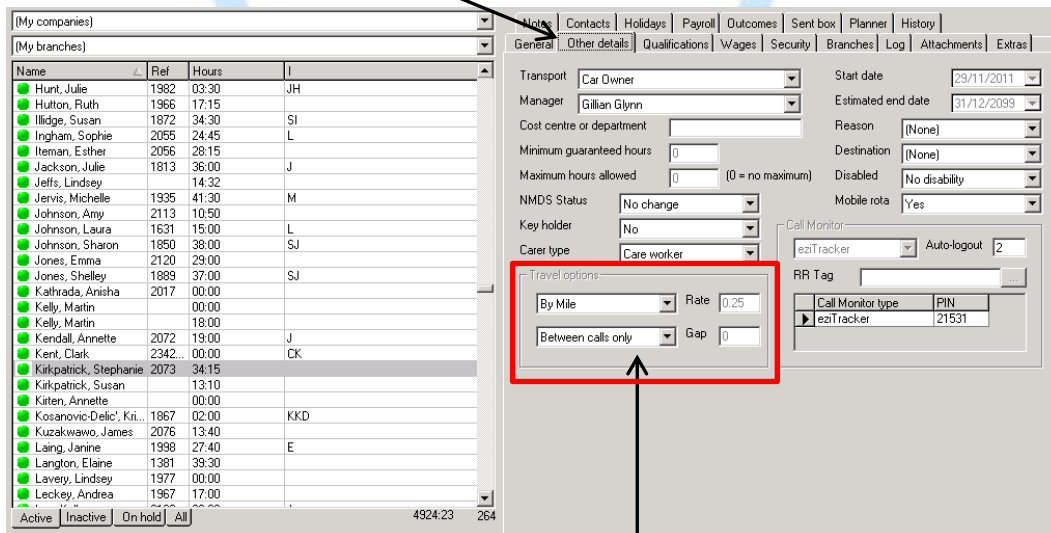
Including Mileage on Carer Wages

You can set a global mileage payment rate in the Shared Options for mileage. (See Configure the Shared Options for Mileage on page 56).

If your carers are paid different rates for mileage, it is possible to override the global setting on an individual carer basis in the Other Details tab of the Carers screen.

Setting Individual Mileage Rates/Options for Carers

- Click on the  Carers icon to access the Carers screen
- Select the **Other Details** tab



The screenshot shows the 'Carers' screen with a list of carers on the left and the 'Other Details' tab selected on the right. The 'Travel options' section is highlighted with a red box, showing the following settings:

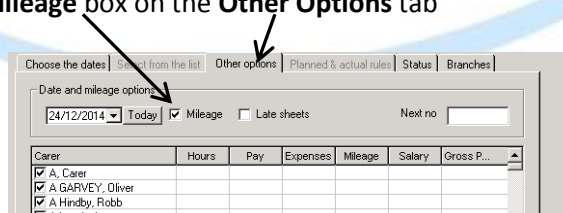
- By Mile (Rate: 0.25)
- Between calls only (Gap: 0)

- Specify mileage rates and options under **Travel Options**

Including Mileage Payments when Calculating Wages

When generating the Carer wages report, it is extremely simple to include payments for mileage based on the options you have configured:

- Simply select the **Create and Finalise Wages** report in the **Reports** screen
- Specify which data is to be included on the wages run. (See page 51 for instructions)
- Put a tick in the **Mileage** box on the **Other Options** tab



The screenshot shows the 'Other Options' tab in the 'Create and Finalise Wages' report screen. The 'Mileage' checkbox is checked, and the 'Date and mileage options' section shows '24/12/2014' and 'Today'. The 'Next no' field is empty.

Carer	Hours	Pay	Expenses	Mileage	Salary	Gross P...
<input checked="" type="checkbox"/> A. Carer						
<input checked="" type="checkbox"/> A. GARVEY, Oliver						
<input checked="" type="checkbox"/> A. Hindoy, Robb						
<input checked="" type="checkbox"/> A. Lorch, James						

Making Manual Adjustments to Client Invoices or Staff Wages


CareFree offers complete flexibility in terms of making manual adjustments to both invoices and wages. 'Additions & Adjustments' are commonly used to make payments for ad-hoc expenses, or apply deductions for uniforms or DBS checks for example. Client invoices can be adjusted to include charges for ad-hoc expenses such as the costs for taxis or parking on excursions.

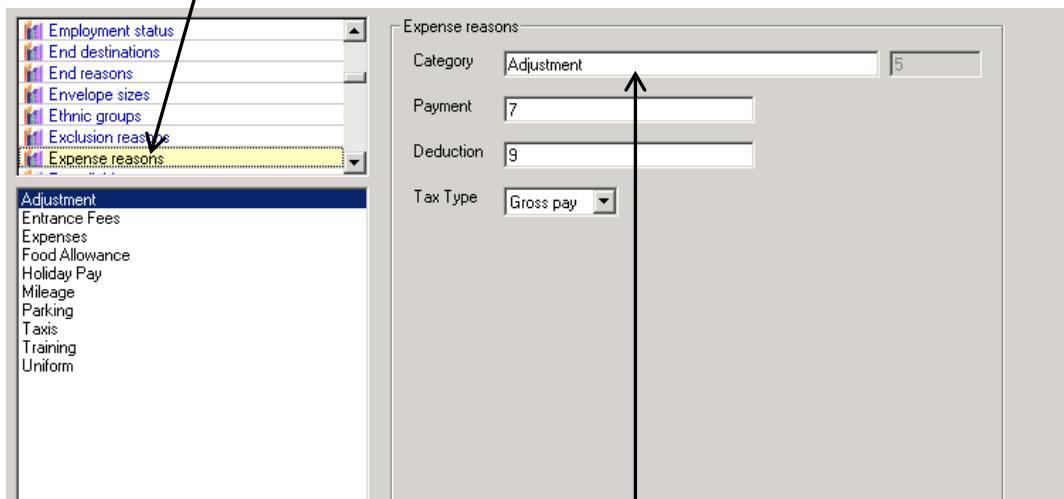
Preparing to Make Manual Adjustments

Before beginning to create manual adjustments it is important to think about the reasons you may need to adjust wages or invoices. Whenever a manual adjustment is made in CareFree, the user must specify the **Expense Reason** on the adjustment. The reason for the adjustment will appear on invoices or wage sheets.

Creating and Editing Expense Reasons in Items

To create new or edit expense reasons:

- Click on the  icon to open the **Items** screen
- Select **Expense Reasons** in the box at the top left with the blue text entries



The screenshot shows the 'Expense reasons' configuration screen. On the left, a list of categories is visible, with 'Expense reasons' selected. The main area contains a form with the following fields:

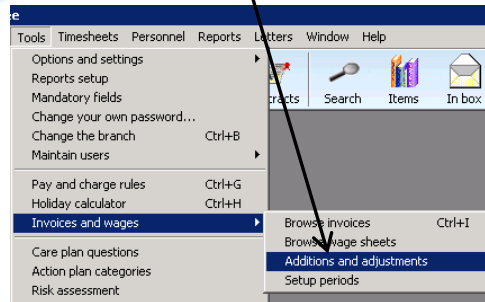
Category	Adjustment	5
Payment	7	
Deduction	9	
Tax Type	Gross pay	

- Click **New** to add new Expense Reasons to the list, or click **Edit** to amend existing entries
- Enter the name for the Expense Reason in the **Category** box

Working with Additions & Adjustments

To access the Additions & Adjustments screen:

- Go to the **Tools** menu
- Hover over **Invoices & Wages**
- Select **Additions & Adjustments** in the sub menu



The Additions and Adjustments screen will display any adjustments which have previously been created and saved. The list displayed can be filtered by specifying a **date range**.

Date	Reason	Exp type	Description	Type	Amount	Tax / VAT	Client	Carer	Received	Paid	Invoice No	Wages No	Locked
26/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
26/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
25/12/2014	Food Allowance	Call	asdasdasd	Wage sheet	£10.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
25/12/2014	Entrance Fees	Call	ghg	Invoice	£5.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
25/12/2014	Adjustment	Call	efewf	Invoice	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
25/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	No			
25/12/2014	Holiday Pay	Call	dcwewewe	Wage sheet	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	n/a	No			
19/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
19/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
18/12/2014	Food Allowance	Call	asdasdasd	Wage sheet	£10.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
18/12/2014	Entrance Fees	Call	ghg	Invoice	£5.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
18/12/2014	Adjustment	Call	efewf	Invoice	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
18/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	No			
18/12/2014	Holiday Pay	Call	dcwewewe	Wage sheet	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	n/a	No			
12/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
12/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
11/12/2014	Adjustment	Call	efewf	Invoice	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
11/12/2014	Entrance Fees	Call	ghg	Invoice	£5.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
11/12/2014	Holiday Pay	Call	dcwewewe	Wage sheet	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	n/a	No			
11/12/2014	Food Allowance	Call	asdasdasd	Wage sheet	£10.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
11/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	No			
05/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
05/12/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
04/12/2014	Food Allowance	Call	asdasdasd	Wage sheet	£10.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
04/12/2014	Entrance Fees	Call	ghg	Invoice	£5.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
04/12/2014	Adjustment	Call	efewf	Invoice	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
04/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	No			
04/12/2014	Holiday Pay	Call	dcwewewe	Wage sheet	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	n/a	No			
28/11/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
28/11/2014	Mileage	Call		Invoice	£0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
27/11/2014	Food Allowance	Call	asdasdasd	Wage sheet	£10.00	£100.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
27/11/2014	Entrance Fees	Call	ghg	Invoice	£5.00	£10.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
27/11/2014	Adjustment	Call	efewf	Invoice	£100.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			

The adjustments displayed in the list can be further filtered by selecting an **individual client or carer**.

- An existing adjustment can be edited by selecting it in the list and clicking 

Creating a New Addition & Adjustment

- Click on the **New** button to add a new adjustment

The screenshot shows a dialog box titled "Addition or adjustment item" with the following fields and callouts:

- Date:** 06/01/2015 (Today) - Callout: Specify a **date** for the adjustment. This is the date upon which the adjustment will be itemised on an invoice/wagesheet.
- Type:** Invoice (client charge) - Callout: Choose to create an adjustment to either a client invoice or carer wagesheet (or both) using **Type**
- Reason:** (None) - Callout: Select the expense **reason**
- Description:** (Empty) - Callout: Add an additional **description** if required. This can be output on invoices/wagesheets.
- Amount:** 0.00 - Callout: Specify adjustment **amount**. If creating a deduction, ensure a negative value is used.
- Qty:** 1.00
- Total:** (Empty)
- VAT rate:** Gross pay - Callout: Select the **client** or **carer** for whom the adjustment applies
- Client:** (None)
- Contract:** (None)
- Carer:** (None)
- Buttons:** Save, Cancel - Callout: Click **Save** to complete

Once the adjustment has been saved, it will automatically be picked up in the next invoice/wages run.