

From the Office of Health Informatics Clairvia Web Schedule Report

July 2, 2025

Managers who wish to maintain a copy of original schedules can do so through Clairvia Web and save a copy onto their personal desktop.

Schedule Report

Keeping a copy of the original schedule can be beneficial for managers who need to track trends or are asked to confirm original finalized post.

STEP 1:From Clairvia Web toolbar, selectReports→Schedule→Schedule.

STEP 2: Select Profile.

- If the manager of more than one unit, multiple units can be selected. The schedules will generate with a page break.
- **<u>STEP 3</u>**: Select all Shift Category Partitions, Skills, and Tasks.
 - Click Home key to start at the top and Shift + End to highlight all.
- <u>STEP 4</u>: Set the following settings with the below recommended selections:
- > **Date**: Set to the **First Sunday** of the schedule.
- Number of Weeks: Based on MO schedule pattern: either 4 or 6 weeks.
 - Legal or Letter option is dependent on available printer settings.
- > Display Format By: Profile
- Group Employees by Partition: <u>Uncheck</u> Group by Shift Category Partition
 - Leaving this box checked will print in the 8-4-4-8 format.
- Include Profile Based Unscheduled Employees: Yes
- Display Name Format: Full Name
- **Employee Sort By**: Manager preference



Profiles	Shift Categories
Ac_1 Sou - 2174 Ac_2 North/South - 2172 Ac_3 North/South - 2171 Ac_Behav Resource Cntr - 1054 Ac_Child & Adolescent Amb - 4280 Ac_Family Murse Pract - 3051 Ac_Float Staff - 1097 Ac_Infection Control - 1231 Ac_Med & Phy Practice - 1048 Ac_Mursing Admin - 1096	(Ac_1 Sou - 2174) 12-12 (Ac_2 North/South - 2172) 12-12 (Ac_Behav Resource Cntr - 1054) 12-12 (Ac_Child & Adolescent Amb - 4280) 8-4-4-8
Shift Category Partitions with Spillover	0600 1800 (Spill: Front 60 - Back 60) 1800 0600 (Spill: Front 60 - Back 60)
Skills	(Ac_1 Sou - 2174))SS (Ac_1 Sou - 2174))PSYCH TECH (Ac_1 Sou - 2174)PSYCH TECH (Ac_1 Sou - 2174)PT OBS (Ac_1 Sou - 2174)PN •
Tasks	(Ac_3 North/South - 2171)0600 1430 Orientee Psych Tech (Ac_3 North/South - 2171)0600 1430 Preceptor Psych Tech (Ac_3 North/South - 2171)0630 1500 NLSS (Ac_3 North/South - 2171)0630 1500 LCPC

Number Of Weeks	6 Weeks (Letter) 🐱
Display Format By	Profile O All Employees
Group Employees By Partition	Group By Shift Category Partition
Include Profile Based Unscheduled Employees	Yes O No
Display Name Format	Full Name O Abbreviation
Employee Sort By	Skill and then Employee Name Break out by Job Skill
	C Employee Name Only
	Employee Custom Display Order
Include Phone Number	🔿 Yes 🖲 No
Exclude Scheduled Tasks	○ Yes
Show Task	O Abbreviation
	Abbreviation w/ Scheduled Start/End Times When Different
	O Abbreviation And Coverage Start/End Times
Mark Filled Opportunities with (O)	Yes O No
Show Unfilled Opportunities and Open Shifts	O Schedule Only; Don't Show Opportunities/Open Shifts
	Show Opportunities/Open Shifts and Schedule
	O Show Opportunities/Open Shifts Only
Include Paid Hours By Employee	Yes O No
Total By	○ FTEs ○ Staff
Calculate Totals By	Employee Skill O Task Skill
Float In Display	Separate Table O Show in Red O Show with '(In)'
	○ Display After Profile Based Employees ○ Do not Display
Float Out Display	○ Separate Table ○ Show in Blue ● Show with '(Out)'
	O Do not Display
Show Notes	Show Notes in Page Footer
Write-in Lines	0
	Run Report Clear Form

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- Include Phone Number: No
- > Exclude Scheduled Tasks: No
- > Show Task: Abbreviation w/ Start/End Times When Different
- > Mark Filled Opportunities with (O): Yes
- > Show Unfilled Opportunities and Open Shifts: Show Opportunities/Open Shifts and Schedule
- > Include Paid Hours by Employee: Yes
- Total By: Hours
- > Calculate Totals By: Employee Skill
- ➢ Float In Display: Show with '(In)'
- Float Out Display: Show with '(Out)'
- > Show Notes: Show Notes in Page Footer
- ➢ Write-in Lines: 0
- **<u>STEP 5</u>**: Run Report: A print preview will appear on the screen.

<u>NOTE</u>: The Schedule Report is a large report, depending on the unit size. <u>Printing is discouraged</u>. Managers can follow the steps below to copy the report to their desktop, as needed.

Saving Schedule Report to Local Desktop

- **<u>STEP 1</u>**: Hover over the top of the screen. to show icons and click the **Save** (Disk) button.
- STEP 2:From the Save As window, clickComputer in the left view pane, thenLocal Disk (C: on <*yourdevice*>.
- <u>STEP 3</u>: Double-click to open the **Users** folder and search for network sign on.
- <u>STEP 4</u>: Double-click to open and select Desktop Desktop and Save.



<u>NOTE</u>: To create a specific folder for Schedules, expand the left view pane down to Desktop and right -click \rightarrow Folder and name. The new folder will be available on the desktop.

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