

# Working with Mileage & Adjustments in CareFree

10/12/14 V1.0

# Table of Contents

Configuring Mileage/Travel Time Calculations       3         Configure the Personal Options for Mileage       3         Configure the Shared Options for Mileage       4         Calculating Mileage for the First Time       5         Display Distances & Travel Times on Rotas       6         Including Mileage on Carer Wages       7         Setting Individual Mileage Rates/Options for Carers       7         Including Mileage Payments when Calculating Wages       7         Making Manual Adjustments to Client Invoices or Staff Wages       8         Preparing to Make Manual Adjustments       8         Working with Additions & Adjustments       9         Creating a New Addition & Adjustments       10	Using CareFree to Calculate Mileage Payments/Charges	3
Configure the Personal Options for Mileage       3         Configure the Shared Options for Mileage       4         Calculating Mileage for the First Time       5         Display Distances & Travel Times on Rotas       6         Including Mileage on Carer Wages       7         Setting Individual Mileage Rates/Options for Carers       7         Including Mileage Payments when Calculating Wages       7         Making Manual Adjustments to Client Invoices or Staff Wages       8         Preparing to Make Manual Adjustments       8         Creating and Editing Expense Reasons in Items       8         Working with Additions & Adjustments       9         Creating a New Addition & Adjustments       10	Configuring Mileage/Travel Time Calculations	3
Configure the Shared Options for Mileage       4         Calculating Mileage for the First Time       5         Display Distances & Travel Times on Rotas       6         Including Mileage on Carer Wages       7         Setting Individual Mileage Rates/Options for Carers       7         Including Mileage Payments when Calculating Wages       7         Making Manual Adjustments to Client Invoices or Staff Wages       8         Preparing to Make Manual Adjustments       8         Creating and Editing Expense Reasons in Items       9         Creating a New Addition & Adjustments       9         Creating a New Addition & Adjustment       10	Configure the Personal Options for Mileage	3
Calculating Mileage for the First Time	Configure the Shared Options for Mileage	4
Display Distances & Travel Times on Rotas	Calculating Mileage for the First Time	5
Including Mileage on Carer Wages       7         Setting Individual Mileage Rates/Options for Carers       7         Including Mileage Payments when Calculating Wages       7         Making Manual Adjustments to Client Invoices or Staff Wages       8         Preparing to Make Manual Adjustments       8         Creating and Editing Expense Reasons in Items       8         Working with Additions & Adjustments       9         Creating a New Addition & Adjustments       10	Display Distances & Travel Times on Rotas	6
Setting Individual Mileage Rates/Options for Carers	Including Mileage on Carer Wages	7
Including Mileage Payments when Calculating Wages	Setting Individual Mileage Rates/Options for Carers	7
Making Manual Adjustments to Client Invoices or Staff Wages       8         Preparing to Make Manual Adjustments       8         Creating and Editing Expense Reasons in Items       8         Working with Additions & Adjustments       9         Creating a New Addition & Adjustments       10	Including Mileage Payments when Calculating Wages	7
Preparing to Make Manual Adjustments	Making Manual Adjustments to Client Invoices or Staff Wages	8
Creating and Editing Expense Reasons in Items	Preparing to Make Manual Adjustments	8
9. Working with Additions & Adjustments9 Creating a New Addition & Adjustm <mark>ent10</mark>	Creating and Editing Expense Reasons in Items	8
Creating a New Addition & Adjustm <mark>ent10</mark>	Working with Additions & Adjustments	9
	Creating a New Addition & Adjustment	10



Mileage

## 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

Safety & Security		
Safety options	Confirm all deletions Confirm when exiting Double-click editing	
Lock screen if idle for 'x' mintues	0	
Regions & mapping		
Regions		
Mapping	⑦ Google Maps ○ Microsoft MapPoint	
Google Maps	Use the browser to display maps Use the directions API for distances	
Excel exports	Excel US dates	
Messages and alerts		
Check for messages	5	
Alerts sound		
Messages sound	0.wav	
Alert screen	Modal screen	
Inbox	Popup for new messages	
Rostering and Rota screen		
Options	<ul> <li>✓ Use matching criteria for rostering</li> <li>✓ Show carer working hours on rota</li> <li>✓ Calculate the distance between calls</li> <li>Show call details using italic font</li> <li>■ Red borders for Thiss week &amp; beyond'</li> <li>✓ Allow dragging and dropping of calls</li> <li>■ Highlight name it all calls are allocated</li> <li>Use the split screen as the default</li> </ul>	

• Ensure Calculate the distance between calls is ticked

#### CareFree

Mileage

### 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

Rotas and Rostering	E	Default options						
Rotas		Туре	By Mile					
Rostering		Rate	£0.10 £0.00					
External links		Unpaid						
🔄 Invoices, wages & exports		Travel gap	30					
Invoices		Alternative postcode	Extra field 05					
Wages Employment & holidays Exports		Journey options	☐ Include calls from home ✔ Include calls back home ✔ Carer goes home for breaks					
🔁 Call monitoring SMS & Email		Break time	180					
Call monityring SMS and alerts Email Magge Security & flavour Security Flavour		Other options	✓ Warn about bad postcodes     Use Prick up and take home'     □ Ignore break if same run     Except for overnight calls     □ Ignore all run changes for breaks     ✓ Check for missing routes     □ Include back-to-back calls     □ Exclude late timesheets					
		Single calls	Yes					
NMDS		Double-up calls	Yes					
11000		GoogleMaps API Key	AlzaSyBDQOqTrKblCqZ0utq3ik8hThqCargoc-g					
	E	Mileage limits						
		Limit on wages	£0.00					
		Limit per day	0					
		Disallowed per day	0					
		Limit from/to home	0					
	E	MapPoint options						
		Routing options	© Quickest route O 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

Limit on wages	٤0.00	_
Limit per day	0	
Disallowed per day	0	
Limit from/to home	0	
MapPoint options		
Routing options	Quickest route     C Shortest route	
imit on wages	$\mathbf{V}$	
his 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:

E Click on the Reports icon to open the Reports screen Select the **Carers** report group (to run a mileage report for Carers) • Choose the dates Select from the list Other options Planned & actual rules Status Branches 🌌 Service delivery 🌌 Clients ᅏ Carers / Staff Date options ‴ Main Carers C Last 4 weeks 24/11/2014 to 21/12/2014 🌌 Invoices 🏉 Wages C Last 2 weeks 08/12/2014 to 21/12/2014 🏉 Business

🛷 Electronic Monitoring	C Last week	15/12/2014	to	21/12/2014
In Analysis and statistics	C Last month	01/11/2001/4	to	20/11/2014
🖅 CQC & RQIA	- Edst month	0171172014		30/11/2014
/// Others	This week	22/12/2014	to	28/12/2014
Your custom reports	C Custom	22/12/2014 💌	to	18/01/2015 🖵
Away periods 🛛 🔺	O Periods			
Birthday list		2014-2015		
Contact logs	Week starts on	Mondau		
Contacts		Imonday		
Contracted hours	Time range			
CRB status				
Exclusions and preferences				
Ethnicity report				
Extra data				
Full details	Print report for	Status		Detail or summary
Holiday fund	Carers 🔻	Active	•	Summary 💌
Holidays	·		_ '	,
Issued items	🔲 Duplex			
Languages spoken				
List of carers				
Mileage				
Movements				
New and ceased people				
Notes				
PD forms				
Postcode areas				
Preferred carers without calls				
Show report descriptions	-			

- 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 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 areas icon to access the Carers screen
- Select the Other Details tab

(My companies)					Hotes Contacts Holidays Payroll Outco	omes Se	nt box Planner	History	
My branches)					•	General Other details Qualifications Wages	s Securit	y Branches L	og Attachments Extra
Name 🛆	Ref	Hours	1			Transport Car Ourses	-	Start date	29/11/2011
🕘 Hunt, Julie	1982	03:30	JH			Cal Owner			23/11/2011
📒 Hutton, Ruth	1966	17:15				Manager Gillian Glynn	-	Estimated e	nd date 31/12/2099
🕘 Illidge, Susan	1872	34:30	SI			Cost centre or department		Beacon	
🕘 Ingham, Sophie	2055	24:45	L			Cost centre of department		riedson	[[None]
🕘 Iteman, Esther	2056	28:15				Minimum guaranteed hours		Destination	[None]
🕘 Jackson, Julie	1813	36:00	J						
Jeffs, Lindsey		14:32				Maximum hours allowed 0 (U = n	no maximun	n) Disabled	No disability
🕘 Jervis, Michelle	1935	41:30	м			NMDS Status	7	Mobile rota	Vee
🕘 Johnson, Amy	2113	10:50				INO change			1165
Johnson, Laura	1631	15:00	L			Keyholder No	- Call	Monitor	
Johnson, Sharon	1850	38:00	SJ			Ester huno	5 6	ziTracker	Auto-logout 2
Jones, Emma	2120	29:00				Care worker			
Jones, Shelley	1889	37:00	SJ			<ul> <li>Travel options</li> </ul>	- RI	RTag 🛛	
🕘 Kathrada, Anisha	2017	00:00					_		
🔴 Kelly, Martin		00:00				By Mile Tate 0.25		Call Monitor typ	e PIN
Kelly, Martin		18:00						<ul> <li>eziTracker</li> </ul>	21531
Kendall, Annette	2072	19:00	J			Between calls only 🔻 Gap 🕧			
Kent, Clark	2342	00:00	CK						
Kirkpatrick, Stephanie	2073	34:15							
Kirkpatrick, Susan		13:10				· · · · · · · · · · · · · · · · · · ·			
Kirten, Annette		00:00							
Kosanovic Delic', Kri	1867	02:00	KKD						
Kuzakwawo, James	2076	13:40							
Laing, Janine	1998	27:40	E						
Langton, Elaine	1381	39:30							
Lavery, Lindsey	1977	00:00							
Leckey, Andrea	1967	17:00			Ţ.				
• v •	0100	00.00		1001.00	<u> </u>				

• 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

nouse the dates   Second	• •	iei optiona		actual fule	s   Status	biaricries
- Uate and mileage options	4					
24/12/2014 🔻 Today	🔽 Mileage	🗌 Late	sheets		Next no	
Carer	Hours	Pay	Expenses	Mileage	Salary	Gross P
Carer	Hours	Pay	Expenses	Mileage	Salary	Gross P
Carer A, Carer A, GARVEY, Oliver	Hours	Pay	Expenses	Mileage	Salary	Gross P
Carer ✓ A, Carer ✓ A GARVEY, Oliver ✓ A Hindby, Robb	Hours	Pay	Expenses	Mileage	Salary	Gross P

**CareFree** 

# 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:

1

- Click on the <sup>11</sup>/<sub>Imm</sub> icon to open the Items screen
- Select **Expense Reasons** in the box at the top left with the blue text entries

Employment status	Expense reasons			
End reasons	Category Adjus	tment	5	
ft Ethnic groups	Payment 7			
Expense reasons	Deduction 9			
Adjustment Entrance Fees Expenses		spay 💌		
Food Allowance Holiday Pay Mileage				
Parking Taxis				
Uniform				

- 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

Taala	Timochoote	Dersennel	Deperts	Litters	Window	Hale	
Opt Rep Mar Cha Cha Mai	timesheets tions and setti ports setup indatory fields ange your owr ange the brand intain users	personnei ngs password :h	Ctrl+B	rat	s Searc	h Items	In box
Pay Holi	r and charge n iday calculator	ules	Ctrl+G Ctrl+H				
Inv	oices and wag	les		Br Br	owse invoid owse vage	tes sheets	Ctrl+I
Car	e pian questio	ories		A	dditions and	d adjustments	;

۱

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**.

Rotas Plan	ners Clients	Carers	staff Contracte	~	Items In	hox	E Verify	OA Reports	EXIT	1	Annual A			
01/08/2014	▼ <sup>to</sup> 06/01/2	015 💌	Chient (None)		- (	Carer (N	None)	•						
Date $ abla v$	Reason	Exp type	Description	Туре	Amount	Caty	Total Tax / VAT	Client	Carer	Received	Paid	Invoice No	Wages No	Locked
26/12/2014	Mileage	Call		Invoice	20.00	0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a		1	1
26/12/2014	Mileage	Call		Invoice	£0.00	0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
25/12/2014	Food Allowance	Call	asdasdasdasd	Wage sheet	£10.00	0.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
25/12/2014	Entrance Fees	Call	ghig	Invoice	£5.00	0.00	EU.SO Gross	Allen, Jessie	McTest, Test	No	n/a			
25/12/2014	Adjustment	Call	efewf	Invoice	£100.00	0.00	£0.00 Sross	Abbott, Betty	A Palacios, George	No	n/a			
25/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	0.00	£0.00 Gros	Abbott, Betty	A Palacios, George	No	No			
25/12/2014	Holiday Pay	Call	dowewewe	Wage sheet	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, George	n/a	No			
19/12/2014	Mileage	Call		Invoice	£0.00	0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
19/12/2014	Mileage	Call		Invoice	£0.00	0.00	£0.00 Gross	Dray Alan	Bayley, Janice	No	n/a			
18/12/2014	Food Allowance	Call	asdasdasdasd	Wage sheet	£10.00	0.00	£0.00 Gross	Allen, Jassie	McTest, Test	n/a	No			
18/12/2014	Entrance Fees	Call	ahia	Invoice	£5.00	0.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
18/12/2014	Adjustment	Call	efewf	Invoice	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
18/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	No			
18/12/2014	Holiday Pay	Call	dowewewe	Wage sheet	£100.00	0.00	£0.00 Gross	Abbott, Betty	Agalacios. George	n/a	No			
12/12/2014	Mileage	Call		Invoice	20.00	0.00	£0.00 Gross	Dray, Alan	Bayles Janice	No	n/a			
12/12/2014	Mileage	Call		Invoice	20.03	0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
11/12/2014	Adjustment	Call	efewf	Invoice	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, Unorge	No	n/a			
11/12/2014	Entrance Fees	Call	ahia	Invoice	25.00	0.00	£0.00 Gross	Allen, Jessie	McTest, Test	No	n/a			
11/12/2014	Holiday Pay	Call	dowewewe	Wage sheet	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, George	Na	No			
11/12/2014	Food Allowance	Call	asdasdasdasd	Wage sheet	£10.00	0.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
11/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	0.00	£0.00 Gross	Ahhott Betty	A Palacins, Genride	No	No			
05/12/2014	Mileage	Call		Invoice	20.03	0.00	£0.00 Gross	Dray, Alan	Bayley, Janice	No	n/a			
05/12/2014	Mileage	Call		Invoice	£0.00	0.00	£0.00 Gross	Dray Alan	Bauley Janice	No	100			
04/12/2014	Food Allowance	Call	asdasdasdasd	Wage sheet	£10.00	0.00	£0.00 Gross	Allen, Jessie	McTest, Test	n/a	No			
04/12/2014	Entrance Eees	Call	abia	Invoice	85.00	0.00	£0.00 Gross	Allen Jessie	McTest Test	No	n/a			
04/12/2014	Adjustment	Call	efewf	Invoice	£100.00	0.00	£0.00 Gross	Abbott, Betty	A Palacios, George	No	n/a			
04/12/2014	Mileage	Call	ecwefewfwerf	Both	£100.00	0.00	£0.00 Gross	Abbott Betty	A Palacins, Gentre	No	No			
04/12/2014	Holiday Pay	Call	dowewewe	Wage sheet	£100.00	0.00	£0.00 Gross	Abbott Betty	A Palacios, George	n/a	No			
28/11/2014	Mileage	Call		Invoice	2.50.00	0.00	£0.00 Gross	Dray Alan	Bauley Janice	No	n/a			
28/11/2014	Mileage	Call		Invoice	20.00	0.00	ED DD Gross	Dray Alan	Bauley Janice	No	n/a			
27/11/2014	Food Allowance	Call	asdasdasdasd	Wage sheet	£10.00	-10.00	£100.00 Gross	Allen Jessie	McTest Test	n/a	No		$\mathbf{i}$	
27/11/2014	Entrance Fees	Call	abin	Invoice	10.00	2.00	£10.00 Gross	Allen Jessie	McTest Test	No	n/a			
27/11/2014	ådjustment	Call	efewf	Invoice	£100.00	0.00	£0.00 Gross	Abbott Betty	A Palacins, Genrae	No	n/a			
Show outs	tanding items only												New	Edit Delete Di

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 \_\_\_\_\_\_button to add a new adjustment

Specify a <b>date</b> for the adjustment. This is the date upon which the adjustment will be itemised on an	Addition or adjustment item     Addition or adjustment item     Date     Date     Type     Invoice (client change)	Choose to create an adjustment to either a client invoice or carer wagesheet (or both) using <b>Type</b>
invoice/wagesheet.	Reason (None)	Select the expense <b>reason</b>
Add an additional <b>description</b> if required. This can be output on invoices/wagesheets.	Amount 0.00 Qty 1.00 Total	Specify adjustment <b>amount</b> . If creating a deduction, ensure a negative value is used.
Specify if the adjustment is made to gross or net pay.	Contract (None)	Select the <b>client</b> or <b>carer</b> for whom the adjustment applies
Click <b>Save</b> to complete	<u>Save</u>	

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

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