



# Clairvia

## Manager Checklist & Employee Set-Up

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Wednesday, October 1, 2025

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# Manager Checklist & Employee Set-Up

## Manager Checklist

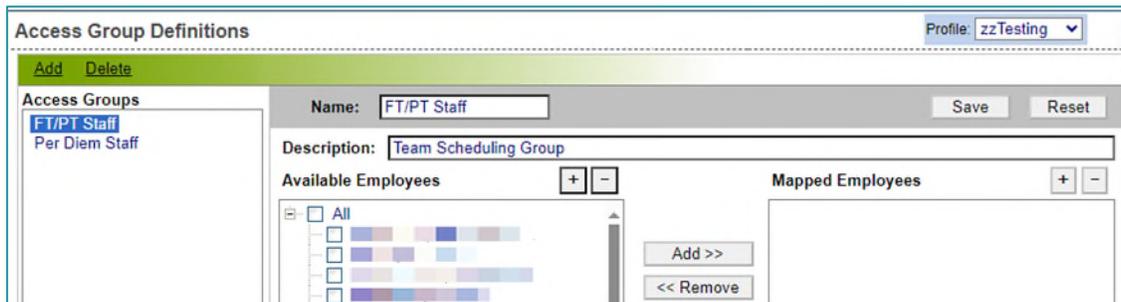
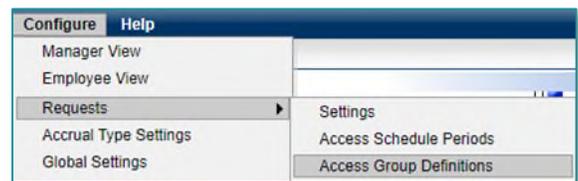
- These steps need to be completed by unit managers for all new employees joining the unit to ensure they have the correct access in Clairvia.

<b>Clairvia Web</b>	
➤ <b>Team Scheduling: Assign the employee to appropriate access group.</b>	
<b>Clairvia Staff Manager</b>	
<ul style="list-style-type: none"><li>➤ <b>Employee Info Window:</b><ul style="list-style-type: none"><li>○ Skills Tab: Validate primary skill and add secondary skills where applicable.</li><li>○ Pattern Tab: Create template schedules as needed.</li><li>○ Float Tab: Add Float department(s) to the employee as needed.</li><li>○ Permissions Tab: Set access for Opportunities, Demand, Acuity, and Assignment Manager.</li><li>○ Employee Groups: Assign employee to the appropriate group.</li></ul></li><li>➤ <b>Display Order: Confirm the employee's position in the custom display order.</b></li><li>➤ <b>If employee has pre-approved requests that the unit will be honoring, enter them manually.</b></li></ul>	
<b>Requesting Admin Access for Employees</b>	
➤ <b>Submit Clairvia Request in ServiceNow for staff that have additional responsibilities</b>	

## Clairvia Web

### Team Scheduling

- To ensure new employees can request working shifts during the Team Scheduling period, they must be added to an access group in Clairvia Web.



**STEP 1:** Hover over **Configure** → **Requests** → **Access Group Definitions**.

**STEP 2:** Choose profile from dropdown.

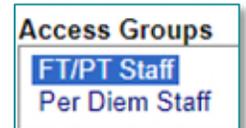
**STEP 3:** Click the desired Access Group from the list.



**STEP 4:** Select the staff member(s) from the Available Employees list.

**STEP 5:** Click **Add >>** to move them to the Mapped Employees list.

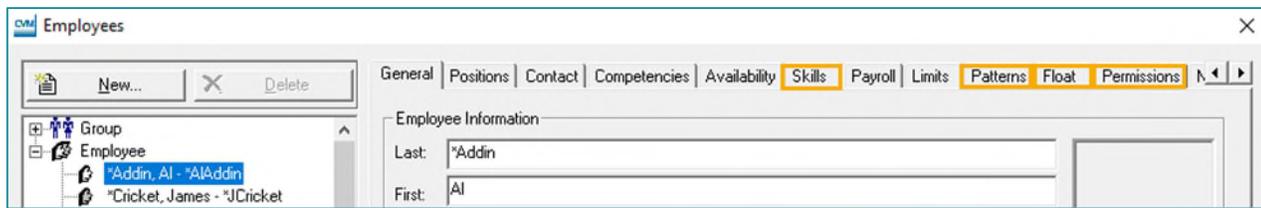
**STEP 6:** Click **Save**.



## Clairvia Staff Manager

### Employee Info

- To open the Employee Info window, choose Maintain → Employee Info
- Before starting:
  - If Schedule Editor is open, the Employee Info window will be read-only.
  - All the tabs within Employee Info correspond to the employee that is selected from the list.
  - Dropdowns within Clairvia will only open on primary monitor.
  - When making changes, always select **Apply** to save, and **OK** to save and close the window.
  - New employees may not appear in employee list until their start date.



### Skills Tab

- Skills in Clairvia determine whether an employee is available for a task, can request a task, and pick up Open Opportunities.
- If an employee is officially hired in a job code/work assignment, the HR interface will automatically add a matching skill in Clairvia.
- May need to add additional skill(s) if an employee is cross trained to work in roles that are under the umbrella of their job code. For example:
  - A nurse has the RN skill but needs an additional CHG skill to work in that role.
  - A nurse tech has the CNA/NT skill but needs an additional US skill to work in that role.

# Manager Checklist & Employee Set-Up

## How to add an additional skill

**STEP 1:** Confirm correct employee is selected.

**STEP 2:** Select the **Skills** tab, select **Edit Employee Jobs/Skills**.

**STEP 3:** Select **Add a Job/Skill**.

**STEP 4:** Confirm **Start Date** matches current date.

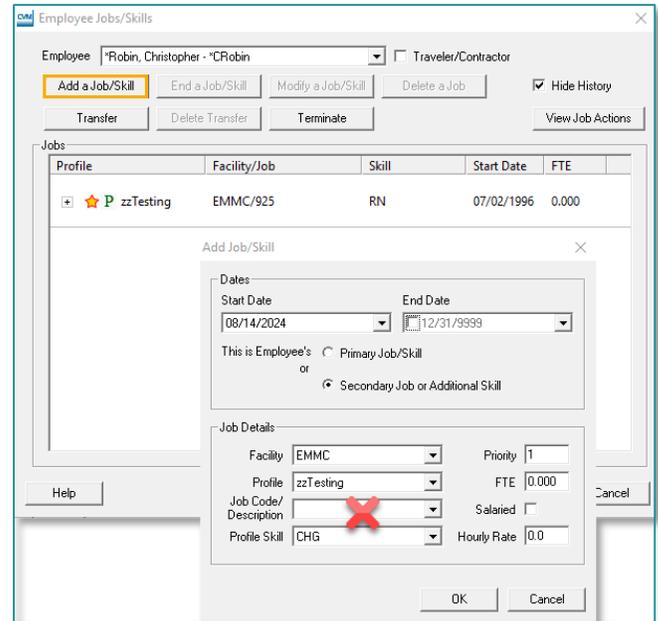
**STEP 5:** Confirm the radio button is selected for **Secondary Job or Additional Skill**.

**STEP 6:** Make selections for the following dropdowns: **Facility, Profile, and Profile Skill**.

**NOTE:** **Job Code/Description should be left blank**

**STEP 7:** Select **OK** to save.

**STEP 8:** If done updating skills, click **OK** to save and close.



## How to end an additional skill

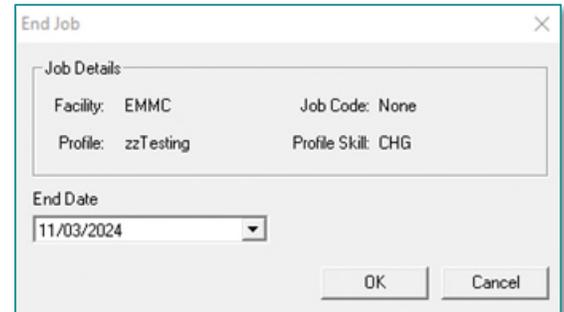
**STEP 1:** From the Employee Jobs/Skills window, select the additional skill.

**STEP 2:** Select **End a Job/Skill**.

**STEP 3:** Choose **End Date** from the dropdown, click **OK**, click **Yes** to confirm.

**STEP 4:** When done updating skills, click **OK** to save and close.

**NOTE:** **Never Modify or Delete a Job/Skill. Only use Add or End a Job/Skill.**



## Patterns Tab

➤ Used to create a recurring schedule without a set end date. This template schedule will not impact assignments already on the schedule, it will populate in Schedule Editor after generating.

**STEP 1:** Confirm correct employee is selected.

**STEP 2:** Select **Patterns** tab.

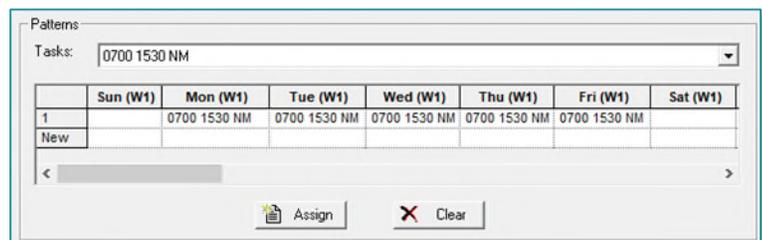
**STEP 3:** Select the **Task** from the dropdown.

**STEP 4:** Click the days to be patterned, then click **Assign**.

**STEP 5:** Click **Apply** to save.

➤ **Tips for Pattern tab**

- Sun (W1) aligns to Sunday Week 1 of the schedule. Use the scroll bar to add patterns to additional weeks.
- Holding down the CTRL key while selecting days will allow the ability to select multiple days.



- If the “**No slot is available in this shift**” warning is received, this means all available slots have been already patterned to other employees. Either remove the pattern from another employee or log a ServiceNow request to increase slots.
- If an employee is patterned to more than 40 hours a week, it will not generate onto the schedule.
- To remove a pattern, click the cell(s) then click **Clear**, or click in the far-left column to select the row then click **Clear** delete the entire pattern. Click **Apply** to save.

**Float Tab**

➤ Adding float profiles is how to designate that an employee is qualified to work in another unit. If an employee needs to pick up Opportunities in another unit, they will need that unit added to their Float tab.

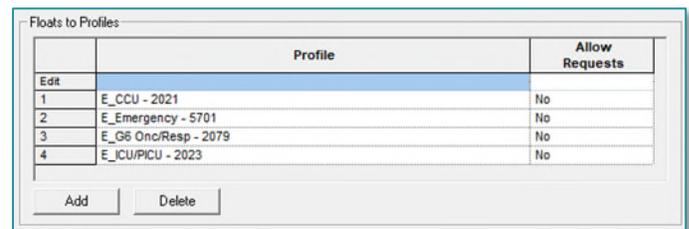
**STEP 1:** Confirm correct employee is selected.

**STEP 2:** Select the **Float** tab.

**STEP 3:** Click into the blue cell under Profile in the **Edit** row to display the dropdown and select the profile.

**STEP 4:** Select **No** in the Allow Requests Column unless the employee participates in Team Scheduling for this unit.

**STEP 5:** Select **Add** and then **Apply** to save changes.



➤ **Tips for Float tab**

- If the dropdown does not display, move the Employee Info window to the other monitor.
- Profiles are sorted alphabetically by Member Organization abbreviation.
- To remove a float profile, click the **Edit** column to select the row then click **Delete**, click **Apply** to save.

**Permissions Tab**

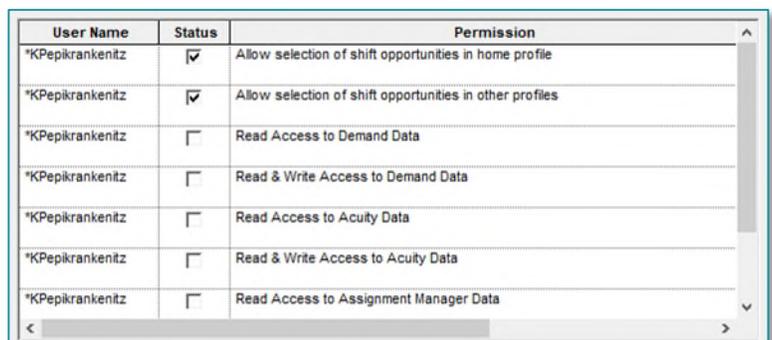
➤ Permissions granted on this tab will apply to the home unit and all profiles listed within the Float tab.

**STEP 1:** Confirm correct employee is selected.

**STEP 2:** Select **Permissions** tab.

**STEP 3:** Check a box to grant the corresponding permission.

**STEP 4:** Click **Apply** to save changes.



# Manager Checklist & Employee Set-Up

## ➤ Permission types

- Opportunities.
  - Allows employees to volunteer for Opportunities, and opt in for ShiftAlerts, for their home profile and Float (other) profiles.
- Demand Data.
  - Grants employee access to the Demand toolbar in Clairvia Web.
  - If an employee needs to enter patient events, they will need this permission.
    - For more information on Patient Events, see the flyer [here](#).
- Acuity Data.
  - Grants employee access to the Acuity toolbar in Clairvia Web.
  - If an employee needs to complete Acuity Audits, they will need this permission in addition to Admin Access.
    - For more on information on Acuity Audits, see the flyer [here](#).
- Assignment Manager Data.
  - Grants employee access to the Assignment Manager toolbar in Clairvia Web.
  - If an employee needs to make patient assignments, they will need this permission.
    - For more information on Assignment Manager, see flyer [here](#).

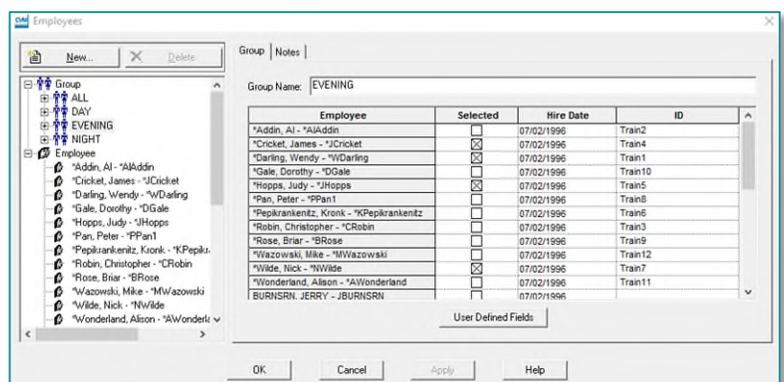
## Employee Groups

➤ Adding employees to groups is an optional step to organize employees into staff lists. The staff lists are visible while using the Availability Window in Schedule Editor.

**STEP 1:** Expand the Groups by selecting the plus sign next to **Group**. If groups are not visible, scroll up on the Employee list.

**STEP 2:** Select the Group name. The right side of the window will update to show the list of employees.

**STEP 3:** Check the box next to the name of the employee(s) to be added to the Group, click **Apply** to save changes.



## ➤ Tips for Employee Groups:

- Never modify the **ALL Group**.
- Employees may be added to multiple Groups.
- To **Add** or **Modify Groups**, log a **ServiceNow** ticket.
- Adding employees to Groups **does not** impact an employee's ability to make request.

## Display Order

- Display Order allows users to set a custom sort order for the profile. Changing the custom Display Order impacts the view in Clairvia Web and Clairvia Staff Manager (CVM) for all users.

**STEP 1:** Click **Options** in the toolbar, then select **Display Order**.

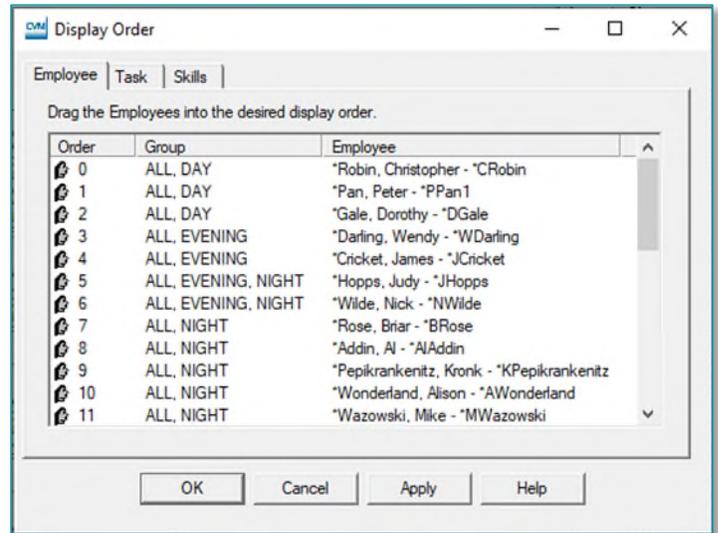
**STEP 2:** Click the **Employee** tab to sort the **Staff Order**.

**STEP 3:** Locate the new employee within the list, drag and drop the icon within the order column to reorder. If the mouse is released while the do not enter symbol is visible, no changes will be made. 

**STEP 4:** Click **OK** to save and close the window.

### ➤ Tips for Display Order.

- If the Display Order is read only, make sure Schedule Editor is closed then try again.
- Expand the window and resize columns for ease of viewing.
- Choose the Task tab to reorder the custom display order for Tasks.



## Enter Pre-Approved Requests

- If employee has pre-approved requests that the unit will be honoring, they can be entered on behalf of the employee.
  - To manually enter pre-approved requests on behalf of the employee, see the flyer [here](#).
- The day an employee transfers in from another Clairvia profile, any requests submitted in the previous profile, which fall after the date of transfer, will be deleted. Once deleted, there will be no record of these requests in Clairvia.
  - The Request Details report can be run **before** the transfer takes effect to capture a list of all requests that will be deleted. If you do not have access to run this report, consider reaching out to the employee's previous manager.
  - For more information on the Requests Details report, see flyer [here](#).

# Manager Checklist & Employee Set-Up

## Requesting Admin Access for Employees

➤ Most employees access can be managed at the unit level using this checklist. Admin Access to Clairvia is required only for employees that have additional responsibilities.

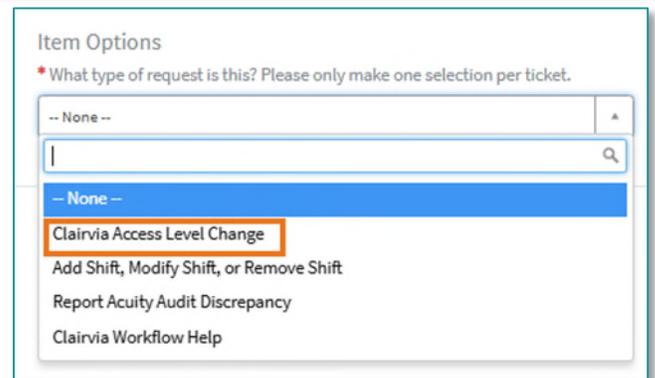
- Acuity Auditors/Patient Outcomes Experts/Educator.
- Anyone that needs access to Clairvia Staff Manager (CVM) or reports.

**STEP 1:** Start by selecting the **ServiceNow link** from **Member Organization's Intranet Page**.

**STEP 2:** Type **Clairvia** in the search box and click **Clairvia Requests**.

**STEP 3:** Choose **Clairvia Access Level Change** in the **Item Options** and fill out the required fields in the form.

**STEP 4:** Click **Submit**.



For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket](#) to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.