Northern Light Health

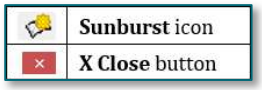
From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Clairvia - Daily Editor

December 14, 2020

This Quick Reference Guide (QRG) Reviews Using the Daily Editor.

Common Buttons & Icons



Navigate to the Daily Editor

➢ **From the Clairvia Client page:**

STEP 1: Click **Maintain** in the menu.

STEP 2: Click **Daily Editor** .

NOTE: **You can also click the Sunburst icon.**

Adjust a Staff Member's Shift Start or End Time

➢ **From the Clairvia Daily Editor page:**

STEP 1: Hover over a cell that displays staff names to review staff hours for those in that field.

STEP 2: Double-click the person whose shift you need to adjust.

STEP 3: Click the **Shift Start** or **Shift End** field based on what needs to be adjusted.

STEP 4: Type in the new time.

NOTE: **You can also use the up and down arrows to adjust the time.**

STEP 5: Click the **X Close** button to close the Edit window.

Document Non-Productive Hours

➢ **From the Clairvia Daily Editor page:**

STEP 1: Locate the staff on the shift they are scheduled for in the Profile tab of the right-side pane.

STEP 2: Scroll down the left side pane to the Non-Productive assignment needed.

STEP 3: Click the staff member's name and drag and drop it in the field in the center of the screen for the appropriate assignment.

Resolve Schedule Conflicts

➢ **From the Schedule Conflict Resolution window:**

STEP 1: Select the appropriate action for resolving task time conflicts.

STEP 2: Note if you want to override the conflict.

STEP 3: Resolve the conflict using the Schedule Conflict Resolution window.

STEP 4: Click the **Task Start** and **End time** fields to activate; adjust as appropriate.

STEP 5: Click **OK**.

Reassigning Hours

- **From the Clairvia Editor page:**

STEP 1: Click the **Auth. Floats** tab in the right-side pane.

STEP 2: Locate a staff member within the listed profiles.

NOTE: **Expand the profiles by clicking the + icon.**

STEP 1: Click the staff member's name.

STEP 2: Drag and drop it in the center column of the shift they will be covering.

NOTE: **If the person that floats in changes profiles during the same shift to cover the hours, you will need to document the changes.**

Documenting Different Profiles in One Shift

- **From the Clairvia Editor page:**

STEP 1: Double-click the staff member that was floated in.

STEP 2: Click the **Shift End** field.

STEP 3: Enter the time the shift ended for the current profile.

STEP 4: Click the **X Close** button in the Edit window.

STEP 5: Transfer of the staff to the new profile will need to be documented by the receiving unit.

STEP 6: Click the **Profile** drop-down arrow.

STEP 7: Select the new profile.

STEP 8: Locate the staff member within the Auth. Floats tab.

NOTE: **Expand the information using the + icon as needed.**

STEP 9: Drag and drop the staff member's name to the new shift.

STEP 10: Double-click the staff member's name.

STEP 11: Click the **Start Time** field.

STEP 12: Type in the start time for the new profile.

STEP 13: Click outside the field when you are done entering the new time.

STEP 14: Click the **X Close** button for the Edit window.