This Quick Reference Guide (QRG) provides a review Clairvia CVM Client

Use Clairvia CVM Client

Clairvia CVM, also known as Clairvia Client, is an enterprise scheduling and staffing decision support solution allowing the ability to align staff with patient needs in real time.

Overview of CVM Client

Set Up a Quick Link

➢ From the Northern Light Health homepage:

STEP 1: Click the [type here and then click the link] field under My Quick Links.

STEP 2: Type **Clairvia**; then click the ➕ icon to add it as a Quick Link.

Review Clairvia CVM

➢ From the Northern Light Health homepage:

STEP 1: Click the > Clairvia hyperlink.

STEP 2: Click the Clairvia folder icon.

NOTE: If you have multiple folders, you can sort them by category using the Categories tab.

STEP 3: Click the CVM **Clairvia CVM** icon to open the Schedule Navigator.

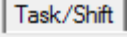**STEP 4**: Click Maintain in the top menu to access a variety of options, including Employee Info, Schedule Editor, and Daily Editor workflows.

STEP 5: Click Options in the top menu; then click **Display Order**.

STEP 6: In the Display Order window, click the 🔲 **Maximize** icon to expand the window size to full screen.

STEP 7: Click and drag the ✛ **Resize** icon to resize the columns for optimal viewing.

NOTE: You can reduce the size to hide columns as suited to your documentation style, as needed.

STEP 8: Click the Task/Shift tab to sort employees so that you can view your schedule based on task and shift.

STEP 9: Click the Order header ✛ **Resize** icon to make the column narrower.

STEP 10: Click the Assignment header ✛ **Resize** icon to hide the column completely.

STEP 11: Click any order number and drag it to a new position to change the order in which these tasks display in the Schedule Editor.

NOTE: The most commonly used tasks are located near the top of the list.

NOTE: If there are multiple people interacting with the schedule, it's important they all agree on the layout as it is the same layout for anyone that accesses the schedule for that unit.

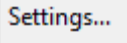NOTE: If you have a task that doesn't match your need, place a help desk ticket to have it fixed.

NOTE: If you accidently click between the Order and Task Shift columns, a ⊘ Cancel icon displays to notify you that you can't move anything there.

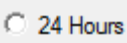**STEP 12:** Once you finish reordering the list, click Apply .

**STEP 13**: Click OK .

Review the Options Menu

STEP 1: Click Options in the top menu.

STEP 2: Click Settings... in the drop-down list.

STEP 3: In the System Settings window, click the Undo Step Limit down arrow to set the default undo step limit.

STEP 4: Click ○ 24 Hours in the Time Format field to follow best practice of matching time frames of tasks and shifts that also use the 24-hour format.

STEP 5: Click the Display tab; then set the Assignment and Employee Display order to display alphabetically.

STEP 6: Click ○ Last, First - Abbreviation to set the Employee Name Format to the recommended setting.
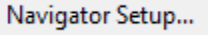
STEP 7: In the Program Template section, click the <Task> Label field.

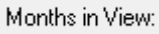**STEP 8**: Type Task/Shift to add an additional label for the word Shift; then click Apply .

STEP 9: Click OK .

Review the Format Menu

STEP 1:   Click Format in the top menu.

STEP 2:   Click Navigator Setup... in the drop-down list.

STEP 3:   In the Navigator Setup window, click the Months in View: drop-down arrow to change the view to show more than 1 month.

STEP 4:   Click Apply.

STEP 5:   Click OK.

Get Help Using Clairvia

STEP 1:   Click the [?] Question Mark icon in the top menu.

NOTE: The [?] Question Mark icon attaches to your cursor, so wherever you click next will open the Online Help window for that page.

NOTE: From any open Online Help window, click the ✕ X Close button to exit the window.

Review the Help Menu

STEP 1:   Click Help in the top menu.

NOTE: The Hover-to-Discover feature allows you to hover your cursor over any icon to learn what it does.

NOTE: It is your preference whether you use the icons or the menu bar to access various items and options.

STEP 2:   Click the Select Profile drop-down arrow to view the schedules/profiles you are associated with.

Review Icons

STEP 1:   Hover over the **Open Editor** icon to reveal its name.

STEP 2:   Use the **Arrow** icons to change the month and year.

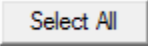**STEP 3**:   Hover over the **Display Assignment** icon to reveal its name.
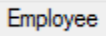
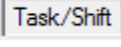**STEP 4**:   Hover over the **Display Request** icon to reveal its name.

STEP 5:   Hover over the **Font** icon to reveal its name.

STEP 6:   Hover over the **Display Filter** and **Filter Setup** icons to reveal their names.

Set Filters

STEP 1: Click the [Filter Setup icon] **Filter Setup** icon.

STEP 2: In the **Display Filter** window, click [Select All] on the [Employee] tab to see how many staff are assigned to a particular task or shift.

STEP 3: With all employees selected, click the [Task/Shift] tab to select the shift you want to view.

STEP 4: Once you select the employees and the task/shift, click [Apply].

STEP 5: Click [OK].

STEP 6: Back on the Schedule Navigator page, click the [icon] **Display Filter** icon to see how many nurses are assigned to that shift for the month.

NOTE: To remove the filtered results, click the [icon] Display Filter icon again.
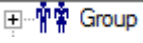
Review Icons – Cont'd

STEP 1: Click the [icon] Enable Highlight icon to show tasks and staff that have been assigned to the schedule.

STEP 2: Click the [icon] View Employee/Assignment Lists icon to hide or display the Employee Assignment pane.

STEP 3: Click the [Alphabetic ▼] Change Sort drop-down arrow to change it from Alphabetic to Custom so that it will stay in sync with the display order set by the scheduler and manager.

STEP 4: Click the [icon] Sort by Employee icon to see the employee's name followed by the shift time in the calendar.

STEP 5: Click the [icon] Sort by Task/Shift icon to see the shift time followed by the employee's name in the calendar.

STEP 6: Click the [⊞ 👥 Group] Group + icon to see all the groups assigned to your profile in the Employee pane.

NOTE: Assigning staff to groups helps save time, allowing you to balance the schedule by group rather than by individual.