

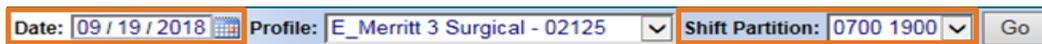
Assignment Manager leverages the staffing data of Staff Manager and the patient data of Demand Manager and Outcomes-Driven Acuity, to support equitable assignments of caregivers to patients. Patient assignments should be updated in real time to ensure accurate capturing of care hours.

## Daily Assignment

The Daily Assignment is used to assign caregivers to the unit's patients for the oncoming shift. The assignment is intended to be completed prior to the oncoming shift's start time.

**STEP 1:** Select **Assignment Manager** from the toolbar, then click **Patient Assign**.

**STEP 2:** Select the **Assign Patients** button. Confirm the correct date and shift partition are selected.

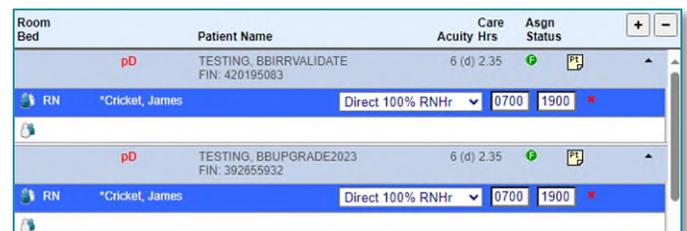


**STEP 3:** To generate assignments based on previous shifts from the past 72 hours, select the **Continuity** button.



**STEP 4:** **Primary Caregivers:** To assign a caregiver to a patient, hold down the caregiver's name and drag to the box below the patient's name. Repeat the process until all nursing staff have been appropriately assigned.

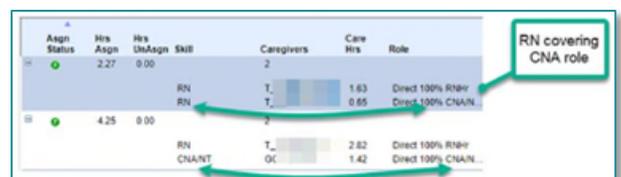
- The first box below the patient is designated for **primary caregivers**, as indicated by the icon with the blue person on the left.
- Multiple caregivers can be assigned as primary (RN, CNA, etc.) by dragging and dropping in the same **primary caregiver** column.
- Other **caregiver** scenarios are covered in the [caregiver](#) roles.



Room Bed	Patient Name	Care Acuity Hrs	Asgn Status
pD	TESTING_BBIRVALIDATE FIN: 420195083	6 (d) 2.35	PF
RN	*Cricket, James	Direct 100% RNHr	0700 1900
pD	TESTING_BBUPGRADE2023 FIN: 392655932	6 (d) 2.35	PF
RN	*Cricket, James	Direct 100% RNHr	0700 1900

**NOTE:** Assign a caregiver to multiple patients at once by selecting the boxes below the patients, then dragging the caregiver to one of the selected boxes. All highlighted patients will now display with the caregiver.

**NOTE:** Units that utilize CNAs, if the CNA is out or there is not enough to cover all patient's and the RN is also covering the CNA patient hours, then the RN should also be assigned to the CNA caregiver hours to have an accurate assignment workload.



Asgn Status	Hrs Asgn	Hrs UnAsgn	Skill	Carers	Care Hrs	Role
●	2.27	0.00	RN	T	1.63	Direct 100% RNHr
●	4.25	0.00	RN	T	0.65	Direct 100% CHAIN
●			RN	T	2.82	Direct 100% RNHr
●			CHAINT	OC	1.42	Direct 100% CHAIN

RN covering CNA role

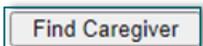
**STEP 5: Assign Relief/Secondary Caregiver:**

The second box below the patient is designated for **relief staff**, as indicated by the icon with **blue** person on the **right**. Relief staff **do not** populate to the Operational Whiteboard (CareView Dashboards) and do not receive alerts through the Oracle Nurse Mobility (CareAware Connect) devices.



Room Bed	Patient Name	Care Acuity Hrs	Asgn Status
	pD TESTING_BBIRVALIDATE FIN: 420195083	6 (d) 2.35	PT
RN	*Cricket, James	Direct 100% RNHr	0700 1900
RN	*Gale, Dorothy	Relief 0% RNHr	0700 1900
	pD TESTING_BBUPGRADE2023 FIN: 392655932	6 (d) 2.35	PT
RN	*Cricket, James	Direct 100% RNHr	0700 1900
RN	*Gale, Dorothy	Relief 0% RNHr	0700 1900

**STEP 6:** If a desired staff member is not currently listed on the assignment list, select the **Find Caregiver** button to search for the employee.



**STEP 7:** Assign the charge nurse by selecting the Charge button. Check the box next to the charge nurse's name, select **Save**, then close the window.

- The Charge Nurse is now identified on the assignment list with the **CHG** icon.



**STEP 8: Final Check**

- Employee equitability** – Check that caregivers percent assigned are balanced per unit guidelines by reviewing the caregiver assignment section.
- Patient Assign status** – all patients should be fully assigned (has a direct RN, Preceptor, or RN Observer) and no **unassigned** care hours.

Skill	Caregiver	# Pts	Acuity Avg	Avail Hrs	Asgn Hrs	% Asgn	Start	End
RN	*Cricket, James	5	3.80	12.00	8.19	68.2	0645	1845
RN	*Gale, Dorothy	4	4.25	12.00	7.34	61.2	0645	1845
RN	*Papikrankanitz, Kronk	5	7.00	12.00	11.67	97.3	0645	1845
RN	*Robin, Christopher	5	4.40	12.00	9.02	75.2	0645	1845
C...	*Rose, Briar	5	5.00	12.00	1.07	8.9	0645	1845

**Updating Assignments**

- If a staff member must leave early, be sure to change the end times on the assignment when the relieving staff member is added to the assignment.
- Patient Events can be added for those patients that need extra support and more 1:1 time with staff. See [Creating a Patient Event](#).

Room Bed	Patient Name	Care Acuity Hrs	Asgn Status
	pD TESTING_BBIRVALIDATE FIN: 420195083	6 (d) 2.35	PT
RN	*Cricket, James	Direct 100% RNHr	0700 1700
RN	*Darling, Wendy	Direct 100% RNHr	1700 1900

**NOTE:** Partial shifts assigned in the Schedule Editor automatically display in Assignment Manager.

**IMPORTANT:** If no patient assignments have been designated for a shift, 96 hours after the end of a shift, the original available employees for assignment will no longer be available for assignment. Best practice is to have an accurate schedule in Clairvia, so patient assignments can be completed in real time and to ensure Assignment Manager is accurate prior to end of shift.

## Caregiver Roles

Caregiver assignments are defaulted to Direct 100% care for the RN or CNA skill. After a caregiver has been assigned, these roles can be updated to reflect different staffing situations.

### ➤ LPN Patient Assignments

- Assign the LPN to LPN/New 90% RNHr and the staffed RN to the RN OBSV 10% RNHr.

### ➤ Preceptor and Orientee Assignments

- Orientee and Preceptor assignments are not always clearly distinguishable within the patient assignment. To streamline identification of these roles, Orientees display with zero available hours, where staffed RNs display 12 hours.
- When possible, an assignment note should be added to indicate the Preceptor role and their Orientee counterpart during schedule creation.



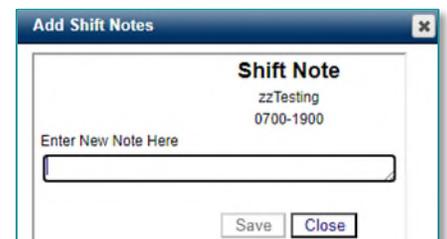
Skill	Caregiver	# Pts	Acuity Avg	Avail Hrs	Asgn Hrs	% Asgn	Start	End
RN	*Cricket, James	0	0.00	0.00	0.00	0.0	0700	1900
RN	*Rabbit, Peter	0	0.00	12.00	0.00	0.0	0700	1900

Preceptor for J. Cricket

## Icons

- **Primary Caregiver:** Caregiver assigned for most of the shift and displays as the nurse on the CareView Dashboard. 
- **Relief Staff:** Caregiver providing support to the primary caregiver and does **not** display on the CareView Dashboard. 
- **Shift Notes:** Added to communicate additional information to staff, such as Skills Day and staff meetings to maintain a record of any additional information that may be needed with reviewing an assignment at a future date.

- To add a Shift Note:
  - Click the **Shift Notes** button. 
  - Type the desired note in the available field.
  - Click **Save**, then **Close**.
  - After a **Shift Note** has been added, the **Shift Note** button displays with a yellow star. 



- **Anticipated Admissions:** To assign admissions, change the number by the blue A to those anticipated.



- This creates future arrival slots where nurses can be assigned.

- Once the patient arrives, click the icon next to Future Arrival to select that appropriate patient. 

➤ **Acuity Dashboard:** Displays a quick view of all patient acuity scores.

- The final box in this view shows the number of patients without a complete assessment documented.

1	2	3	4	5	6	7	8	9	10	11	12	--
1	5	0	9	7	4	4	1	0	0	0	0	1

➤ **Patient Notes:** Enter specific Patient Notes by selecting the **Patient Notes** icon. 

- Patient Notes** is displayed under the room number on the Assignment Manager list.

➤ **Patient Acuity Score:** Displays the patient's acuity level.

G505/01 Testing, Patient 5 5.67 U 

Patient notes display here

➤ **Patient Care Hours Unassigned:** Displays the number

caregiver hours left to be assigned to the patient based on their acuity. 

- Hovering over the **Patient Care Hours** shows the total hours assigned/unassigned.

➤ **Patient Not Fully Assigned:** Indicates the patient has not been assigned 100% RN Direct/Preceptor hours.



➤ **Patient Fully Assigned:** Indicates the patient has 100% RN Direct/Preceptor hours assigned. 

- If care hours remain for the patient, these are the hours designated for the NT.
- When both the RN and NT are assigned, those **Patient Care** hours display as 0.00.
- If only the NT is assigned, the **Patient Not Fully Assigned** icon still displays and the NT hours are subtracted from the **Total Patient Care** hours.

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➤ **New Admission Icon:** Displays next to newly admitted patients. 

➤ **Pending Discharge Icon:** Indicates that a discharge is projected to occur during the shift. 

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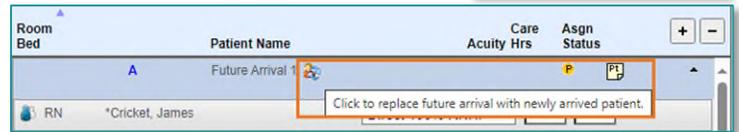
- Pending Discharge is calculated from the average LOS for the unit.
- The total number of **Pending Discharges** displays in the upper right.

➤ **Pending Discharge Overdue:** Displays when the Pending Discharge Date is past the average length of stay for the unit. 

➤ **Future Arrival Icon:** Displays in a slot for a patient that has not arrived yet. 

- Nurses can be assigned to future arrival slots, just like they are to current patients.

- **Future Arrival** slots can be added by clicking the up arrow next to the **New Admission** icon in the upper right.
- Once the patient arrives, click the **Future Arrival** icon to replace the **Future Arrival** slot with the new patient's information.



## Viewing Patient Assignment Status Report

**STEP 1:** From the Clairvia Web toolbar, click **Assignment Manager**, then click **Patient Assignment Status**.

**STEP 2:** Ensure that the correct date, facility, and profile are selected in the Navigator pane on the left.

**STEP 3:** Once details have been chosen, click **Go** in the upper left corner. 

- The **Patient Assignment Status View** displays showing shift partitions with completed patient assignment with a green checkmark and shift partitions with incomplete patient assignments with a red X.

Patient Assignment Status View 05/24/2019		
	0700 1900	1900 0700
E_CCU - 2023	✓	✗



**STEP 4:** Click the red X to quickly open the **Patient Assign** window.

## Helpful Hints

### ➤ Save Button is Dithered

- If a nurse is assigned twice to the same patient, the start and end times for the nurse's shifts display in red and the assignment cannot be saved.
- To correct, click the red X next to the duplicate assignment slot to remove the assigned employee.



### ➤ Surgical Patients

- With surgical patients that they are being transferred off the unit to the surgical area, a discharge/transfer conversation is created, and the patient is removed from the **Assignment Manager List** for the unit. Once the patient is slated to return, the patient can be transferred/admitted back to the unit and an assignment recreated for that patient. The [Anticipated Admissions](#) workflow can be used to streamline the workflow.

### ➤ Alert for Assignments not being saved for a particular patient.

- Indicates that a staff member is being assigned to a patient who is already discharged.

- Typically occurs with the discharge registration issues as outlined above. It does not affect the other assignments that have been saved.

### **Troubleshooting**

- Patients that are discharged mid-shift remain on the patient assignment record for the remainder of the shift. If the patient remains on the assignment record the next day, place a HelpDesk ticket.
- If a caregiver is not displaying on the CareView Dashboard, ensure the caregiver is in the Primary Caregiver assignment box. 