



Workforce Management Clairvia Common Questions

May 21, 2019

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Thank you for participating in the recent education sessions for Clairvia. This solution will be used for staff scheduling, as well as assigning staff to patients on identified units. Below is a list of frequently asked questions. Please review for enhanced understanding of the Clairvia workflows.

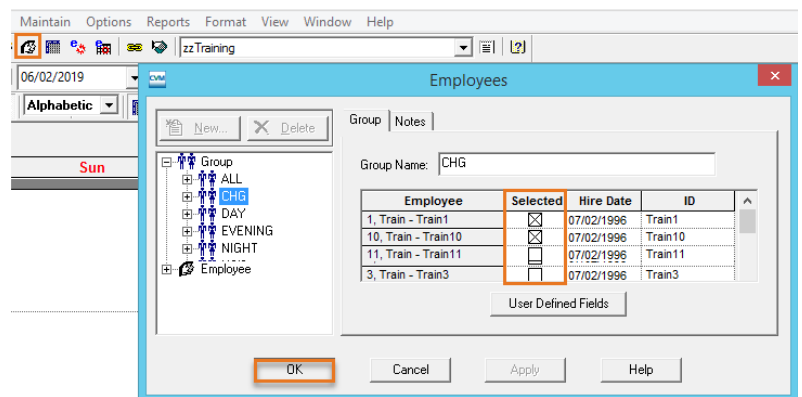
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Staff Maintenance

- There are names on my Employee list of staff who no longer work for my department, how do I remove those?
 - This information is received through an interface with Human Resources. Please contact HR to update this information.

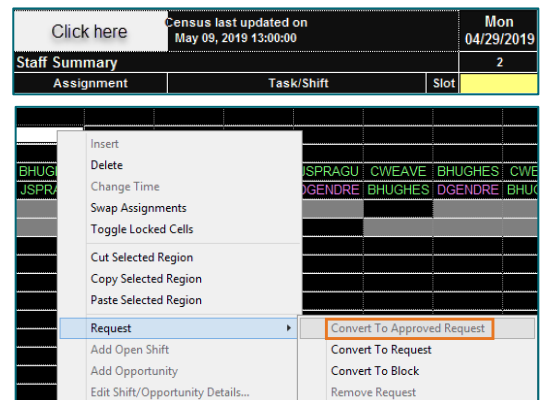
Conflict Resolution

- I am trying to assign an employee to a task, but there is a Staff List conflict. How do I resolve the conflict?
 - The employee will need to be added to the group associated with the task.
 - Open Employee Info and use the scroll bar on the left to go up to Group.
 - Expand Group, highlight the desired section and place an X in the box beside the employee's name.



Request Approval

- How do I approve pending requests from Team Scheduling that have been approved?
 - Click the cell to the left of “Census” to turn the screen black.
 - Right-click in a cell *within the schedule* and hover over Request to see the Convert to Approved Request option.

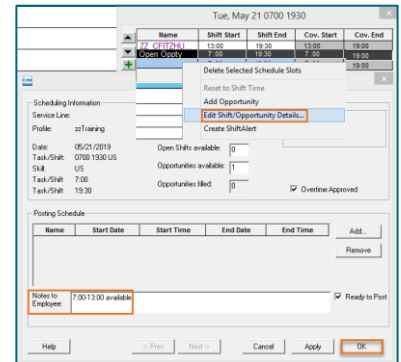


Schedule Changes

- I have made a change to the schedule after publishing the final copy to Clairvia Web, do I need to regenerate for staff to see the changes?
 - No, just save your changes in Schedule Editor and they will be available for the Charge Nurse to see during Assignment Management tasks.

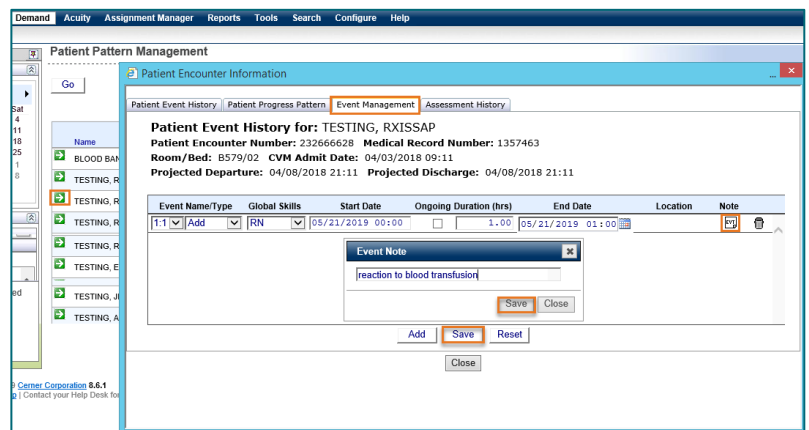
Opportunity Times

- How do I change the times when I create an Opportunity?
 - An Opportunity will always have the default times listed. If an employee is only able to assist for part of the time, a second Opportunity can be created, and a note added with the remaining times available.



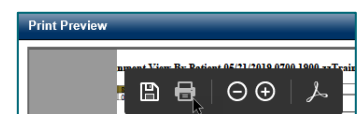
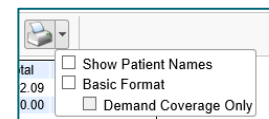
Patient Events

- How do I create a Patient Event?
 - From Clairvia Web, click **Demand, Patient Pattern Management**.
 - Select your criteria and click **Go** to see a list of patients on your unit.
 - Click the green arrow to open the Patient Encounter window and select the **Event Management** tab.
 - Click **Add** to enter the Event details.
 - Click the **Note** icon to enter specific details regarding the Event and Save.



Printing Daily Assignment

- Where do I print a copy of the daily assignments?
 - There is a printer icon on the Patient Assign page. The end user can select the desired view by clicking the drop-down and placing a checkmark in the box.
 - Once the format is decided, the end user can click the printer and a preview screen will open.
 - The end user can hover over the top for the action pane to appear and select the Printer icon.



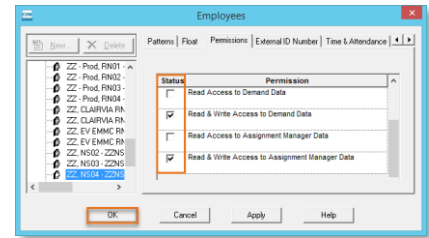
Pathways to Our Future

Clairvia Questions

May 21 2019

Patient Assignments

- What can't I open Patient Assign in Assignment Manager?
 - Ask your manager to check the settings in Permissions. To use Assignment Manager, the Status box should have a checkmark.



Shift Swaps

- Why am I unable to request a Shift Swap?
 - The ability to swap a shift is activated once the final schedule is posted.
 - The person you are requesting to swap with should have the same hours to avoid losing or picking up time. Discussions with managers/schedulers can occur to explore options (PEPfill).
 - A swap cannot be requested if within 8 hours of the scheduled start of the shift.
 - The person you are looking to swap with must have the skill set to match, i.e. Charge.

Submitting Requests

- Why am I not able to request days I want to work?
 - Requests can only be made during the Team Scheduling period. Your manager should have access to the time frame associated with your organization.
 - If the necessary coverage for that day has been met, no other requests will be allowed. i.e. if 5 RNs are needed to be fully staffed, the sixth nurse will not be able to request to work.
- How do I enter a request for PTO that will block the whole week, so I do not receive notices to work when I am on vacation?
 - Requests for PTO should match your FTE limits. To block the entire week, R-days can be used. However, if the manager attempts assign you to a task during that week, a conflict will present as a reminder that the employee's hours that week have been met.

Accessing My Schedule

- How can I print my monthly schedule?
 - Click on Printable View to open the schedule window.
 - Click on the Gear icon in the top right of the screen and select Print → Print
 - Ctrl + P is not currently functioning properly
- How do I sync my calendar to my phone?
 - There are instructions on the CI website to assist with setting up the sync.

