



# Clairvia Web

## Team Scheduling Guide

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Monday, April 21, 2025

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## Team Scheduling Guide

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### Introduction to Clairvia and Team Scheduling

Clairvia is the system used to create employee schedules. Access **Clairvia** through a web browser or **Mobile Device App**.

- **Clairvia allows the employee to request for vacation time and work shifts, view the schedule, swap shifts with other employees, and pick up extra shifts through opportunities or shift alerts.**
- **Northern Light Health uses a "Team Scheduling" model. This promotes the idea that everyone is working together to make a schedule that is fair and equitable for all, while also meeting the needs of the unit to provide patient care.**
- **Scheduling Expectations:**
  - Team Scheduling Calendars are available that outline the schedule dates, when requests can be submitted, and when to expect the final schedule to be available online.
    - These calendars are unique to each member organization and can be found [HERE](#).
  - Employees are expected to submit requests for their preferred schedule during open request periods.
  - There may be limits to the number of requests allowed for any single shift or day.
  - Employees can indicate days they cannot work and do not want to use PTO, by using the **Request Off** or **"R"** tasks. These should be used sparingly.
- **For questions about scheduling rules that may be unique to your department, contact your manager.**

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### Logging into Clairvia

#### Onsite Northern Light Health

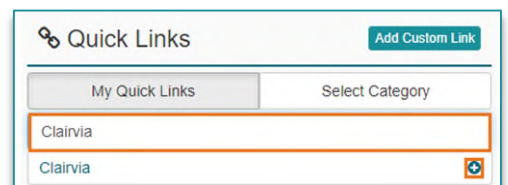
When onsite at Northern Light Health, Clairvia Web can be launched through either the Intranet page or PowerChart Toolbar.

#### **Adding Quick Link to the Intranet Page**

**STEP 1:** From the **Member Organization's Intranet** page, navigate to the **Quick Links** section.

**STEP 2:** If **Clairvia** is not available from the **My Quick Links** list, search for it using the **Search** field.

**STEP 4:** Once the link is located, click the **Add** button to the right of the link to add it to **My Quick Links** section.



The screenshot shows a 'Quick Links' interface. At the top right is a button labeled 'Add Custom Link'. Below it is a search bar with the text 'Clairvia' entered. Under the search bar is a list of results, with 'Clairvia' appearing twice. To the right of the list is a small blue square button with a white plus sign.



**STEP 5:** Select the **Clairvia Link**, then login with **Cerner Millennium Username** and **Password**.

**STEP 6:** Select the blue **Clairvia** folder.

**STEP 7:** Select **Clairvia Web**.

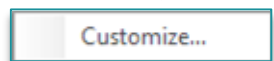


### Add a Clairvia Link to PowerChart Toolbar

**STEP 1:** Open **Clairvia** using the typical link.

**STEP 2:** From the browser window, highlight the URL and press **CTRL+C** on the keyboard to copy.

**STEP 3:** From **PowerChart**, right-click in the toolbar area at the top of the screen and click **Customize**.



- The **Customize Tool Bar** window will display.

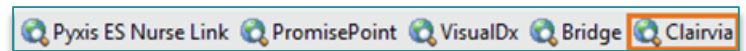
**STEP 4:** Click the **Add** button.

- The **Add User Links** window will display.

**STEP 5:** Type a name for the link that will display on the **Toolbar** (i.e., Clairvia).

**STEP 6:** Paste the URL into the URL field by pressing **CTRL+V** on the keyboard.

**STEP 7:** Click **Ok**.



- The **Clairvia** link will now display on the **Link** toolbar in **PowerChart**.

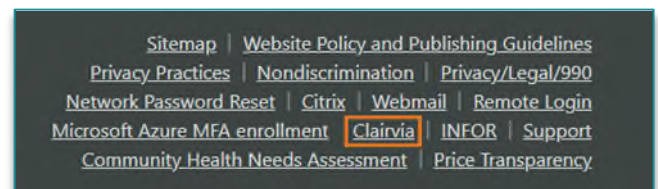
**STEP 8:** Exit PowerChart using the **Exit Door** button from the toolbar to save changes.

## Home Access

### Northern Light Hospital Internet Page

#### ➤ Open Northern Light Health Home Page

- Scroll to the bottom.
- Select Clairvia



**NOTE:** This login method will not show any PHI. Access to patient information is limited to onsite and secure domains.

### Mobile App

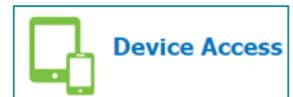
Cerner Staff Manager mobile app is available for Apple and Android phones. Not all features are available through the mobile app. For full functionality, use Clairvia Web.

**NOTE:** Users installing Cerner Staff Manager for the *first time* will need to complete steps 1 and 2 before logging into the app on their phones.

## Team Scheduling Guide

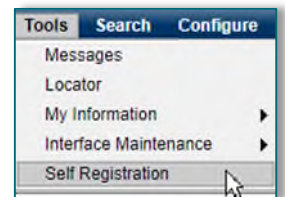
### First Time Application Set Up

**STEP 1:** Request an access code through Cerner Central. Navigate [here](#) to initiate the request.



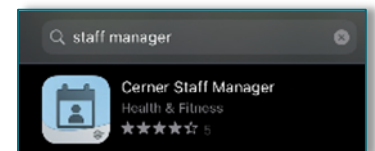
- This request can only be completed from the intranet site.
- Access Code requests are approved within three business days and will expire after seven days.

**STEP 2:** Navigate to **Clairvia Web**, select the **Tools** menu, and select **Self Registration**. In the **Self Registration** window, select **Generate** to produce **Unique Key**.

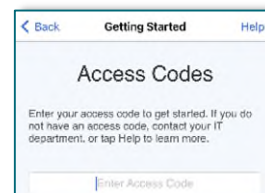


- Need to enter this key the first time the app is opened.
- This key does not expire.

**STEP 3:** Access the application store on Apple or Android device, search **Cerner Staff Manager**, and download the application.

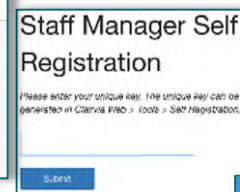


**STEP 4:** When the application is opened for the first time, users will be prompted to input an **Access Code**.

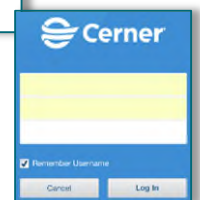


- Input the access code provided by NLH Security in Step 1.

**STEP 5:** Enter the **Unique Key** produced in **STEP 2**.



**STEP 6:** Enter **Cerner Username** and **Password**, then select **Log In**.



- Check the box next to **Remember Username** to save the username for future use.

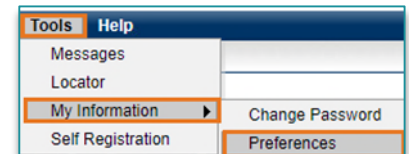
**NOTE:** A PIN can be created to make logging in easier.

## Recommended Settings

➤ Select **Tools** from the menu bar.

- **My Information.**
  - **Preferences.**

**NOTE:** Clairvia uses Single Sign-on, passwords cannot be changed within the application.



➤ If preferred contact information is not shown, update Infor Global HR.

## Email Notifications

### Opportunity, Shift Swap Notifications

➤ Email notifications can be sent to personal and work emails depending on preferences selected.

- Check **Enable Email Notifications**.
- Select preferences: **Personal** and/or **work Email**.
- **Schedule Notification**: Sends notification when your schedule changes once it is published. May not be enabled on all units.
- **Request Notification**: Sends an email summarizing the requests you submit. It includes only the start date of the request. Only the first date of multi-day requests (same shift on consecutive days) will be included in the request notification email.
- **Shift Swap Notification**: Notifies if you are invited to swap a shift. Still need to login to accept if you choose to. This is **Recommended**.
- **Opportunity Notification**: Notifies when an opportunity is approved, updated, or denied with an email stating status has been changed please login and review the change. This is **Recommended**.

	Schedule Notification	Request Notification	Shift Swap Notification	Opportunity Notification
@personalemail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
@workemail.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**NOTE:** Whenever a notification is received, login to Clairvia and review the schedule to see all changes.

## Shift Alerts

### Phone, Text Message, Email

➤ If shift alerts are used on the unit, staff can receive notifications of urgent needs in the form of a phone call, text message, or email. These shifts are first come first serve and can be accepted directly from the alert message through a link.

- Check **Enable ShiftAlerts**.
- Select which units can send shift alerts.
- Select preferences: **Personal** and/or **work, phone call, text, Email**.

	Phone Call	Text Message	Email
@personalemail.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
@workemail.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**NOTE:** Hold CTRL to select multiple profiles.

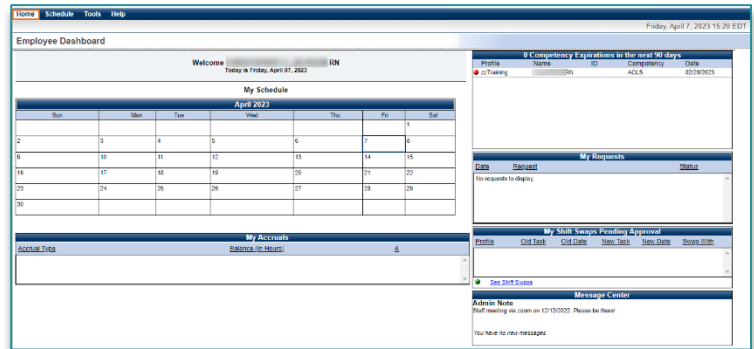
## Team Scheduling Guide

### Employee Dashboard

#### Home Screen

- This screen will give an overview of the schedule, but no details. Does not show start and stop times of the shift. If there are any assignment notes for a particular shift, they will not show.
- **Accrual Type:** Updates once a pay period to give to a general idea of PTO amounts.
- **Competencies in the Next 90 Days:** Competencies required for position, currently only licensing information from HR at this time.
  - **Yellow Dot:** Competency about to expire.
  - **Red Dot:** Competency has already expired.
- **My Requests:** This will show future requests and current status.
  - Click a request to navigate directly to the **My Request** page for that date.
- **My Opportunities:** Any opportunities signed up for that are pending manager review.
  - Click an opportunity to add comments or cancel the request.
  - **See Opportunities** hyperlink will direct to all open opportunities.
- **My Shift Swap Pending Approval:** Shows pending shift swaps that have been accepted by another employee but are pending manager review.
  - **See Shift Swap** hyperlink will direct to the weekly schedule view where shift swaps can be managed.
- **Message Center:** Includes messages for opportunities or shift swaps.
  - **Admin Note:** information from the manager about the unit.
  - Open message to accept a swap or opportunity.

**NOTE:** If an opportunity or swap message is deleted, it cannot be recovered.



### My Requests


The **My Request** page is used to submit requests for future working shifts and days off. Other employee's requests can be viewed and compared to already scheduled assignments.

- Check the Team Scheduling Calendars [HERE](#) for information on when you can make requests.

**NOTE:** To view the final schedule and all available details, use the My Schedule pages.



**Request Status Key**

- Shifts Already on the Schedule – **Show up in Gray.**
- New – Code (N), appears in the Request Sidebar only. Unsaved request.
- Pending – **Code (P) White Italic Text within a Dark Blue Cell**
- Approved – **Code (A) White Italic Text within a Dark Green Cell**
- Denied – **Code (D) White Italic Text within a Dark Red Cell**
- Wait Listed – **Code (WL) White Italic Text within an Orange Cell**
- White Envelope -  A request that includes a note to the scheduler.

**Creating Requests**

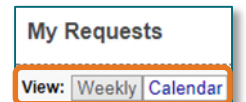
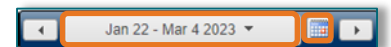
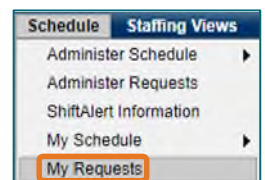
**STEP 1:** From the Employee Dashboard in Clairvia Web, click the **Schedule** option from the toolbar, and then click **My Requests**.

- The **My Requests** Page opens.

**STEP 2:** Navigate to the appropriate schedule date range by using the calendar dropdown or icon.

**STEP 3:** Choose between the Calendar View or Weekly View:

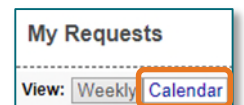
- **Calendar View:** High-level view. Requires users to select dates first and then choose the type of task to request.
- **Weekly View:** Detailed view. Allows users to submit different type of requests without choosing a date first. Displays only the tasks available for request so some schedule data may be omitted from this view.

**Calendar View**

**STEP 1:** From the calendar grid on the right of the **My Requests** page, click to select the date which you want to request shifts/tasks.

- The selected dates are highlighted in yellow and populate the **Request Sidebar** on the left side of the screen. Select a highlighted day again to deselect it.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5	Apr 6
Apr 7	Apr 8	Apr 9	Apr 10	Apr 11	Apr 12	Apr 13



**STEP 2:** From the **Select Tasks** pane in the lower left of the window, click the + sign next to an Assignment Group (1 Day, 2 Evening, 5 Non-Productive, etc.) to see shifts/tasks available for request.

# Team Scheduling Guide

- If the Assignment Group is **unavailable**, as indicated by the – sign, confirm the following:

- No filters are applied.
- It is an open request period, per the unit's Team Schedule Calendar.
- Confirm with unit manager user is in the correct **Team Scheduling** group.

**STEP 3:** Select the desired task from the available list.

**NOTE:** If the desired task is dithered (grayed-out), that task is no longer available on one or more of the dates selected in the calendar.

**STEP 4:** Click **Select**.

- The **Select Tasks** pane changes to the **Note to Scheduler** window.

**STEP 5:** Type an optional note to the scheduler regarding the shifts/tasks requested if necessary.

- The note will be added to any request highlighted blue in the **Date: Status** pane.

**STEP 6:** When complete, select the **Save** button.

- The Calendar view will refresh to display the newly submitted requests.

**NOTE:** Requesting PTO/R-days is done in the same way (R-days are non-PTO days off). Simply choose the desired date and request the desired PTO task/shift from the "Non-Productive" Assignment Group.

## Weekly View

**STEP 1:** Scroll to find the task (row) and Date (column) for request. Select the cell(s).

- The selected cells will highlight in yellow and populate the **Request Sidebar** on the left side of the screen. Select a highlighted cell again to deselect it.

**A: Open tasks/shifts** will be seen as a white box.

**B: Closed/full tasks/shifts** will be seen as a gray box.

**C: Selected tasks/shifts** will highlight yellow.

**STEP 2:** Review selections highlighted in blue on the Request Sidebar.

**STEP 3:** Document any notes in the **Note to Scheduler** box.

- The note will be added to any request highlighted blue in the Request Sidebar.

**STEP 4:** When complete, select the **Save** button.

**NOTE:** If unable to request a task, confirm the following:

- No filters are applied.
- It is an open request period, per the unit's Team Schedule Calendar.
- Confirm with unit manager user is in the correct Team Scheduling group.

### Tools Supporting Team Scheduling:

#### Sort By

- Each request view defaults to sort by "Task" and viewing by employee is also an option.
  - Calendar View: Changing the sort option to **Employee** changes the label of the request to start with the employee name instead of the task name.
  - Weekly View: Changing the sort option to **Employee** shows all information by employee instead of task.
    - To make requests in this format, select the date and then the task from the **Select Tasks** pane and assignment groups similar to submitting requests through Calendar View.

#### Show Menu

- Select the Show dropdown menu.
  - Check ☒ **Show Only Request** to see just requests, no schedule information.
  - Check ☒ **Show Only My Schedule** to see only your requests and schedule.

**NOTE:** If neither box is checked, then all employee schedules and requests for that unit will display. In the Weekly View, this can be used to see when other staff are working/requesting to help create a more balanced schedule. In Calendar View, if there is too much information to be displayed, click the "Details" link on a day to see more.

### Projected Paid Hours Window

- Select Project Paid Hours hyperlink. [Projected Paid Hours](#)

Date	Hours
06/04/2023 - 06/10/2023	12
06/11/2023 - 06/17/2023	16

The **Projected Paid Hours** window will help track scheduled hours and the total hours of approved and pending requests. The hours shown include both worked time and paid time off.

- When making requests for preferred schedule, sign up for only as many hours as expected to work each week.

## Team Scheduling Guide

### Skill Coverage Window

- Select Skill Coverage hyperlink. [Skill Coverage](#)

The **Skill Coverage** window gives an overall view of staffing per skill set for the week in view. The higher the number, the more requests have already been submitted for that date and time.

Thu	Fri
1 [Empl Name]: 0700 1930 RN [0700-1430]	2 <a href="#">Oppty: 0700 1930 RN</a>

- Select the appropriate week within the dropdown.
- Check Include Pending Requests.
  - **Black** text means **Targeted** number of staff.
  - **Blue** text means **Understaffed**.
  - **Red** text means **Over Staffed**.

Week 1: Apr 16 - Apr 22 2023	Shift	Skill	04/16/2023	04/17/2023	04/18/2023	04/19/2023	04/20/2023	04/21/2023	04/22/2023
<input checked="" type="checkbox"/> Include Pending Requests	0700 1500	RN	0.00	4.00	6.00	2.00	2.00	2.00	2.00
	1500 1900	RN	0.00	4.00	6.00	2.00	2.00	2.00	2.00
	1900 2300	RN	0.00	0.00	0.00	1.00	1.00	0.00	0.00
	2300 0700	RN	0.00	0.00	0.00	1.00	1.00	0.00	0.00

### Profiles

If employees have alternate jobs in other profiles (units), they may be able to submit requests to work directly in that profile.

- Select the Profile dropdown menu and switch to a Secondary Profile to make requests in another unit.

Profile: E\_H3SSU - 2376

Primary Profile  
 E\_H3SSU - 2376  
 Secondary Profiles  
 E\_Merritt 3 Surgical - 2081

Filter: (none) Setup...

### Filters

Filters can be created to limit the information visible on any web page. Once turned on, the filter will affect all pages in **Clairvia Web** until it is turned off. Filters may not be available on all units.

**NOTE:** Filters should be used with caution. If a filter is turned on when viewing requests, the filter will remain on when switching to view the schedule. Always turn a filter off when finished by setting it to the (none) option.

### Request Definitions

When making requests, staff will select from various shift types to indicate their request type.

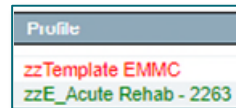
- **R Day:** Requested Days off that do not count against PTO or total projected paid hours.
- **PTO:** Paid Time Off
- **Availability Tasks:** Shifts/work time open within skill set. Often used by per diem staff.

## My Schedule

Use the **My Schedule** screens to view the completed schedule. These screens show all details for employee assignments.

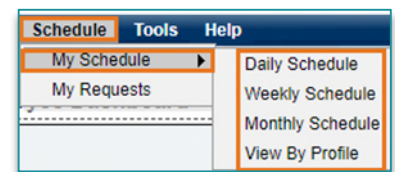
### Schedule Key

- **[Empl Name] 0700 1930 RN** = Scheduled Assignment. Employee Name is first, followed by the names of the shift.
- **[Empl Name]:0700 1930 RN [0700-1430]** = Modified start and end times for a shift are shown in brackets [ ].
- **Yellow Highlight** = Assignment Note, hover to read.
- **<>** or **<<>>** = Jump to a different period.
- **Red text** = Employee Floating into the unit.
- **Green text** = Employee floating out of the unit.
- **Oppty:** = Opportunity for an extra shift.
- **!** = Shift alert.
- **(O)** = Shift awarded through an opportunity.
- ☒ **Show Opportunities** = Quick filter to see opportunities in the Monthly or Weekly view.
- ☒ **Show Only My Schedule** = Quick filter to see the full unit schedule or only the user's schedule.
- ☒ **Show Shift Swaps** = Quick filter to see swaps pending manager approval.
- Filter: (none) Setup... = Indicates if a filter is applied to the view. Set to (none) to see the full schedule.
- **Printable View** = Allows users to print the schedule if necessary.



### Schedule Views

- Select Schedule from the toolbar.
- Select My Schedule.
- Select preferred view; Daily, Weekly, Monthly, or By Profile.
  - [Monthly Schedule](#): Pick up opportunities.
  - [Weekly Schedule](#): Initiate a shift swap, pick up opportunities, three sorting options.
  - [Daily Schedule](#): Shows employee's home unit schedule only.



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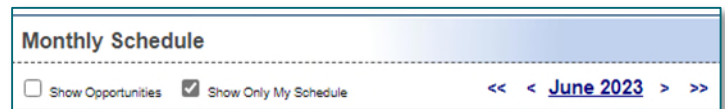
- [View By Profile](#): Shows float unit schedules. Useful for staff with alternate jobs in other units.

## Monthly Schedule

➤ This will show the schedule for a calendar month.

➤ Options from Monthly Schedule view Include:

- View only your schedule or view the full schedule for home department.
- Change the date range:
  - [<>](#) = jump by one month.
  - [<<>>](#) = jump by one year.
- View assignment notes by hovering over a yellow assignment.
- See opportunities to pick up extra shifts.
- Click the underlined date in the calendar grid to switch to the weekly view.

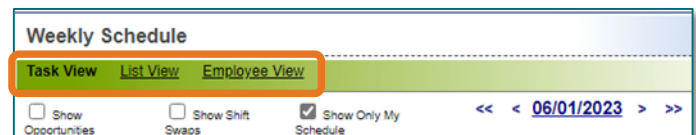


Hover on yellow assignments to see any notes.

## Weekly Schedule

➤ This shows one week of the schedule and offers the most functionality.

- Sunday – Saturday.
- It offers three different sorting options.



## Task View

Default view shows assignments in a grid with the task name in the first column. Sorted in a custom order controlled by unit schedulers.

➤ Options from Weekly Schedule: Task View include:

- View only your schedule or view the full schedule for home department.
- Change the date range:
  - [<>](#) = jump by one week.
  - [<<>>](#) = jump by one month.
- Initiate a shift swap with another employee.
  - (Only available in this view!)
- See opportunities to pick up extra shifts.
- View assignment notes by hovering over a yellow assignment.
- Click in a cell to switch to the daily view.

Task <a href="#">Show Definitions</a>	Skill	Sun 06/04/2023	Mon 06/05/2023
0700 1530	NM		*AIAAddin-NM
0700 1530	ANM	*JHoppes-ANM	*JHoppes-ANM
0700 1930 CHG	CHG	<a href="#">Oppty</a>	*WDarling-CHG
0700 1930	RN	*PPan1-RN <a href="#">Oppty</a>	*BRose-RN <a href="#">[Empl Name]-RN</a>
0700 1930	CNA/ NT	*MWazowski- CNA/NT	*MWazowski- CNA/NT

Hover on yellow assignments to see any notes.  
Right-click on your assignment to initiate a swap.

**NOTE:** Assignments floated to another unit will appear at the bottom of the Task View.



**List View**

Lists all employee assignments by date, skill, and start time.

➤ **Options from Weekly Schedule: List View include:**

- View the full schedule for home department.
- See all assignment notes without hovering.

Weekly Schedule: List View								
Task View <b>List View</b> Employee View								
<< < 06/05/2023 > >>								
Date	Employee	Skill	Assignment	Task	Start	End	Profile	Assignment Notes
06/05/2023	*Rose, Briar	RN	1 E_Day	0700 1930	700	1930	zzTraining	
06/05/2023	*Employee Name, .	RN	1 E_Day	0700 1930	700	1430	zzTraining	Assignment Notes appear here. Adjusted shift times appear in the Start & End columns.
06/05/2023	*Addin, Al	NM	1 E_Day	0700 1530	700	1530	zzTraining	
06/05/2023	*Hopps, Judy	ANM	1 E_Day	0700 1530	700	1530	zzTraining	
06/05/2023	*Darling, Wendy	CHG	1 E_Day	0700 1930 CHG	700	1930	zzTraining	
06/05/2023	*Wonderland, Alison	US	1 E_Day	0700 1530	700	1530	zzTraining	
06/05/2023	*Wazowski, Mike	CNA/NT	1 E_Day	0700 1930	700	1930	zzTraining	
06/05/2023	*Wilde, Nick	US	2 E_Evening	1500 2330	1500	2330	zzTraining	
06/06/2023	*Darling, Wendy	RN	1 E_Day	0700 1930	700	1930	zzTraining	
06/06/2023	*Rabbit, Peter	RN	1 E_Day	0700 1930	700	1930	zzTemplate EMMC	Red Font = Employee Floating In   Green Font = Employee Floating Out
06/06/2023	WASSON, ROBIN	RN	1 E_Day	0700 1930	700	1930	zzTraining	
06/06/2023	*Addin, Al	NM	1 E_Day	0700 1530	700	1530	zzTraining	
06/06/2023	*Wonderland, Alison	US	1 E_Day	0700 1530	700	1530	zzTraining	
06/06/2023	*Wazowski, Mike	CNA/NT	1 E_Day	0700 1930	700	1930	zzTraining	
06/06/2023	*Wilde, Nick	US	2 E_Evening	1500 2330	1500	2330	zzTraining	
06/07/2023	*Addin, Al	NM	1 E_Day	0700 1530	700	1530	zzTraining	
06/07/2023	*Darling, Wendy	ANM	1 E_Day	0700 1530	700	1530	zzTraining	
06/07/2023	*Wonderland, Alison	US	1 E_Day	0700 1530	700	1530	zzTraining	

**Employee View**

Shows assignments in a grid with the employee name in the first column. Sorted alphabetically.

➤ **Options from Weekly Schedule: Employee View include:**

- View the full schedule for home department.
- See the full schedule for each employee in one row.

Weekly Schedule: By Employee							
Task View List View <b>Employee View</b>							
<< < 06/05/2023 > >>							
Employee	Sun 6/4/23	Mon 6/5/23	Tue 6/6/23	Wed 6/7/23	Thu 6/8/23	Fri 6/9/23	Sat 6/10/23
*Rose, Briar ["BRose]		0700 1930 RN:RN					
*Wazowski, Mike ["MWazowski]	0700 1930 CNA/NT:CNA/NT	0700 1930 CNA/NT:CNA/NT	0700 1930 CNA/NT:CNA/NT				
*Wilde, Nick ["NWilde]		1500 2330 US:US	1500 2330 US:US	1500 2330 US:US	1500 2330 US:US	1500 2330 US:US	
*Wonderland, Alison ["AWonderland]		0700 1530 US:US	0700 1530 US:US	0700 1530 US:US	0700 1530 US:US	0700 1530 US:US	
Employee Name, . [[Empl Name]]		0700 1930 RN [0700-1430]:RN			(O) 0700 1930 RN:RN		

Hover on yellow assignments to see any notes.

**Daily Schedule**

This will show the schedule for a single day.

# Team Scheduling Guide

## ➤ Options from Daily Schedule include:

- View the full daily schedule for home department.
- Change the date range:
  - < > = jump by one day.
  - << >> = jump by one week.
- See all assignment notes without hovering.

Daily Schedule							
<< < 06/10/2023 > >>							
Employee	Skill	Assignment	Task	Start	End	Profile	Assignment Notes
*Gale, Dorothy	RN	1 E_Day	0700 1930	700	1930		Assignment notes appear here.
*Rabbit, Peter	RN	1 E_Day	0700 1930	700	1930	zzTemplate EMMC	Red = Float In
*Cricket, James	RN	1 E_Day	0700 1930 RN	700	1930	zzE_Acute Rehab - 2263	Green = Floating Out

## View by Profile

This view allows users to see a calendar view of the full schedule for departments they have permission to float to. The employee's schedule will appear in blue text.

Profile: **zzTraining**

Primary Profile

zzTraining

Float Profiles

zzTemplate EMMC

## ➤ Options from View by Profile include:

- View the full schedule for float departments or view only your schedule.
- Change the **Profile** to view the schedule for float unit(s).
- Change the date range:
  - < > = jump by one month
  - << >> = jump by one year
- View assignment notes by hovering over a yellow assignment.
- Click an underlined date in the calendar grid to switch to the weekly view.
- Click the underlined **W#** in the calendar grid to view the weekly skill coverage.

View By Profile						
Profile: zzTraining						
<< < June 2023 > >>						
Options <input type="checkbox"/> Show Only My Schedule						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
May 28 (O) [Empl Name]: 0700 1930 RN *JHoppes: 0700 1530 ANM *BRose: 0700 1930 CHA/NT	May 29 *VDarling: 0700 1930 RN *AIAddin: 0700 1530 US *WVilde: 1500 2330 US	May 30 *VDarling: 0700 1930 RN *AIAddin: 0700 1530 US *WVilde: 1500 2330 US	May 31 *AIAddin: 0700 1530 NM *WVonderlan: 0700 1530 US *WVilde: 1500 2330 US	Jun 1 [Empl Name]: 0700 1930 RN <0700-1430> *AIAddin: 0700 1930 Chg Nurse *WVonderlan: 0700 1530 US *MVazowski: 0700 1930 CHA/NT *WVilde: 1500 2330 US	Jun 2 *PPant: 0700 1530 ANM *AIAddin: 0700 1930 Chg Nurse *WVonderlan: 0700 1530 US *MVazowski: 0700 1930 CHA/NT *WVilde: 1500 2330 US	Jun 3 (O) [Empl Name]: 0700 1930 RN *JHoppes: 0700 1530 ANM *MVazowski: 0700 1930 CHA/NT
Jun 4 *PPant: 0700 1930 RN *JHoppes: 0700 1530 ANM *MVazowski: 0700 1930 CHA/NT	Jun 5 *BRose: 0700 1930 RN [Empl Name]: 0700 1930 RN <0700-1430> *AIAddin: 0700 1530 NM *JHoppes: 0700 1530 ANM *VDarling: 0700 1930 Chg Nurse *WVonderlan: 0700 1530 US *MVazowski: 0700 1930 CHA/NT *WVilde: 1500 2330 US	Jun 6 *VDarling: 0700 1930 RN *PRace: 0700 1930 RN (zzTemplate EMMC) *AIAddin: 0700 1530 NM *WVonderlan: 0700 1530 US *MVazowski: 0700 1930 CHA/NT *WVilde: 1500 2330 US	Jun 7 *AIAddin: 0700 1530 NM *VDarling: 0700 1530 ANM *WVonderlan: 0700 1530 US *CPEARSON: 1500 2330 RN *WVilde: 1500 2330 US	Jun 8 *CRobin: Available Day (O) [Empl Name]: 0700 1930 RN *VDarling: 0700 1530 ANM *AIAddin: 0700 1930 Chg Nurse *WVonderlan: 0700 1530 US *WVilde: 1500 2330 US	Jun 9 *CRobin: Available Day *AIAddin: 0700 1930 Chg Nurse *WVonderlan: 0700 1530 US *MVazowski: 0700 1930 CHA/NT *WVilde: 1500 2330 US	Jun 10 *CRobin: Available Day *DGate: 0700 1930 RN *PRace: 0700 1930 RN (zzTemplate EMMC) *JHoppes: 0700 1530 ANM



## Opportunities

- **Opportunities are holes on the schedule that need to be filled. Staff can volunteer for these extra shifts if they meet the following criteria:**
  - Have the necessary settings enabled by the manager:
    - Permission to pick up opportunities on home unit or float unit(s).
    - Float access to the unit where the opportunity exists.
  - Have the skill required for the shift (RN, CHG, CNA, etc.).
  - Are not already scheduled on an overlapping shift.
- **There are two types of Opportunities:**
  - **Consider Me:** Multiple employees can volunteer for this opportunity. Managers or schedulers will decide who is granted the shift and respond via Clairvia Web notification.
  - **Schedule Me:** The first employee to volunteer for the opportunity is awarded the shift and placed directly on the schedule.

Tue	
16	<a href="#">Oppty: 0700 1930 RN</a>

### Volunteering for Opportunities in Clairvia Web

Employees can view opportunities in Clairvia Web on the My Schedule [Weekly](#) or [Monthly](#) screens or through the [Mobile App](#). The dashboard widget shows **Consider Me** opportunities pending manager approval.

**STEP 1:** Click **See Opportunities** on the Employee Dashboard.

**STEP 2:** Confirm the “Show Opportunities” box is checked.

**STEP 3:** Click the hyperlink for the opportunity in either the calendar grid or the opportunity list. This will open the **Opportunity** Window.

**STEP 4:** Click **Consider Me** or **Schedule Me**.

- Can cancel a **Consider Me** request until the manager has approved.

My Opportunities				
Profile/Service	Date	Task	Status	
zzTraining	06/02/2023	0700 1930 RN	Pending	
<a href="#">See Opportunities</a>				

View/Select Opportunity

Facility: EMMC

Date: 06/02/2023

Start Time: 7:00 AM

Profile/Service: zzTraining

Task: 0700 1930 RN

End Time: 7:30 PM

General comments from the scheduler

Legal comments from the scheduler

By clicking the Request button below, you are requesting to be considered to work this shift. If a manager selects you to work this shift, a status change will appear on your employee dashboard. You will be notified when you are actually scheduled for this shift.

Optional note to the scheduler here: (1024 characters maximum)

Close

Consider Me

Remove From List

Cancel My Request

**NOTE:** Check notification preferences to ensure alerts are sent when an opportunity is updated. Upon receipt of a Clairvia notification, login to Clairvia and review the schedule to see all changes.

## Team Scheduling Guide

### Shift Alerts

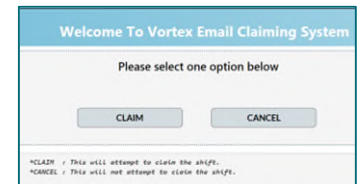
A Shift Alert is an urgent opportunity that needs to be filled. It is identified with a (!) icon on the schedule. Depending on notification preferences, can receive shift alerts as emails, texts, or phone calls. These shifts are awarded to the first employee that accepts them.

➤ **When the employee receives the email:**

**STEP 1:** Open email and follow **Click Here** link or paste the URL into the browser.

**STEP 2:** Click **Claim** or **Cancel**.

- The first employee to **Claim** will receive notice on the screen of being awarded the shift.
- A follow-up email will be sent acknowledging the shift has been added to the schedule.
- Subsequent employees will receive a pending message on the screen and a follow-up email that the opening is no longer available.



**NOTE:** Click this link to set up [Notification Preferences](#) for above messages to be received.

### Shift Swap

Once the schedule is finalized, staff can swap shifts in Clairvia Web on the My Schedule [Weekly](#) screen or through the [Mobile App](#). Only working shifts can be swapped, not benefit time.

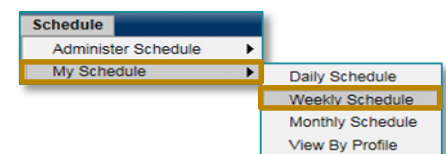
Common guidelines for swaps:

- Swaps require manager approval.
- An employee must accept a swap invitation in Clairvia before a manager can approve it.
- Swaps can be initiated between shifts on the same day.
- Swaps are not allowed 8 hours before the start of the shift.
- Users can opt-in to receive notifications about swaps.
- Use caution when initiating or accepting a swap so not to create conflicts with existing schedule.

#### Requesting a Shift Swap in Clairvia Web

**STEP 1:** From the toolbar, click **My Schedule** and then **Weekly Schedule**.

**STEP 2:** Right-click the desired shift to swap from the **Weekly Schedule** grid.



**STEP 3:** Click the **Request Shift Swap** option.

**STEP 4:** The **Shift Swap** window opens.

- Schedule is shown at the top.
- Employees eligible to swap are highlighted with a light blue background.

Task	Skill	Sun 05/20/2018	Mon 05/21/2018	Tue 05/22/2018
0700 1530	NM			
0700 1930	RN	ZZRN02-RN	ZZRN02-RN	Pending Oppty
0700 1930	CNA/ NT		Request Shift Swap	

**NOTE:** Clairvia has very few limitations around swaps. Just because it believes an employee is eligible to swap, does not mean they should. Example: Confirm you have the skill to work the shift being swapped and that you are not already scheduled to work that day.

**My Schedule**

Sun 05/20/2018	Mon 05/21/2018	Tue 05/22/2018	Wed 05/23/2018	Thu 05/24/2018	Fri 05/25/2018	Sat 05/26/2018
0700 1930 RN	0700 1930 RN			0700 1930 RN		

Click light-blue cells to select people to invite. Click Cancel to cancel the swap.

Task	Skill	Sun 05/20/2018	Mon 05/21/2018	Tue 05/22/2018	Wed 05/23/2018	Thu 05/24/2018	Fri 05/25/2018	Sat 05/26/2018
		zzTraining						
0700 1930	RN	ZZRN02	ZZRN02	Train1 ZZRN01 ZZRN03	ZZRN01 ZZRN04	ZZRN02	Train1 ZZRN01 ZZRN03 ZZRN04	Train1 ZZRN01 ZZRN03 ZZRN04

Shift Selected for Swap: 0700 1930 Skill: RN Profile: zzTraining Date: 05/24/18

Buttons: **Swap Selected Shifts**, Reset, Cancel

**STEP 5:** Click one or more eligible employees.

- The blue background turns to grey to show the employees selected.

**STEP 6:** Click the **Swap Selected Shifts** button.

- This sends the invitations and closes the **Shift Swap** window.

The **Weekly Schedule** page refreshes to show the status of the swap:

- (RS): Requested Shift Swap
- (S): Swap Invitee
- (PSM): The Swap Invitee has accepted, and the swap is pending manager review.
- (CS): Completed Swap

### Accepting/Declining Shift Swap Requests in Clairvia Web

(For information on Swaps in Mobile click [HERE](#))

**STEP 1:** On the **Employee Dashboard**, locate the swap invitation under the **Message Center** widget.

**STEP 2:** Select the hyperlink to open the message. Accept or decline the swap.

- Once accepted, two notifications happen automatically.
  1. The swap initiator will be alerted that the invitation was accepted.
  2. The unit manager will be alerted that there is a swap pending review.

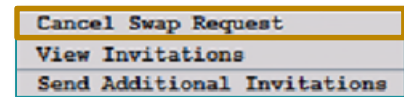
## Team Scheduling Guide

### Canceling a Shift Swap

**STEP 1:** From the **Schedule** menu, click **My Schedule**, and then **Weekly Schedule**.

- This opens the **Weekly Schedule** page.

**STEP 2:** Right-click the cell containing the (RS) code and select **Cancel Swap Request** option.



**NOTE:** Once a manager has approved a swap, the swap can no longer be canceled; however, a new shift swap can be created to “undo” the previous swap. If an invited user does not accept/decline the swap before a specified period, the invitation automatically expires. Invitations expire 10 minutes before midnight the day before the first swapped shift was supposed to take place.

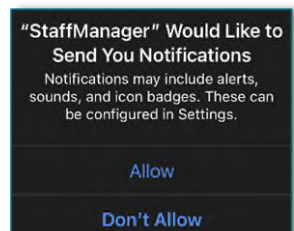
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## Using Cerner Staff Manager Mobile App

### Using the Cerner Staff Manager App

➤ Notifications Preferences:

- **Allow** will turn on push notifications so users receive a message regarding schedule changes. Users will need to remain logged into the app to receive these notifications.
- **Do not Allow** will only show users notifications when the app is open.



➤ Apply filters such as unit, request status, opportunity type, and shift swaps, by selecting the filter  icon.

**NOTE:** Filters will remain applied until removed. When filters are applied, a Filter Applied message will populate to the top of the screen. No Filter Applied will populate when filters have been removed.





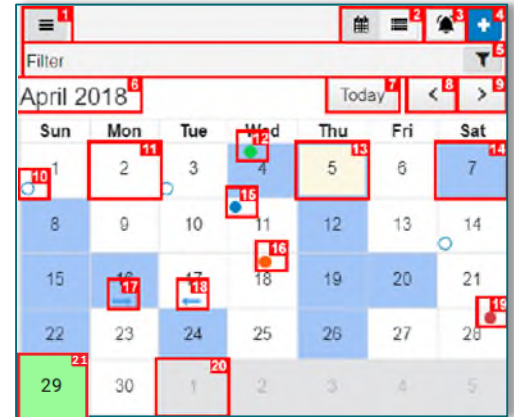
### Navigating Calendar View in Cerner Staff Manager









➤ The current month will display upon opening the application. The number displayed in the below bullet points corresponds with the numbers within the calendar image.

- 1: **Menu:** Displays the following options:
  - **Security Settings:** Allows you to manage your PIN for login.

- **Logout:** Logs out of Staff Manager and opens the **Log In** page.
- **2: Calendar or List View:** Toggles between Calendar View or List View.
  - **Calendar View:** Displays as calendar, like the screenshot displayed.
  - **List View:** Displays schedule as list of tasks.
- **3: Notification Button:** Opens the notification screen.
  - **Notifications (None)** : If all notifications have been read, the bell is white.
  - **Notifications (New)** : If unread notifications are present, the bell is black.



**NOTE:** Users will need to remain logged into the app to be alerted for push notifications. Otherwise, the in-app notification will be seen when users log in.

- **4: Add Request Button** : Select to make requests for work shifts or PTO.
- **5: Filter Bar:** Select to apply or remove filters.
- **6: Month in view**
- **7: Today Button:** Returns calendar to month with current date. Today will be dithered if the current month is in view
- **8: Previous Month Button**
- **9: Next Month Button**
- **10: Open Opportunity Icon** 
- **11: Free Date:** Date with no scheduled tasks
- **12: Approved Request Icon** 
- **13: Current date will display with yellow background if no tasks are scheduled.**
- **14: Scheduled dates display with blue background**
- **15: Pending Request Icon** 
- **16: Wait Listed Request Icon** .
- **17: Shift swap invitation sent arrow**
- **18: Shift swap invitation accepted arrow**
- **19: Denied Request Icon** 
- **20: Disabled date:** Date belongs a month before or after the current month.
- **21: PTO dates display with a green background**

## Team Scheduling Guide

### Requests in Cerner Staff Manager

- Requests can be placed within the app for work tasks, such as shifts or PTO requests.

**STEP 1:** Select the **Add Request**  button.

**STEP 2:** Select the department and desired dates for request. The cell turns blue when it has been selected.  
If a date has a gray background, it cannot be selected due to being outside of the request period.

**STEP 3:** Click **Next** to open the **Select Task** screen.

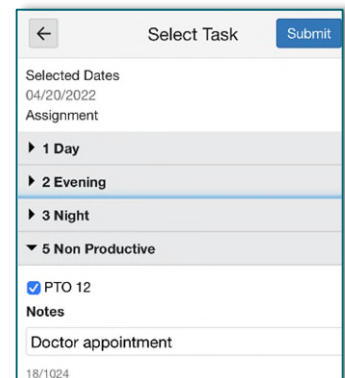
**STEP 4:** Tasks are organized by assignments. Assignments have dark blue triangles on the left, indicating the task can be expanded or collapsed. If the assignment desired is collapsed, select the triangle to expand the tasks.

**STEP 5:** Select the desired task for the request. Notes can be attached to the request for the scheduler to view by entering information into the **Notes** textbox.


- Text limit is 1024 characters within the Notes textbox.

**STEP 6:** To submit requests, select **Submit** at the top of the screen.

**NOTE:** Adjustments to the request can only be made during the request period.

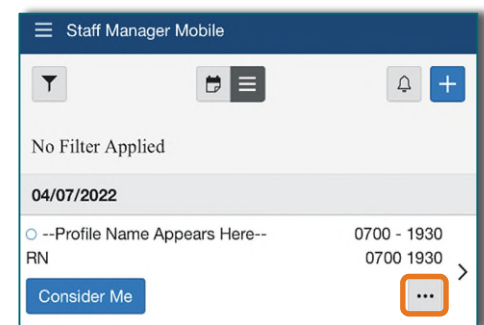


### Opportunities in Cerner Staff Manager

**STEP 1:** In Calendar view, select a date cell that contains the **Opportunity**  Icon.

**STEP 2:** Select the **action** button.

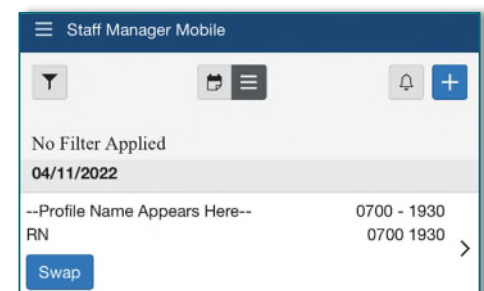
- **Consider Me:** select the “...” button to review details and apply for the opportunity. Manager approval is needed for acceptance.
- To remove the opportunity request, select the “...” button and select **Remove from List** to delete.



### Shift Swaps in Cerner Staff Manager Mobile

- Use caution when initiating or accepting a Shift Swaps.

- Only swap shifts with employees of the same skill set. (Do not swap an RN shift for a CNA shift.)
- Do not offer to swap to a day already scheduled.
- Swaps should occur within the same work week.





**STEP 1:** In **Calendar View**, select the date with the shift swap desired for swapping. The **List View** will open with the shift date selected at the top.

**STEP 2:** Select **Swap** to open the **Shift Swap Invitee List**.

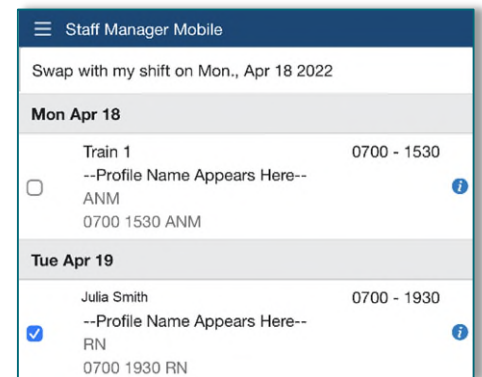
**STEP 3:** Select the **Information** icon beside the staff member's name to see how this swap would affect your schedule.

**STEP 4:** Select the checkbox beside one or more staff members to send the **Shift Swap Invite**.

**STEP 5:** Select **Swap** in the upper-right corner of the screen to send the invite.

- This will send notice to those selected and will show a **Pending Acceptance** message with an arrow icon.
- Once a colleague accepts or declines, the user will receive notification. The final step is manager approval.

**NOTE:** Users may have to refresh the notifications page by dragging the notifications screen down.



### Accepting/Declining Shift Swap Requests in Cerner Staff Manager

**STEP 1:** Open the **shift swap invitation**.

**STEP 2:** Click the **Information** icon to view current schedule compared to potential schedule if the request is accepted.

**STEP 3:** Select **Accept** or **Decline**. Notice will be sent to the requestor as well as the manager for final approval.

## FAQs

### When can I submit a request?

- Team Scheduling Calendars are available that outline the schedule dates, when requests can be submitted, and when to expect the final schedule to be available online.
  - These calendars are unique to each member organization and can be found [HERE](#)

### Why can't I make a request?

- Units may decide to limit the number of requests allowed for a particular type of shift or day to encourage staff to spread requests evenly throughout the schedule.
- Employee settings need to be updated by managers.
  - Skills: Staff can only request tasks that match their assigned skills. (RN, CHG, Resource, CNA/NT, etc.)
  - Team Scheduling Group assignments are required to request working shifts.

## Team Scheduling Guide

### Can I edit my request?

- Requests can be edited during the request period when they are in the pending (P) or waitlist (WL) stage. Once they have been approved or denied, or the request period is closed, they cannot be edited.