
This Quick Reference Guide (QRG) demonstrates an introduction to manager responsibilities in Clairvia.

Log In to Clairvia Staff Manager

➤ From the Northern Light Health Clairvia Apps screen:

STEP 1: Click the **Clairvia Staff Manager** icon.

- The **Select Profile** window displays if this is the first time logging into Clairvia Staff Manager. If previously logged into Clairvia Staff Manager, skip to Step 4.



STEP 2: Use the dropdown list to select the appropriate profile.

STEP 3: Click **OK**.

- The Schedule Navigator screen displays.

Modify Manager User Settings

➤ From the Schedule Navigator screen:

STEP 1: Click **Options**.

STEP 2: Click **Settings**.

- The System Settings window opens to the General tab.

STEP 3: Click **24 Hours** in the Time Format field.

NOTE: **Leave the Undo Step Limit set at 10.**

STEP 4: Click the **Display** tab.

STEP 5: Click **Last, First – Abbreviation** in the Employee Name Format field.

STEP 6: Click **OK**.

- Changes are saved and the System Settings window closes.

NOTE: **Click Apply to save changes and keep the System Settings window open.**

Add a Job/Skill

➤ From the Schedule Navigator screen:

STEP 1: Double-click the employee in the Employee list.

NOTE: **In addition to double-clicking, hover over Maintain in the toolbar menu; then, click Employee Info.**

- The Employee window displays.

NOTE: If accessing the window through an employee, that employee will be selected in the Employee list in the left pane.

NOTE: Staff will only display in the Employee list for their primary profile, no matter how many departments they are hired in. If an employee is not visible in your profile's Employee list, they may have a primary job in another Clairvia department. That unit, and their primary manager, will be responsible for maintaining their settings and permissions.

STEP 2: Click the appropriate employee in the Employee list in the left pane (if not already selected).

STEP 3: Click the **Skills** tab.

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

- The Add Employee Jobs/Skills window displays.

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

- The Add Job/Skill window displays.

STEP 6: Document the **Facility**, **Profile**, and **Profile Skill** fields, as appropriate.

NOTE: The Job Code/Description field should remain blank.

STEP 7: Click **OK**.

STEP 8: Click **Apply** or **OK**.

- The Jobs pane displays the added skill.

Remove a Job/Skill

➤ From the Employees window with the employee selected:

NOTE: Because additional skills are manually added, they must be manually removed.

STEP 1: Click the **Skills** tab.

STEP 2: Click **Edit Employee Jobs/Skills**.

- The Add Employee Jobs/Skills window displays.

STEP 3: Click the job/skill to be ended in the Jobs pane.

STEP 4: Click **End a Job/Skill**.

- The End Job window displays.

STEP 5: Confirm the information; then click **OK**.

- A CVM window prompts to confirm ending the job/skill.
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STEP 6: Click **Yes**.

- The ended job/skill displays with a **Do Not Enter** icon.



STEP 7: Click **Apply** or **OK**.

Create a Schedule Pattern

➤ From the **Employee** window with the employee selected:

STEP 1: Click the **Patterns** tab.

STEP 2: Click the **Task** dropdown arrow; then click the appropriate task.

STEP 3: Click the cell for the first day of the pattern.

- The selected cell turns black.

STEP 4: Press and hold **Ctrl**; then click the additional days of the pattern.

NOTE: When working in the primary department, pattern template will usually match the schedule length.

- To create a repeating assignment that does not fit the pattern template, open a ServiceNow request for help.
- Adjusting a pattern does not edit the current schedule; it updates the template that will be used to create the next schedule.
- Do not create a pattern that would schedule an employee for overtime. These extra shifts will not populate on the schedule, and the last consecutive shifts will be left off the schedule.

STEP 5: Click **Assign**.

STEP 6: Click **Apply** or **OK**.

Delete a Schedule Pattern

➤ From the **Employee** window with the employee selected:

STEP 1: Click the **Patterns** tab.

STEP 2: Click the row for the pattern to be deleted.

STEP 3: Click **Clear**.

STEP 4: Click **Apply** or **OK**.

Add a Float Profile

NOTE: If an employee has a secondary work assignment in another Clairvia department, or someone will soon be transferring out of the unit, Float access will need to be granted to those other profiles.

➤ From the Employee window with the employee selected:

STEP 1: Click the **Float** tab.

STEP 2: Click the **Profile** field.

STEP 3: Click the **Profile** dropdown arrow; then click the appropriate profile.

NOTE: All profiles start with an abbreviation of the member organization; make sure to select the appropriate unit.

STEP 4: Click **Add**.

STEP 5: Click **Apply** or **OK**.

NOTE: Take a look at the Allow Requests column. If an employee has an alternate work assignment in another unit and will be participating in Team Scheduling for the other unit, click this field, click the dropdown arrow, and then select Yes.

- If the employee will only pick up opportunities, keep the default selection, which is No.

Delete a Float Profile

➤ From the Employees window with the employee selected:

STEP 1: Click the **Float** tab.

STEP 2: Click the row for the Float profile to be deleted.

STEP 3: Click **Delete**.

STEP 4: Click **Apply** or **OK**.

Grant Permissions

➤ From the Employees window with the employee selected:

STEP 1: Click the **Permissions** tab.

STEP 2: Select the checkbox(es) of the corresponding Permission(s) to be added for the employee.

NOTE: Selecting access to Demand Data, Acuity Data, or Assignment Manager Data will add the associated menu item in Clairvia Web.

STEP 3: Click **OK**.

Add Employees to a Group in Clairvia Web

➤ From the Northern Light Health Clairvia Apps screen:

STEP 1: Click the Clairvia Web icon.

- The Clairvia Web Admin Dashboard displays.

STEP 2: Hover over **Configure** in the toolbar menu.

STEP 3: Click **Requests**.

- A submenu displays.

STEP 4: Click **Access Group Definitions**.

- The Access Group Definitions screen displays.

STEP 5: Use the **Profile** dropdown menu to select the appropriate profile.

STEP 6: Verify the **FT/PT Staff Access Group** is highlighted in the Access Groups list on the left.

NOTE: **Select the Per Diem Staff Access Group and follow the same process, if needed.**

STEP 7: Select the checkbox(es) of the employee(s) to be added to the Mapped Employees list.

STEP 8: Click **Add**.

STEP 9: Click **Save**.

- A Confirmation window displays.

STEP 10: Click **OK**.



Customize Manager User Settings

➤ From the Clairvia Web Admin Dashboard:

STEP 1: Hover over **Configure**.

STEP 2: Click **Manager View**.

- The Manager View screen displays with options #1-20 to customize the view.

STEP 3: For #1. - Select up to 5 Profiles/Units to display on the Admin Dashboard.

NOTE: **The first time accessing this screen, all 5 profiles will be selected by default. Clicking one profile will deselect the others.**

STEP 4: For #2. - Set the FTE Threshold for Staffing Alerts to **1**.

STEP 5: For #3. – Set the dashboard to Include Competency Expirations for the next **90** days.

STEP 6: For #4. – set staffing alerts in StaffView to show for **1** day.

STEP 7: Select the checkboxes for #5-15.

NOTE: **#15 is deselected by default; be sure to select it so that the employee's seniority date shows in Opportunity Details.**

STEP 8: For #16. – retain the default **Hover only** option.

STEP 9: For #17. – retain the default **No spacing** option.

STEP 10: For #18. – It is not recommended to select Requests for Sending Email Notifications.

STEP 11: For #19-20. – It is recommended to select both options as well as the **Send once daily** option for each one.

STEP 12: Click **Save Changes**.

- A confirmation window displays.

STEP 13: Click **OK**.

Set Manager Preferences for ShiftAlert Notifications

➤ **From the Clairvia Web Admin Dashboard:**

STEP 1: Hover over **Tools**.

STEP 2: Click **My Information**.

- A submenu displays.

STEP 3: Click **Preferences**.

- The Preferences screen displays.

STEP 4: Click the **Filled ShiftAlert Notification** tab.

STEP 5: Select the **Enable Filled ShiftAlert Notifications** checkbox.

STEP 6: Click the appropriate profile(s) in the left pane.

STEP 7: Select the appropriate checkbox(es) on the right to indicate how to receive the notifications.

NOTE: **All profiles selected on the left will be notified via all selected methods on the right.**

STEP 8: Click **Save**.

- A confirmation window displays.

STEP 9: Click **OK**.

STEP 10: Click the Email Notifications tab.

STEP 11: Verify that all the Notification options are selected.

NOTE: **These determine what email notifications will be receive related to your own schedule.**

STEP 12: Click **Home**.

Approve or Deny Opportunities

➤ From the Clairvia Web Admin Dashboard:

STEP 1: Click the **Shift Opportunities** hyperlink in the Opportunities/Shift Swaps window.

- The Weekly Schedule displays.

STEP 2: Confirm the **Show Opportunities** checkbox is selected. (This is the default selection.)

STEP 3: Confirm the **View By Opportunity** radio button is selected. (This is the default selection.)

STEP 4: Click the appropriate **View By Opportunity** option.

STEP 5: Click the appropriate **Task** hyperlink in the Opportunities pane.

- The Opportunity Details window displays.

NOTE: Staff are able to volunteer for an Opportunity even if it would result in overtime.

- If there are multiple employees requesting the Opportunity, review the employees' paid hours and select the employee with less paid hours so that minimal overtime is scheduled.

STEP 6: Select the checkbox of the employee being approved for the opportunity.

STEP 7: Adjust the **Start** and **End Time** fields, as needed, if the employee is covering a partial shift.

NOTE: The remaining part of the shift cannot be assigned to another employee from this window; a new Opportunity would need to be created in the system for the remainder of the shift.

- If an employee is only covering a partial shift, add a Staff Manager Assignment Note to indicate only a partial shift is being covered.

STEP 8: Click **Schedule**.

NOTE: Click **Deny** to deny the employee for the Opportunity.

- A confirmation window displays.

STEP 9: Click **OK**.

NOTE: The employee's name is added to the schedule with an (O) in front of their abbreviation to indicate it was scheduled via an Opportunity.

- The employee will receive a notification on their Employee Dashboard and an optional email.
 - A yellow highlight over the (O) and employee abbreviation indicates there is a Staff Manager Assignment Note attached. Hover over the abbreviation to view the note.
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Approve or Deny Shift Swaps

➤ From the Clairvia Web Admin Dashboard:

STEP 1: Click the **Shift Swap** hyperlink in the Opportunities/Shift Swaps window.

NOTE: If on the Weekly Schedule, select the **Show Shift Swaps** checkbox.

- The Weekly Schedule displays.

STEP 2: Click the appropriate **Name** or **Task** hyperlink in the Shift Swaps Pending Approval pane.

- The Request Approval window displays.

NOTE: Review the overall schedule before approving a Shift Swap to consider all aspects and makeup of the schedule.

STEP 3: Select the checkbox of the appropriate employee in the Swap Invitation Information field.

STEP 4: Click **Approve Selected**.

NOTE: Click **Deny Selected** to deny the selected employee for the Shift Swap.

- A confirmation window displays.

STEP 5: Click **OK**.

Approve or Deny Vacation Requests

➤ From the Clairvia Web Admin Dashboard:

STEP 1: Hover over **Schedule**.

STEP 2: Click **Administer Requests**.

- The Administer Requests screen displays.

STEP 3: Verify the correct profile is selected; or use the **Profile** dropdown menu to select the appropriate profile.

STEP 4: Verify the Filter is set to **None**.

STEP 5: Use the **Display** dropdown menu to set the appropriate Quick List Display option.

STEP 6: Click the appropriate **Sort By** option.

STEP 7: Click the appropriate **Request** hyperlink in the left pane to navigate directly to the date in the calendar; or manually scroll through the calendar to look for the request.

STEP 8: Right-click the Pending request; then click **Approve All/Approve (selected date)** or **Deny All/Deny (selected date)**.

- The Pending request turns green. A request that is denied will turn red.
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NOTE: There are two Approve options: one for consecutive days and one for an individual day. They both notify the requester by email.

- There are two Deny options that function similarly, and both send a notification to the requester. If denied, the requester cannot ask for time off on that date and time again.
- The Delete option deletes the request from the calendar. This removes all record of the request, and the employee is able to submit the same request again.

STEP 9: Click Save.