From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Use Clairvia Web

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This Quick Reference Guide (QRG) demonstrates the basic use of Clairvia Web for employees.

Access Clairvia Web

➢ **From the Northern Light Health Intranet:**

STEP 1: Type **Clairvia** in the **Search Quick Links** field.

STEP 2: Click the **Add** icon next to Clairvia.

NOTE: **The Clairvia QuickLink will only need to be added one time.**

STEP 3: Click **Clairvia.**

STEP 4: Enter login credentials.

STEP 5: Click **Log on.**

Log On

STEP 6: Click the **Clairvia** folder.

STEP 7: Click the **Clairvia Prod** folder.

STEP 8: Click the **Clairvia Web** icon.

NOTE: **To view additional written instructions for key Clairvia features and copies of the scheduling calendar for each organization, click the Clairvia Job Aids icon.**

Set Email Notifications Preferences

➢ **From the Employee Dashboard:**

STEP 1: Click **Tools.**

STEP 2: Hover over **My Information.**

STEP 3: Click **Preferences.**

STEP 4: Select the **Enable Email Notification** check box.

STEP 5: Select the type of notifications to receive.

NOTE: **By default, Clairvia Web only contains assigned work email addresses. For notifications to be sent to another email or phone, update contact information in HR.**

STEP 6: Click **Save.**

Set Shift Alert Preferences

➢ **From the Employee Dashboard**

STEP 1: Click **Tools.**

STEP 2: Hover over **My Information.**

STEP 3: Click **Preferences.**

STEP 4: Click the **Shift Alert** tab.

STEP 5: Select the **Enable ShiftAlerts** check box.

STEP 6: Select the profile(s) to receive shift alerts for.

NOTE: **Hold the Ctrl key to select multiple profiles.**

STEP 7: Select the types of notifications.

STEP 8: Click **Save.**

Generate a Self-Registration Key for the Mobile App

- **From the Employee Dashboard:**

STEP 1: Click **Tools.**

STEP 2: Click **Self Registration.**

STEP 3: Click **Generate.** Generate

NOTE: **For specific instructions on setting up the Clairvia Mobile App, see additional information within Clairvia Job Aids.**

Request Time Off

- **From the Employee Dashboard:**

STEP 1: Click **Schedule.**

STEP 2: Click **My Requests.**

STEP 3: Click **Weekly.**

STEP 4: Select the **Date** drop-down arrow; then select the appropriate week.

NOTE: **Requests for time off can be made further out than requests for working shifts.**

STEP 5: Select the date wanted for time off.

NOTE: **PTO or scheduled non-paid time off can be requested using an R day.**

STEP 6: Click **Save.**

Request a Shift

Requests can only be made for working shifts within the designated request period.

➢ **From the Employee Dashboard:**

STEP 1: Click **Schedule**.

STEP 2: Click **My Requests**.

STEP 3: Click **Weekly**.

STEP 4: Select the **Date** drop-down menu; then select the appropriate week.

NOTE: **Shifts with limits show as "Available" in the cell, displaying how many spots are left.**

Cells that are grayed out indicate that the request period for those dates is not open, or the shift is already full.

STEP 5: Click the cell of the desired shift to claim.

NOTE: **Requests can be made for more than one opportunity at a time. The cell will be highlighted in yellow indicating the shift has been selected.**

STEP 6: Click **Save**.

NOTE: **Note that if working in two different departments or have an alternative unit, requests can be made for shifts at those units. To do so, change the profile by clicking the Profile drop-down arrow.**

Delete a Shift Request

It is important that requests are made only for the number of days corresponding to scheduled hours. For example, staff typically scheduled three 12-hour shifts, should only selected three days each week. If requests are made over projected paid hours, a shift can be deleted.

➢ **From the Employee Dashboard:**

STEP 1: Click **Schedule**.

STEP 2: Hover over **My Requests**.

NOTE: **Clicking Projected Paid hours will show projected paid hours for each week.**

STEP 3: Select the pending request to be deleted.

STEP 4: Click **Delete.**

- A pop-up window displays confirming the shift request to be deleted.

STEP 5: Click **OK**.

Add a Note to a Request

➢ **From the My Requests page:**

STEP 1: Click the pending request of the shift that a note is to be added.

STEP 2: Click **Edit.**

STEP 3: Document your note.

STEP 4: Click **Save.**

Volunteer for an Opportunity

➢ **From the Employee Dashboard:**

STEP 1: Click **Schedule.**

STEP 2: Hover over **My Schedule.**

STEP 3: Click **Monthly Schedule.**

STEP 4: Select the available opportunity.

- The View/Select Opportunity pop-up window displays.

NOTE: **If only available to take part of a shift, ensure to make a note to the scheduler.**

STEP 5: Click **Consider Me.**

Claim a Shift Alert

➢ **From the Employee Dashboard:**

STEP 1: Click **Schedule.**

STEP 2: Hover over **My Schedule.**

STEP 3: Click **Monthly Schedule.**

STEP 4: Select the Shift Alert opportunity.

STEP 5: Click **Schedule Me.**

Request a Shift Swap

➢ **From the Employee Dashboard:**

STEP 1: Click **Schedule.**

STEP 2: Hover over **My Schedule.**

STEP 3: Click **Weekly Schedule.**

STEP 4: Click **Task View**.

STEP 5: Right-click the shift to be swap; then click **Request Shift Swap**.

- The Shift Swap pop-up window displays.

STEP 6: Select the name(s) of the employee(s) to request a swap shifts with.

NOTE: **Employees who are available for shift swaps are highlighted in blue.**

STEP 7: Click **Swap Selected Shifts**.

STEP 8: Clear the **Show Only My Schedule** check box.

NOTE: **The shift will display with an (RS) for Requested Swap; the requested shift swaps will display with (S) for Swap. Other shift-swap codes include (PSM) for Pending Swap, Awaiting Manager Approval; and (CS) for Completed Swap.**

When an employee accepts the swap, a message is received in Message Center. Note that a manager still needs to approve the swap. Message Center can be used to accept or decline invitations from other employees to swap shifts.

Any pending swaps needing manager review can be viewed in the My Shift Swaps Pending Approval pane on the Employee Dashboard.