



WellSky[®] Resource Manager Mileage Tracking

User Guide

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Document Revision History

| Software Version | Revision Date | Revision Number | Revision Description |
|------------------|---------------|-----------------|---|
| 2022 R4 | March 8, 2022 | 1 (2022_01) | First publication of user guide: My Travel tab, Mileage Tracking tab, Override Miles, Add Segments, Approve Mileage, Unapprove Mileage. |

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Mileage Tracking

Clients who have purchased WellSky Resource Manager full suite can manage mileage reporting and segments of travel for scheduled appointments by enabling mileage tracking. Providers can review, add, and override daily mileage estimates. Managers can override, approve, and export reported mileage.

The following tabs are available:

- My Travel - Displays mileage estimates for scheduled segments of travel for providers to review, add segments, and override.
- Mileage Tracking - Displays provider estimated and actual mileage for managers to override, approve, unapprove, and export.

Time and Travel Access Scenarios

WellSky Resource Manager allows for different levels of access for time and attendance and mileage tracking. Icons, menu titles, and headers will adjust depending on the features that are enabled. Your provider dashboard must be set to **Full** or **ReadOnly** under Global Rights to enable any of the following scenarios. To enable time and attendance, see Time Logging User Settings. To enable mileage tracking, see "Enable Mileage Tracking" on page 18.

Time and Attendance Only

- Time logging is enabled.
- Mileage tracking is disabled.
- Menu Title and Header: Time and Attendance
- Icon Hover Name and Picture: Time and Attendance and Clock

My Travel Only

- Time logging is disabled.
- Mileage tracking is enabled.
- Menu Title and Header: My Travel
- Icon Hover Name and Picture: My Travel and Car

Time and Mileage

- Time logging is enabled.
- Mileage tracking is enabled.
- Menu Title and Header: Time and Mileage
- Icon Hover Name and Picture: Time and Mileage and Clock

If time logging and mileage tracking are both disabled, the features do not display on your dashboard.

My Travel Overview

The *My Travel* tab is visible only if you have mileage tracking enabled for your domain(s) and Provider Dashboard is set to **Full** or **ReadOnly** under Global Rights. To enable mileage tracking for your domain (s), see "Enable My Travel" on the next page.

The *My Travel* tab displays a domain drop-down list, estimated total miles traveled, actual miles traveled, and travel segments for a selected time period. To view the *My Travel* tab, click **Optimize > My Travel > My Travel**.

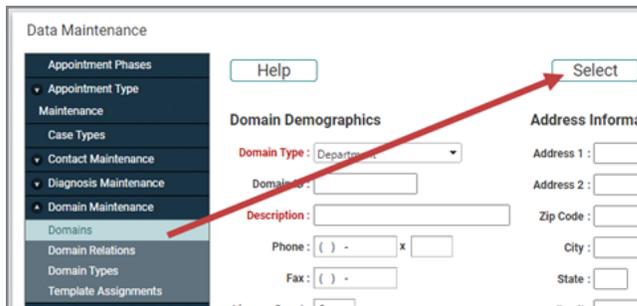
If you work in multiple domains, the **Domain** field allows you to select a domain listed in your user security profile. Only domains that have mileage tracking enabled will appear in the domain drop-down list.

Enable My Travel

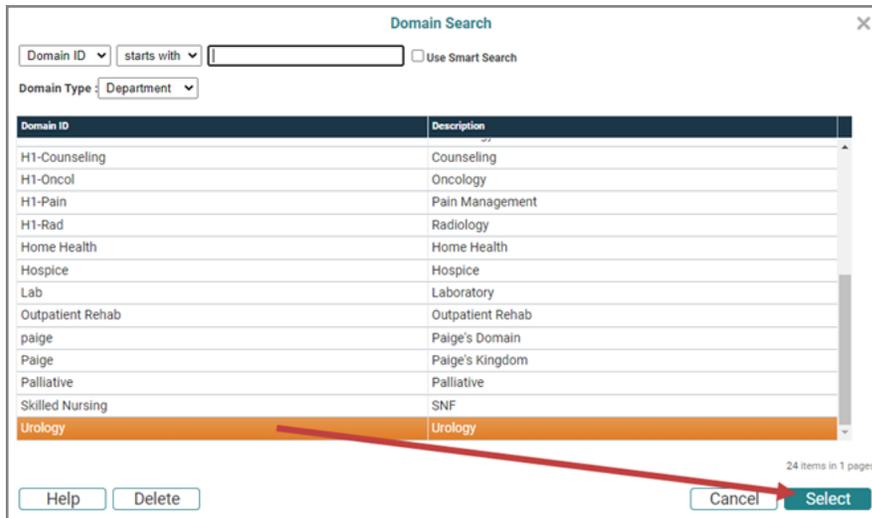
Mileage tracking can be enabled or disabled per domain. Your provider dashboard must be set to **Full** or **ReadOnly** under Global Rights to view the *My Travel* tab. Users must have WellSky Resource Manager full suite enabled.

To enable mileage tracking:

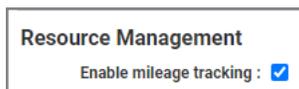
1. On the WRM main menu, click **Data Maintenance > Domain Maintenance > Domains**.



2. Click **Select**. The Domain Search screen appears.
3. Select a domain then click **Select**. Alternatively, double-click a domain.



4. On Resource Management, click the **Enable mileage tracking** checkbox. The Enable mileage tracking checkbox should be filled.



- 5. To disable mileage tracking, click the **Enable mileage tracking** checkbox. The Enable mileage tracking checkbox should be empty.
- 6. Click **Save**.

The screenshot shows a web application interface for 'Data Maintenance'. On the left is a vertical navigation menu with items: Appointment Phases, Appointment Type, Maintenance, Case Types, Contact Maintenance, Diagnosis Maintenance, Domain Maintenance (highlighted), Domains, Domain Relations, Domain Types, and Template Assignments. The main content area is divided into two columns. The left column is titled 'Domain Demographics' and contains fields for 'Domain Type' (a dropdown menu set to 'Department'), 'Domain ID' (a text box containing 'Urology'), 'Description' (a text box containing 'Urology'), 'Phone' (a form with area, number, and extension boxes), and 'Fax' (a similar form). The right column is titled 'Address Information' and contains fields for 'Address 1', 'Address 2', 'Zip Code', 'City', and 'State'. At the top of the main content area are three buttons: 'Help', 'Select', and 'New'. The 'Save' button is highlighted with a red rectangular border.

Select a View Period

Use the **Day**, **Week**, **Month**, and **Custom** buttons on the View Period sub header to choose a different date or date range.



- Click **Day** to view the information for the current date. The current day of the week and date appears with a toggle on each side. Click **<** to move backward in one day increments. Click **>** to move forward in one day increments.  is also available to select a different date.
- Click **Week** to view the information for the current week. The first day of the week is set to Sunday unless a different start day is set via the **Preferences > Grid Preferences > Weekly View Start Day of Week** option. The currently selected date range appears with a toggle on each side. Click **<** to move backward in one week increments. Click **>** to move forward in one week increments.  can also be used to select a different week.
- Click **Month** to view the information for the current month. The currently selected month and year appears with a toggle on each side. Click **<** to move backward by one month increments. Click **>** to move forward in one month increments.  can be used to select a different month.
- Click **Custom** to set a custom date range. The range defaults to the current date. Click  then select a start date and an end date. A custom date range from 1 to 31 days is allowed.

My Travel Day View

The Day view period on the *My Travel* tab displays a list of appointments for a selected day, appointment details, and mileage for each appointment.

| VIEW PERIOD | Day | Week | Month | Custom | < | Friday, Feb 4, 2022 | > | EST TOTAL 37 mi | ACTUAL TOTAL 60 mi |
|---------------------|--|---|------------------|---------------|-----------|---------------------|---|-----------------|--------------------|
| Friday, Feb 4, 2022 | | | | | | | | | |
| Segment | From / to | Patient | Appointment time | Miles | Overrides | | | | |
| 1 | [Redacted] | Jo Applegate | 10:30 AM | Miles * 25 | | | | | |
| | [Redacted] | Travel note | | | | | | | |
| 2 | [Redacted] | Betty Addison | 03:00 PM | Miles * 12 | | | | | |
| | [Redacted] | Travel note | | | | | | | |
| 3 | Override reason * Supply pick up/drop off | Travel note Pick up supplies before 3PM appointment. | | Miles * 23 | | | | | |
| + Add segment | | | | | | | | | |

The Day view period also provides the ability to:

- Override miles
- Add a travel note
- Add travel segments
- Delete travel segments

The day of the week and the date for the selected day appear with the ability to cancel or save any edits made to appointments.

Appointments appear in chronological order as scheduled segments for the selected day. For each segment, From and To addresses, the assigned patients, appointment times, estimated miles, and override fields appear. The total estimated miles traveled for the entire day appears towards the top right.

My Travel Week View

The Week view period on the *My Travel* tab displays a list of days for a selected week, total estimated mileage, total actual miles, approved status, and the ability to view or edit details for each day.

| VIEW PERIOD | Day | Week | Month | Custom | < | 01/30/2022 - 02/05/2022 | > | 📅 | EST TOTAL | 0 mi | ACTUAL TOTAL | 60 mi |
|----------------------|----------------------|--------------|----------|---|---|-------------------------|---|---|-----------|------|--------------|-------|
| Date | Estimated total (mi) | Actual miles | Approved | View/Edit | | | | | | | | |
| Sunday 01/30/2022 | 0 | 0 | |  | | | | | | | | |
| Monday 01/31/2022 | 0 | 0 | |  | | | | | | | | |
| Tuesday 02/01/2022 | 0 | 0 | ✓ |  | | | | | | | | |
| Wednesday 02/02/2022 | 0 | 0 | |  | | | | | | | | |
| Thursday 02/03/2022 | 0 | 0 | |  | | | | | | | | |
| Friday 02/04/2022 | 0 | ● 60 | |  | | | | | | | | |
| Saturday 02/05/2022 | 0 | 0 | |  | | | | | | | | |

The dates of the week appear in chronological order. The estimated miles and actual miles traveled for a day appear under the Estimated total (mi) and Actual miles fields.

To edit a day period, click an unapproved past or unapproved current day. Alternatively, click the associated  under the **View/Edit** field.

To view a day period, click an approved current day, approved past day, or future day. Alternatively, click the associated  under the **View/Edit** field.

My Travel Month View

The Month view period on the *My Travel* tab displays a list of weeks for a selected month, total estimated mileage, total actual miles, approved status, and the ability to view details for each week.

The screenshot shows a user interface for viewing travel data for February 2022. At the top, there are tabs for 'VIEW PERIOD' (Day, Week, Month, Custom) and navigation arrows. The current view is 'Month'. The table below has columns for 'Week', 'Estimated total (mi)', 'Actual miles', 'Approved', and 'View'. The first row shows a date range of 01/30 - 02/05 with 0 estimated miles and 60 actual miles. The 'Approved' status is 'Partially' and there is a 'View' icon. The other rows show 0 estimated miles and 0 actual miles, with 'View' icons.

| Week | Estimated total (mi) | Actual miles | Approved | View |
|---------------|----------------------|--------------|-----------|------|
| 01/30 - 02/05 | 0 | 60 | Partially | |
| 02/06 - 02/12 | 0 | | | |
| 02/13 - 02/19 | 0 | | | |
| 02/20 - 02/26 | 0 | | | |
| 02/27 - 03/05 | 0 | | | |

7-day weeks for the selected month appear in chronological order. The estimated miles and actual miles traveled for a week appear under the Estimated total (mi) and Actual miles fields.

To view a week period, click a date range or the associated  under the **View** field.

My Travel Custom View

The Custom view period on the *My Travel* tab displays a list of days for a selected period, total estimated mileage, total actual miles, approved status, and the ability to view or edit details for each day. The custom view period has a limit of 31 days as the selected range.

| VIEW PERIOD | Day | Week | Month | Custom | 02/01/2022 - 02/05/2022 | EST TOTAL 0 mi | ACTUAL TOTAL 60 mi |
|----------------------|----------------------|--------------|----------|-----------|-------------------------|----------------|--------------------|
| Date | Estimated total (mi) | Actual miles | Approved | View/Edit | | | |
| Tuesday 02/01/2022 | 0 | 0 | ✓ | | | | |
| Wednesday 02/02/2022 | 0 | 0 | | | | | |
| Thursday 02/03/2022 | 0 | 0 | | | | | |
| Friday 02/04/2022 | 0 | 60 | | | | | |
| Saturday 02/05/2022 | 0 | 0 | | | | | |

The days of the week appear in chronological order. The estimated miles and actual miles traveled for a week appear under the Estimated total (mi) and Actual miles fields.

To edit a day period, click an unapproved past or unapproved current day. Alternatively, click the associated under the **View/Edit** field.

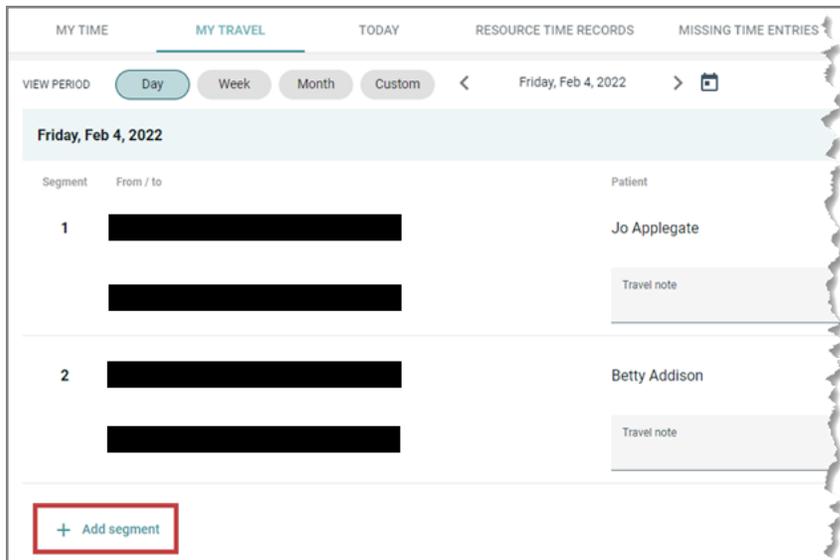
To view a day period, click an approved current day, approved past day, or future day. Alternatively, click the associated under the **View/Edit** field.

Add Travel Segments

The **Add Segment** field allows users to report non-appointment related travel segments for approval. Manually added segments appear at the end of the segment list in the chronological order that they were added.

To add a travel segment:

1. Select a day on the *My Travel* tab to add the travel segment. Click **Add Segment**.



 **NOTE** - All dates past the current date are viewable and editable, unless approved. All future dates ahead of the current date are read-only.

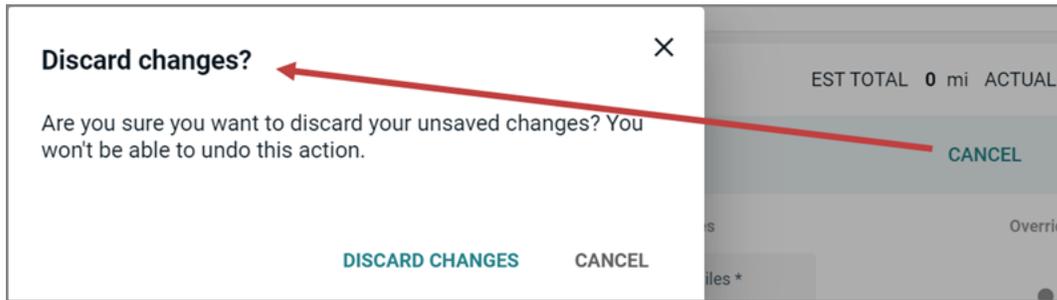
2. In the **Override reason** field, select a reason for adding the travel segment.

| | | |
|----------------------------|---|---------------|
| Override reason * Other | Travel note * Pick up supplies before 3PM appointment. | Miles * 23 |
|----------------------------|---|---------------|

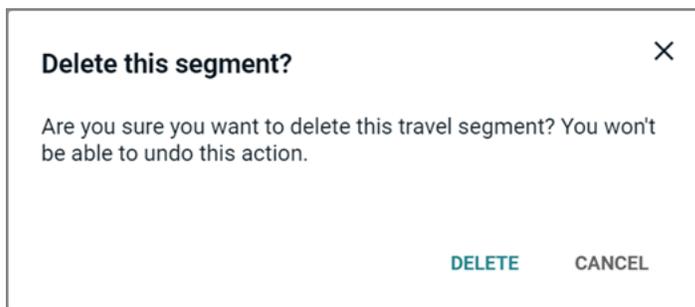
3. If **Other** is selected, the **Travel note** field appears. Entering input into the **Travel note** is then required.
4. **(Optional)** Enter comments about the travel segment on the **Travel note** field.
5. In the **Miles** field, enter a full or one decimal digit number.
6. Click **Save**.

The following actions are also available for an added segment:

- Cancel - Enabled when a user adds a segment or edits a previously saved segment. A confirmation screen appears before completing the action.



- Save - Enabled when a user enters input for all required fields or edits a previously saved segment. An added travel segment remains editable until it is approved.
- Delete  - Enabled when a travel segment is successfully added and saved. Click  to delete a segment. A confirmation screen appears before completing the action.



Override Miles

Travel segments may require an edit to the **Miles** field due to external reasons, such as roadwork or alternate routes.

To override a mileage tracking:

1. Select a day and segment to edit.

 **NOTE** - All dates past the current date are viewable and editable, unless approved. All future dates ahead of the current date are read-only.

2. In the **Miles** field, enter a full or one decimal digit number. The **Override reason** drop-down field appears.

| Patient | Appointment time | Miles | Overrides |
|-----------------------------|------------------|----------------------------|-----------|
| Amy Decker | 09:00 AM | Miles * 10.5 | |
| Travel note * Flat tire. | | Override reason * Other | |

3. Select an **Override reason**. If **Other** is selected in the **Override reason** field, the **Travel note** field appears. Entering input into the **Travel note** field after selecting **Other** as the **Override reason** is required. The **Travel note** field has a limit of 50 characters.

 **NOTE** - To learn more about override reasons, see [Override Reason Maintenance](#).

4. To cancel overriding miles, click **Cancel**. The Discard changes screen appears. Click **Discard Changes** to revert changes. Click **Cancel** to continue editing overrides.

Discard changes? ×

Are you sure you want to discard your unsaved changes? You won't be able to undo this action.

DISCARD CHANGES **CANCEL**

5. Click **Save**.

 **NOTE** - If you click another tab on the Time and Travel or Mileage Tracking screen and click back to the *My Travel* tab, previous edits to your mileage remain. If you



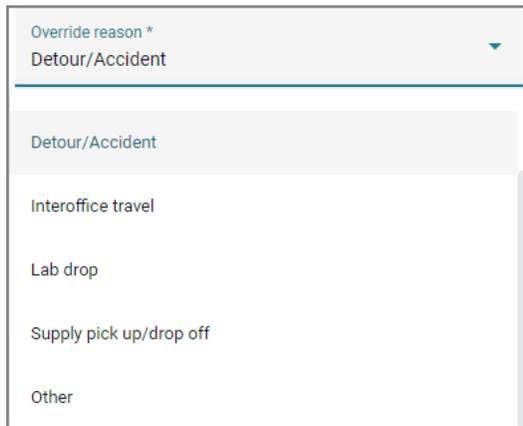
navigate to another screen without clicking **Save** prior, a confirmation screen appears asking if you want to discard changes. If you click **Discard Changes**, your previous edits do not save. Click **Cancel** to go back to return to the *My Travel* tab.

To view more information about the previous override, hover over . The original estimated mileage, override mileage, and editor appears.



Reason Maintenance - Mileage Override

When overriding an estimated mileage or adding additional mileage segments to a day, an option in the **Override reason** field must be selected. To view existing Mileage Override reason descriptions, click **Data Maintenance > Reason Maintenance > Select** and select **Mileage Override** in the **Reason Type** field. To learn more about Reason Maintenance, view Adding/Editing Reasons.



The screenshot shows a dropdown menu for 'Override reason *'. The current selection is 'Detour/Accident'. The menu is open, displaying a list of options: 'Detour/Accident', 'Interoffice travel', 'Lab drop', 'Supply pick up/drop off', and 'Other'.

The Descriptions under Mileage Override on Data Maintenance appear in the **Override reason** field on the *My Travel* and *Mileage Tracking* tabs. The following mileage tracking reason descriptions have already been inserted into WellSky Resource Manager:

- Interoffice travel
- Lab drop
- Supply pick up/drop off
- Other - Requires **Travel note** input.

Mileage Tracking Overview

The *Mileage Tracking* tab allows you to view, add travel segments, approve, unapprove, and override mileage. Essentially, managers can use this feature to approve travel segments reported by domain resources.

The *Mileage Tracking* tab is visible only if Manager Dashboard is set to **Full** under your Global Rights, you have a security profile to a domain where mileage tracking is enabled, and **Mileage Tracking Override** is enabled. See "Enable Mileage Tracking" on the facing page. Users must have WellSky Resource Manager full suite to have this enabled.

To view the *Mileage Tracking* tab, click **Optimize > Mileage Tracking > Mileage Tracking**. The *Mileage Tracking* tab displays a domain drop-down list, total miles, and mileage tracked by resources for a selected time period.

If you manage multiple domains, the **Domain** field allows you to select a domain listed in your user security profile. Mileage tracking must be enabled for the domains listed.

The *Mileage Tracking* tab fundamentally works the same way as the *My Travel* tab, with the exceptions of approving mileage for resources and different view period setups. All view periods display a list of clickable resources that lead to a Day view period. See "Select a View Period" on page 7. To view more information on additional features the same as the *My Travel* tab, click on the following topics:

- "Time and Travel Access Scenarios" on page 3
- "Add Travel Segments" on page 12
- "Override Miles" on page 14

Enable Mileage Tracking

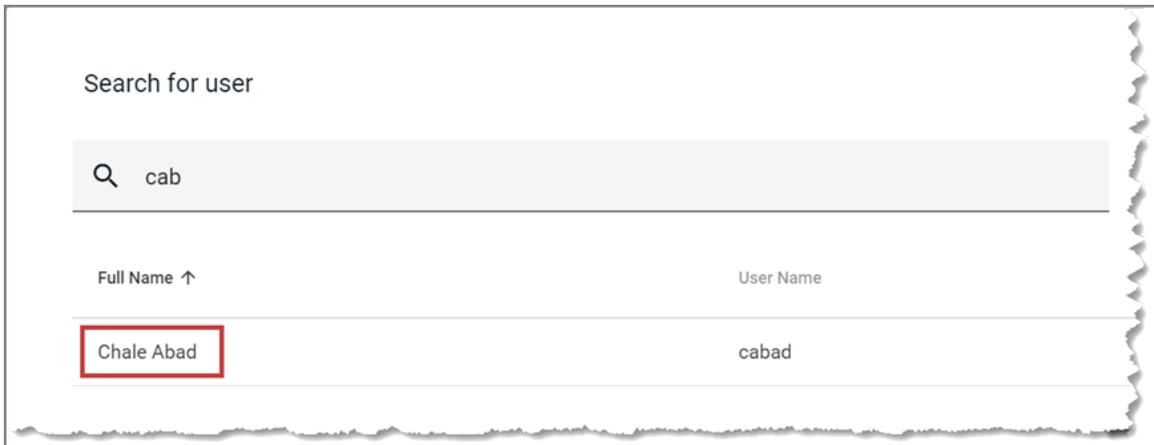
To enable mileage tracking, your Manager Role must be set to **Full** and mileage tracking overrides must be enabled. Users must have WellSky Resource Manager full suite enabled.

To enable mileage tracking:

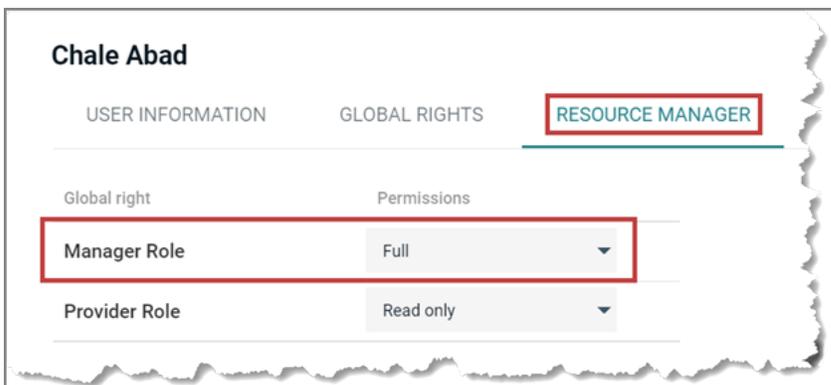
1. Click **Data Maintenance > System and Security > Users**.
2. Click **Search**. The Search for user screen appears.



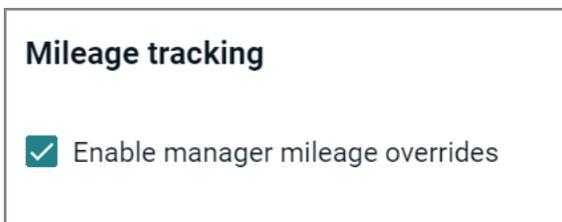
3. Enter in the search field, fully or partially, the first name, last name, or user name of the user. Select your user.



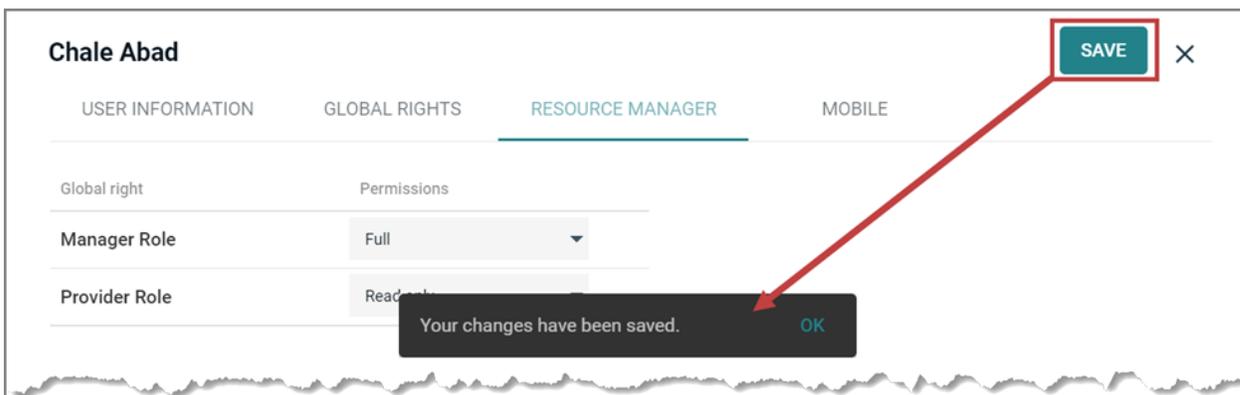
4. Click the *Resource Manager* tab. For the Manager Role global right, **Full** must be selected.



- 5. Under Mileage tracking, click the **Enable manager mileage overrides** checkbox. The checkbox should be filled.



- 6. To disable mileage tracking overrides, click the **Enable manager mileage overrides** checkbox. The checkbox should be empty.
- 7. Click **Save**. A confirmation message appears.

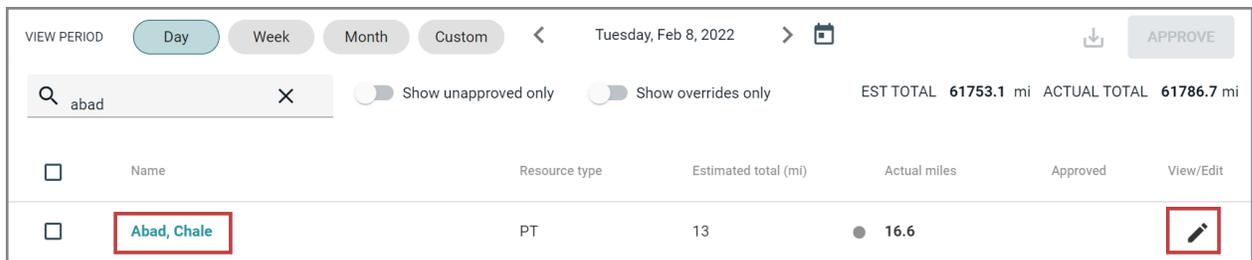


Approve Mileage for a Single Resource

To approve mileage, the view period selected must be current day or past days. When approving the current day, you will want to ensure that all travel segments are completed. Only unapproved or days that have not been approved can be approved.

To approve mileage for a single resource:

1. If you want to approve a day of mileage, search and select a day period.
2. If you want to approve multiple days of mileage, search and select either a week, month, or custom period.
3. Search for the resource by, fully or partially, entering the resource name in the **Search for resource** text box.
4. Click the name of the resource or the  associated to the resource. The mileage for the resource appears.



| VIEW PERIOD | | Tuesday, Feb 8, 2022 | | APPROVE | | | |
|--------------------------|-------------|----------------------|----------------------|---------------------|----------|---|--|
| Day | | Week | | Month | | Custom | |
| Search: abad | | Show unapproved only | | Show overrides only | | EST TOTAL 61753.1 mi ACTUAL TOTAL 61786.7 mi | |
| <input type="checkbox"/> | Name | Resource type | Estimated total (mi) | Actual miles | Approved | View/Edit | |
| <input type="checkbox"/> | Abad, Chale | PT | 13 | ● 16.6 | |  | |

5. If you want to approve multiple days of mileage, click the associated checkbox to the days you want to approve.

| VIEW PERIOD | | | |
|--|----------------------|----------------------|--------------|
| <input type="radio"/> Day <input type="radio"/> Week <input checked="" type="radio"/> Month <input type="radio"/> Custom | | | |
| February 2022 | | | |
| Mileage for Chale Abad PT | | | |
| <input type="checkbox"/> | Date | Estimated total (mi) | Actual miles |
| <input checked="" type="checkbox"/> | Tuesday 02/01/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Wednesday 02/02/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Thursday 02/03/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Friday 02/04/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Saturday 02/05/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Sunday 02/06/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Monday 02/07/2022 | 0 | 0 |
| <input checked="" type="checkbox"/> | Tuesday 02/08/2022 | 13 | ● 16.6 |

- To select all days in the view period, select the checkbox to the left of the **Date** field name.
- Click **Approve**. A confirmation screen appears asking you to approve the mileage.

VIEW PERIOD Day Week Month Custom February 2022

Mileage for Chale Abad PT

Approve this mileage?

Do you want to approve the following mileage?

Chale Abad

23 days

16.6 total miles

CANCEL CONTINUE

APPROVE

- To cancel the approval, click **Cancel**.
- Click **Continue**. A confirmation message appears. The **Approved** field for the day(s) update accordingly.

VIEW PERIOD Day Week Month Custom < February 2022 > APPROVE [BACK TO ALL RESOURCES](#)

Mileage for Chale Abad PT SWITCH TO UNAPPROVE MODE TOTAL **16.6** mi

| <input type="checkbox"/> | Date | Estimated total (mi) | Actual miles | Approved | View/Edit |
|-------------------------------------|----------------------|----------------------|--------------|----------|-----------|
| <input checked="" type="checkbox"/> | Tuesday 02/01/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Wednesday 02/02/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Thursday 02/03/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Friday 02/04/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Saturday 02/05/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Sunday 02/06/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Monday 02/07/2022 | 0 | 0 | ✓ | |
| <input checked="" type="checkbox"/> | Tuesday 02/08/2022 | 13 | ● 16.6 | ✓ | |
| <input type="checkbox"/> | Wednesday 02/09/2022 | 0 | 0 | | |
| <input type="checkbox"/> | Thursday 02/10/2022 | 0 | 0 | | |
| | Friday 02/11/2022 | 0 | 0 | | |

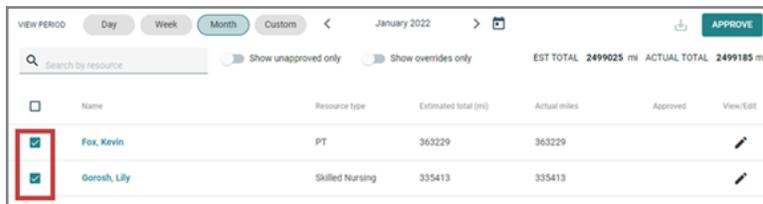
Mileage has been approved. OK

To view all resources mileage, click **Back To All Resources**.

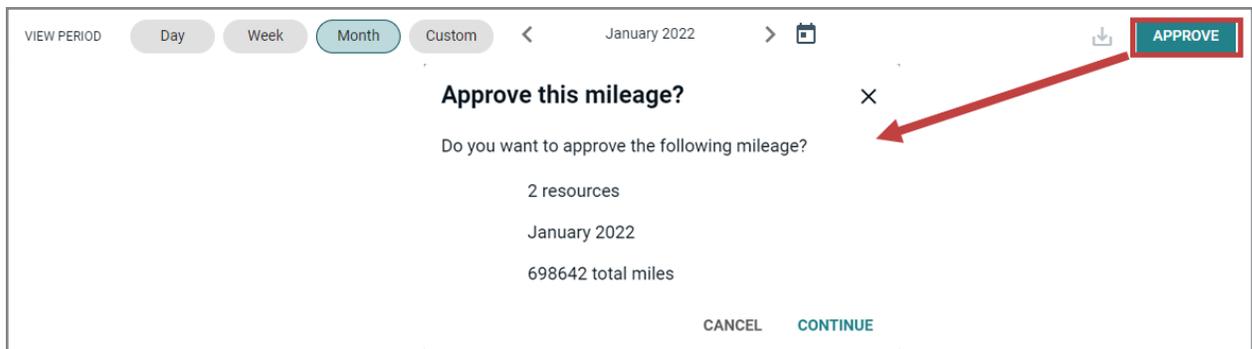
Approve Mileage for Multiple Resources

To approve mileage for multiple resources:

1. If you have a single resource still on view, click **Back to All Resources**.
2. Select any view period on the *Mileage Tracking* tab. Unapproved current and past days can be approved.
3. Select all the resources you would like to approve mileage. Alternatively, search for a resource by entering the resource name in the **Search for resource** text box then click the resource. To search and select more resources, clear the **Search for resource** text box and repeat the previous step.



4. To select all resources in the view period, select the checkbox to the left of the **Name** field name.
5. Click **Approve**. A confirmation screen appears asking you to approve the mileage.



6. To cancel the approval, click **Cancel**.
7. Click **Continue**. A confirmation message appears. The **Approved** field for the resources update

accordingly.

VIEW PERIOD Day Week Month Custom < January 2022 > APPROVE

Show unapproved only Show overrides only EST TOTAL 2499025 mi ACTUAL TOTAL 2499185 mi

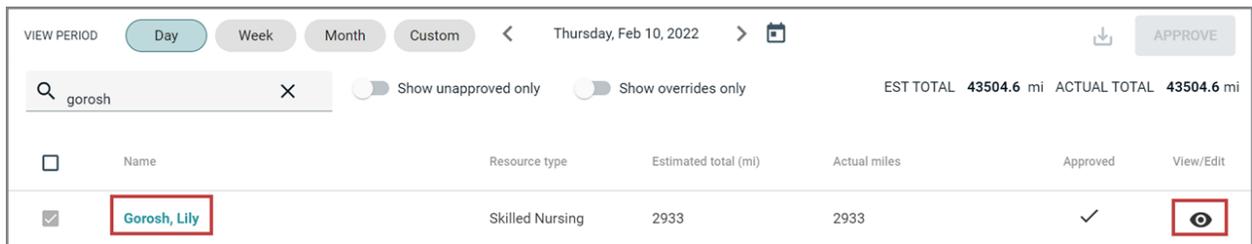
| <input type="checkbox"/> | Name | Resource type | Estimated total (mi) | Actual miles | Approved | View/Edit |
|-------------------------------------|------------------|-----------------|----------------------|--------------|----------|-----------|
| <input checked="" type="checkbox"/> | Fox, Kevin | PT | 363229 | 363229 | ✓ | |
| <input checked="" type="checkbox"/> | Gorosh, Lily | Skilled Nursing | 335413 | 335413 | ✓ | |
| <input type="checkbox"/> | Kadam, Rushikesh | OT | 292637 | 292637 | | |
| <input type="checkbox"/> | Katte, Hemant | PT | 247508 | 247508 | | |
| <input type="checkbox"/> | Leick, Melissa | Skilled Nursing | 267730 | 267730 | | |
| <input type="checkbox"/> | Mann, Chris | PT | 267337 | 267337 | | |
| <input type="checkbox"/> | Scot, Paige | PT | 93856 | 93989 | | |

Mileage has been approved. OK

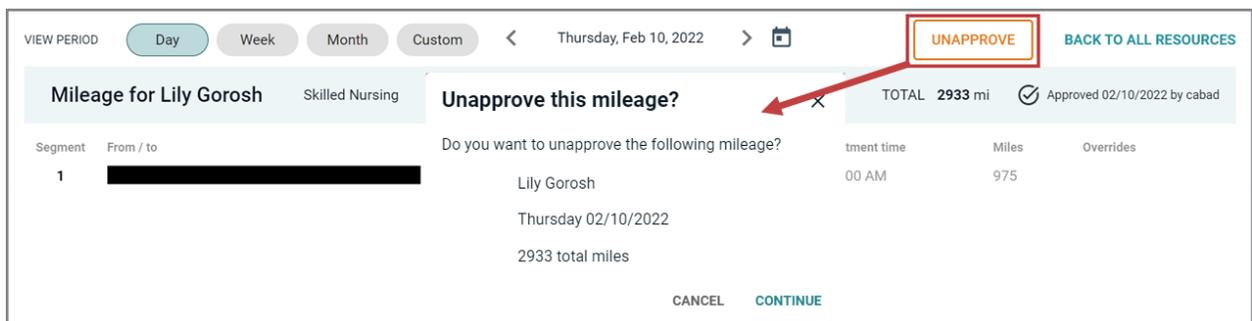
Unapprove Mileage for a Single Day

To unapprove mileage for a single day:

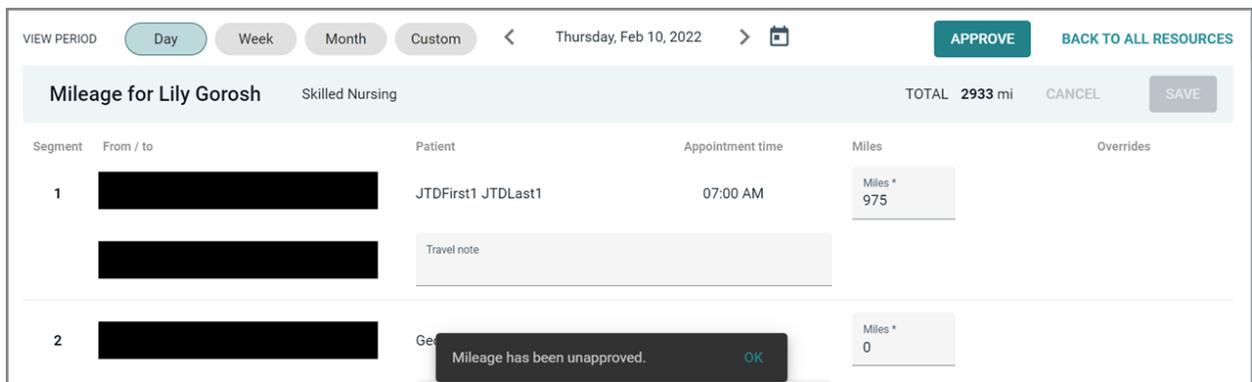
1. On the day view, search for the resource by, fully or partially, entering the resource name in the **Search for resource** text box.
2. Click the name of the resource or the  associated to the resource. The mileage for the resource appears.



3. Click **Unapprove**. A confirmation screen appears asking you to unapprove the mileage.



4. To cancel the unapproval, click **Cancel**.
5. Click **Continue**. A confirmation message appears. The **Approved** field for the resources update accordingly.



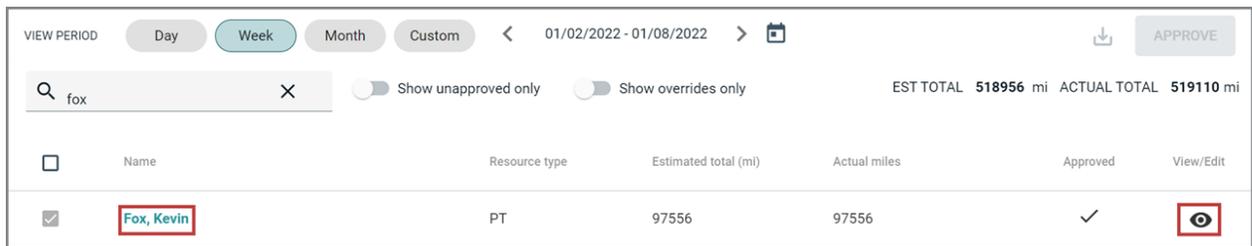
To view all resources mileage, click **Back To All Resources**.

Unapprove Multiple Days of Mileage

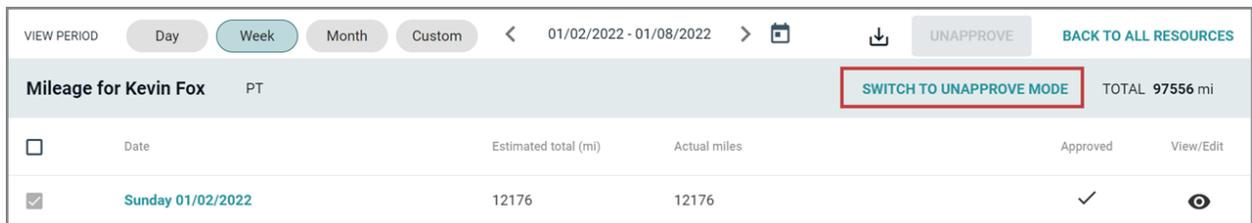
The *Mileage Tracking* tab displays the **Approve** field by default. Switching to unapprove mode makes it easier to select multiple days to unapprove.

To unapprove mileage for multiple days:

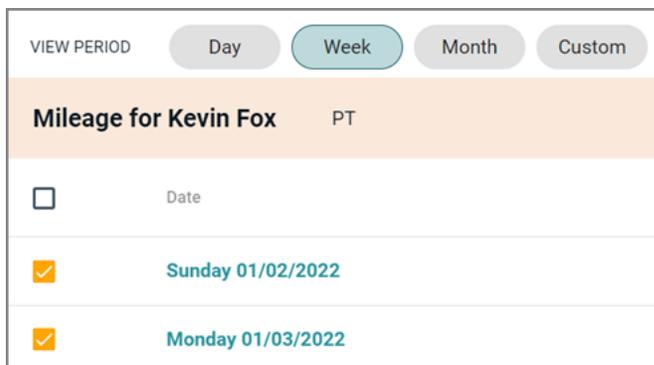
1. Select either the week, month, or a custom view period.
2. Search for a resource by, fully or partially, entering the resource name in the **Search for resource** text box.
3. Click the name of the resource or the  associated to the resource. The mileage for the resource appears.



4. Click **Switch to Unapprove Mode**. Only approved days appear.



5. Select the associated checkbox to the days you want to unapprove.



6. To select all days in the view period, select the checkbox to the left of the **Date** field name.

| VIEW PERIOD | | |
|---------------------------------|-------------------|-------|
| Day | Week | Month |
| Mileage for Kevin Fox PT | | |
| <input type="checkbox"/> | Date | |
| <input type="checkbox"/> | Sunday 01/02/2022 | |
| <input type="checkbox"/> | Monday 01/03/2022 | |

7. Click **Unapprove**. A confirmation screen asking you to approve the mileage appears.

VIEW PERIOD Day Week Month Custom < 01/02/2022 - 01/08/2022 > **UNAPPROVE** [BACK TO ALL RESOURCES](#)

Mileage for Kevin Fox PT **Unapprove this mileage?**

Do you want to unapprove the following mileage?

Kevin Fox
01/02/2022 - 01/08/2022
97556 total miles

CANCEL CONTINUE

[BACK TO APPROVE MODE](#) TOTAL 97556 mi

8. To cancel the unapproval, click **Cancel**.

9. Click **Continue**. A confirmation message appears. The **Approved** field for the approved days update accordingly.

| VIEW PERIOD | | | | | |
|---------------------------------|----------------------|----------------------|--------------|----------|-----------|
| Day | Week | Month | Custom | | |
| Mileage for Kevin Fox PT | | | | | |
| TOTAL 97556 mi | | | | | |
| <input type="checkbox"/> | Date | Estimated total (mi) | Actual miles | Approved | View/Edit |
| <input type="checkbox"/> | Sunday 01/02/2022 | 12176 | 12176 | | |
| <input type="checkbox"/> | Monday 01/03/2022 | 12255 | 12255 | | |
| <input type="checkbox"/> | Tuesday 01/04/2022 | 16908 | 16908 | | |
| <input type="checkbox"/> | Wednesday 01/05/2022 | | | | |

Mileage has been unapproved. [OK](#)

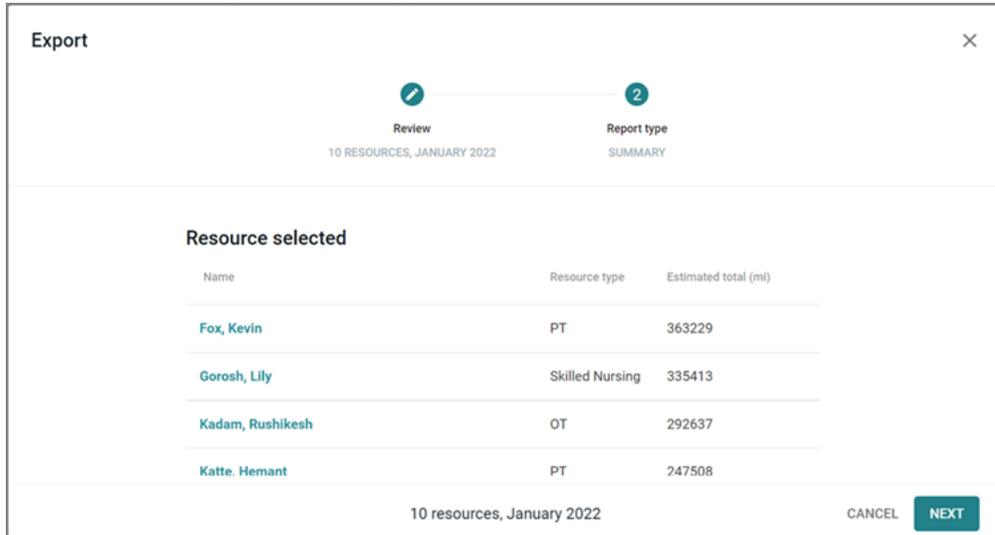
To view all resources mileage, click **Back To All Resources**.

Export CSV Report

The Summary CSV export feature allows managers the ability to create an export file with general approved mileage information. The Detail CSV export feature allows managers the ability to create an export file with a detailed report of every approved travel segment for the view period selected. The export button appears near the top right of the *Mileage Tracking* tab. See "Enable Mileage Tracking" on page 18.

To create a CSV report:

1. Select a view period to export. Only approved mileage may be included in the report. The export button is disabled if unapproved mileage or future-dated mileage is in the view period. The resources in view are approved and will be included in the export.
2. Click . The Export screen appears.



The screenshot shows the 'Export' dialog box. At the top, there is a progress bar with two steps: 'Review' (1) and 'Report type' (2). Below the progress bar, the text '10 RESOURCES, JANUARY 2022' is displayed. The main content area is titled 'Resource selected' and contains a table with the following data:

| Name | Resource type | Estimated total (mi) |
|------------------|-----------------|----------------------|
| Fox, Kevin | PT | 363229 |
| Gorosh, Lily | Skilled Nursing | 335413 |
| Kadam, Rushikesh | OT | 292637 |
| Katte. Hemant | PT | 247508 |

At the bottom of the dialog, the text '10 resources, January 2022' is shown, along with 'CANCEL' and 'NEXT' buttons.

3. Review the resources and time period selected. To cancel the export, click **Cancel**.
4. If the information selected is correct, click **Next**.

5. Select **Summary** or **Detail**.

The screenshot shows a dialog box titled "Export" with a close button (X) in the top right corner. At the top, there is a progress indicator with two steps: "Review" (1) and "Report type" (2). Below the progress indicator, it says "10 RESOURCES, JANUARY 2022" under the Review step and "SUMMARY" under the Report type step. The main content area is titled "Report type" and contains two radio button options: "SUMMARY" (selected) and "DETAIL". To the right of each option is a description of the row format. At the bottom, there are four buttons: "BACK", "Summary", "CANCEL", and "EXPORT".

6. Click **Export**. A confirmation message appears. Once the file is created, it appears as a download file at the bottom of your browser window, and you can save the file to your device. Each Summary file includes the following information for the selected view period and resources.

- Date
- Resource Name
- Total Actual Mileage (per day)

Each Detail file includes the following information for the selected view period and resources.

- Date
- Resource Name
- Segment number
- Segment From address
- Segment To address
- Patient
- Appointment Time
- Actual Mileage for a segment