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**
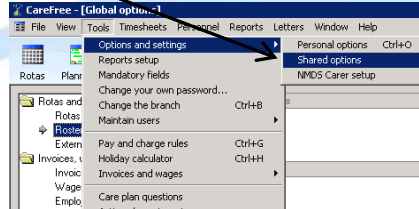- Select **Personal Options**
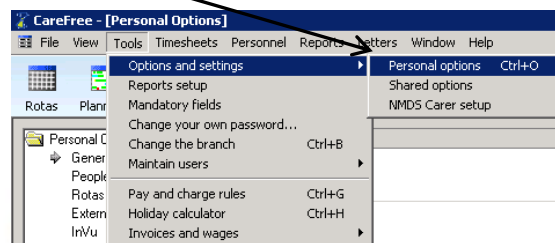
- Select the mapping software you wish to use
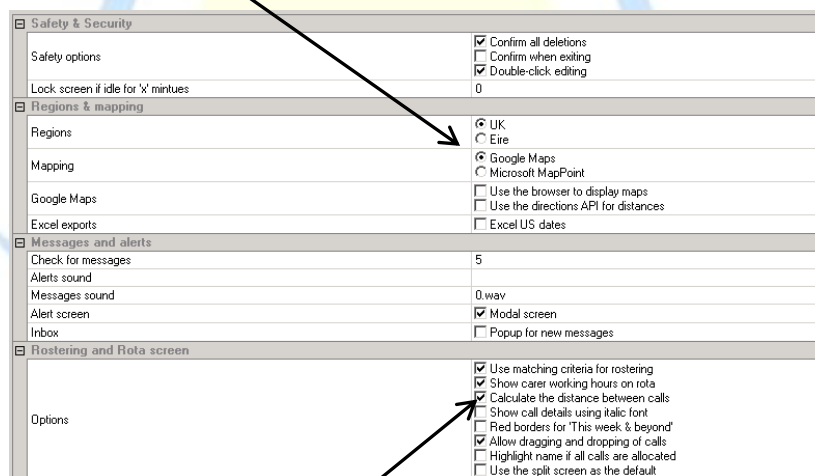
- Ensure **Calculate the distance between calls** is ticked

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

- 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
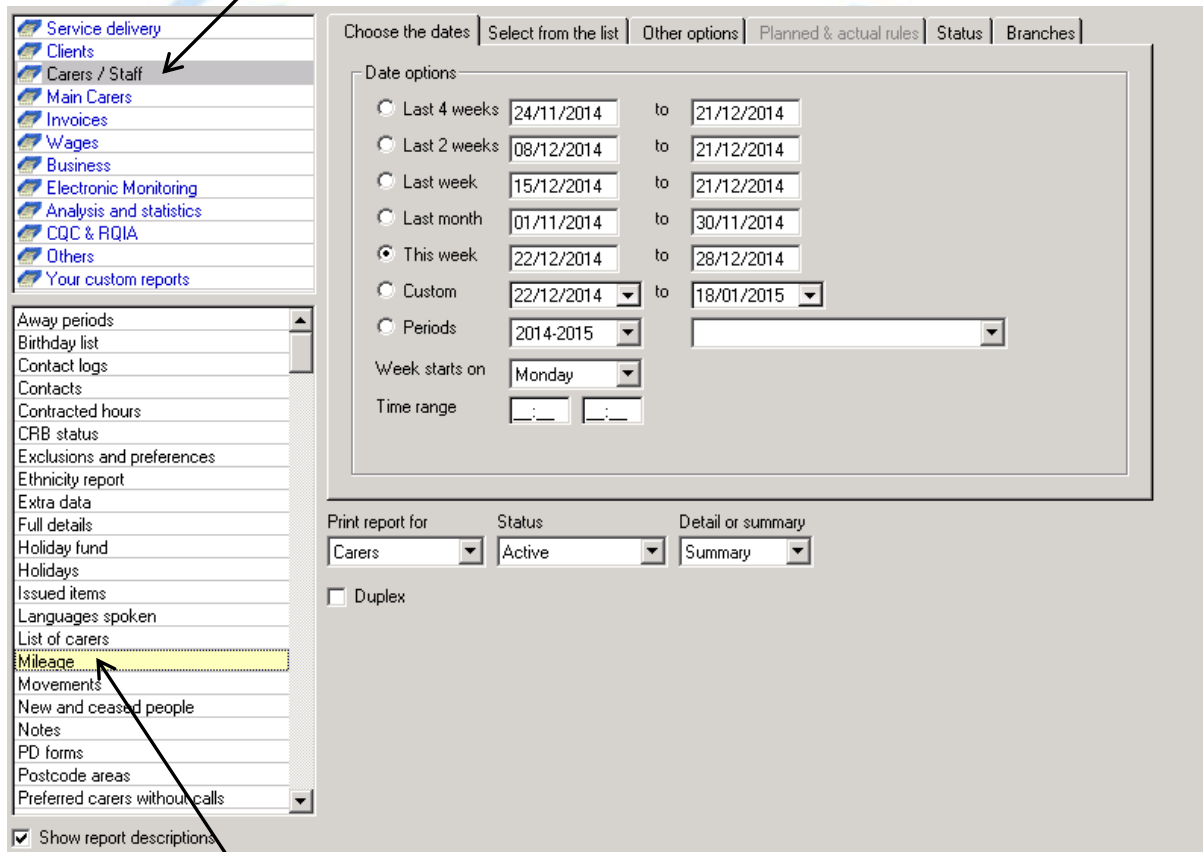
Calculating Mileage for the First Time

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)

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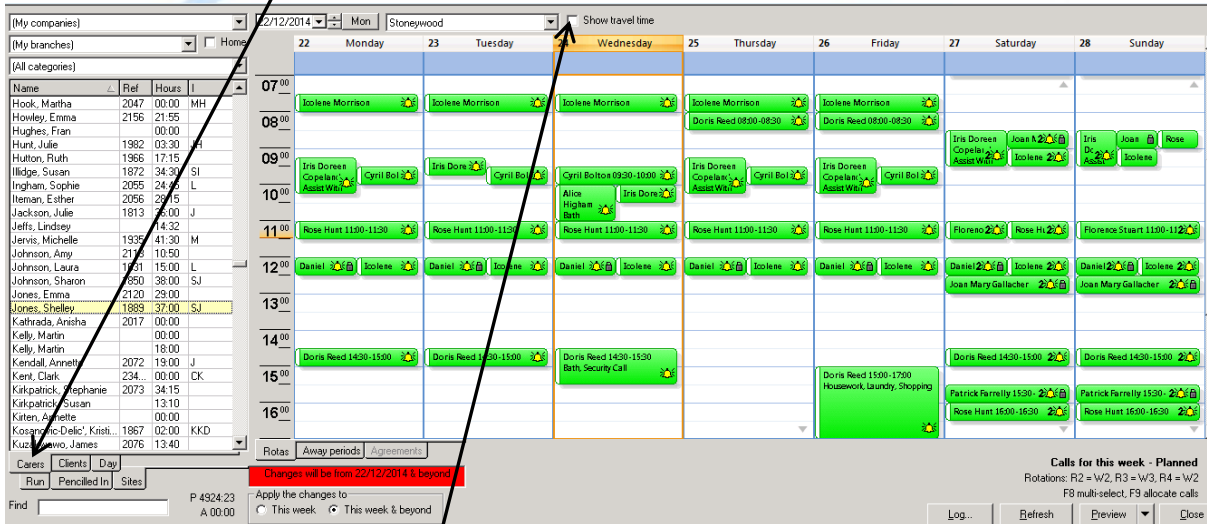- Click the **Preview** button to calculate the mileage

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.

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

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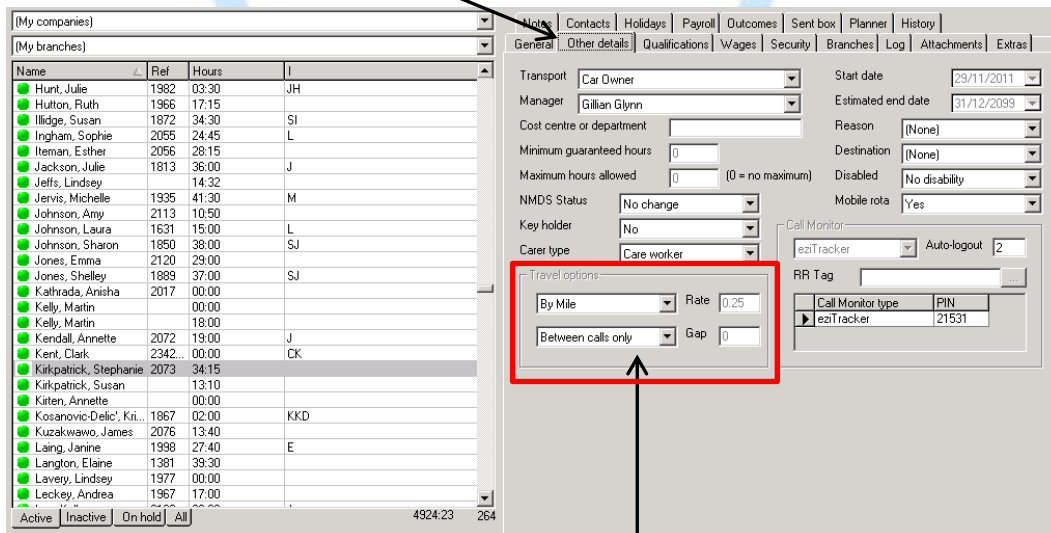
Including Mileage on Carer Wages

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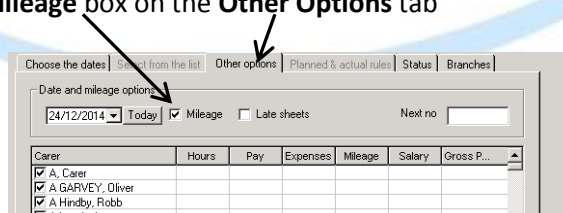
- Specify mileage rates and options under **Travel Options**

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 configures:

- 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

# 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.
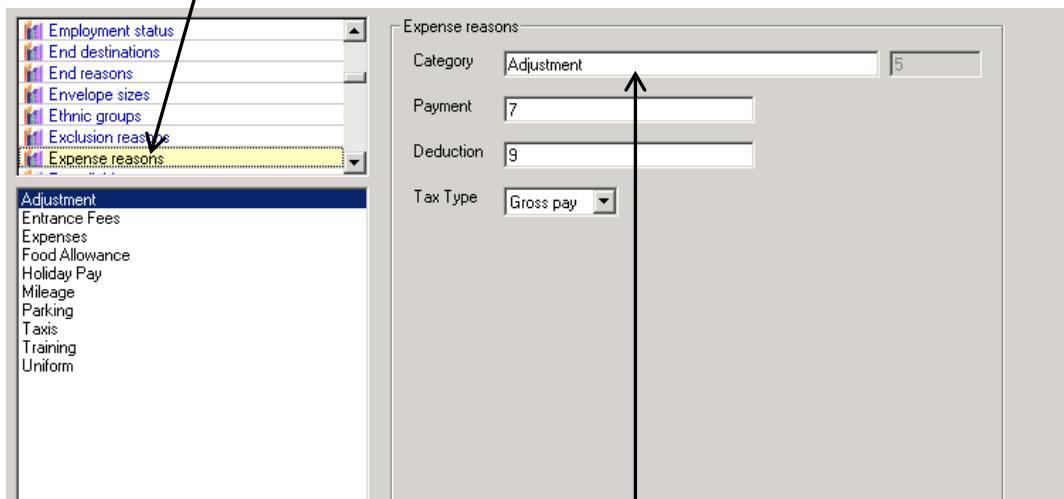
Preparing to Make Manual Adjustments

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

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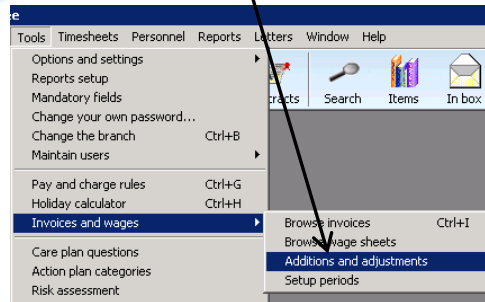
The Additions and Adjustments screen will display any adjustments which have previously been created and saved. The list displayed can be filtered by specifying a **date range**.

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 [Edit]

Creating a New Addition & Adjustment

- Click on the [New] button to add a new adjustment

> Specify a **date** for the adjustment. This is the date upon which the adjustment will be itemised on an invoice/wagesheet.

> Add an additional **description** if required. This can be output on invoices/wagesheets.

> Specify if the adjustment is made to gross or net pay.

> Click **Save** to complete

> Choose to create an adjustment to either a client invoice or carer wagesheet (or both) using **Type**

> Select the expense **reason**

> Specify adjustment **amount**. If creating a deduction, ensure a negative value is used.

> Select the **client** or **carer** for whom the adjustment applies

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