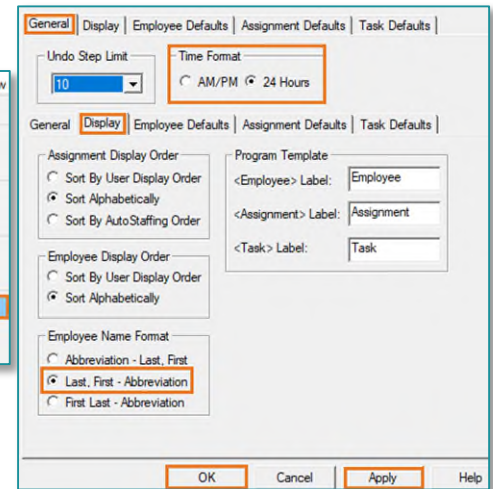
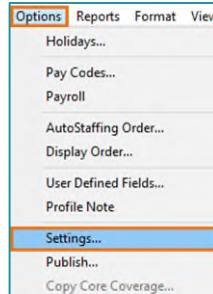


Daily Editor is the view recommended for making daily staffing edits. The guide highlights staffing edits that are recommended to be completed in Daily Editor.

Clairvia Staff Manager Recommended Settings

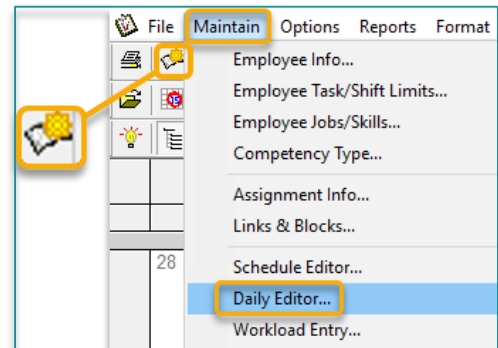
- From the **Options** menu, select **Settings...**
 - General Tab – Time Format: **24 Hours**.
 - Display Tab – Employee Name Format: **Last, First – Abbreviation**
- Click **Apply** and then **OK** to save settings.



Daily Editor Navigation

To open Daily Editor, click **Maintain** from the menu bar then choose **Daily Editor** from the dropdown menu or use the **Open Daily Editor** icon.

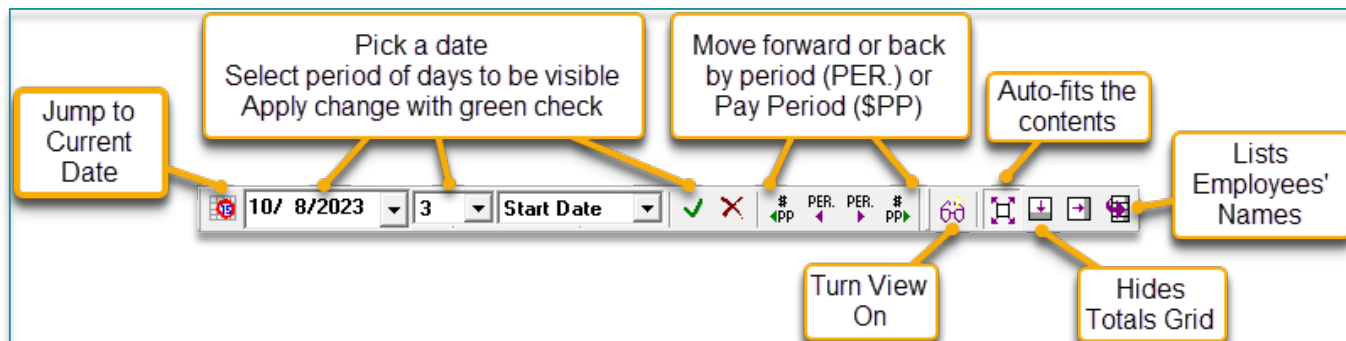
- Choose profile from dropdown.
- Sort Schedule Columns.
 - Click column headers to change sort order.
 - (A): ascending alphabetic order.
 - (D): descending alphabetic order.
 - (C): custom display order.
 - For instructions on setting up Display Order, see the [Clairvia Manager Checklist and Employee Set Up](#).
 - Click and drag column headers to change their order.



Assignment (A)	Task/Shift (D)	Skill (C)
Task/Shift (A)	Assignment (A)	Skill (A)

NOTE: The schedule is sorted by the first three columns from left to right. To hide the Assignment column, choose **View** from the menu bar and then choose **Assignment Columns** and deselect **Assignment**.

➤ Adjust view in **Daily Editor**.



NOTE: Click the icon to auto-fit content after adjusting the view to reapply.

Schedule Pane

Shows the schedule for the profile and date range selected.

➤ Hover over the cells to view:

- Employee name
- Shift time
- Assignment notes (highlighted yellow)
- Employee's home profile

Task (A)	Skill (C)	10/15 Sun3	10/16 Mon3	10/17 Tue3	
0700 1100	RN				
0700 1530	RN				
0700 1930	RN	*JCricket	*WDarling *PRabbit	*WDarling *JCricket	
0700 1930	CNA/NT	*BRose			

*Darling, Wendy - *WDarling
 Shift Time: 07:00 to 19:30 Hours: 12.00
 Note: sample assignment note
 *Rabbit, Peter - *PRabbit Profile: zzTemplate EMMC
 Shift Time: 07:00 to 19:30 Hours: 12.00

➤ The cell selected is the intersection between the white column and white row.

Employee Pane

Shows staff available for scheduling and facilitates custom views.

➤ **Profile Tab**

- Shows all employees whose home profile is the profile being viewed.

➤ **Authorized Floats Tab**

- Shows all employees who have permission to float into the viewed profile, click + to the left of profiles to see employees.

➤ **All Employees Tab**

- Shows employees in all profiles available for access, except for the profile being viewed (those employees are on the **Profile** tab), click + to the left of profiles to see employees.

➤ Find feature

- Search for employees within the current tab by employee name, skill, or abbreviation.

➤ Columns on the Profile, Authorized Float, and All Employees Tabs

- Hover over each column for more information.
- **Employee:** phone number, skill, etc.
- **A/U:** Available/Unavailable. This drives the sort order of the employee pane. Changes based on selection in the schedule pane.
- **Paid Hours:** Total hours scheduled to for the pay period.
- **Schedule:** Shows the selected in the schedule pane, and the day before, and after. Changes based on selection in the schedule pane.

Employee	A/U	Paid Hours	10/12 Thu2	10/13 Fri2	10/14 Sat2
*Darling, Wendy - *W	A	80	0700 1530 AN		
*Addin, AI - *AIAddin	U	92	0700 1930 Chg	0700 1930 Chg	0700 1930 Chg
*Cricket, James - *JCri	U	24	0700 1930 CN	0700 1930 CN	

➤ View and Task tabs

- **View Tab:** Select the assignments and skills to include in the filter.
- **Task Tab:** Only needed to add certain tasks to the filter instead of all tasks in the assignment. Will be grayed out until the **View** is turned on.
 - Click + to expand assignments.
 - Double-click tasks to add to filter.
 - Click and drag the task from the schedule pane back to the Task tab to remove from filter.
- Click the **Turn View On** icon to apply filter.

How to Edit the Schedule using Daily Editor

➤ Add employee/change employee's schedule (i.e., call in or float)

- Select the profile needed to make a schedule edit.
- Locate employee on the **Profile**, **Authorized Float**, or **All Employees** tab.
- Drag and drop the employee to the new task.

- If employee is already scheduled to a task that overlaps with the time of the new task, a **Schedule Conflict Resolution** window appears.

NOTE: **Schedule Conflict Resolution window only pops up if the new task overlaps with the original task. If this does not popup, delete or edit shift times for the original task and modify the shift times for the new task if needed.**

Schedule Conflict Resolution

*Cricket, James has the following conflict(s) when assigned to shift 0700 1930 on 10/18/2023.

Employee is already scheduled on the requested date and time.
[zzTraining] 0700 1930 RN 10/18/2023 07:00 - 19:30 (07:00 - 19:00)

Select action to take to resolve task time conflicts:

- ☐ Add new Task/Shift.
- ☐ Replace overlapping Task/Shift.
- ☒ Edit Task/Shift times.

Would you like to override the conflict and continue making the assignment?

Yes No

- There are three options:
 - **Add New Task/Shift:** Keeps original task and adds a new task.
 - **Replace overlapping Task/Shift:** Replaces original task with new task.
 - **Edit Task/Shift times:** Choosing this option opens a second **Schedule Conflict Resolution** window to update the times for both tasks or remove task.

Schedule Conflict Resolution

*Addin, AI is scheduled for the following Task/Shifts during the period 10/18/2023 to 10/20/2023.

Remove	Profile	Task/Shift	Date	Task/Shift Start	Task/Shift End	Coverage Start	Coverage End
<input type="checkbox"/>	zzTraining	0700 1530 NM	10/18/2023	7 :00	15:30	7 :00	15:00
<input type="checkbox"/>	zzTraining	0700 1930 Chg Nurse	10/19/2023	7 :00	19:30	7 :00	19:00
<input type="checkbox"/>	zzTraining	PTO1UNCHED -12	10/19/2023	7 :30	19:30	7 :00	19:00
<input type="checkbox"/>	zzTraining	0700 1930 Chg Nurse	10/20/2023	7 :00	19:30	7 :00	19:00

OK Cancel

NOTE: **Edit Task/Shift times is recommended. The selection gives the option to review and edit task/shift times if needed. Choose “remove” from the left of the task row if the original task should be deleted.**

➤ **Delete employee from schedule**

- Double-click employee’s name from the schedule pane to open the **Edit** window.
- Select employee, then right-click and choose **Deleted Selected Schedule Slots**.
- Click **Yes** to confirm.

Thu, October 12 1500 2330

Name	Shift Start	Shift End	Cov. Start	Cov. End
*NWilde	15:00	23:30	15:00	23:00
*DGale	15:00	23:30	15:00	23:00

Delete Selected Schedule Slots

Deleting Employee Schedules

Are you sure you want to delete the schedule for the following employees in shift 1500 2330 on date 10/12/2023?

*DGale

Yes No

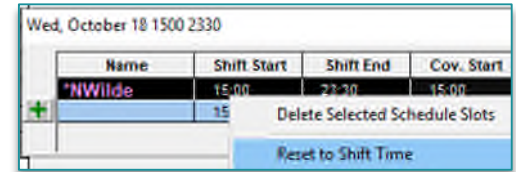
➤ **Modify shift times**

- Double-click employee’s name from the schedule pane to open the **Edit** window.
- Double-click the **Shift Start** or **Shift End** time to update. Use the keyboard to type in correct times.

Wed, October 18 0700 1930

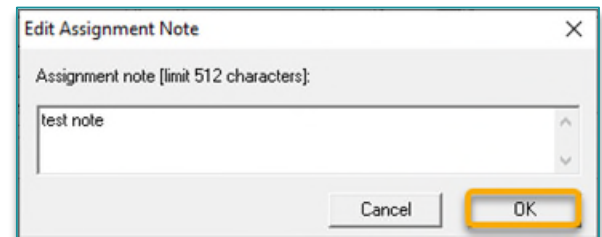
Name	Shift Start	Shift End	Cov. Start	Cov. End
*MWazowski	8:00	19:30	8:00	19:00
*DGale	7:00	19:30	7:00	19:00

- Reset shift time to default time for the task.
 - Double-click employee's name from the schedule pane to open the **Edit** window.
 - Select employee, then right-click and choose **Reset to Shift Time**.



➤ Add Notes

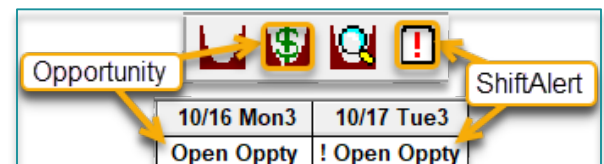
- Double-click employee's name from the schedule pane to open the **Edit** window.
- Select employee, then right-click and choose **Edit Assignment Note**.
- Add note then click **OK**.
- Assignment notes are highlighted yellow in Daily Editor and visible when hovering.



10/17 Tue3	10/18 Wed3	10/19 Thu3
	*Cricket, James - *JCricket Shift Time: 07:00 to 19:30 Note: test note	
*JCricket		Hours: 12.00

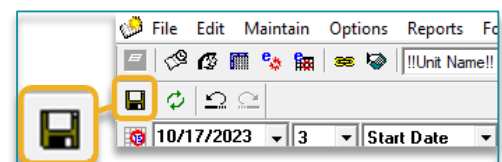
➤ Add an Opportunity/ ShiftAlert

- Drag **Opportunity** or **ShiftAlert** icon onto the schedule to the correct date and task.
- ShiftAlerts are granted to the first employee to respond.



➤ Save changes

- Click **File** from the menu bar then choose **Save Changes** from the dropdown menu or use the **Save Edits** icon.



Examples of Daily Edits

➤ Call Out Prior to Start of Shift

- Drag and drop the employee's name to the appropriate absence task.
 - Example: Travelers should be assigned to UNEA when they call in.
- Select **Edit Task/Shift times** and click **Yes**.
 - Click **Remove** for the working task.
 - Update the task/shift start and end time for the absent task if needed.
 - Click **OK**.

Schedule Conflict Resolution

*Cricket, James is scheduled for the following Task/Shifts during the period 10/16/2023 to 10/18/2023.

Remove	Profile	Task/Shift	Date	Task/Shift Start	Task/Shift End	Coverage Start	Coverage End
<input type="checkbox"/>	zzTraining	PTO1UNCHED - 12	10/17/2023	7:00	19:00	7:00	19:00
<input checked="" type="checkbox"/>	zzTraining	0700 1930 RN	10/17/2023	7:00	19:30	7:00	19:00

OK Cancel

➤ Float to Another Unit

- Select the profile where the employee will float to first.
- Locate employee on either the **Authorized Float** or **All Employees** tab.
- Drag and drop the employee's name to the appropriate task.
- Select **Edit Task/Shift times** and click **Yes**.
 - If float is prior to start of shift, click **remove** for the task scheduled on the original unit and update the task/shift times for the new unit if needed.
 - If float is mid-shift, update the task/shift end time on original unit and the task/shift start time on the new unit.
 - Click **OK**.

Schedule Conflict Resolution

*Darling, Wendy is scheduled for the following Task/Shifts during the period 10/17/2023 to 10/19/2023.

Remove	Profile	Task/Shift	Date	Task/Shift Start	Task/Shift End	Coverage Start	Coverage End
<input type="checkbox"/>	zzTraining	0700 1930 RN	10/17/2023	7:00	19:30	7:00	19:00
<input checked="" type="checkbox"/>	zzTempEMMC	0700 1930 RN	10/18/2023	7:00	19:30	7:00	19:00
<input checked="" type="checkbox"/>	zzTraining	0700 1930 RN	10/18/2023	7:00	19:30	7:00	19:00
<input type="checkbox"/>	zzTraining	0700 1930 RN	10/19/2023	7:00	19:30	7:00	19:00

OK Cancel

Schedule Conflict Resolution

*Darling, Wendy is scheduled for the following Task/Shifts during the period 10/18/2023 to 10/20/2023.

Remove	Profile	Task/Shift	Date	Task/Shift Start	Task/Shift End	Coverage Start	Coverage End
<input type="checkbox"/>	zzTempEMMC	0700 1930 RN	10/18/2023	7:00	19:30	7:00	19:00
<input checked="" type="checkbox"/>	zzTempEMMC	0700 1930 RN	10/19/2023	13:00	19:30	13:00	19:00
<input type="checkbox"/>	zzTraining	0700 1930 RN	10/19/2023	7:00	13:30	7:00	13:00

OK Cancel

➤ Arrive Late/Leave Early

- Double-click employee's name from the schedule pane to open the **Edit** window.
- Adjust the shift start or shift end time.

Wed, October 18 0700 1930

Name	Shift Start	Shift End	Cov. Start	Cov. End
*MWazowski	8:00	19:30	8:00	19:00
	7:00	19:30	7:00	19:00

➤ Check work

- Shift times versus Coverage times:
 - Coverage time excludes the 30-minute unpaid meal break built in working tasks longer than six hours.
 - Coverage time is used in **Clairvia Assignment Manager** and sent to API for benefit time.
 - Since **Coverage** times cannot be edited, adjust the **Shift Start/End** times as needed to correct Coverage Start/End times.
 - After updating Shift times, click away from the row to see Coverage time update.
- Hover over **Schedule** in Employee Pane to check work:

Employee	A/U	Paid Hours	10/17 Tue3	10/18 Wed3	10/19 Thu3
*Addin, Al - *AlAddin	U	88	0700 1530 NM	0700 1530 NM	
*Cricket, James - *JCricket	U	24		0700 1930 RN 0700 1930 RN	
*Darling, Wendy - *WDarling	U	80	0700 1930 RN	0700 1530 AN	
*Gale, Dorothy - *DGale	U	24	1845 0715 RN		
*Horne, Judy - *JHorne	U	56	0700 1930 RN	0700 0730 RN	

*Cricket, James - *JCricket

0700 1930 RN Profile: E_8Cardiac - 2003

Shift Time: 13:00 to 19:30 Hours: 6:00

0700 1930 RN

Shift Time: 07:00 to 13:30 Hours: 6:00