Northern Light Health℠

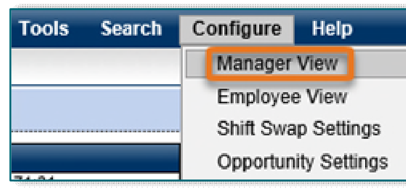
From the Office of Clinical Informatics

Clairvia Scheduler Guide

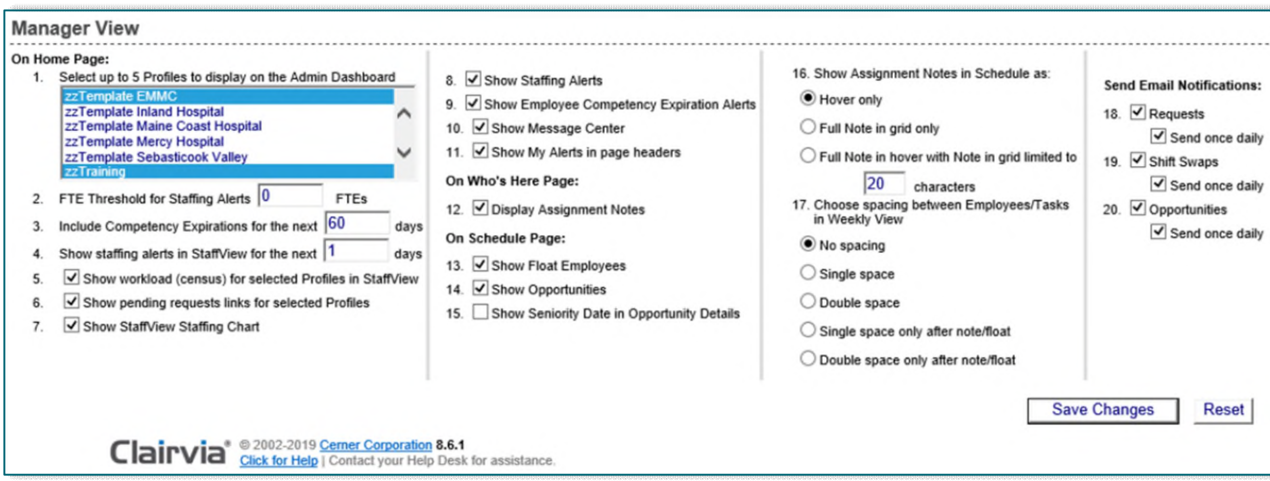
November 14, 2022

The Scheduler Guide has been created to outline the Clairvia Scheduler workflow.

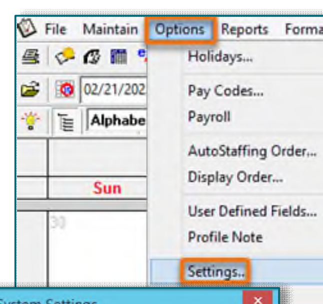
Clairvia Web Recommended Settings



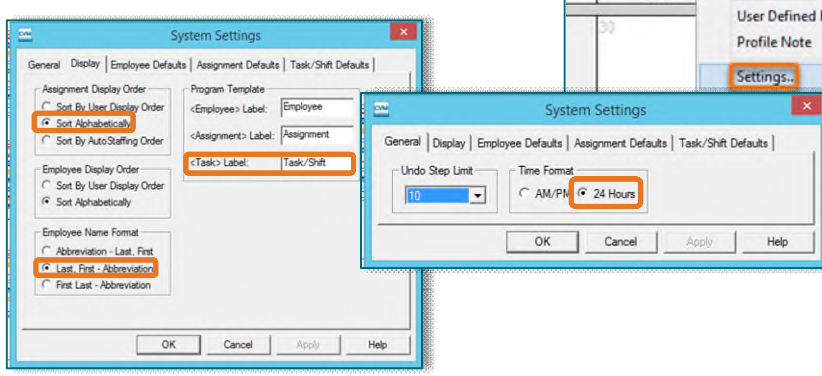
- Hover over the **Configure** menu, then select **Manager View**.
- Select the desired profiles to be displayed on the **Admin Dashboard** for option 1. A maximum of five profiles may be selected.
- For the remaining settings options, choose the selections displayed in the screenshot below, then click **Save Changes**.



Clairvia Client Recommended Settings

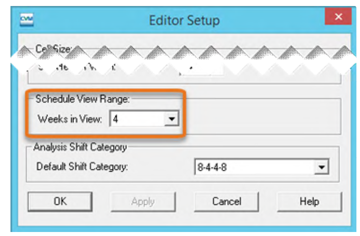


- From the Options menu, select **Settings…**
  - **General** tab – Time Format: **24 Hours**
  - **Display** tab – Assignment Display Order: **Sort Alphabetically**
  - **Display** tab – Employee Name Format: **Last, First – Abbreviation**
  - **Display** tab – <Task> Label: **Task/Shift**
- Click **Apply** and then **OK** to save settings.



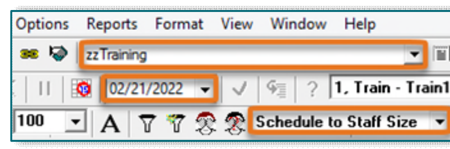
<u>Generate *Skeletal* Schedule</u>

Generating the schedule refers to the steps required to populate the Schedule Editor screen with pre-approved assignments and employee requests. Generating is done twice throughout the schedule life cycle. The skeletal schedule consists of patterns and requests that have been pre-approved. The skeletal schedule is generated **BEFORE** employees submit requests.



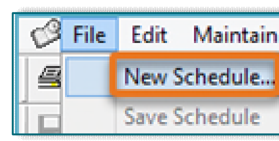
<u>STEP 1</u>: To open the Schedule Editor, click **Maintain** in the toolbar, and select **Schedule Editor**; or select the **Open Editor**  icon.

<u>STEP 2</u>: From **Format** in the toolbar, click **Editor Setup**. Confirm the **Weeks in View** is set to the designated schedule length of your unit (4 or 6 weeks). Then select **Apply**, then **OK** to save.

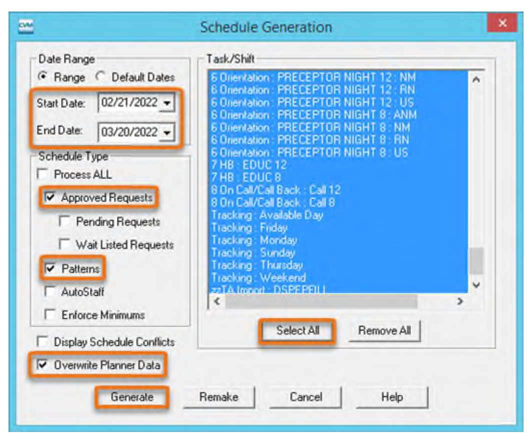


<u>STEP 3</u>: Before generating the schedule, perform the **Triple Check**:

- Correct profile is selected.
- Date is set to the **start** of the schedule.
    - If the date needs to be changed, select the green checkmark to populate the selected date.
- **Schedule to Staff Size** is selected.



<u>STEP 4</u>: Select **File** in the toolbar and select **New Schedule** or select the **New Schedule**  icon to open the **Schedule Generation** window.



<u>STEP 5</u>: Select the Date Range for the schedule cycle in the **Start Date** and **End Date** drop downs.

- Selecting **Default Dates** automatically populates the Start Date and End Date to the dates currently in view in the Schedule Editor. If the dates do not automatically populate, confirm the **Triple Check** has been completed and the date is correct.

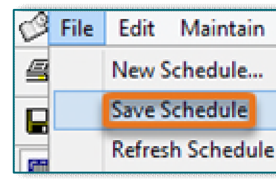
<u>STEP 6</u>: Select **Approved Requests** and **Patterns**.

<u>STEP 7</u>: Keep **Overwrite Planner Data** checked.

<u>STEP 8</u>: Click **Select All** to highlight all tasks (shifts).

<u>STEP 9</u>: Click **Generate** to populate the schedule.

- Selecting **Generate** populates new information to the schedule. **Remake** erases the entire schedule and only display information from the newest generation (Not Recommended).



<u>STEP 10</u>: Save any changes by clicking **File** in the toolbar, then **Save Schedule**; or select the save icon. 

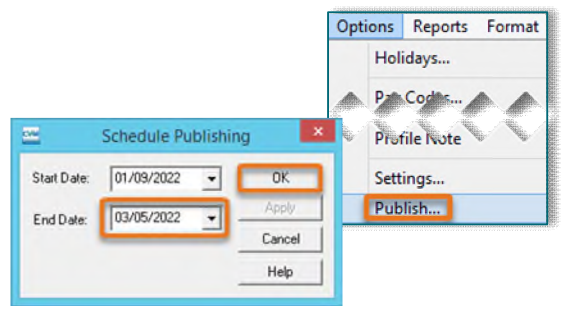
<u>Publishing *Skeletal* Schedule</u>

Publishing allows employees to view a specific date range of the schedule on Clairvia Web. Publishing does not impact when employees can submit requests. Publish the schedule prior to the Employee Request period to help employees see how their requests impact existing assignments and avoid duplicate requests.

<u>STEP 1</u>: Click **Options** from the toolbar and select **Publish…**

<u>STEP 2</u>: Change the End Date to reflect the end of the skeletal schedule range. **DO NOT** change the Start Date.

<u>STEP 3</u>: Select **OK** to Publish.



<u>Employees Enter Requests</u>

After generating the skeletal schedule and publishing the skeletal schedule to Clairvia Web, employees have the opportunity to submit requests in Clairvia Web. Requests can be made for working shifts (Example: 0700-1930 RN) or benefit time (Example: Vacation). For information on how to set-up new staff, see the Clairvia Manager Checklist & Employee Set-Up flyer <u>here</u>.

<u>**NOTE**</u>**:** **Do not generate the schedule during the Employee Request Period. Generating during the Employee Request Period does not prevent employees from submitting additional requests and could lead to missing requests from the Schedule Editor when balancing.**

<u>**NOTE**</u>**:** **The employee request period opens and closes based on a standard system setting and is not dependent on the schedule generation or publishing. The schedule of Clairvia deadlines can be found <u>here</u>.**

<u>Un-Publishing the Schedule</u>

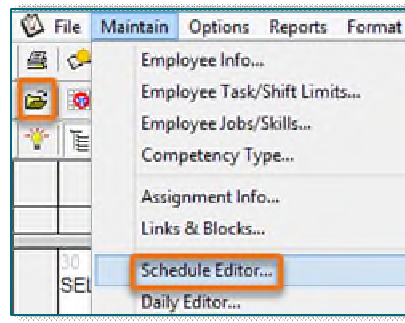
Un-publishing the schedule hides the schedule from employees while the schedulers balance and make changes. Un-publish the schedule at the start of the Schedule Balance period to ensure employees do not mistake the in-progress schedule for the finalized schedule.

<u>STEP 1</u>: Click **Options** from the toolbar and select **Publish**…

<u>STEP 2</u>: Change the End Date to reflect the last day of the previously finalized schedule. Do not change the Start Date.

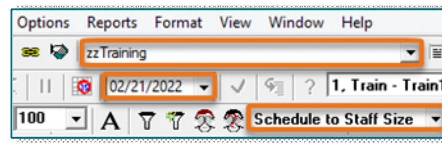
<u>STEP 3</u>: Select **OK** to un-publish (hide) the schedule.

Generate *Pending* Schedule



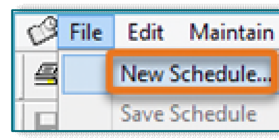
After employees have made requests on Clairvia Web, the scheduler populates the requests into the Schedule Editor. The pending schedule captures all employee requests submitted on Clairvia Web during the open request period.

STEP 1: To open the Schedule Editor, click **Maintain** in the toolbar, and select **Schedule Editor**; or select the **Open Editor**  icon.

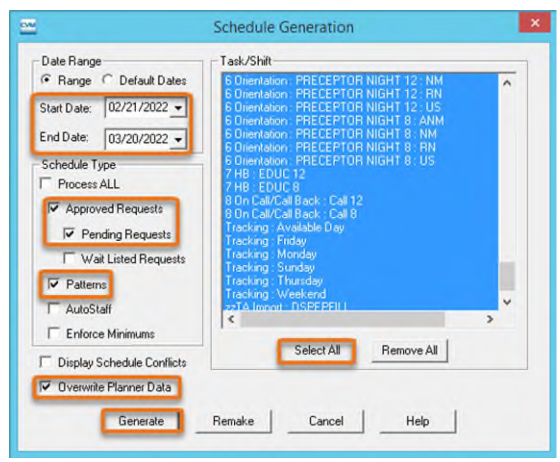


STEP 2: Before generating the schedule, perform the **Triple Check**:

- Correct profile is selected
- Date is set to the **start** of the schedule
    - If the date needs to be changed, select the green checkmark to populate the selected date.
- **Schedule to Staff Size** is selected



STEP 3: Select **File** in the toolbar and select **New Schedule…** to open the **Schedule Generation** window.



STEP 4: Select the Date Range for the schedule cycle in the **Start Date** and **End Date** drop downs.

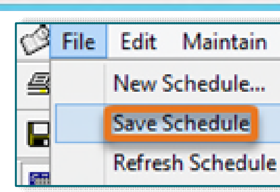
STEP 5: Select **Approved Requests**, **Pending Requests**, and **Patterns**.

STEP 6: Keep **Overwrite Planner Data** checked.

STEP 7: Click **Select All** to highlight all tasks (shifts).

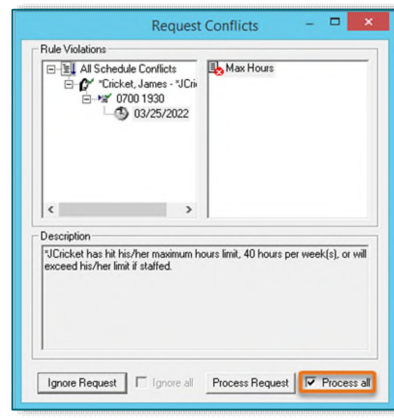
STEP 8: Click **Generate** to populate the schedule.

STEP 9: Save any changes by clicking **File** in the toolbar, then **Save Schedule;** or select the save icon .



Schedule Conflicts

- A conflict arises when the scheduling employee breaks a rule that is set-up in the system.
- The **Schedule Conflict** window displays the conflict type and the description of the conflict.
- Ignoring the request does not add it to the schedule. Ignoring does not deny the request.
- Processing requests override the conflict and add the request to the schedule to be considered when balancing. Processing does not approve the request.



NOTE: **Best Practice is to select Process All to ensure all requests, regardless of conflicts, appear in the Schedule Editor for consideration when balancing the schedule.**

Common Schedule Conflicts

- **Max Hours Conflict**: Displays when attempting to schedule an employee over the max hours, set under the **Limits** tab within Employee Info. NLH limit is set to 40 hours for all employees.
- **Staff List Conflict**: Displays when an employee is not listed in the Staff List/Employee Group for the selected shift. To resolve, add the employee to the appropriate Employee Group found within Employee Info.
- **Shift Full Conflict**: Displays when attempting to assign an employee to a task/shift that does not have an open slot. To resolve, in **Assignment View**, right-click the cell and select **Increase Slot Size** to open an additional slot for a single assignment on the schedule. To permanently increase slots available for a shift, place a HelpDesk ticket.
- **Skill Effective Date Conflict**: Displays when an employee does not have the required skill for a task as of the date of the assignment (such as assigning a CNA being assigned to an RN shift). Employee skills are updated from the HR interface.
- **Sameday Compatibility Conflict**: Displays when two conflicting assignments are scheduled during the same day.
- **Task Time Conflict**: Displays when two assignments overlap in time.

NOTE: **To review additional information on Schedule Conflicts, view the flyer here.**

Navigating the Schedule Editor

- Frequently save changes through File > Save Schedule or by clicking the save icon.
- The **Hide Empty Rows** icon hides any rows in the schedule that do not have assignments.
- The **View By Assignment** icon displays the shifts on the left-hand side of the Schedule Editor and the employees who fill those shifts within the grid.
- The **View by Employee** icon displays the employees on the left-hand side of the Schedule Editor and the shifts assigned to the employee appear in the grid. Selecting **View by Employee** does **not** show float employees, only staff from the unit.

- The **Highlight**  icon allows the scheduler to locate assignments or tasks more easily within the Schedule Editor. Select an employee or task from the drop down or select a cell within the schedule grid. Anywhere the employee or task is assigned is highlighted in yellow.

- Selecting **Alphabetic** as the Display Order sorts shifts or employees alphabetically in Schedule Editor. Selecting **Custom** as the Display Order sorts the employees or shifts to a custom sort order that is set for the unit.
    - For more information on modifying the Display Order, please view the Display Order section of the Manager Checklist & Employee Set-Up flyer here.

Schedule Editor Color Code

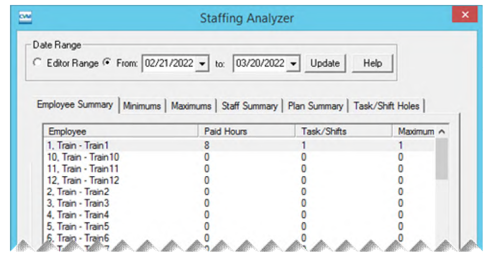
Within the Schedule Editor, assignments are color-coded to indicate how they were added to the schedule.

- Purple Font: Indicates data has been manually added.
- Red Font: Indicates an approved request.
- Orange Font: Indicates a pending request.
- Green Font: Indicates a patterned assignment.
- Pink Font: Indicates a float employee was added manually.
- Blue Font: Indicates a link shift, often used to track weekend commitments.
- **Black** Font: Indicates Autostaff was selected in the schedule generation window allowing Clairvia to auto-fill holes within the schedule.
- *Italic* Font: Indicates an employee from a different unit submitted the request.

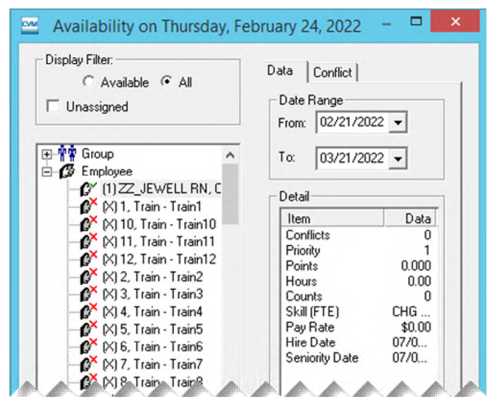
Balance the Schedule

Various tools are available within Clairvia Client to assist with the balancing process. The **Request Details Report** is used to ensure schedulers don't miss employee notes, see the flyer here.

- Balancing the schedule begins with changing the schedule target to Schedule to Core Coverage. Be sure to change the schedule target to **Schedule to Staff Size** when generating.
- **The Staffing Analyzer**: The tool displays how many hours your employees are assigned on the schedule, displays employees who have not met their minimum requirements, and displays employees who are currently scheduled over the maximum limit.
    - To open the **Staff Analyzer**, right-click a cell within the Schedule Editor and select **View Analyzer**. The analyzer's date range defaults to what is selected within the Schedule Editor but can be modified. Select **Update** to refresh the window.
    - The analyzer may remain open while the scheduler makes edits.



- **Employee Summary Tab**: Provides an overview of the following for each employee in your unit:
  - Paid hours assigned for the specified date range.
  - Number of tasks assigned, includes paid and unpaid tasks.
  - Maximum number of consecutive days scheduled, includes paid and unpaid tasks.
- **Minimums Tab:** Displays only the employees who have not been scheduled to their minimum paid hour requirements per pay period within the selected date range.
- **Maximums Tab:** Displays only the employees who are scheduled over the maximum limit within the selected date range.



➢ **The Availability Window**: Displays employees from your unit who are available to work a selected task. From the **Availability** window, schedulers may manually add employees to the schedule, view conflicts, and view employee details.

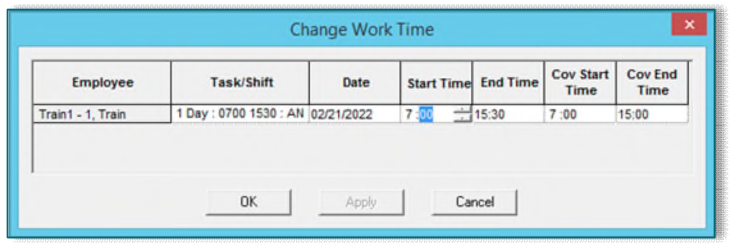
- To open the **Availability** window, double-click a cell within the Schedule Editor, or right-click and select **View Availability** window. A green checkmark indicates an available employee. The red X indicates an employee has a conflict. To see more information about the conflict, navigate to the **Conflict** tab.
- Set the display filter to **All** to display all employees, regardless of conflicts.
- To add a single assignment, select the face icon next to the employee's name, drag and drop the icon into the appropriate cell; or select an employee and double-click the target cell.
- To add multiple assignments, select multiple cells on the schedule by holding the **CTRL** button on your keyboard and clicking the cells with your mouse. Once all desired cells have been selected, drag, and drop the face icon next to the employee's name to one of the highlighted cells.

➢ **The Float Window**: The tool allows the scheduler to pull employees from other units and assign them to work in your unit.

- To open the Float Window, ensure your view is set to **View by Assignment**. right-click any cell within the Schedule Editor and select **View Float Window**.
- Units with available float employees are displayed with a plus sign. Click the plus sign to view the available employees and additional information. A green checkmark indicates an available employee; a red X indicates an employee with a conflict.

- Drag desired employees from the Float window to the appropriate cell in the schedule to make the assignment.

NOTE: **Standard float permissions are the responsibility of the unit. Schedulers may adjust the float permissions for staff in their department through Employee Info. For more information on Employee Set-Up, see the flyer here.**



➢ **Change Task Time**: Start and End times of shifts can be modified. To change task times, right-click a shift and select **Change Time**. Click the time within the Start Time or End Time column and adjust by typing or using the arrow keys.

NOTE: **Utilizing the Copy/Paste feature copies the specific start and end time of the task copied.**

➢ **Swap Assignments**: Swap Assignment switches two shifts with each other within the Schedule Editor.

- Select the first shift desired for swapping. Hold the CTRL key on your keyboard and select the second shift that is to be swapped. Right-click and select **Swap Assignments**.

➢ **Core Coverage Table**: Found at the bottom of the Schedule Editor window on the **Coverage Totals** tab. Core Coverage is the estimated target staffing need for the schedule cycle. Staffing targets are broken out by shift category partitions (time of day) and are based on budgeted average daily census.

- Blue Font: Under the budgeted staff needs
- Red Font: Over the budgeted staff needs
- **Black** Font: Within an acceptable range of the staff needs
- The top number is the FTE coverage, and the bottom number is the variance from the target staff need.

➢ **View Staff Totals**: Displays a count of how many people are working a particular shift within a shift category partition. Select **Staff Totals** at the bottom of the Core Coverage table. Confirm you are in View by Assignment.

NOTE: **Submit a HelpDesk ticket to adjust target staffing goals.**

Approve and Deny Requests

To review how to approve and deny requests, view the Request Management flyer here.

Create Opportunities

Opportunities are the holes left in the schedule after balancing.

- **Create an Opportunity**: From the Schedule Editor, using **View by Assignment**, select an open cell or cells. Click the **Create Opportunity** icon or right-click and select **Add Opportunity**. An Open Opportunity appears in the empty slot.
    - To delete opportunities, select the cell(s) and the **Delete** key on your keyboard.
    - Opportunities are only displayed to the employees on Clairvia Web when the schedule is published.

NOTE: **Opportunities should never be added prior to generating the schedule. If opportunities are added prior to generation, they will be deleted.**

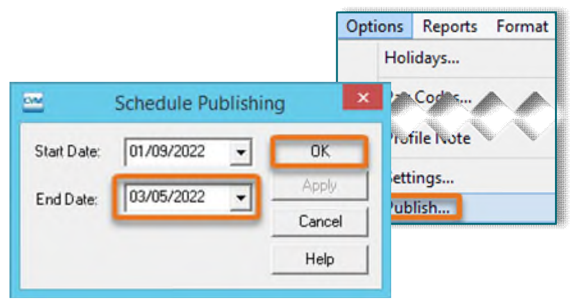
Publish Final Schedule

Publishing the schedule allows employees to view the schedule on Clairvia Web for a specified date range. Once the schedule has been balanced, publish the newly finished schedule for staff to view. Once published, employees can volunteer for opportunities and swap shifts as desired.

STEP 1: Click **Options** from the toolbar and select **Publish…**

STEP 2: Change the **End Date** to reflect the end of the skeletal schedule range. **DO NOT** change the Start Date.

STEP 3: Select **OK** to Publish.



Employees Fill Opportunities and Swap Shifts

Employees can view available opportunities in the weekly or monthly view of the schedule within Clairvia Web.

- Opportunities display on Clairvia Web when the schedule is published.
- Employees only see opportunities that match their skill and do not conflict with their existing schedule.
- Opportunities require manager approval.
- Shift swaps require manager approval once both parties agree to the swap.
- Employees can swap shifts of different lengths.
- Employees can swap shifts that occur on the same day.
- Swaps cannot be initiated in Clairvia less than 8 hours prior to the start of the shift.
- To review information on managing opportunities, shift swaps, and shift alerts, see the flyer here.