



Manager Checklist & Employee Set-Up

Wednesday, April 12, 2023

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Clairvia

Manager Checklist & Employee Set-Up

Manager Checklist

Clairvia Web – Employees Transferring Out/In & New Hires	Complete
<ul style="list-style-type: none"> ➤ Assign the staff member to the appropriate Access Group Definition. ➤ Update any filters that have been created in Clairvia Web if you use filters that rely on specific employee selections. 	
Employees Transferring Out of the Department	Complete
Clairvia Staff Manager (CVM)	
<ul style="list-style-type: none"> ➤ Run a “Navigator/Reports/Employee/Requests Report” for any approved non-productive shifts and email this report to the new manager for consideration for approval by the receiving unit. ➤ In Employee Info/Float, grant the staff member float privilege to the new unit. 	
Employees Transferring Into the Department/New Hires	Complete
Clairvia Staff Manager (CVM)	
<ul style="list-style-type: none"> ➤ Approved Requests: Using the report that the previous manager emailed to you, manually enter all previously approved days that are appropriate to accept. ➤ Employee Window: <ul style="list-style-type: none"> ○ Employee Groups: Assign the staff member to the appropriate Employee group, i.e., Days, Nights, Charge, etc. ○ Contact Tab: Verify phone numbers, address, and email imported via HR System. ○ Skills Tab: Validate primary skill imported via HR System and add secondary skills where applicable. ○ Pattern Tab: Assign the staff member to the appropriate Pattern sequence, if applicable. ○ Float Tab: Assign the staff member to the appropriate Float departments. ○ Permissions Tab: Allow selection of shift opportunities in home profile and allow selection of shift opportunities in other profiles. ➤ Display Order (Optional): If a new employee is added, update the Custom Display Order for them to appear in the appropriate position on Schedule Editor and Daily Editor. 	
HR System	
<ul style="list-style-type: none"> ➤ Complete all appropriate work in the HR system for the transferring staff. 	

Clairvia Web

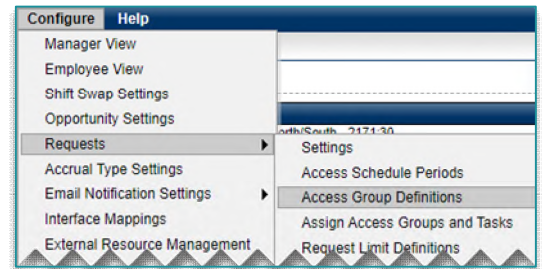
Team Scheduling

- To ensure new employees may place requests during the Team Scheduling period, they must be added to the appropriate group in Clairvia Web.

STEP 1: Hover over **Configure** → **Requests** → **Access Group Definitions**.

STEP 2: Click the desired Access Group from the list.

- Regular employees will be added to the Full Time/Part Time (Team) Scheduling Group, while Pool employees will be added to the Per Diem (Pool) Group.



STEP 3: Select the staff member(s) needing to be included in the Group from the **Available Employees** List.

STEP 4: Click **Add**, then **Save**.

Clairvia Staff Manager (CVM)

Run Navigator/Reports/Employee/Requests Report

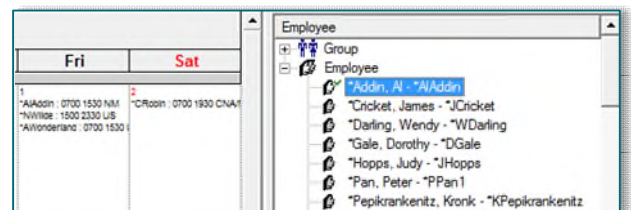
- Run this report to capture employee requests that fall after the date of their transfer. The report must be run before the staff member leaves the department. Provide this information to their new department manager.
- Requests for tasks following the date of transfer are deleted upon receipt of the transfer from HR. These requests cannot be reported on after deletion; this applies to all requests, approved or pending.

Managing Requests

- When an employee transfers in, use the report provided by their previous unit to enter approved requests that are still applicable for the new unit.
- For more information on Request Management, see the flyer [here](#).

Employee Info Window

- To open the Employee Info window, double-click any employee name from the Employee section.
 - If the schedule is open, the Employee window will be read-only.



NOTE: Dropdowns within Clairvia will only open on your primary monitor.

- When making changes, always select Apply to save, and OK to close the window.

Clairvia

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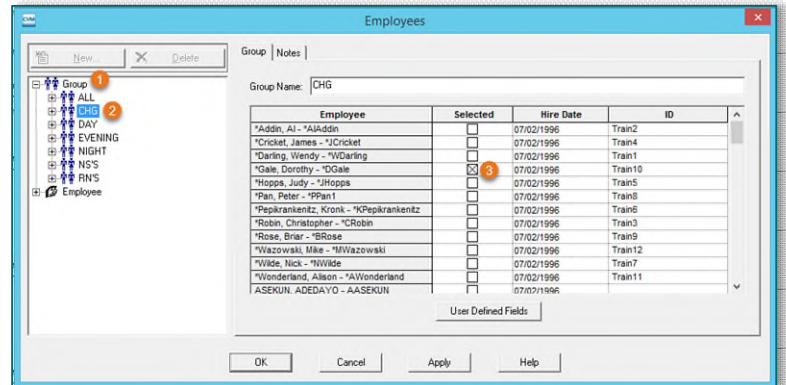
Employee Groups

- Creates a staff list for tasks which triggers a warning if schedulers add employees to a shift, they are not eligible for on the schedule. Adding employees to groups also creates sets of staff in the Availability window.

STEP 1: Expand the groups by selecting the plus sign next to **Group**. If groups are not visible, scroll up to display additional options.

STEP 2: Click the name of the group desired for adding employees. A list of employees within the group will display.

- Employees may be added to multiple groups. To modify group names, place a HelpDesk ticket.



STEP 3: Check the box next to the name of the employee to be added to the group, click **Apply** to save changes.

NOTE: Adding employees to groups does NOT impact an employee's ability to make requests, see "Clairvia Web – Team Scheduling" (above) for more information.

Contact Tab

- Employee may enter an update or add additional email addresses via Employee Self Service (ESS).
- Managers may manually update and will need to maintain, as the information will not appear in HR System.

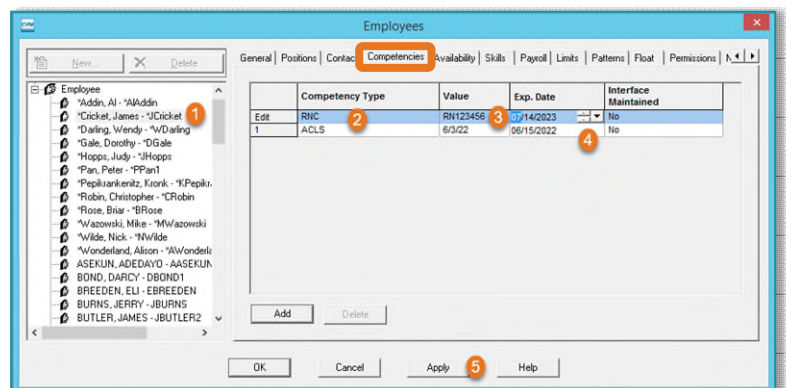
Competencies Tab

STEP 1: Select the employee needing additional competencies and click the **Competencies** Tab.

STEP 2: Click into the blue **Edit** row to display the dropdown and select the desired competency type.

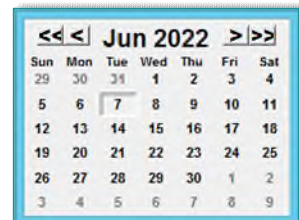
NOTE: If a new competency type needs to be added, submit a Help Desk Ticket.

STEP 3: Enter the license number associated with the competency within the **Value** column. If no license number is associated with the competency, enter the date the competency was obtained.



STEP 4: Update the expiration date by selecting the upside-down triangle to open the calendar.

- To edit an existing competency, click into the date range to modify.



STEP 5: Click **Add** to save the new competency, then **Apply** to save changes.

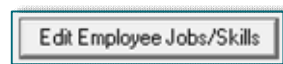
NOTE: Competency expiration dates display on the employee's Clairvia homepage 90 days prior to expiration and 60 days prior to expiration on the Manager Dashboard.

Skills Tab

- Primary skills are added via the Human Resources Interface.
- If an employee has an alternate position or works as a relief/charge nurse, these secondary skills are added to allow staff to request additional task types.

STEP 1: Select the employee needing a skill entered.

STEP 2: Within the **Skills** tab, select **Edit Employee Jobs/Skills** to open the Employee Jobs/Skills window.



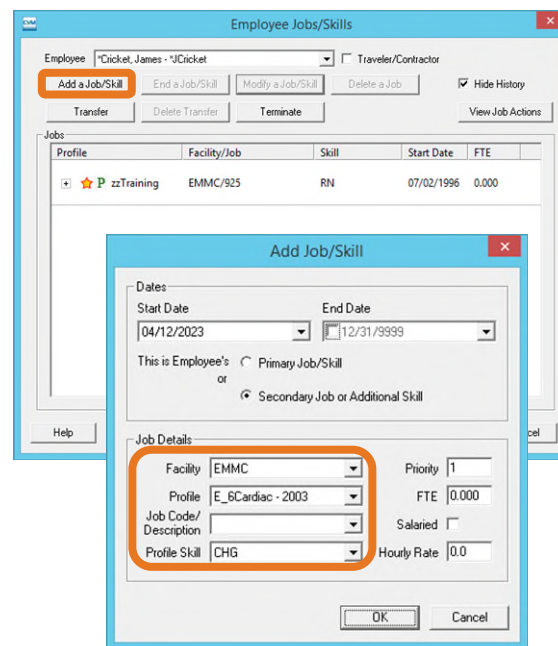
STEP 3: Select **Add a Job/Skill**.

STEP 4: Enter the **Start Date**. The **End Date** does not need to be entered if there is no set end date for the secondary skill.

STEP 5: Confirm the radio button is selected for **Secondary Job or Additional Skill**.

STEP 6: Enter the **Facility**, **Profile**, and **Profile Skill**. Leave the Job Code/Description blank. Select **OK** to save the skill.

STEP 7: The new skill will now display under **Jobs**. The primary skill will display with a star icon. Click **Apply** to save.



NOTE: If the primary skill for the employee is not accurate, place a ticket to the Help Desk.

Clairvia

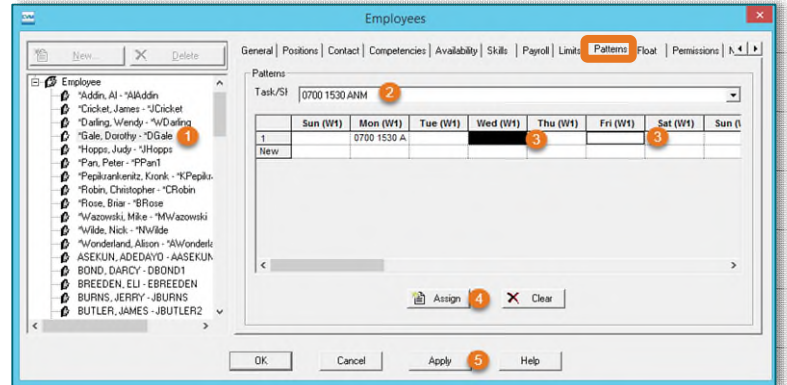
Manager Checklist & Employee Set-Up

Patterns Tab

➤ Used to create a recurring schedule without a set end date. The patterns established will be added to the schedule during generation.

STEP 1: Select the employee needing a pattern entered.

- Patterns edited within the Employee window will **not** affect assignments already on the schedule.



STEP 2: Within the **Patterns** tab, select the **Task/Shift** needing to be patterned.

STEP 3: Click the days to be patterned, then click **Assign**.

NOTE: Holding down the CTRL while selecting days will allow you to select multiple days to assign as part of the Pattern.

STEP 4: Click **Apply** to save.

NOTE: The pattern can be built to match the weeks of the schedule. For example, (W1) indicates week one of the schedule. Use the scroll bar to add patterns to additional weeks.

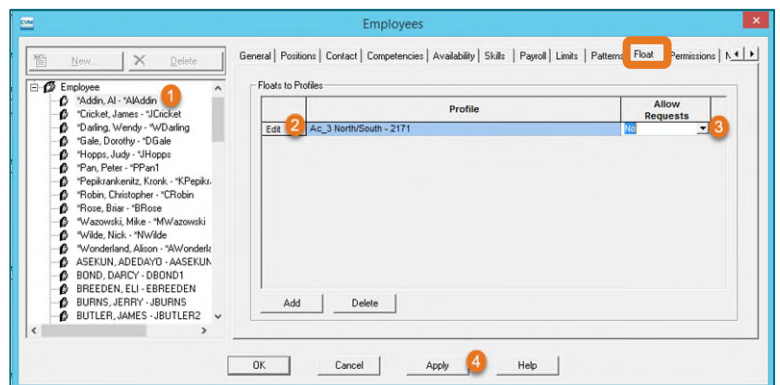
Float Tab

➤ Granting float permission establishes the units where employees may pick up opportunities or access Assignment Manager. Float permissions allow schedulers in other departments to manually float staff to their unit.

STEP 1: Select the employee needing Float Permissions and click the **Float** Tab.

STEP 2: Click into the blue **Edit** row to display the dropdown and select the desired float profile (unit).

STEP 3: Select **No** in the Allow Requests Column unless the employee has an alternative role in the selected profile (unit).



STEP 4: Select **Add** and then **Apply** to save changes.

Permissions Tab

NOTE: Granting the below permissions will apply to the home unit and all subsequent profiles listed within the Float Tab.

➤ **Shift Opportunity Permissions**

STEP 1: Select the employee and select the **Permissions** tab.

STEP 2: Check the box next to **Allow selection of shift opportunities in home profile**.

- If the employee floats to other units and is allowed to pick up opportunities on that unit, check the box next to **Allow selection of shift opportunities in other profiles**.

STEP 3: Click **Apply** to save changes.

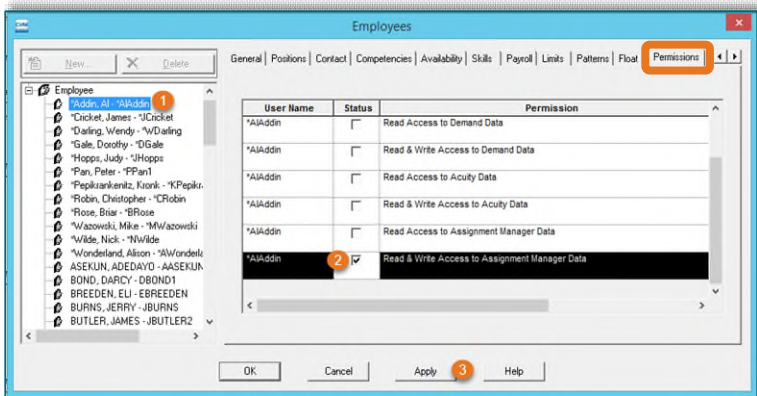
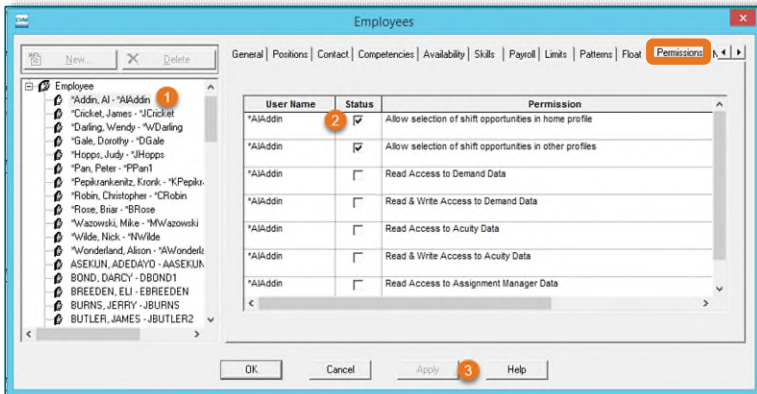
➤ **Assignment Manager Permissions**

- Setting this privilege allows access to the Assignment Manager menus in Clairvia Web, where patient/caregiver assignments are made. Privileges may need to be set-up for staff such as, Charge and Relief Charge Nurses, as well as select unit secretaries in some situations.

STEP 1: Select the employee needing access to Assignment Manager and select the **Permissions** Tab.

STEP 2: Scroll to the bottom and select the checkbox for Read & Write Access to Assignment Manager.

STEP 3: Click **Apply** to save changes, then **OK** to close the window.



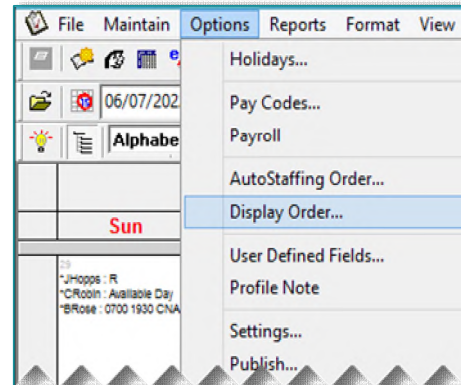
Display Order

STEP 1: From the **Schedule Navigator**, click **Options** in the toolbar, then select **Display Order...**

- Expand the window for ease of viewing.


STEP 2: Click the **Employee** tab to sort the **Staff Order** or the **Task/Shift** tab to adjust the **Shift Order**.

STEP 3: Drag and drop items within the **Order** column to change their location.



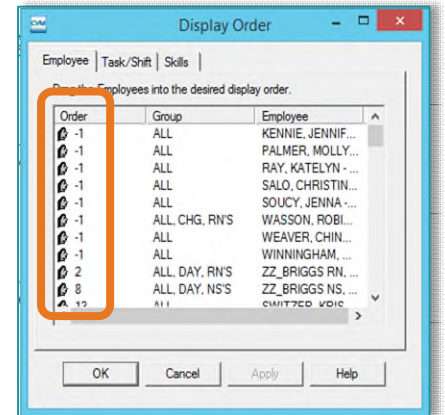
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NOTE: If you try to drag and drop outside the Order column, no changes will be made and this symbol will appear: 

STEP 4: Click **Apply** to save changes, then **OK** to close the window.

NOTE: If Schedule Editor is open, you cannot change the display order. It is recommended infrequently utilized tasks are moved to the bottom.



HR System

- If a Nurse Tech has graduated and became a Nurse, complete the appropriate HR system work.
- Employee skills update based on an import from HR. Until Infor is updated, the employee will not transfer in Clairvia.
- The new staff member (new employee, transfer, traveler) will not appear in your Clairvia unit until the date in which the staff member is registered to start. Use zzplaceholder and enter a comment with the employee's name to show on schedule as needed.

Troubleshooting

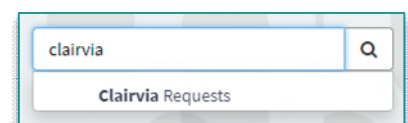
- Employee is unable to make requests: Confirm Team Scheduling settings in [Clairvia Web](#).
- Employee is unable to make patient assignments in other departments: Confirm Assignment Manager & Float settings in [Clairvia Staff Manager \(CVM\)](#).
- Employee is relief charge nurse but cannot request charge shifts: Confirm relief charge has secondary skill in [Clairvia Staff Manager \(CVM\)](#).
- Employee is not appearing in Clairvia: Confirm the [HR System](#) has been updated.

Placing Tickets for Clairvia

- Start by selecting the ServiceNow Portal button from your Member Organization's Intranet Page.



- To place a ticket requesting things, such as updating your scheduled shifts, increasing staff sizes, or creating additional tasks:
 - Type **Clairvia** in the Search box and click the **Clairvia Scheduling Work Request** option.
 - Fill in the appropriate fields of the **Request Form**.



- Include any applicable attachments.
- Click **Submit**.
- Alternatively, call the **IS Help Desk** and request a **Clairvia Request**.
- To place a ticket for issues such as staff not showing or system errors:
 - Click the **Open a Trouble Ticket** option.
 - Fill in the appropriate fields of the **Help Desk Ticket Form**.
 - Include any applicable attachments.
 - Click **Submit**.
 - Alternatively, call the **IS Help Desk** and request an **Incident Ticket** be placed.

