Northern Light Health | Optum

From the Office of Health Informatics

Clairvia Scheduler Guide

April 24, 2025

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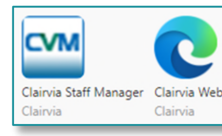
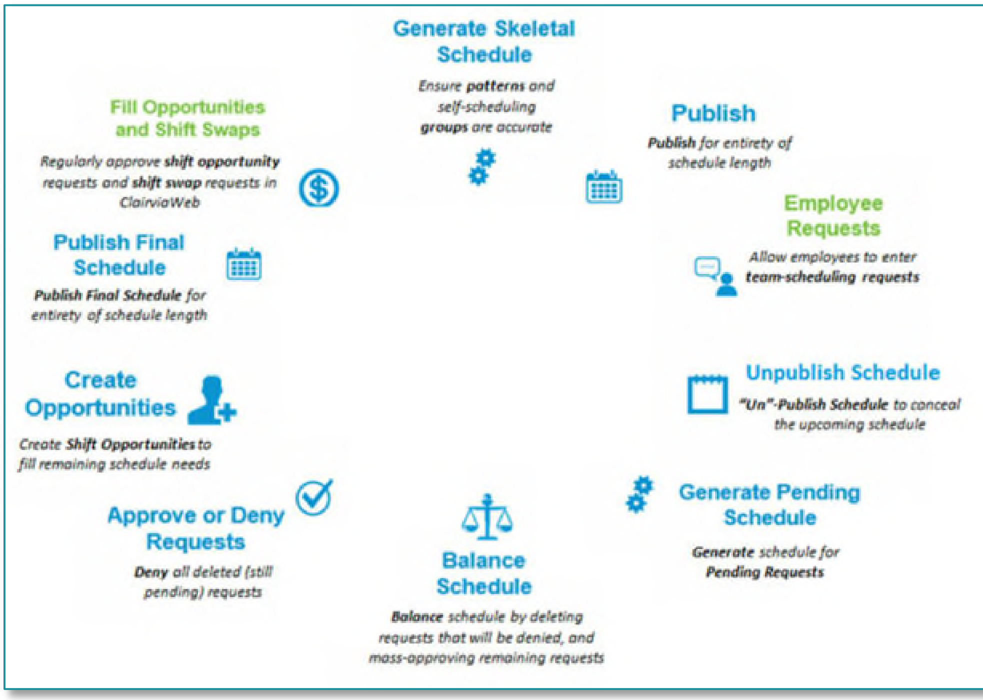
Introduction

- **This is a comprehensive guide to creating schedules in Clairvia. Please note, this guide is a reference, and managers/schedules are required to take the NOLH-6425 Introduction to Manager Responsibilities in Clairvia and the in-person Clairvia Scheduling for Leaders class before they will be granted Admin Access to manage schedules in Clairvia.**
- **Schedulers will use two icons: Clairvia Staff Manager to create, balance, and publish unit schedules and Clairvia Web to approve time off requests, Opportunities, and Shift Swaps.**



- **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.**
  - When using Team Scheduling, staff are expected to request their preferred schedule and make requests that would not exceed their normal paid hours.
  - Staff also use Clairvia to request time off either with PTO or Requests off. Requests off are used to indicate a day the employee cannot work and does not want to use PTO.
  - Making requests that would result in overtime or blocking all their open days with requests off is not respectful of other employees in the unit. This can stop co-workers from entering their own requests and increase the workload on schedulers as they try to create a balanced schedule for the unit.
- **To ensure employees are set up correctly in Clairvia and can be scheduled with ease, all managers should review and update permissions for any new hires or transfers. See the Clairvia Manager Checklist & Employee Set-Up flyer here.**

Scheduling Cycle



Team Scheduling Calendar

➢ **The Clairvia Schedule Life Cycle applies to all areas using Clairvia, not all member organizations do the steps at the same time. The Team Scheduling Calendars have been created to show the dates for critical steps in the schedule life cycle at each NLH member organization. You can find them here.**

Schedule Dates	Generate *Skeletal* Schedule & Publish By:	Team Scheduling: FT/PT staff submit requests:	Team Scheduling: Per Diem staff submit requests:	Schedule closes for PTO requests	Generate *Pending* Schedule On or After:	Build and Balance the Schedule	Publish Final Schedule By:	Opps and Swaps Begin When Schedule is Final
5/12/2024 - 6/22/2024	3/31/2024	3/31/2024 - 4/8/2024	4/8/2024 - 4/12/2024	4/12/2024	4/13/2024	4/13/2024 - 4/26/2024	4/26/2024	~4/27/2024
6/23/2024 - 8/3/2024	5/12/2024	5/12/2024 - 5/20/2024	5/20/2024 - 5/24/2024	5/24/2024	5/25/2024	5/25/2024 - 6/7/2024	6/7/2024	~6/8/2024
8/4/2024 - 9/14/2024	6/23/2024	6/23/2024 - 7/1/2024	7/1/2024 - 7/5/2024	7/5/2024	7/6/2024	7/6/2024 - 7/19/2024	7/19/2024	~7/20/2024
9/15/2024 - 10/26/2024	8/4/2024	8/4/2024 - 8/12/2024	8/12/2024 - 8/16/2024	8/16/2024	8/17/2024	8/17/2024 - 8/30/2024	8/30/2024	~8/31/2024
10/27/2024 - 12/7/2024	9/15/2024	9/15/2024 - 9/23/2024	9/23/2024 - 9/27/2024	9/27/2024	9/28/2024	9/28/2024 - 10/11/2024	10/11/2024	~10/12/2024
12/8/2024 - 1/18/2025	10/27/2024	10/27/2024 - 11/4/2024	11/4/2024 - 11/8/2024	11/8/2024	11/9/2024	11/9/2024 - 11/22/2024	11/22/2024	~11/23/2024
1/19/2025 - 3/1/2025	12/8/2024	12/8/2024 - 12/16/2024	12/16/2024 - 12/20/2024	12/20/2024	12/21/2024	12/21/2024 - 1/3/2025	1/3/2025	~1/4/2025

- The first gray columns titled "**Schedule Dates**" are the start and end dates of the unit schedule. The colorful columns are the dates for the steps in the life cycle.
- The first purple column titled "**Generate Skeletal Schedule and Publish By**" is the cut-off date to generate a skeletal schedule and publish it so staff can see it in Clairvia Web.

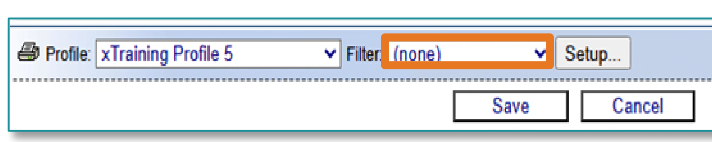
    - "Generating the Schedule" refers to the process of auto-populating the schedule with patterns and employee requests. This is done twice during the schedule life cycle and reduces the amount of time it takes to create the schedule overall. The skeletal schedule consists of patterns and pre-approved requests (like vacation). This is generated BEFORE employees submit requests so they can see these scheduled assignments while they make their requests.

- The third column titled "**Team Scheduling**" shows the date ranges when staff can make request for working shifts.
- The green column titled "**Schedule closes for PTO requests**" shows the last date that staff can make time off requests for the upcoming schedule. Employees can make requests for time off further in advance than they can request working shifts.
- The second purple column titled "**Generate Pending Schedule On or After**" is the earliest date the manager should generate the schedule. This second round of "generating" adds the pending requests recently submitted by staff, onto the schedule. At this time the schedule should also be "un-published" so staff can no longer see it online.
- The yellow column titled "**Build and Balance the Schedule**" is the time units must finish the schedule and create opportunities for open holes.
- The last purple column titled "**Publish Final Schedule By**" is the date by which the schedule should be completed and made visible for staff through Clairvia Web.
- The last column titled "**Opps and Swaps Begin When Schedule is Final**" is a reminder that employees can begin to pick up extra shifts and request swaps as soon as the schedule is finished.

Approving and Denying Vacation Requests in Clairvia Web Prior to Creating the Schedule

Depending on the location, Employees may be able to request PTO up to a year in advance. These requests can be approved or denied in Clairvia web by managers at any point before the schedule is created. This can help improve employee satisfaction, reduce duplicate requests during the team scheduling window, and give guidance to unit schedulers around pre-approved time off.

- **From the home Admin Dashboard, hover over Schedule, then select Administer Requests.**
- **Review that the correct Profile is selected.**
- **Filters should be set to none or reviewed for accuracy.**
- **Quick List:**
    - **Display by**: All, Pending only or Waitlist only.
        - **Waitlist** is not used at NLH.



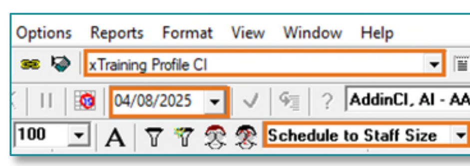
- **Sort by: Request Date or Date Submitted.**
- **Scroll down through the requests in the quick list box to find PTO requests or scroll to the PTO tasks in the calendar to look for requests in blue.**
  - If you select the blue hyperlink in the list, Clairvia will forward the screen to that date and time of the requests.
  - Right click on the PTO request:
    - Details will open a details pane for the request where the date and time of the request can be seen along with any notes added by the employee.
    - Add Note will add a note to the request to the employee.
    - Approve, approves the requests and notifies the requester according to their own preferences.
    - Deny, denies the request and sends a notification to the requestor. If denied, the requestor cannot ask for that task on that date and time again.
    - Delete, deletes the request from the calendar. This removes all record of the request, and the employee would be able to submit the same request again.

Generate Skeletal Schedule

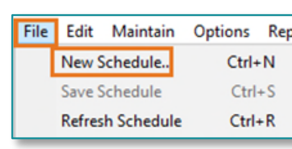
Generating the schedule refers to the steps required to populate the Schedule Editor screen with pre-approved assignments and employee requests. Generating is done twice throughout the schedule life cycle. The skeletal schedule consists of patterns and requests that have been pre-approved. The skeletal schedule is generated **BEFORE** employees submit requests.

STEP 1: To open the Schedule Editor, select **Maintain** in the toolbar, and then **Schedule Editor**

STEP 2: Before generating the schedule, perform the **Triple Check**:

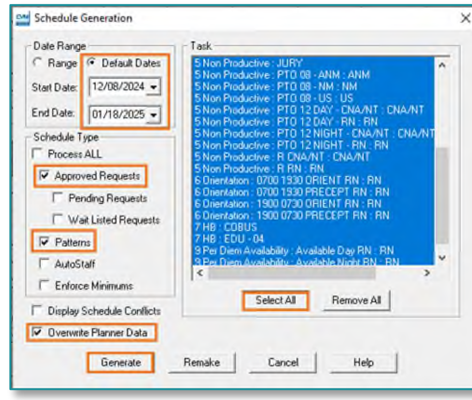


- Correct profile is selected.
- Date is set to the **start** of the schedule.
  - If the date needs to be changed, select the date dropdown, select the appropriate date, then select the green checkmark to populate the selected date.
- **Schedule to Staff Size** is selected.



STEP 3: Select **File** in the toolbar and select **New Schedule** to open the **Schedule Generation** window.

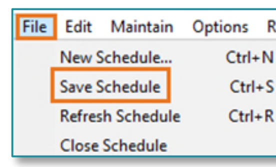
STEP 4: Select **Default Dates**.



This automatically populates the Start Date and End Date to the dates currently in view in the Schedule Editor. If the dates do not populate correctly, confirm you have selected the correct start date (see step 2) and updated your weeks in view settings (see Staff Manager recommended settings)

STEP 5: Select **Approved Requests** and **Patterns**.
STEP 6: Keep **Overwrite Planner Data** checked.
STEP 7: Click **Select All** to highlight all tasks.
STEP 9: Click **Generate** to populate the schedule.

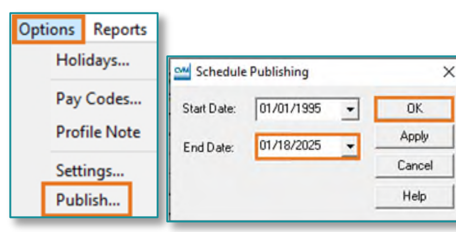
NOTE: Selecting Generate populates new information to the schedule. Remake erases the entire schedule and only display information from the newest generation (Not Recommended).



STEP 10: Save any changes by clicking **File** in the toolbar, then **Save Schedule**; or select the save icon. 

Publishing Skeletal Schedule

Publishing allows employees to view a specific date range of the schedule on Clairvia Web. Publishing does not impact when employees can submit requests. The request period opens and closes automatically. Publish the schedule prior to the Employee Request period to help employees see how their requests impact existing assignments and avoid duplicate requests.



STEP 1: Click **Options** from the toolbar and select **Publish…**
STEP 2: Change the End Date to reflect the end of the skeletal schedule range. **DO NOT** change the Start Date.
STEP 3: Select **OK** to Publish.

Employees Enter Requests

- **Employees enter request for working shifts (Example: 0700-1930 RN) when the Team Scheduling period opens.**
  - Full time (FT) and Part time (PT) staff often have access to make requests before Pool/per diem staff.
    - Designating employees as FT/PT or Pool/per diem is an important step managers must take whenever they get a new employee. This is covered in the Manager Checklist.
  - Reminder: Staff can request working shifts only during the Team Scheduling period but can request time off further in advance. Requests for time off for the upcoming schedule only shut down before the upcoming schedule starts.

- Please reference the Team Scheduling calendar unique to your Member Organization found here for specific dates.

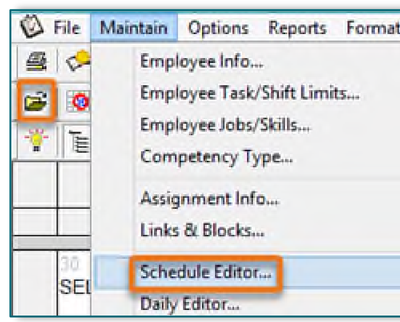
NOTE: **Do not generate the schedule during the Employee Request Period. Generating during the Employee Request Period does not prevent employees from submitting additional requests and could lead to missing requests from the Schedule Editor when balancing.**

Un-Publishing the Schedule

Un-publishing the schedule hides the schedule from employees while the schedulers balance and make changes. Un-publish the schedule at the start of the Schedule Balance period to ensure employees do not mistake the in-progress schedule for the finalized schedule.

STEP 1: Click **Options** from the toolbar and select **Publish.**
STEP 2: Change the End Date to reflect the last day of the previously finalized schedule. Do not change the Start Date.
STEP 3: Select **OK** to un-publish (hide) the schedule.

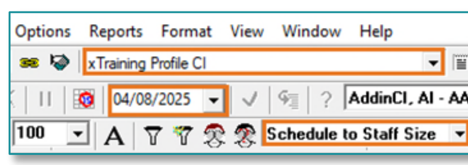
Generate Pending Schedule



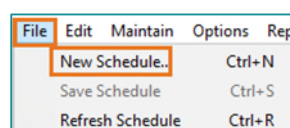
After employees have made requests on Clairvia Web, and the Team Scheduling window is complete, the scheduler populates the requests into the Schedule Editor. The pending schedule captures all employee requests submitted on Clairvia Web during the open request period.

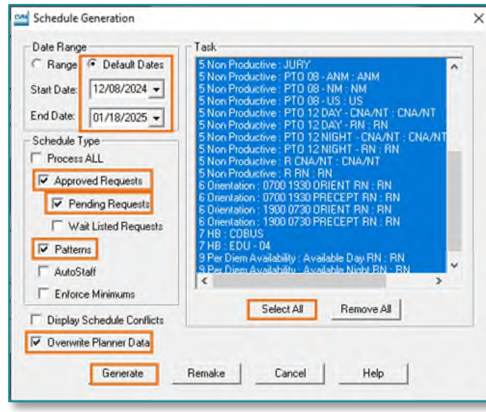
STEP 1: To open the Schedule Editor, click **Maintain** in the toolbar, and select **Schedule Editor**

STEP 2: Before generating the schedule, perform the **Triple Check:**



- Correct profile is selected.
- Date is set to the **start** of the schedule.
    - If the date needs to be changed, select the date dropdown, select the appropriate date, then select the green checkmark to populate the selected date.
- **Schedule to Staff Size** is selected.





STEP 3: Select **File** in the toolbar and select **New Schedule** to open the **Schedule Generation** window.

STEP 4: Select **Default Dates**.

STEP 5: Select **Approved Requests**, **Pending Requests**, and **Patterns**.

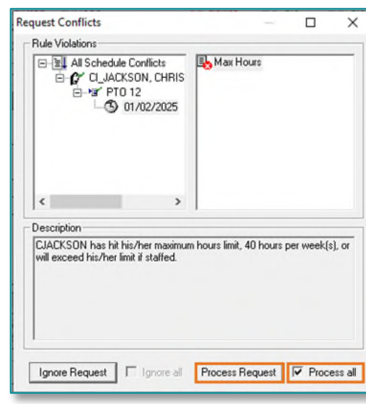
STEP 6: Keep **Overwrite Planner Data** checked.

STEP 7: Click **Select All** to highlight all tasks (shifts).

STEP 8: Select **Generate** to populate the schedule.

STEP 9: Save any changes by selecting **File** in the toolbar, then **Save Schedule;** or select the save icon .

Schedule Conflicts



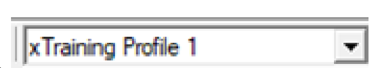
- After generating, the **Requests Conflicts** window may display.
- Clairvia checks to see if any rules are being broken (i.e. employee already scheduled on the same day, shift is full etc.). Clairvia will try to warn you of problems through a pop-up window after you generate.
- You do not have all the information to be able to decide what to do with these issues.
- Best practice is to select **Process All** to ensure all requests, regardless of conflicts, appear in the Schedule Editor for consideration when balancing the schedule. You will have an opportunity to review these conflicts again when you are balancing.
    - Check the box next to **Process all**.
    - Select **Process Request**.

NOTE: Processing does not approve the request. Ignoring the request is not recommended. When you click Ignore Request or click the X to close the window, pending requests are not added to the schedule for consideration. Ignoring does not deny the request.

Navigating the Schedule Editor

Schedule Editor Tool bar

Below is a description of the of the dropdowns and icons available in Schedule Editor. Some icons are not mentioned here because they are not used by Northern Light Health. Hover over icons in Schedule Editor to see the icon label.

- Use the **Profile** dropdown to view schedules for different units/profiles. 

- Frequently save changes through File > Save Schedule or by clicking the save icon.
- The **Refresh Schedule** icon will refresh the schedule to show any updates made by other schedulers that may be making changes at the same time.
- The **undo/redo** icons are grey when all changes have been saved and black when you can reverse an action.
  - There is a limit to the number of actions you can "undo". However, you can close the schedule without saving changes to get back to where you started.
- The **Today** icon will update Schedule Editor to today's date.
- The **Select Date** 09/28/2025 dropdown can be used to change the dates displayed in Schedule Editor.
  - After choosing a date from the dropdown, click the Commit Start Date Change icon to update the schedule grid.
- The **Availity Window** icon will open the Availability window which is used to manually update the schedule.
- The **Highlight** icon allows the scheduler to locate assignments or tasks more easily within the Schedule Editor. Select an employee or task from the dropdown or select a cell within the schedule grid. Anywhere the employee or task is assigned is highlighted in yellow.

  NOTE: Float staff will not highlight using this method.
- The **Lock** icon allows the scheduler to select an assignment and lock it. The cell will now have teal highlight. This feature is rarely used but it does have a big impact. Locking someone into an assignment means that they cannot swap out of that shift and other schedules cannot adjust their assignment without unlocking them first.
- The **Show Holes** icon will highlight all open spots on the schedule in pink.
- The **Create Open Shift** icon will create an open shift on the schedule used to identify a potential hole in the schedule. Open shifts are not posted to Clairvia Web. Schedule Editor must be set to **View By Assignment** to use this feature.
- The **Create Opportunity** icon will create an open opportunity on the schedule. These are holes on the schedule that are posted to Clairvia Web, allowing employees to sign up for extra shifts. Schedule Editor must be set to View By Assignment to use this feature. Opportunities can only be created for future dates.

- The **Fill Schedule Vacancies** icon can be used to create multiple Open Shifts or Open Opportunities at one time. Users choose Open Shifts or Open Opportunities, the date range, and task(s) then click generate and Clairvia will add the Open Shifts/Open Opportunities to every open slot in that date range for the selected tasks.

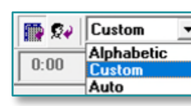
- The **Opportunity Worklist** icon opens the Opportunity Worklist which is used to see all Open Shifts and Opportunities on the schedule. Users can see if there are any pending requests to pick up extra shifts before opening Clairvia Web to review/approve them. This display can also be used to convert Opportunities to Shift Alerts.

- The **Create Shift Alert** icon will create a Shift Alert that will send information about the shift to qualified employees using their preferred contact method. Managers do not approve Shift Alerts, they are first come first serve and can result in overtime. Shift Alerts should be used closer to when the need is approaching if no one has picked up the Open Opportunity and the unit still needs coverage.

- The **View By Assignment** icon displays the shifts on the left-hand side of the Schedule Editor and the employees who fill those shifts within the grid.

- The **View by Employee** icon displays the employees on the left-hand side of the Schedule Editor and the shifts assigned to the employee appear in the grid. Selecting **View by Employee** does **not** show float employees, only staff from the unit.

- Selecting **Alphabetic** as the Display Order sorts shifts or employees alphabetically in Schedule Editor. Selecting **Custom** as the Display Order sorts the employees or shifts to a custom sort order that is set for the unit.

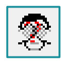
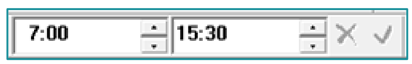


- The Change Zoom dropdown 100 allows you to zoom in or out.

- The **Font** A icon allows you to change your font size or set to bold for easier viewing.
    - Look for the dropdown immediately below the “Bold” check box option, it should show the word “Routine”. Clicking into this dropdown can give you a reference list of the color codes you may see in Schedule Editor. These color codes are described in the next section.

NOTE: You should not change these default colors for cells as they are standard across Northern Light Health. See Schedule Editor Color Code in the next section.

NOTE: You can make changes to the color of the dates for weekends and holidays or the color of open opportunities also found in this dropdown. Since Open Shifts and Open Opportunities both default to yellow, this can be helpful to differentiate the two.

- The **Display Filter**  icon turns on or off the filter. This filter is for viewing the schedule only. The schedule cannot be edited when the filter is on.
- The **Filter Setup**  icon opens a window allowing you to choose to modify a filter.
- The **Hide Empty Rows**  icon hides any rows in the schedule that do not have assignments.
- The **Hide Empty Coverage Rows**  icon hides any rows in the Coverage totals at the bottom of the screen that do not have anyone assigned for that skill and shift.
- The **Staffing Goal** dropdown should be showing “Schedule to Staff Size” when generating the schedule.
- The **Start and End Working Hour time boxes** 

show you the actual start and end times for the assignment selected on the schedule. You can also use these time boxes to adjust the actual working times for the shift.

Schedule Editor Color Code

Within the Schedule Editor, assignments are color-coded to indicate how they were added to the schedule.

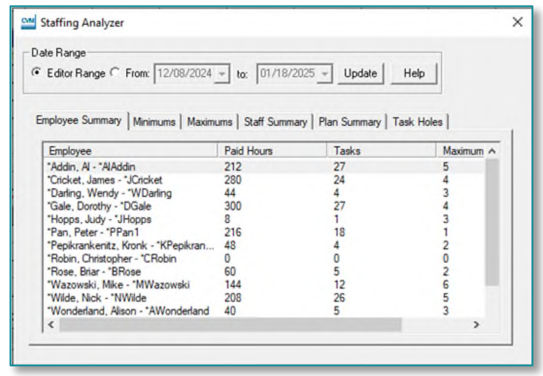
- **Black** Font: Indicates Autostaff was selected in the schedule generation window allowing Clairvia to auto-fill holes within the schedule. Most Member Organizations do not use this feature.
- Purple Font: Indicates data has been manually added.
- Red Font: Indicates an approved request.
- Orange Font: Indicates a pending request.
- Blue Font: Indicates a linked shift. Most Member Organizations do not use this feature.
- Green Font: Indicates a patterned assignment.
- Pink Font: Indicates a float employee.

Balance the Schedule

Various tools are available within Clairvia Client to assist with the balancing process.

- The **Request Details Report** is used to ensure schedulers do not miss employee notes, see the flyer here.
- The **Staffing Analyzer**: The tool displays how many hours employees are assigned on the schedule, displays employees who have not met their minimum requirements, and displays employees who are currently scheduled over the maximum limit. Employee limits are updated in Clairvia from HR and can be viewed under Maintain > Employee Info > Limits tab.

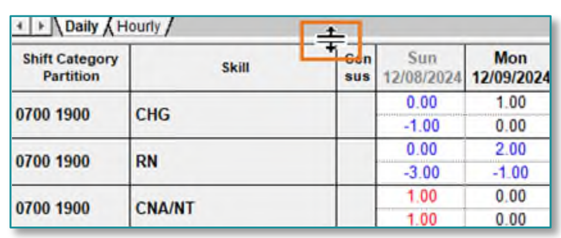
- To open the **Staffing Analyzer**, choose **View** from the menu and select **Staffing Analyzer**. The analyzer's date range defaults to what is selected within the Schedule Editor but can be modified. Select **Update** to refresh the window.
- The analyzer may remain open while the scheduler makes edits.



- **Employee Summary Tab**: Provides an overview of the following for each employee in your unit:
  - Paid hours assigned for the specified date range.
  - Number of tasks assigned for the specified date range.
  - Maximum number of consecutive paid days scheduled.
- **Minimums Tab:** Displays only the employees who have not been scheduled to their minimum paid hour requirements within the selected date range.
  - The top box shows the list of employees that do not have enough hours and their expected hours (value)
  - Select an employee and the bottom box will show you their current scheduled tasks.
- **Maximums Tab:** Displays only the employees who are scheduled over the maximum limit within the selected date range.
  - The top box shows the list of employees that have too many hours and their expected hours (value).
  - Select an employee and the bottom box will show you their current scheduled tasks.
- Skip the remaining tabs. Other features offer better views for staff totals and finding holes in the schedule.

Coverage Totals:

- **Found at the bottom of the Schedule Editor window on the Coverage Totals tab.**
  - If this is not showing in your view, click the dark grey line to drag the window up. You may need to activate the tool: choose View from the menu bar then select Totals.



- **Core Coverage is the target staffing need for the schedule. Staffing targets are broken out by skill and shift category partitions (time of day) and are based on budget/productivity goals. For inpatient units, this target is the core staffing needed for the budgeted average daily census. The Coverage Totals tab shows the scheduled FTE's, by shift, skill, and day, and the variance from the unit's target.**
  - The top number is the FTE coverage.
    - Typically, Shift Category Partitions are 0700 – 1900 and 1900 -0700, to represent a 12-hour day shift and a 12-hour night shift.
      - Three nurses working a 12-hour day shift would appear as 3.0 FTE.
      - One manager working an 8-hour day would appear as 0.67 (8÷12=0.67 FTE)
    - Employees scheduled to anything that does not contribute to core staffing, like PTO or orientation, are not included in this count.
  - The bottom number is the variance from the target staff need.
    - Variance is displayed as FTE, or you can hover to see the variance in hours.
  - Color coding:
    - Blue Font: Under the target staff needs.
    - Red Font: Over the target staff needs.
    - **Black** Font: Within an acceptable range of the staff needs.
- **Adjust the View**
  - Core Coverage can be sorted by double-clicking the column headers for either the Shift Category Partition or skill.
  - Hide Empty Coverage Rows icon  will hide empty rows in this tab.

NOTE: **Target staffing is updated annually after budgets are finalized. If your budget or staffing mix changes during the year, please submit a HelpDesk ticket to adjust the target staffing.**

View Staff Totals:

- **Also found at the bottom of Schedule Editor is the Staff Totals tab. For this tab to be active, you must have your view set to View by Assignment.**
- **The Staff Totals tab displays a simple head count of how many people are working per day by skill and shift category partition.**
  - Please note, this Staff Count is a count of people, not coverage, so it will not show you if someone is only working a partial shift. For more precise coverage totals, we recommend the Coverage Totals tab.

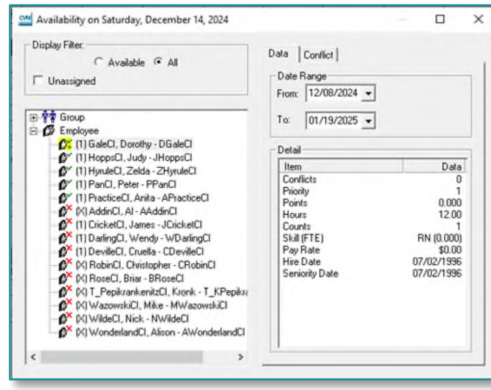
Daily | Hourly

Shift Category Partition	Skill	Sun 12/08/2024	Mon 12/09/2024
0700 1900	CHG	0	1
0700 1900	RN	0	2
0700 1900	CNA/NT	1	0
0700 1900	US	0	2
0700 1900	NM	0	1
0700 1900	ANM	1	0
0700 1900	RSC	0	0
0700 1900	CI	0	0
0700 1900	LPN	0	0
0700 1900	PT OBS	0	0
0700 1900	EARNLEARN	0	0
1900 0700	CHG	0	0
1900 0700	RN	0	1
1900 0700	CNA/NT	0	0
1900 0700	US	0	1
1900 0700	NM	0	0

Coverage Totals | Hourly Totals | Staff Totals

Manually Update the Schedule

The Availability Window:



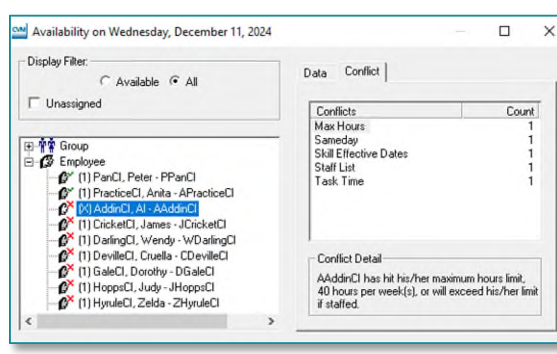
- ➢ **From the Availability window, schedulers may manually update the schedule, view conflicts, and view employee details.**
- ➢ **To open the Availability window, double-click a cell within the Schedule Editor, or right-click and select View Availability window.**
- ➢ **When Schedule Editor is set to View by Employee, the Availability Window displays tasks for your unit that can be assigned to a selected employee.**
- ➢ **When Schedule Editor is set to View by Assignment, the Availability Window displays employees from your unit who are available to work a selected task.**
  - If Display Filter is set to **Available** only employees eligible to work the selected task are displayed. Set the Display Filter to **All** to display all employees, regardless of conflicts.
    - For someone to be considered available they must have the skill for the task, not be scheduled to a conflicting task, and the assignment should not put them over their hourly limits.
      - A green checkmark indicates an available employee.
      - A yellow highlight indicates an employee is "super available". Employees, usually Per Diems, may indicate their availability to work during Team Scheduling using tasks with the word "Available" in the name. If their request aligns with a hole on the schedule, they are highlighted yellow and put at the top of the employee list.
    - A red X indicates an employee has a conflict. To see more information about the conflict, click the **Conflict** tab.
  - To add a single assignment, select the face icon next to the employee's name, drag and drop the icon into the appropriate cell; or select an employee and double-click the target cell.
  - To add multiple assignments, select multiple cells on the schedule by holding the **CTRL** button on your keyboard and clicking the cells with your mouse. Once all desired cells have been selected, drag, and drop the face icon next to the employee's name to one of the highlighted cells.
- ➢ **The filter and method of updating the schedule is the same when using the Availability Window with Schedule Editor set to View by Employee.**

Schedule Conflicts

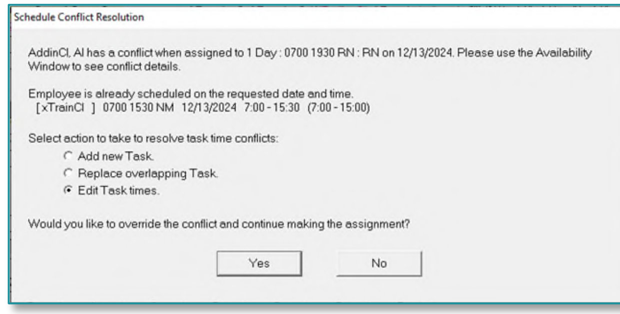
- **Conflict messages should be helpful and correct. They are meant to help schedulers choose the right staff to fill holes and avoid overtime without having to know each employees' qualifications by heart. If conflict messages are overwhelming or inaccurate, open a ServiceNow ticket so unit and employee settings can be improved.**
  - **Max Hours Conflict:** Displays when attempting to schedule an employee over the max hours, set under the Limits tab within Employee Info.
  - **Skill Effective Date Conflict:** Displays when an employee does not have the required skill for a task as of the date of the assignment (such as assigning a CNA being assigned to an RN shift). Employee skills are updated from the HR interface. Reminder, managers can manually add secondary skills as needed. Please see the Manager checklist here.
  - **Staff List Conflict:** Displays when an employee is not listed in the Staff List/Employee Group for the selected shift. To resolve, add the employee to the appropriate Employee Group found within Employee Info. See the Manager checklist for how to add employees to groups.
  - **Same day Conflict:** Displays when two conflicting assignments are scheduled during the same day.
  - **Task Time Conflict:** Displays when two assignments overlap in time.
  - **Shift Full Conflict:** Appears only when using Schedule Editor set to View by Employee. Displays when attempting to assign an employee to a task/shift that already has its needs met and no longer has open spots on the schedule. To resolve, remove another employee from the assignment or switch to Assignment View, right-click the cell and select Increase Slot Size to open an additional slot for a single assignment on the schedule. To permanently increase slots available for a shift, place a HelpDesk ticket.
  - **FTE Core Met Conflict:** Displays when the scheduler has the Staffing goal menu set to Schedule to Core Coverage and scheduling the employee would exceed the target coverage for the unit. To remove the conflict, set the Staffing goal menu to Schedule to Staff Size.

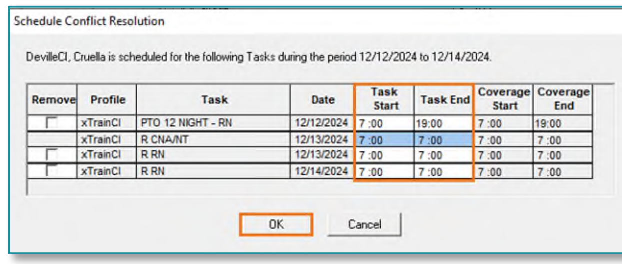
Resolving Conflicts

- Conflicts are meant to be helpful and guide you to finding the best staff for an assignment that avoids overtime.
- All conflicts can be overridden by the scheduler and the cause of some conflicts can be corrected so they do not appear again.
  - For example, if the employee does not have the correct skill for a task, the scheduler can add the skill to the employee through Employee Info. This will prevent the conflict from appearing again and will also ensure the employee can request tasks and opportunities related to that skill.



- When the conflict overlaps with an employee's already scheduled task, the Schedule Conflict resolution window will open when the scheduler tries to add the new task. The Schedule Conflict resolution window provide details about the conflict and the scheduler must choose how to proceed:

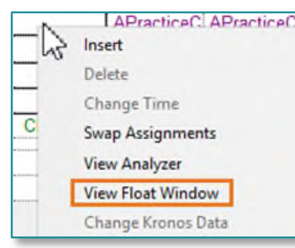




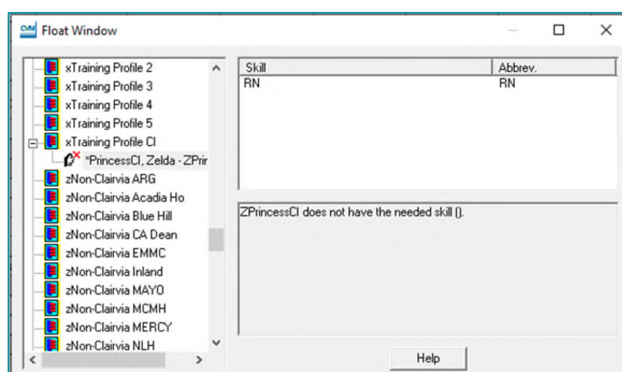
  - **Add new Task:** adds the new assignment in addition to the original. This is rarely used.
  - **Replace overlapping Task** adds the new assignment and removes the original.
  - **Edit Task times:** gives you another window where you can adjust the start and end times of either shift so they would no longer overlap. You also have the option to remove the original task if you only need the new one. Choose this option instead of "replace overlapping task" when the default times of the new task are not correct to save a step.

The Float Window:

- **The float window tool allows the scheduler to pull employees from other units and assign them to work in your unit. Employees only display in one profile's employee list so anyone with a secondary job in your unit will need to be floated in.**



  - To open the Float Window, ensure your view is set to **View by Assignment**. Right-click the appropriate cell within the Schedule Editor for the day and task you would like to schedule the employee to and select **View Float Window**.

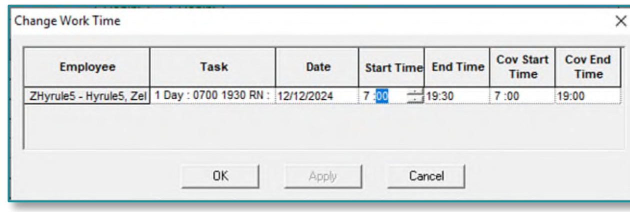


  - Units with available float employees display with a plus sign. Click the plus sign to view the employees that are eligible to float. A green checkmark indicates an available employee; a red X indicates an employee with a conflict.
  - Drag desired employees from the Float window to appropriate cell in the schedule to make the assignment.

NOTE: **Standard float permissions are the responsibility of the unit. Schedulers may adjust the float permissions for staff in their department through Employee Info. For more information on Employee Set-Up, see the flyer here.**

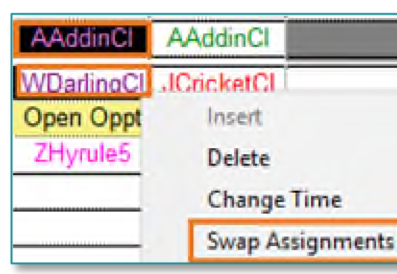
Change Task Time:

- **Start and End times of tasks can be modified.**
  - To change task times, right-click a shift and select Change Time. Click the time within the Start Time or End Time column and adjust by typing or using the arrow keys.



  - Note the label of the shift does not change when the task times are changed. See **Adding Assignment Note** below for how to add a note to draw attention to this update.
- **Shift times versus coverage times.**
  - Coverage times exclude the 30 min unpaid meal break built into working tasks that are longer than 6 hours.
  - Nonproductive tasks such as PTOUNSCHED, do not include the 30-minute meal break.
  - Coverage time is used in Clairvia Assignment Manager to display the time a caregiver is available to be assigned to a patient.
  - Coverage time is sent to API for nonproductive tasks and on call tasks.
  - You cannot edit coverage times; you must edit the Task Start and End Times as appropriate to update coverage times. After updating task times, click the coverage time header to update coverage times to ensure they are correct.

Swap Assignments:



- **Swap Assignment switches two employees with each other within the Schedule Editor.**
  - Select the first employee desired for swapping. Hold the **CTRL** key on your keyboard and select the second employee that is to be swapped. Right-click and select **Swap Assignments**.

Cut/Copy and Paste

- **Cut/Copy and Paste is available; however, when you use copy, cut, and paste you move not only the name of the employee but also the times associated with the task. Copying task times includes the start and end of the task and copies whether or not the assignment includes an unpaid break.**
  - Reminder – PTO does not include a break. If you used copy and paste to move someone from a task that had a break to one that does not, the break would copy too and could impact the employee's timecard.

- **Cut/Copy and Paste should only be used when moving someone from the same task to another day or as a short cut in cases when the default time of the task is not accurate for the scheduled assignment.**
    - i.e. an employee will be on 8 hours of FMLA for 10 days and FMLA defaults to 24 hours. I can add the first FMLA day then update the task times then copy and paste the remaining 9 days to save time updating task times.

Delete an Assignment

- **Right-click the employee's abbreviation or task name then select Delete from the dropdown.**

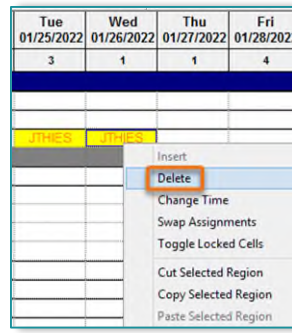
Adding Assignment Notes

- **As you create the schedule, it may be helpful to add notes that give more information to both schedulers and employees. In Clairvia, these are called "Assignment Notes."**
    - These are not the same as the "Request notes." Request notes are tied to a specific request and are not visible directly in Schedule Editor.
    - Assignment notes can be read on the schedule in Clairvia Web by any employee.
    - The background of the cell turns blue when an Assignment Note is added.
    - Assignment notes can be printed onto staffing reports.
- **Some common uses might be:**
    - Indicating which Orientees and Preceptors are paired together.
    - Assigning a specific duty the employee may have that is not otherwise captured on the schedule. For example, checking crash carts, making discharge phone calls, or reminders for patient outcome experts to complete acuity audits.
    - Confirming that modified task times are intentional and not a result of using copy/cut/paste. This also draw attention to the task for other admins, so they are more likely to notice the default task time has been modified.
    - Indicating who the "New Employee Placeholder" represents. This is a generic account you can use to represent new employees that are not yet in Clairvia. When the employee's account is available in Clairvia, the schedule should be updated so they can log in to see when they work and downstream systems can be updated with the correct caregiver information. Until that time, an assignment note can be used to add the real name of the employee.
- **How to Add/Edit Assignment Notes**
    - Right-click a scheduled call and choose **Add/Edit Assignment Note**.
    - In the free text box that opens, add a note. Click **OK** to save and close the window.
    - To read an assignment note, right-click and choose **Add/Edit Assignment Note**.

Approve and Deny Requests

Approving and Denying Requests

- **When it comes to managing requests in Clairvia, managers have the option to approve or deny vacation requests months in advance through Clairvia Web. Requests for working shifts; however, should only be approved or denied in bulk in Clairvia Staff Manager once the schedule is finished and ready to be published.**
- **After the scheduler has generated for pending requests, the schedule will display those requests in orange text.**

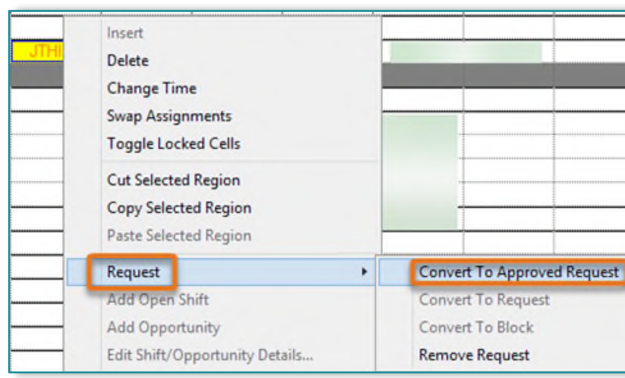


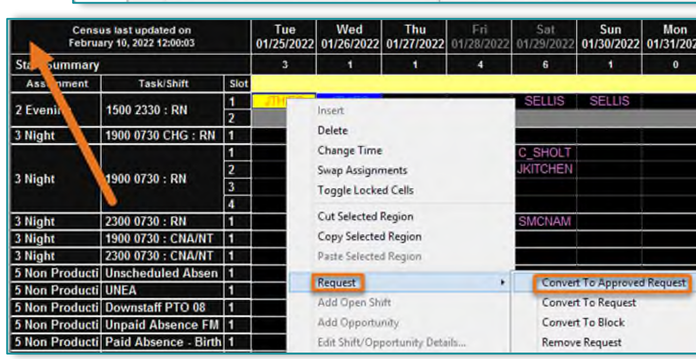
STEP 1: While balancing the schedule, delete any pending requests that should be denied by right-clicking the request (in orange text) and select **Delete** from the dropdown.

NOTE: Deleting requests in Schedule Editor will not deny the request but will remove the request from view. Deleted requests will be denied within the Request Window.

STEP 2: Once the unit schedule is complete, schedulers can approve all remaining requests at once or individually.

- To approve a single request, right-click the cell with the orange request. Hover over **Requests** and select **Convert to Approved Request**.
- To approve all requests at once, make sure the schedule is opened to the first date of the new schedule then click the left-side of the large rectangle in the top left corner of the schedule grid (above Staff Summary) to highlight all cells within the schedule. The cells will appear black when highlighted.





- Right-click any request then hover over **Requests** and select **Convert to Approved Request**, which will change all the orange pending requests to red approved requests.

NOTE: **As soon as a request is approved in schedule editor, employees can see the status of the requests change in Clairvia web regardless of whether the schedule has been published. For this reason, we recommend you approve the entire schedule at once, and as close to publishing the schedule as possible.**

NOTE: **If there are ever discrepancies between the status of a request and the schedule, the schedule is considered the source of truth. Employees should never determine their schedule based only on the status of their requests.**

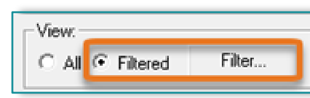
Request Window

- **The Request Window stores all employee requests. The Request Window is used to edit or change the status of a request. Filters can be applied to locate specific requests. Changing the status of a request, will not change how it appears on the schedule.**

STEP 1: From the **Schedule Navigator**, select **Maintain** from the menu bar then **Requests** in the dropdown, then **Requests** in the submenu.

NOTE: **The Request Window is read-only if the Schedule Editor is open.**

STEP 2: In the Request Window, select the **Filtered** radio button to turn the filter on and then click **Filter…**to open the **Request Filter** window.

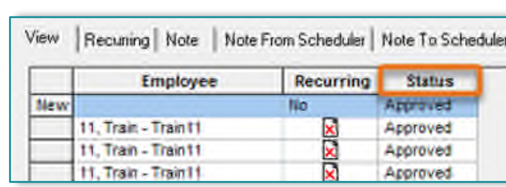


STEP 3: Within the **Request Filter** window, create a filter for the date range of the new schedule by selecting the check box for **Start** under the **Date Range** header. Then choose the start date of the new schedule from the dropdown. Then select the check box next to End and select the end date of the new schedule from the dropdown. Click **OK** to apply filters.

Denying Requests

- **After filtering requests within the Request Window, all the pending requests deleted while balancing the schedule can now be denied. Denying requests prevents the employees from placing the same request again and alerts the employee via Clairvia Web (and email if they have opted in) that their request has been denied. It also ensures that pending requests are only for future schedules.**

STEP 1: Double-click the **Status** column label to sort the requests alphabetically by status. Since we have filtered for date range and already approved all requests that will be approved for this date range, anything listed as pending should be denied.



STEP 2: To quickly deny requests, select the status cell of the first pending request, click the letter **D** on the keyboard to auto-populate the Denied status in the cell, and then click the down arrow on your keyboard to go to the next request and click the letter **D** on your keyboard again. Continue down the list until all the pending requests have been denied.

STEP 3: Click **OK** to save and close the Request Window.

NOTE: If you wish to send a note to the employee to explain why a request was denied, select the Request by clicking the gray box to the left of the row then select the Note From Scheduler tab at the top and free text a note. Click OK to save and close. Employees can see this note in Clairvia Web.

NOTE: Individual requests can be approved from Clairvia Web in the administer request pages. However, for bulk approvals or denials, the features in Staff Manager are recommended.

Entering Requests on Behalf of Employee

Schedulers can create requests for employees through the **Schedule Navigator**. Schedulers may add one-time or recurring requests with predetermined intervals.

STEP 1: From the **Schedule Navigator**, click the **Display Request** icon. 

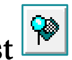
STEP 2: Select the employee's name and task for the request from the Employee and Assignment list on the right side of the screen. The employee and task you select will have a green checkmark next to the icon.

STEP 3: Drag and drop the name or task to the appropriate date in the Schedule Navigator calendar. The scheduler will be prompted to **Create Request**, **Create Block,** or **Cancel**, after dropping the staff into the date. Click **Create Request**.

NOTE: Multiple dates or employees can be selected by using the CTRL key while making selections, prior to dragging/dropping names/tasks to the calendar.

STEP 4: The **Request Window** will display the new request at the top of the list.

- **Requests** entered in **Staff Manager** default to an **Approved** status.
- To change the status to pending, click the status within the Status column, and select **Pending** from the dropdown menu.
- To create a recurring request, click the red **X** in the **Recurring** column, and select **Yes**. Parameters can be set in the Recurring tab.
- Schedulers may add Note from Scheduler within the Request Window.

<u>STEP 5</u>: Once the requests have been entered, click the **Display Request**  icon to return to the Schedule Navigator, displaying assignments in the calendar.

<u>**NOTE**</u>: **Use the date dropdown selection or black single arrows to switch to future months. You can view multiple months at once by changing the options in the Format menu and choosing Navigator Set-up.**

Open Shifts, Opportunities, and Shift Alert

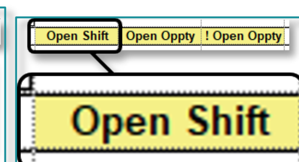
- **Even if all employees on the unit are scheduled properly, that does not guarantee your schedule will meet the needs of the unit. You may still have holes on the schedule that you need to fill. There are three options to mark holes on the schedule: Open Shifts, Opportunities, and Shift Alerts.**
  - **Open Shift:** Open shifts are only visible to schedulers using Staff manager. They can be used to mark potential holes that are not ready for employees to see yet.
  - **Opportunities:** Opportunities are visible to schedulers using Staff Manager and are also shown to employees as soon as the schedule is published. Employees can volunteer to work Opportunities. Because of this feature, they are often used more than open shifts.
  - **Shift Alert**: Shift Alerts are a type of opportunity that can be used when the unit has an urgent need and is willing for the task to be filled by the first employee to accept it. Shift Alerts initiate a blast notification to all staff that have the skill, are not scheduled to another shift on the day, and – most importantly – have opted to receive Shift Alert notifications for the unit.

<u>**NOTE**</u>: **Open Shifts and Opportunities can only be created for future dates. Generating the schedule will automatically delete them the Schedule Editor.**

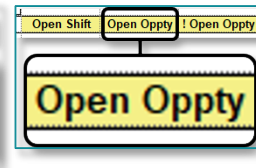
- **The icons for Open Shifts, Opportunities, and Shift Alert are at the end of the tool bar that starts with the save icon.**
- **Scheduler Editor must be in View by Assignment to add Open Shifts, Opportunities, and/or Shift Alerts to the schedule.**

Creating an Open Shift

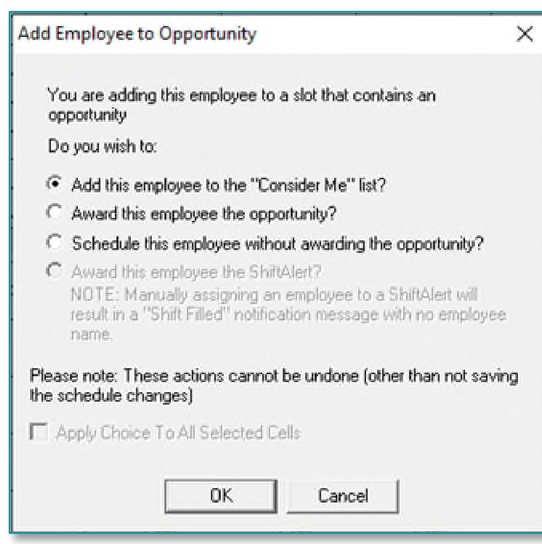
- **Select an open cell or cells. Click the Create Open Shift icon.**
- **This applies a highlight and marks the cell as an Open Shift.**



Creating an Opportunity



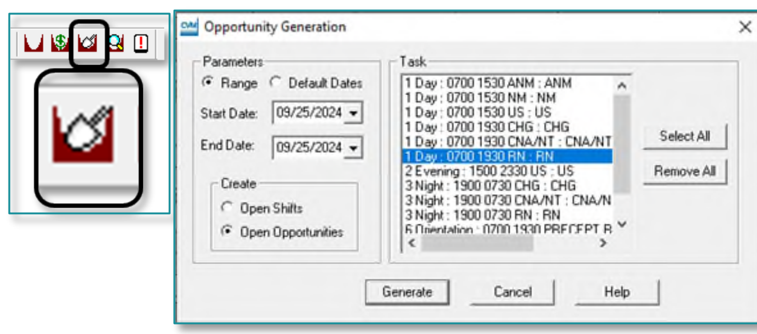
- **Select an open cell or cells. Click the Create Opportunity icon.**
- **This applies a highlight and marks the cell as an "Open Oppty".**
  - To see opportunities in Clairvia Web, the schedule must be published, employees need to have the skill of the task, permission to pick up opportunities and cannot have a conflicting assignment on the same day.
  - At NLH opportunities default to a "consider me" status. This means employees can volunteer to work the shift through Clairvia Web, but manager review and approval is still required before it is assigned to anyone.
  - Most of the time opportunities should be filled with this process. However, schedulers have the option of adding someone to an opportunity through Schedule Editor.
    - Use the Availability Window to drag and drop an employee onto the Opportunity.
    - Choose from the selections:
      - **Add this employee to the "Consider Me" list?**
        - This adds the employee to the "Consider Me" list as if the employee signed-up for the opportunity in Clairvia Web. When managers are ready to review and approve, the employee would be in the list with everyone else that has asked to be considered for shift.
      - **Award this employee the opportunity?**
        - Skips the line and puts the employee directly on the schedule and their name will appear on the schedule with an "(O)" in cell. The Opportunity is now closed since it has been filled.
      - **Schedule this employee without awarding the opportunity?**
        - Puts the employee directly on the schedule but does not mark the task with the "(O)". The opportunity is still open for other staff to request.



Approving Opportunities

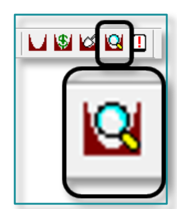
- **Opportunities are approved in Clairvia Web. Schedulers can see Opportunities pending approval on their Admin Dashboard or navigate to Schedule > Administer Schedule then choose Weekly or Monthly Schedule and make sure Show Opportunities checkbox is selected.**
  - Click any opportunity hyperlink from the list of the left to open the details.
  - Select an employee to be awarded the opportunity.
  - If needed, add an **Assignment Note** that will be added to Scheduler Editor and/or adjust the task times.
  - Click **Save**.
- **Once approved for an opportunity the employee's name will be added to the schedule with an (O) in front of their abbreviation. The employee will receive a notification on their employee dashboard and an (optional) email.**

Fill Schedule Vacancies



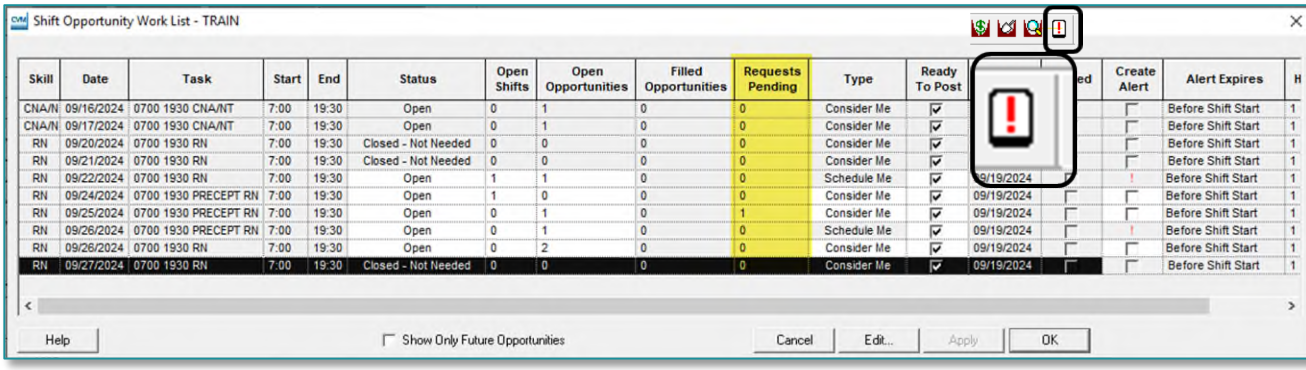
- The **Fill Schedule Vacancies** icon opens an opportunity generation window. The tool allows you to quickly fill all vacancies or empty cells on the schedule.
- This should only be used with caution as it can create an overwhelming number of opportunities if you do not narrow your selections carefully.

Opportunity Worklist



- The Opportunity Worklist icon opens the Shift Opportunity Work list window. This window shows details about all the open opportunities for the unit.

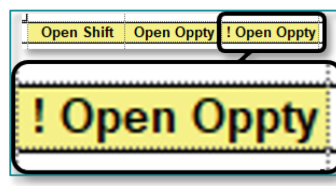
- The **Requests Pending** column allows the scheduler to see if any staff have volunteered for the opportunity. Schedulers can then navigate to Clairvia Web to approve the Opportunity or wait for more volunteers.



Creating a Shift Alert

➢ **Select an open cell or cells. Click the Shift Alert icon. An Open Opportunity with an exclamation point will appears in the empty slot.**

- If an employee is eligible to pick up opportunities on a unit, they can opt-in for Shift Alerts as well.
- Shift Alerts can be accepted via text message, phone call, or email. There is no manager review and the first person to accept it will be added to the schedule automatically.



➢ **You cannot convert an Open Shift to an Opportunity. But you can convert an Opportunity directly into a Shift Alert. Instead of selecting an empty cell, click an existing Opportunity, then click the Shift Alert button to convert the Opportunity into a Shift Alert.**

NOTE: Before converting an Opportunity into a Shift Alert, use the Opportunity Worklist to check and see if there are any pending requests waiting for review.

Additional notes about Open Shifts, Opportunities, and Shift Alert

➢ **To remove an open shift, opportunity, or Shift Alert, right-click and delete them. You cannot use the undo button.**

➢ **Opportunities do not generate any alerts for employees. The employee needs to look at the schedule to see them.**

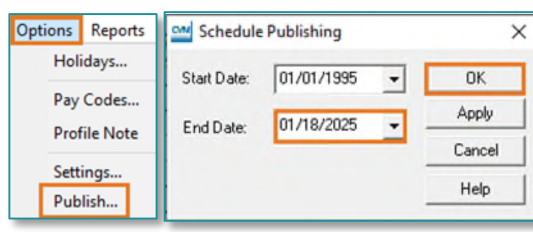
➢ **You cannot create an Opportunity for only part of a task. If you often need to fill partial shifts (4 hours, 6 hours, etc.), new tasks with those times can be created for your unit. In the meantime, you can add a note to the Opportunity to let staff know what hours you need coverage for. You have the option to adjust the start and end time of an opportunity at the time it is approved.**

- **Opportunities and Shift Alerts are only available to employees when the schedule is published.**
- **Employees can see Opportunities based on their settings in Employee Info.**
  - They must have the skill of the task. For example, Opportunities for Charge tasks will only be shown for employees that have the CHG skill.
  - They cannot be assigned to any another task on the same day. This includes R days or availability tasks. So, if an assignment is no longer applicable, it should be removed from the schedule.
  - In the permissions tab you can allow them to pick up opportunities in their home unit and/or their float profiles.
  - See the Clairvia Manager Checklist & Employee Set-Up flyer here.
- **Staff will only receive Shift Alerts if they opt in to receive them.**
  - There is a report available to manager to see which staff have chosen to get the alerts. Clairvia Web > Reports > Management > Shift Alert Participation.
- **If you generate the schedule for a day and task that has an opportunity, it will automatically remove it. Adding opportunities should be one of the last steps when you create a schedule.**

Publish Final Schedule

- **Publishing the schedule allows employees to view the schedule on Clairvia Web or Clairvia Staff Manager Mobile App for a specified date range. Once published, employees can volunteer for Opportunities and Swap Shifts as desired.**

<u>STEP 1</u>: Click **Options** from the toolbar and select **Publish.**
<u>STEP 2</u>: Change the **End Date** to reflect the end of the skeletal schedule range. **DO NOT** change the Start Date.
<u>STEP 3</u>: Select **OK** to Publish.



- **Remember to follow the Team Scheduling Calendar for your Member Organization so you can deliver on staff's expectations for viewing the final schedule.**
  - Team Scheduling Calendars are located here.

<u>NOTE:</u> Publishing does not impact the Team Scheduling request periods those will still open and close on the dates outlined in your Member Organization Team Scheduling calendar. Schedulers can continue to edit a published schedule without needing to "republish".

Shift Swaps

- **Employees can request to Swap Shifts once the scheduled is published.**
  - Employees can swap shifts of different lengths, shifts that occur on the same day, and shifts that have different skills (like CHG for RN).
  - Employees can send a Shift Swap invitation to more than one employee.
    - Clairvia sends automated messaged to employees in Clairvia Web and will let the know if someone accepts and the manager approves before the other invites see the invitation to swap shifts, they will receive a message that the invitation has expired.
  - Swaps cannot be initiated in Clairvia less than 8 hours prior to the start of the shift.
    - If an invited user does not accept/decline the swap, the invitation automatically expires.
- **Shift Swaps require manager approval once both parties agree to the swap.**
  - Schedulers will see a (RS) and (S) in Schedule Editor when employees request to Swap Shifts. The requestor has an RS in front of their abbreviation and the swap invitee(s) have an (S).
  - Once a Swap has been accepted, Schedulers will see a (PSM) on the schedule which stands for Pending Swap Manager Approval.

Approving Shift Swaps

- **Shift Swaps are approved in Clairvia Web. Schedulers can see Shift Swaps pending approval on their Admin Dashboard or navigate to Schedule > Administer Schedule then choose Weekly Schedule and make sure Show Shift Swaps checkbox is selected.**
  - Click any **Shift Swap hyperlink** from the Shift Swaps Pending Approval list of the left to open the details.
  - Select an **employee**.
  - Click **Save**.
- **Once approved the schedule will be updated and a (CS) will be visible for both employees indicating a completed swap. The employee will receive a notification on their employee dashboard and an (optional) email.**