From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Clairvia Web for Administrators

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This Quick Reference Guide (QRG) reviews Clairvia Web for Administrators.

Common Buttons & Icons

	Clairvia Folder
Clairvia Web Clairvia	**Clairvia Web Internet Explorer** icon
Add >>	**Add** button
<< Remove	**Remove** button
	Chicklet icon
	Green Arrow icon
	Event Note icon

Set Clairvia Quick Link

- **From the Northern Light Homepage screen:**

STEP 1: Click Add Custom Link.

STEP 2: Type the name you want to use for the link in the Link Text field.

STEP 3: Copy and paste the URL for Clairvia Web into the Link URL field.

STEP 4: Use the drop-down arrow as needed to set it to open in a new window.

STEP 5: Click Save Changes .

Navigate to Clairvia Web

- **From the Northern Light Homepage screen:**

STEP 1: Click the Clairvia quick link you previously created.

STEP 2: Click **Categories** .

STEP 3: Click the **Clairvia Folder** .

STEP 4: Click the **Clairvia Web Internet Explorer** icon.

Set Email Preferences

- **From the Clairvia Web Administrator Dashboard:**

STEP 1: Click **Tools** in the blue banner at the top of the page.

STEP 2: Click the **My Information** right arrow.

STEP 3: Click **Preferences** .

STEP 4: Select the appropriate check box based on your preference.

NOTE: It is best practice to have one bulk email for requests, shift swaps, and opportunities per day.

Bulk Email Settings

STEP 1: Click **Configure** in the top menu.

STEP 2: Click **Manager View**.

STEP 3: Click the **Requests, Shift Swaps, and Opportunities** check boxes.

STEP 4: Click the **Send once daily** check boxes for each notification.

STEP 5: Click **Save Changes**.

Navigate Access Groups to Map Employees

➢ **From the Clairvia Web Administrator Dashboard:**

STEP 1: Click **Configure** in the top menu.

STEP 2: Click the **Requests** right arrow.

STEP 3: Click **Access Group Definitions**.

STEP 4: Click the Access Group needed within the Access Group pane.

STEP 5: Select the appropriate check box of those you need to add.

NOTE: You may need to scroll depending on how many available employees there are.

STEP 6: Click the **Add** button to add them to the Mapped Employees pane.

NOTE: Similarly, if you add someone in error, click the Remove button to remove them from the Mapped Employee pane.

STEP 7: Click **Save**.

STEP 8: Confirm your changes in the pop-up window.

STEP 9: Use the **Profile** drop-down to change profiles and make changes using a different profile following the same steps as needed.

Review Staffing Assignments

➢ **From the Clairvia Web Administrator Dashboard Home Screen:**

STEP 1: Review the profiles for the Current Census pane.

NOTE: Remember the goal is to have both the red and blue bar equal.

STEP 2: Review staff alerts in the bottom-left pane.

STEP 3: Click the appropriate colored bar for the information you want to review.

STEP 4: Click the needed shift partition.

STEP 5: Review the shift based on task.

Process Staff Requests

- **From the Clairvia Web Administrator Dashboard:**

STEP 1: Process pending requests by clicking the appropriate hyperlink in the Requests/Opportunities/Shift Swaps field.

STEP 2: Click the request you want to process.

NOTE: **You can sort if needed within the Quick List pane by Request Date or Date Submitted.**

STEP 3: Right-click the pending request bar in the calendar.

STEP 4: Click the appropriate option to approve, deny, or partially approve per day.

NOTE: **When you partially approve or deny, you must process each day individually. Continue to process the rest of the request using the right-click menu until all days are addressed.**

STEP 5: Click **Save**.

STEP 6: Continue to process the additional requests as needed.

Update the Message Center Admin Note

- **From the Clairvia Web Administrator Dashboard Home Page:**

STEP 1: Click the **(Change)** hyperlink in the Message Center.

STEP 2: Click the **Admin Note** free text field.

STEP 3: Type your updated note.

STEP 4: Click **Save Changes**.

STEP 5: Click the **Home** in the blue menu bar to return to the Dashboard.

Using the Demand Manager

- **From the Clairvia Web Administrator Dashboard:**

Target/Schedule

STEP 1: Click **Demand** in the blue menu bar.

STEP 2: Click **Target/Schedule**.

STEP 3: Select the date you want to view using the calendar in the Navigation Pane.

STEP 4: Use the **Facilities** drop-down arrow to select your facility.

STEP 5: Use the **Profile/Location** to select the unit you need.

STEP 6: Select the appropriate **Global Skill** check box that you need.

NOTE: **It is best practice to select one skill at a time and not to combine multiple roles.**

STEP 7: Click **Go** when your Navigation Pane information is set.

NOTE: **What you have selected will remain until you change it.**

STEP 8: Review the information noting the following:

- Use the legend at the bottom of the page to help you understand what information is being displayed.
- Peaks indicate an additional patient event.
- The goal is to have an acceptable range of 95-105% staff utilization.

STEP 9: Use the 2 Hour and 1 Hour chicklet icons above the graph as needed to review the Caregiver Intensity Impact information.

NOTE: **The Caregiver Intensity Impact looks at Patient Activity, Demand-based Acuity, Total Caregiver Demand, and Average Acuity Level information.**

Patient Pattern Management

STEP 1: Click **Demand** in the blue menu bar.

STEP 2: Click **Patient Pattern Management** .

STEP 3: Use the Navigation Pane to set your parameters.

NOTE: **Best practice is to leave the Display Options to their default settings.**

STEP 4: Click **Go**.

STEP 5: Hover over a patient's Level of Care data for a quick view of the patient's MRN, admission date.

Edit Patient Departure Date

➢ **From the Patient Pattern Management screen:**

STEP 1: Set Navigation Pane parameters as needed.

STEP 2: Click **Go**.

STEP 3: Click **Edit**.

STEP 4: Click the **Departure** field for the appropriate patient.

STEP 5: Type or use the Calendar to enter the new date.

STEP 6: Click outside the date field to set the change.

STEP 7: Click **Save**.

STEP 8: Click **Close**.

Document a Patient Event

➢ **From the Patient Pattern Management screen:**

STEP 1: Set the Navigation Pane parameters as needed.

STEP 2: Click **Go**.

STEP 3: Click the **Green Arrow** icon next to the patient's name.

STEP 4: Click the **Event Management** tab in the Patient Encounter Information window.

STEP 5: Click **Add**.

STEP 6: Click the **Ratio** drop-down arrow.

STEP 7: Select the appropriate option.

STEP 8: Use the **Global Skills** drop-down to set the appropriate kind of hours you are adding as needed.

STEP 9: Enter the **Start Date** information.

STEP 10: Document if this event is on-going by selecting or de-selecting the Ongoing check box.

STEP 11: Document the **Duration** field in hours.

STEP 12: Review that the End date information that has auto populated is correct if it is not an ongoing event.

STEP 13: Click the **Event Note** icon.

STEP 14: Enter a free text note about the event.

STEP 15: Click **Save** to save the note.

STEP 16: Click **Save** to save the event.

STEP 17: Click **Close** at the bottom of the Patient Encounter Information window when finished.

STEP 18: Click **Go** on the Patient Pattern Management screen.

STEP 19: Review that the patient has a blue box to note the documented event.