From the Office of Health Informatics

Clairvia Web Resource Reports

July 2, 2025

The Resource Reports offer information on how employees are scheduled and can be run for multiple units at once. The report output is a .CSV file that can be manipulated through Excel. To run the report, users must have both security group and reports access for a unit in Clairvia.

Resource Reports Types

- **Employee Schedule History**:
  - Description: Entire schedule for an employee, regardless of where they are scheduled. Can be run for one or all employees.
  - Uses: Validating weekend requirements or scheduled holidays.
  - Content**:** Employee name, scheduled date, assigned day (of the week), holiday if applicable, scheduled profile, shift name, actual start and end time, actual duration, home profile, login, FTE, skill, and assignment notes.
- **Scheduled For**:
  - Description: Entire schedule by task, regardless of where the assigned employees are hired. Can be run by individual task or entire profiles.
  - Uses: Reviewing all employees that were scheduled to specific tasks like Sitter or Orientation.
  - Content: Employee name, scheduled date, scheduled profile, shift name, actual start and end time, actual duration, coverage start and end time, coverage duration, home profile, login, FTE, skill, and assignment notes.
- **Scheduled Export**:
  - Description: All scheduled tasks, by profile, which count toward coverage of the unit. Can be run by individual profile(s) or by facility. *NOTE: Tasks such as PTO and Orientation do not count toward unit coverage and are not captured in this report.*
  - Uses: Save a copy of working shifts. Calculate total worked hours by employee.
  - Content: Employee name, schedule date, home profile, scheduled profile, actual start and end time, actual duration, coverage start and end time, coverage duration, login, FTE, skill, and assignment notes.
- **Absence History**:
  - Description: Includes all tasks configured to count Toward Sick/No Show for the date range selected. Can be run by individual task or entire profiles.
  - Uses: Report on call ins to get a total number of occurrences.

- Content: Employee name, scheduled date, scheduled profile, home profile, shift name, actual start and end time, actual duration, login, FTE, skill, and assignment notes.

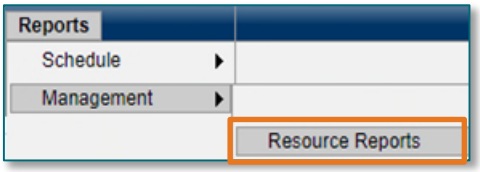
➢ **Active Employees**:

- Description: List of active employees by profile. Active refers to employment status and not if the employee was scheduled during the date range. Can be run by profile or facility.
- Uses: Use to get a total count of employees by skill. This report could also be used to share with staff to confirm their contact information in Clairvia is correct.
- Content: Employee name, home profile, login, email, phone number, skill, and FTE.

➢ **Possibly Available:**

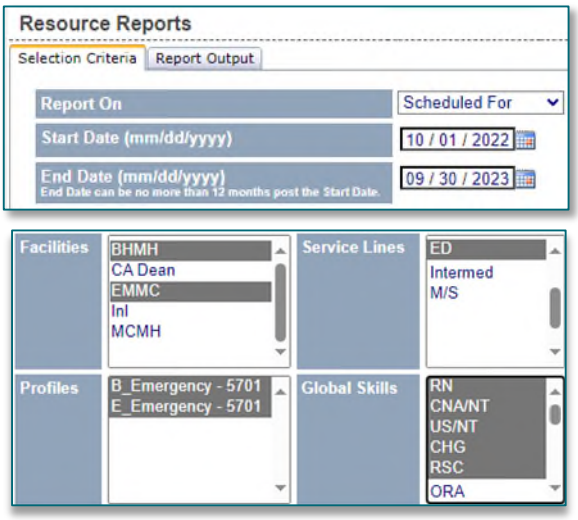
- Description: Displays employees who are not scheduled on a specific day or date range. Also shows the employee schedule for the day before and after the report time frame.
- Uses: See who is not scheduled to call and ask to them to pick up a shift.
- Content: Employee name, home profile, scheduled profile, schedule date, scheduled status (displayed SCHEDULED or NOT SCHEUDLED), shift name, actual start and end time, actual duration, login, FTE, skill, and assignment notes.

Running a Resource Report



➢ In Clairvia Web, hover over **Reports** in toolbar, then hover over **Management**, select **Resource Reports**.

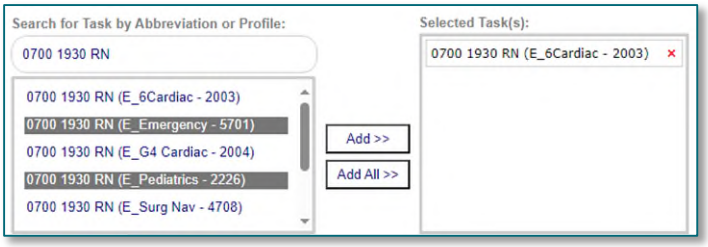
- Use the **Report On** dropdown to select a report type.
  - The report chosen determines the criteria type (selecting vs searching).
- Select the **Start Date**.
- Select the **End Date**.



➢ **Report Criteria Type: Selecting**

- Select the Facility, Service Line, Profile, and Global Skills from lists shown on screen.
- Hold **CTRL** + **left mouse click** to select multiple items.

➢ **Report Criteria Type: Searching**



- Searching by Task or Profile:
  - Enter the name exactly as it appears in Clairvia.
- Searching by Employee:
  - Enter the name in "Last Name, First Name" format.
- Add items from the search results box on the left to the **Selected** box on the right.
  - **ADD >>** will add individually selected items to the report.
  - **ADD ALL >>** will add all search results to the report.

NOTE: **Hold CTRL + left mouse click to select multiple items.**

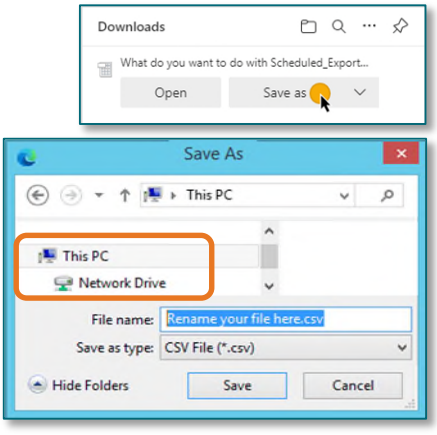
➢ **Select Export Type**

- **CSV** (Comma Separated Values) – see instructions below for downloading a resource report.
- **Email** – enter individual email recipients separated by a semicolon, the report will be emailed and can be opened in Excel.

➢ **Click Run Report**

NOTE: **Resource Reports will not open directly in the Report Output tab, they must be exported. Clairvia cannot email Outlook Distribution groups.**

Downloading a Resource Report



- Click **Save As** on the download pop-up.
- Select **This PC** and navigate to the destination. folder.
  - Recommendation: Select a folder on a Network Drive.
- Rename the file to remove brackets [ ] and **Save**.
- Navigate to the destination folder to open the file.
  - Recommendation: Save the file as excel upon opening.

NOTE: **If the download pop-up does not appear, click the download icon** **or CTRL+J on the keyboard.**