

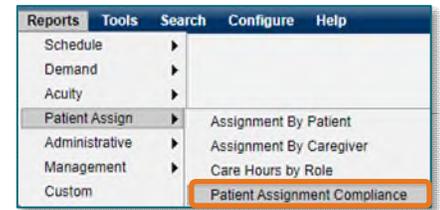
The Patient Assignment Compliance Report provides the ability to identify profiles with problems maintaining patient assignments and determine where patient demand workload is not being met by assigned caregivers.

Running the Report

➤ From within Clairvia Web.

STEP 1: Select **Reports** in toolbar.

- Select **Patient Assign.**
- Select **Patient Assignment Compliance.**



STEP 2: Select a **Shift Category**.

NOTE: Once a **Shift Category** is selected, the **Profile** selection items are filtered down to include only **Profiles** that align to the selected **Shift Category**.

STEP 3: Enter the **Selection Criteria** for:

- Facilities (hospital)
- Profiles (unit or department)
- Global Skills (generic skill label used for reporting on similar skills across multiple units)

NOTE: Hold **CTRL** to select multiple facilities, profiles, or global skills.

STEP 4: Update the Start/End dates.

STEP 5: Set **Export Type** to **CSV** (Comma Separated Values)

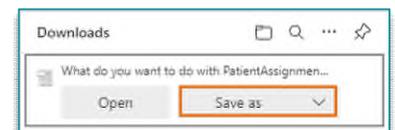
STEP 6: Select **Run** Report.

NOTE: **Global Skills** may not match perfectly with the skill label seen in an individual unit. Example: "Pt Obs" as a unit skill is tied to the 1:1 Obs global skill.

Saving a CSV Report

➤ The Schedule Export does not open directly in the **Report Output** tab, it must be downloaded.

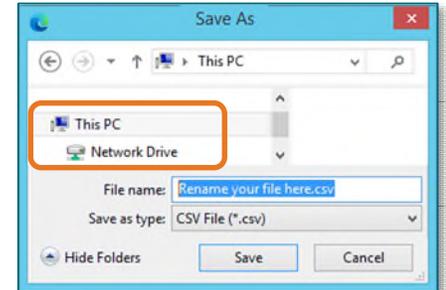
- Click **Save As** on the download pop-up.
- Select **This PC** and navigate to the destination folder.
 - **Recommendation:** Select a folder on a Network Drive.



From the Office of Clinical Informatics
Patient Assignment Compliance Report
 May 26, 2023
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- **Rename** the file to remove brackets [] and **Save**.
- Navigate to the destination folder to open the file.
 - **Recommendation:** Save the file as excel upon opening.

NOTE: If the download pop-up does not appear, click the download icon or CTRL+J on the keyboard.



Interpreting the Report

The report displays a group of rows for each Shift Partition within the selected Shift Category. Within the group are individual rows for each day within the report date range per Profile selected. Subtotal rows display averages for each Unit (Profile), Facility, and Organization for the entire date range.

Sample Report for Day Shift:

Day	Hospital	Unit Number	Unit	Date	Charge	# of Patients	A	D	# of Patients w/ full required assigned	% Patients w/full required assigned	# of Patients w/fully assigned care hours	% of Patients w/fully assigned care hours	Available CNA Hours	Demand CNA Hours	% CNA Utilized	CNA Ratio (x)	Available RN Hours	Demand RN Hours	% RN Utilized (x)	RN Ratio
BW	1111	5W	2/2/2017	DOMINGUEZ, JANE	22	4	3	12	54.55	12	54.55	12	27.25	227.19	22	48.76	72.67	149.04	4.4	
BW	1111	5W	2/3/2017	DOMINGUEZ, JANE	31	10	15	14	45.16	18	58.06	12	31.73	264.34	31	59.89	90.25	150.88	6.2	
BW	1111	5W	2/4/2017	BRAGG, JOHN	22	5	7	7	31.82	13	59.09	12	26.09	222.37	22	56.41	71.51	126.78	4.4	
BW	1111	5W	2/2/2017	BROWN, MARY	27	11	6	0	0	0	0	12	28.5	237.48	27	58.63	79.65	135.85	4.5	
BW	1111	5W	2/6/2017	BROWN, MARY	28	6	8	7	25	22	78.57	23.8	29.85	125.4	14	67.79	80.19	118.3	4	
BW	1111	5W	Unit Average		26				31.3		50.05				215.35				136.13	
BW	2222	6N	2/2/2017	HILL, BRIAN	15	4	2	2	13.33	10	66.67	11.95	14.14	118.33	15	48	53.81	112.1	3.75	
BW	2222	6N	2/3/2017	HILL, BRIAN	14	1	3	3	21.43	13	92.86	11.85	13.82	118.65	14	47.9	54.7	114.2	3.5	
BW	2222	6N	2/4/2017		15	3	1	1	6.67	11	73.33	11.55	13.99	121.1	15	47.88	50.79	106.08	3.75	
BW	2222	6N	2/2/2017	SMITH, JOE	12	0	2	0	0	7	58.33	3.15	11.98	380.42	12	33.78	42.2	124.93	3	
BW	2222	6N	2/6/2017	SMITH, JOE	15	3	5	8	53.33	12	80	12	14.53	121.1	15	50.47	54.54	108.06	1.88	
BW	2222	6N	Unit Average		14.2				18.95		74.24				171.92				113.07	
BW	Facility Average				20.1				25.13		62.15				193.64				124.6	
BW	Organizational Average				20.1				25.13		62.15				193.64				124.6	

- **Hospital:** The facility abbreviation.
- **Unit Number:** The Cost Center number.
- **Unit:** The unit (profile) abbreviation.
- **Date:** The start date of the shifts displayed in the row; one row per profile per date.
- **Charge:** The caregiver(s) identified as charge for the selected shift.
- **# of Patients:** The number of patients in a bed on the profile at any point during the shift.
- **A:** The number of patients who arrived (admissions or transfers in) during the shift.
- **D:** The number of patients who departed (discharge or transfers out) during the shift.
- **# of Patients w/ full required assigned:** The number of patients who had caregivers with the required skills and roles assigned for the entire shift.
- **% Patients w/full required assigned:** The number of patients who had caregivers with the required skills assigned for the entire shift divided by the total number of patients.
- **# of Patients w/fully assigned care hours:** The number of patients who had their defined demand care hours fully met.
- **% of Patients w/fully assigned care hours:** The number of patients with fully assigned care hours divided by the total number of patients.

NOTE: The next four columns are repeated for each Global Skill included in the report. [Global Skill] represents the skill abbreviation, such as RN or CNA.

- **Available [Global Skill] Hours:** All hours that count toward direct patient care worked by caregivers possessing that global skill. Hours assigned to tasks that do not count toward direct care (such as Charge in some profiles) are not included in the Available Hours.
 - **Demand [Global Skill] Hours:** The global skill care hours as determined by Demand Manager across all patients who were on the profile during the shift.
 - **% (Percent) [Global Skill] Utilized:** The percentage of global skill utilized, calculated as the Demand hours for the global skill divided by the Available global skill hours.
 - **[Global Skill] Ratio (1:x):** The total number of patients in that location during the shift partition divided by the number of like skilled caregivers assigned to work during the shift partition, with the resulting value expressed a 1:x ratio.
- **Unit Average:** The sum of the values for the selected column divided by the number of days in the report range.
- **Facility Average:** The average of all profile averages for the profiles in the selected facility.
- **Organizational Average:** The average of all the profiles included in the report run, independent of facility.