

Managing Integrated Mileage Settings Overview

The integrated mileage settings enable agencies to control how mileage is calculated when used in conjunction with a third-party application. The key components of this functionality are as follows:

- These settings help determine if mileage is calculated by the address of the patient or a separate starting point of all staff.
- The mileage settings apply to all employees but can be customized for individual company or location entries.
- As a result of these settings, the visit-to-visit mileage will get calculated and will be completed upon the last visit.
- Miles will pull from line #1 in the patient's address found under Demographics. **Note:** the calculations cannot be processed from a PO Box, Apartment #, Building name or number, etc.
- There is no override for the addresses that cannot be processed by the Interface that tracks the miles. The addresses cannot be tracked if they are not entered into the patient record correctly. The address will need to be updated or GPS coordinates manually entered and the miles will need to be calculated manually if the address is incorrect.
- The Interface Activity report (Reports>Interface) will show all mileage calculations that have failed.

Mileage Tables and Settings

The following information details the tables and settings related to this functionality:

Mileage Adjustment Reason Table

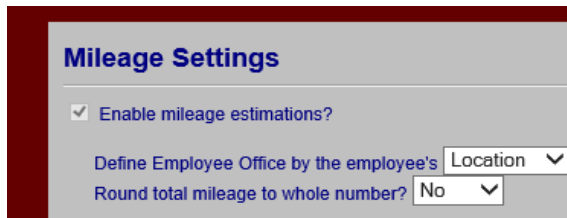
Go to Administration>System>Tables>Mileage Adjustment Reason. This is available to provide options for users to document a reason for an adjustment to the calculation of mileage. These adjustments come into play in Visit Charting. Mileage is estimated and is not based off of odometer readings; therefore, there is no reason to record odometer readings.



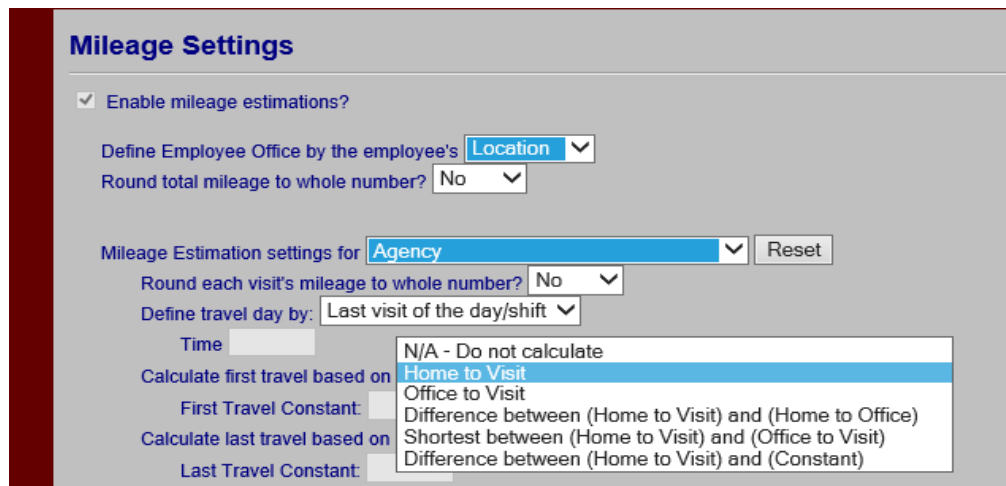
The screenshot shows the 'Mileage Adjustment Reason Table' interface. On the left is a dark red sidebar with the following menu items: 'Mileage Adjustment Reason Table', 'Add/Change', 'Re-Order', and 'Print'. The main content area has a title 'Mileage Adjustment Reason Table' and an 'Edit Mode:' section with radio buttons for 'Add' and 'Change' (which is selected). Below this is a 'Show:' section with radio buttons for 'Active Only' (selected), 'Inactive Only', and 'All'. A 'Select:' dropdown menu is open, showing options: '(Select Reason)', 'Traveled to the office', 'Detour (construction, errand, etc)', 'Overestimated', and 'Other'. Below the dropdown is a 'Description:' text input field. At the bottom is a 'Status:' section with radio buttons for 'Active' (selected) and 'Inactive'.

Mileage Settings

Go to Administration>System>Interoperability>Mileage. This is where all settings are stored relating to mileage calculations. Agency settings and estimation settings are also housed in mileage settings. These are put in place for the entire organization.



- **Define Employee Office by the employee's:** Define employee "office" by Company or Location. Employee "office" must be set in order to calculate the mileage from starting place to the last visit of the day. Note: the employee office is determined by the primary company or primary location based on the entries in the Employee Table (Administration>Employee) and these apply to all employees.
- **Round total mileage to the whole number:** All total mileage is rounded to the high or low number. This is specific to reporting in the Visit List and Employee Day Sheet.



Mileage Estimation Settings for: Estimated settings are in place for the Agency, but can also be customized for individual companies or locations (see drop down box). Mileage calculations will always look at the employee's primary locations settings first, then their primary company settings if needed, and then finally the agency settings. Each time an option is selected and customized, the user MUST use the Save button to complete the process and save the changes. When the entity is selected, the following items should be configured.

- **Round each visit's mileage to whole number:** Determines how each visit's mileage calculation is rounded.
- **Define travel day:** This determines how agencies want to mark the end of the day. The options here are a specific time or last visit of the day/shift. **Note:** If the last visit of the day is chosen, this will need to be selected in Visit Charting once the visit is put on hold or completed. That is when the appropriate calculations will be completed.
- **Calculate first / last travel:** Determines how you want to mark the beginning (first travel) or end (last travel) of the day in order to calculate start and stop mileage. **Note:** If the option for "Difference between (Home to Visit/Visit to Home) and (Constant)" is chosen, the First Travel Constant/Last Travel Constant field is required to reflect the number of miles to act as the "constant" that is the difference between home/visit and visit/home.

Resources

For additional details on the integrated mileage process, please refer to the **NDoc Reference for Integrated Mileage Functionality**.