Northern Light Health

From the Office of Clinical Informatics

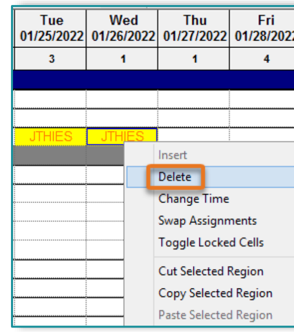
Clairvia CVM Request Management

February 7, 2022

The below flyer outlines request management within CVM.

Approving and Deleting Requests

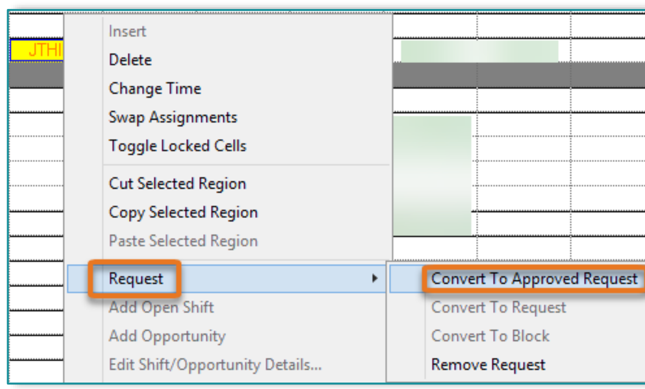
After the scheduler has generated for pending requests, the schedule will display those requests in orange text. Schedulers will delete pending requests that will not be included on the final schedule. After deleting requests, the scheduler will approve requests individually or all at once.



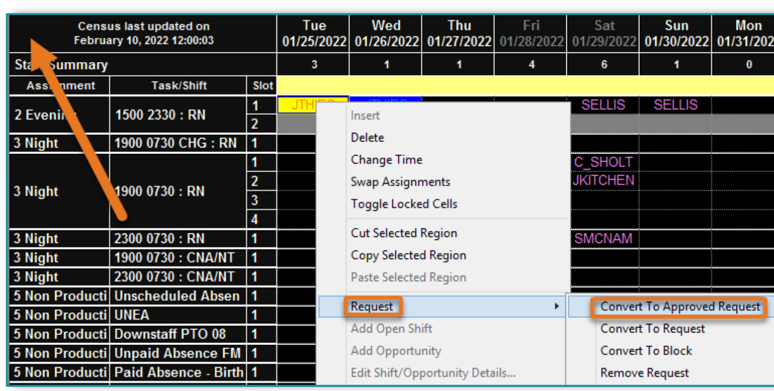
STEP 1: Delete any pending requests from the schedule editor screen by right-clicking the request (in orange text) and select **Delete** from the menu.

NOTE: **Deleting requests in Schedule Editor will not deny the request but will remove the request from view. Deleted requests will be managed within the Request Window.**

STEP 2: After deleting requests that will not be approved, schedulers can approve all remaining requests at once or individually.



- To approve a single request, right-click the cell with the orange request. Hover over **Requests** and select **Convert to Approved Request**.
- To approve all requests at once, click the left-side of the large rectangle in the top left corner of the schedule grid to highlight all cells within the schedule cycle. The cells will appear black when highlighted.
  - Right-click any request, hover over **Requests** and select **Convert to Approved Request**, which will change all the orange pending requests to red approved requests.



NOTE: **Approved requests show in green text and can only be deleted by the scheduler, not the employee.**

Request Window

The **Request Window** stores all employee requests. The **Request Window** is used to edit or change the status of a request. Filters can be applied to locate specific requests.

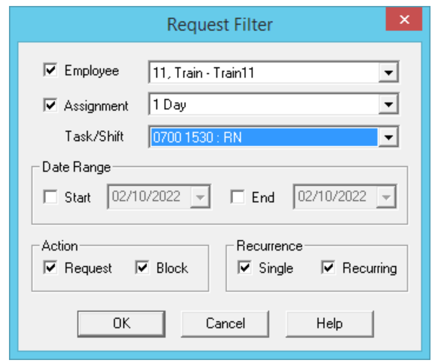
STEP 1: From the **Schedule Navigator**, select the **Request** icon.

NOTE: The Request Window is read-only if the Schedule Editor is open.

STEP 2: In the Request Window, select the **Filtered** radio button and click **Filter…**to open the **Request Filter** window.

STEP 3: Within the **Request Filter** window, select the filter parameters. Once desired filters have been selected, click **OK** to apply filters.

- Requests can be filtered by Employee, Assignment (Task/Shift), Date Range, Action, and/or Recurrence.

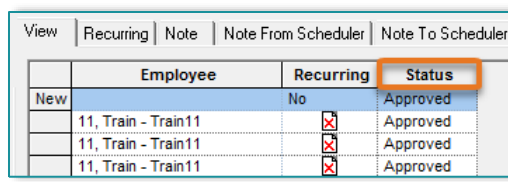


NOTE: Deleting requests removes any record of the request, allowing employees to resubmit the same request.

Denying Requests

After filtering requests within the **Request Window**, all the previously deleted pending requests can now be denied. Denying requests prevents the employees from placing the same request again.

STEP 1: Double-click the **Status** column label to sort the requests alphabetically by status.



NOTE: All previously deleted requests will be listed as pending requests.

STEP 2: To quickly deny requests, select the status cell of the first pending request, click the letter D on the keyboard to auto-populate the Denied status in the cell, and then click the down arrow to go to the next request. Continue down the list until all the pending requests have been denied.

Entering Requests on Behalf of Employee

Schedulers have the ability to create requests for employees through the **Schedule Navigator**. Schedulers may add one-time or recurring requests with predetermined intervals.

STEP 1: From the **Schedule Navigator**, click the **Display Request** icon.

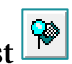
STEP 2: Select the employee name and task for the request from the Employee and Assignment list on the right side of the screen.

<u>**STEP 3**</u>: Drag and drop the name or task to the appropriate date in the Schedule Navigator calendar. The scheduler will be prompted to **Create Request**, **Create Block,** or **Cancel**, after dropping the staff into the date. Click **Create Request**.

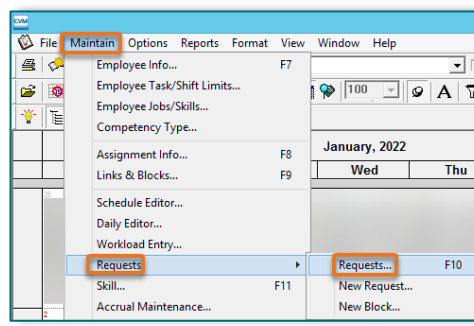
<u>NOTE</u>: Multiple dates or employees can be selected by using the CTRL key while making selections, prior to dragging/dropping names/tasks to the calendar.

<u>**STEP 4**</u>: The **Request Window** will display the new request at the top of the list.

- Requests entered in CVM default to an Approved status.
- To change the status to pending, click the status within the Status column, and select **Pending** from the drop-down menu.
- To create a recurring request, click the red **X** in the **Recurring** column, and select **Yes**. Parameters can be set in the Recurring tab.
- Schedulers may add Note From Scheduler within the Request Window.

<u>**STEP 5**</u>: Once the requests have been entered, click the **Display Request**  icon to return to the Schedule Navigator, displaying assignments in the calendar.

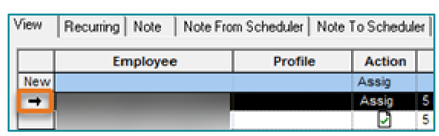
<u>Adding Note From Scheduler</u>



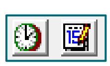
Administrators may add notes to provide additional information to the employee when approving or denying requests.

<u>**STEP 1**</u>: Click the **Maintain** menu, hover over **Requests**, the select **Requests**…

<u>**STEP 2**</u>: Navigate to the request and click the cell under the **New** header to highlight the row.



<u>**STEP 3**</u>: Once the row is highlighted, select the **Note from Scheduler** tab to add free text note. Once note is added click **Apply**.

- Time and date buttons  are available to add time stamp to the note.