

## From the Office of Health Informatics Clairvia Recommended Settings for Managers April 24, 2025

To ensure Schedulers, Managers, and Leadership can view the full schedule, needed employee information, and appropriate alerts, below are the recommended settings for Clairvia Staff Manager and Clairvia Web.

## Logging into Clairvia

- Navigate to Member Organizations' intranet page.
- Search for Clairvia in the Quick Links section.

## **<u>NOTE</u>**: Add Clairvia to favorites for ease of use.

- Select Clairvia Quick Link.
- A login page will open. Use network login and password to access Clairvia.
- Select Clairvia folder.
- Select Clairvia PROD folder.
- Three icons will be available to select:
  - **Clairvia Job Aids** is a direct link to all Clairvia content in the CI Education Library.
  - **Clairvia Staff Manager** is where the schedule is created and modified. This is also where employee settings are managed.

## <u>NOTE</u>: If this is the first-time logged into Clairvia Staff Manager, there will be a pop-up window asking to choose a profile. Select any profile then click OK.

• **Clairvia Web** is where employees can see the schedule and submit requests, and where managers approve or deny opportunities, Shift Swaps, and future time off requests.

## Clairvia Web Recommended Settings

- Select Clairvia Web icon.
- > Hover over the **Configure** menu, then select **Manager View**.
- Manager View Selections:
  - 1. Select the desired **Profiles/Units** to be displayed on the Admin Dashboard. A maximum of five profiles may be selected.
  - 2. Enter 1 FTE Threshold for staffing alerts.
  - 3. Enter 90 days for competency expirations.





Select Pro	file		×
	Please select prof	ile from the list:	
xTrainin	g Profile 1		-
	or	Canad	



Search	Configure	Help
	Manager View	
	Employee View	
	Shift Swap Settings	

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- 4. Enter 1 days for staffing alerts.
- 5. 5-15 should all be checked.
- 16. Defaults to Hover Only. This setting is recommended.
- 17. Defaults to No spacing. This setting is recommended.
- **18. 18-20** are optional if the manager/scheduler would like email notifications. It is recommended to select all and select "send once daily" for each. This will send one email with a summary of all pending requests, Shift Swaps, and Opportunities pending approval to the manager/scheduler around 4pm each day.
- Select **Save** Changes.

On Home Page:  Select up to 5 Profiles to display on the Admin Dashboard  Xiraning Profile 2 Xiraning Profile 3 Xiraning Profile 5 Xiraning Profile 5 Xiraning Profile CI  FTE Threshold for Staffing Alerts I FTEs Include Competency Expirations for the next 90 days C Show staffing alerts in StaffView for the next days S. Show vorkidad (census) for selected Profiles in StaffView C Show pending requests links for selected Profiles 7. Show StaffView Staffing Chart	<ol> <li>Show Staffing Alerts</li> <li>Show Employee Competency Expiration Alerts</li> <li>Show Message Center</li> <li>Show My Alerts in page headers</li> <li>Who's Here Page:</li> <li>Display Assignment Notes</li> <li>On Schedule Page:</li> <li>Show Float Employees</li> <li>Show Opportunities</li> <li>Show Seniority Date in Opportunity Details</li> </ol>	<ul> <li>16. Show Assignment Notes in Schedule as: <ul> <li>Hover only</li> <li>Full Note in grid only</li> <li>Full Note in hover with Note in grid limited to</li> <li>20 characters</li> </ul> </li> <li>17. Choose spacing between Employees/Tasks in Weekly View <ul> <li>No spacing</li> <li>Single space</li> <li>Double space</li> <li>Single space only after note/float</li> <li>Double space only after note/float</li> </ul></li></ul>	Send Email Notifications: 18. Requests Send once daily 19. Shift Swaps Send once daily 20. Opportunities Send once daily
		Save Changes	Reset

• Select **OK** on the settings saved successfully pop-up.

# <u>NOTE</u>: Requests notifications can be overwhelming during the team scheduling period. Due to this most managers do not check this for email notifications.

#### > Manager Preferences for Filled Shift Alert Notifications

- 1. Select **Tools** in the menu bar, then select **My Information**, then select **Preferences**.
- 2. Select the Filled Shift Notifications tab.
- 3. Check the Enable Filled Shift Alert Notifications.
- 4. Select all Profiles that apply. CTRL + click allows to select multiple profiles.

Tools	Search	Configure	Help
Mess	ages		
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Interf	ace Mainte	nance 🕨 🕨	Preferences

Your settings were saved successfully.

zzTesting

Text

Email

- 5. Select appropriate Text or Email notification by selecting the checkbox.
  - a. These notification preferences will apply to all profiles selected during step 4.
- 6. Select Save.

## Clairvia Staff Manager Recommended Settings

- Select Clairvia Staff Manager.  $\geq$
- $\triangleright$ User specific settings
  - Select **Options** in the menu bar, then select **Settings**...
    - General tab – Undo Step Limit: keep default at 10.

😵 Northern Light Health.

Enable Filled ShiftAlert Notifications

Send Filled ShiftAlert Notificat 6Cardiac - 2003

CCU - 2021 CD Cardiology - 5137 CD Echocardiology - 5138 CD Nuclear Imaging - 5139 CD PET CT - 5208 Day Surg - 5616 Emergency - 5701 EMMC OR - 5611 Endoscopy - 5396 Entero & Wound Service - 5 Flexible Staff - 1097 C4 Cerrofize-2004

Item uses - 2085 Inc/Resp - 2079 BGYN/Nursery - 2201

G4 Cardiac - 2004

SSU - 2376

vice - 54R

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Send Filled ShiftAlert Notifications by

To update your contact information, contact your CVM administrator Save Reset

Email@NORTHERNLIGHT.ORG

Home: (555) 123-4567

- General tab – Time Format: 24 Hours
- **Display tab** Employee Name Format: choose Last, First – Abbreviation.
- Leave other settings on **Display tab** set to defaults. No updates are need on the other tabs.
- Click **OK** to save and close.
- Select Maintain in the menu bar, then Schedule Editor in the dropdown.
  - Select **Format** in the toolbar, then **Editor Setup**.
  - Confirm the Weeks in View is set to the designated schedule length of the unit (4 or 6 weeks).
  - Select **OK** to save and close.
- **Employee settings**  $\triangleright$ 
  - Most employee settings are controlled by managers.
  - For information on how to set-up new staff, see the Clairvia Manager Checklist & Employee Set-Up flyer here.



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Default Shift Category:	9-15 💌
OK Apply	Cancel Help

- Profile-wide settings:  $\triangleright$ 
  - **Display** Order
    - Each profile can set a custom display order for employees and tasks. While the general alphabetic order is also available to managers in Clairvia Staff Manager, employees only see the custom display order in Clairvia Web.
      - 1. Select **Options** in the toolbar, then select Display Order.
      - 2. Select the **Task** tab to sort the **Task** Order.
      - 3. Drag and drop the icon under the Order **Column** to reorder. If the mouse is while the do not enter symbol is visible $\bigotimes$ , no changes will be made.
      - 4. Click **Ok** to save and close the window.
    - Tips for Display Order.
      - o If the Display Order is **Read Only**, make sure Schedule Editor is closed then try again.



## The Employee display order can also be customized within the Employee tab. This may be useful when running certain reports. This is completed in the same manner as above.

M Display Order (Read-Only Mode)			
Employee Task Skills			
Drag the Tasks into the desired display order.			
Order	Assignment	Task	
▶≣ 0	1 MA_Day	0800 1630 DIR	DIR
▶≣ 1	1 MA_Day	0600 1530 E1 R	N : RN
▶≣ 2	1 MA_Day 0630 1600 E2 RN : RN		N : RN
<b>▶</b> ≣ 3	1 MA_Day 0700 1630 RN : RN		RN
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NOTE: