This Quick Reference Guide (QRG) reviews using Clairvia CVM Client.

Common Buttons & Icons

Icon	Description
	Double-headed icon
	Open Editor folder icon
	Up and Down arrow
	Checkerboard icon
	Create Open Shift icon
	Create an Opportunity icon
	Shift Alert icon
	Fill Schedule Vacancy icon

Update Employee Information

➢ From the Schedule Navigator window:

STEP 1: Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2: Click the employee you need from the left-side list in the Employees window.

STEP 3: Click the appropriate field within the General tab as needed to update information.

NOTE: **If you update the information in this window it does not flow over to HR and must be kept updated at the department level.**

STEP 4: Click the **Contact** tab to update phone number, address and email address.

- Click the Edit/Type cell in the Phone Number tab.
- Click the appropriate type of phone number.
- Click the subsequent fields to then type in the information.
- Click Add.

STEP 5: Click the **Address** and **Email Address** tabs to update as needed using the same steps as the Contact tab.

STEP 6: Click **OK** to close the window.

Update Employee Skills

➢ From the Schedule Navigator:

STEP 1: Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2: Click the employee from the left-side list in the Employees window.

STEP 3:   Click the **Skills** tab along the top of the window.

STEP 4:   Click **Edit Employee Jobs/Skills** .

STEP 5:   Click **Add a Job/Skill** .

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

STEP 7:   Select the appropriate facility.

STEP 8:   Click the **Profile** drop-down arrow.

STEP 9:   Select the appropriate profile.

NOTE: **The Job Code/Description information is not needed.**

STEP 10:   Click the **Profile Skill** drop-down arrow.

STEP 11:   Select the appropriate Profile Skill.

STEP 12:   Review that everything looks accurate.

STEP 13:   Click **OK**.

Document Incompatibility

➢ **From the Schedule Navigator:**

STEP 1:   Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2:   Click the employee from the left-side list in the Employees window.

STEP 3:   Click the **Incompatibility** tab along the top of the window.

STEP 4:   Click the first incompatible employee within the Available Employees field.

STEP 5:   Click the **Move Left** arrow.

STEP 6:   Click the next incompatible employee from the Available Employees field.

STEP 7:   Click the **Move Left** arrow.

NOTE: **Continue this process until you have all incompatible employees if there are more than two.**

STEP 8:   Click the appropriate incompatible shift fromt eh Available Task/Shifts field.

STEP 9:   Click the **Move Left** arrow.

NOTE: **Continue to add incompatible shifts in the same way if there is more than one.**

STEP 10:   Click **Apply** once all employees and and shifts are set.

NOTE: **With the incompatibility set, if you schedule someone with a shift incompatibility the Schedule Conflict window will pop-up and you will need to address it.**

STEP 11:   Click **OK** to close the window.

Set Schedule Patterns

➢ From the Schedule Navigator:

STEP 1:   Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2:   Click the employee from the left-side list in the Employees window.

STEP 3:   Click the **Patterns** tab along the top of the window.

STEP 4:   Click the **Task/Shift** drop-down arrow.

STEP 5:   Click the appropriate shift.

STEP 6:   Add the first day by clicking the (W1) day the pattern is to begin.

STEP 7:   Press the **[CTRL]** button on the keyboard and scroll right to continue to add the days needed.

STEP 8:   Review that the pattern is accurate.

STEP 9:   Click **Assign**.

STEP 10:   Click **OK** to close the window.

Set Float Employees

➢ From the schedule Navigator:

STEP 1:   Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2:   Click the employee from the left-side list in the Employees window.

STEP 3:   Click the **Tab** right arrow at the top of the window to move right.

STEP 4:   Click **Float**.

STEP 5:   Click the **Edit/Profile** field.

STEP 6:   Enter the correct float profile.

STEP 7:   Review that Allow Requests says No. If it doesn't click the field and enter No.

NOTE: **This keeps from employees out of team scheduling for the identified unit.**

STEP 8:   Click **Add**.

STEP 9:   Click **OK** to close the window.

Document Permissions

➢ **From the Schedule Navigator:**

STEP 1:   Click the **Double-headed** icon.

NOTE: **You can also click Maintain in the Menu bar and click Employee Info.**

STEP 2:   Click the employee from the left-side list in the Employees window.

STEP 3:   Click the **Tab** right arrow at the top of the window to move right.

STEP 4:   Click the **Permissions** tab along the top of the window.

STEP 5:   Click the appropriate check box to add permissions scrolling down as needed.

STEP 6:   Click **Apply** once all are selected.

STEP 7:   Click **OK** to close the window.

Navigate to the Schedule Navigator

➢ **From the Home Screen:**

STEP 1:   Click **Open Editor** folder icon

NOTE: **An alternative is to click Maintain in the top menu and select Schedule Editor.**

Edit a Specific Day

- From the Schedule Navigator:

STEP 1:   Double-click the specific date on the monthly schedule that you need to edit.

STEP 2:   Enter your edits as appropriate.

STEP 3:   Apply your edits.

Using Editor Set-Up

➢ **From the Schedule Navigator:**

STEP 1:   Click the **Open Editor** folder icon.

STEP 2:   Click **Format** in the menu.

STEP 3:   Click **Editor Setup** .

NOTE: **It is Best Practice not to alter the sizes available at the top of the Editor Setup window.**

STEP 4:   Click the Schedule View Range **Weeks in View** drop-down arrow.

STEP 5:   Select how many weeks in view you want on the Schedule Navigator.

NOTE: **It is Best Practice to align the Weeks in View with how far in advance your unit schedules.**

STEP 6:   Click **Apply**.

STEP 7:   Click **OK** to close the window.

Generate a New Schedule

➢ **From the Schedule Navigator:**

STEP 1:   Ensure that the date listed at the top of the window aligns with the first day of the new schedule.

NOTE: **To change the date, click the Date down arrow to open a calendar and select the appropriate date. Click the Date check mark to confirm the date change.**

STEP 2:   Click the **Open Editor** folder icon.

NOTE: **You can hide the Availability window in the bottom pane if needed. Hover in the gray bar until you see an up and down arrow. Click the down part of the arrow.**

STEP 3:   Click **File** in the menu.

STEP 4:   Click **New Schedule**.

STEP 5:   Review that the date range is accurate.

NOTE: **It should default in based on the first day of the new schedule as the start and the last Saturday of the schedule for the end based on the weeks in view setting.**

STEP 6:   Select all tasks in the Task window by clicking the first one, scroll down then hold down the keyboard **[CTRL]** button, then click the last task.

STEP 7:   Click the **Approved Requests** check box.

STEP 8:   Click the **Patterns** check box.

STEP 9:   Confirm the Overwrite Planner Data check box is selected, if it is not, then click to select the check box.

STEP 10:   Click **Generate**.

STEP 11:   Address any schedule conflict alerts by making manual schedule adjustments.

Publish the Schedule

➢ **From the Schedule Navigator:**

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

STEP 2:   Click **Publish**.

NOTE: **Do not edit the start date in the Schedule Publishing window.**

STEP 3:   Edit the End Date to match the last day of the schedule you want to be in effect for team scheduling.

STEP 4:   Click **Apply**.

STEP 5:   Click **OK** to close the window.

Unpublish the Schedule

➢ From the Schedule Navigator:

STEP 1:   Click **Options** in the menu.

STEP 2:   Click **Publish**.

STEP 3:   Set the End Date to the Saturday before the first day of the new schedule.

STEP 4:   Click **Apply**.

STEP 5:   Click the **X Close** button to close the window.

Fill Empty Shifts in the Schedule

➢ While the schedule is unpublished, from the Schedule Navigator:

STEP 1:   Click the **Checkerboard** icon.

STEP 2:   Right-click the empty shift.

STEP 3:   Click **View Availability**.

STEP 4:   Click the name of the staff you want to fill the shift.

NOTE: **Names with a green check mark indicate staff that are available for the shift.**

STEP 5:   Click and drag the staff over to the open shift on the calendar.

STEP 6:   Click the **X Close** button to close the window.

Using Shift Opportunity/Shift Alerts/Open Shift

•   While the schedule is unpublished, from the Schedule Navigator:

STEP 1:   Click the cell of the shift that needs to be filled.

STEP 2:   Click the **Create an Opportunity /Shift Alert/Open Shift** icon.

NOTE: **Opportunities allow for staff to be reviewed before staff are assigned the shift. Shift Alerts are filled on a first come/first served basis.**

STEP 3:   Click the shift cell and then the Fill Schedule Vacancy icon once you have a staff member for the shift.

Print the Schedule

➢ From the Schedule Navigator:

STEP 1:   Complete your Print Setup.

- Click File in the menu.
- Click Print Setup.
- Click the Name drop-down arrow to select your printer.
- Click the Landscape orientation option.
- Click OK.

STEP 2:   Click **File** in the menu.

STEP 3:   Click **Print**.