From the Office of Health Informatics

Quick Reference Guide (QRG)
Use of the Daily Editor

December 6, 2024

This Quick Reference Guide (QRG) reviews the use of the Clairvia Daily Editor.

Set up User-Specific Settings

User-specific settings only need to be made once, upon the first login. From any screen, follow the steps below:

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

STEP 2: Click **Settings**.

- The System Settings pop-up window displays.

STEP 3: Update the Time Format to **24 Hours**.

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

STEP 5: Update the Employee Name Format to **Last, First - Abbreviation**

STEP 6: Click **OK**.

Navigate to Daily Editor

➢ **From the Schedule Navigator screen:**

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

STEP 2: Click **Daily Editor**.

Manage Pre-Shift Call Outs

Follow these instructions to update the schedule when an employee calls out before their shift. To create a filter for call Outs from the Clairvia Daily Editor page, follow the steps below:

STEP 1: Click the **View** tab in the Employee Pane.

STEP 2: Click **Call Outs** in the Assignment section.

STEP 3: Click **Select All** in the Skill section.

STEP 4: Click the **Turn On View** icon. 

- The **Schedule Pane** now only displays call out tasks.

NOTE: **To turn off a filter, click the Turn on View Icon again.** 

Update the Schedule

➢ **From the Clairvia Daily Editor page:**

STEP 1: Select the **POUNSCHED** cell that corresponds with the date of the employee's shift.

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

STEP 3: Click and drag the employee into the selected **PTOUNCHED** cell.

- The **Schedule Conflict Resolution** pop-up window displays, with the Edit Task times option selected by default.

STEP 4: Click **Yes.**

- The **Schedule Conflict Resolution** window updates to display the two conflicting tasks and other tasks that may be impacted by this edit.

STEP 5: Select the check box for the task corresponding to the call out to remove it from the employee's schedule.

STEP 6: Click the **Task Start** cell for the PTOUNSCHED task; then update the start time to correspond with the start time of the employee's shift.

STEP 7: Click the **Task End** cell for the PTOUNSCHED task; then update the end time to 30 minutes before the end time of the employee's shift.

NOTE: **The PTOUNSCHED task is an unproductive task; edits should not include the unpaid 30-minute meal break that is built into working tasks that are longer than six hours.**

STEP 8: Click within any column header.

- The Coverage end time updates accordingly.

STEP 9: Click **OK.**

NOTE: **To confirm that the changes made display, hover over the PTOUNSCHED cell or ensure the change displays in the Employee Pane.**

STEP 10: Click the **Save** Icon.

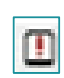
Post an Open Opportunity

➢ **From the Clairvia Daily Editor page:**

NOTE: **Ensure any filters have been turned off before posting an opportunity.**

STEP 1: Drag and drop the **Open Opportunity** icon to the open shift in the Schedule Pane.

NOTE: **For emergent staffing needs, a ShiftAlertcan be created, by dragging and dropping the ShiftAlert icon to the open shift in the Schedule Pane.**



STEP 2: Click the **Save** icon.

Manage a Mid-Shift Call Out

From the **Clairvia Daily Editor** page, follow these instructions to update the schedule when an employee calls out during their shift.

STEP 1: From the Employee pane, drag and drop the employee into the PTOUNSCHED task for today's date in the Schedule Pane.

- The Schedule Conflict Resolution pop-up window displays.

STEP 2: For the appropriate working task (not PTOUNSCHED), click the **Task End** time cell; then update the time to 30 minutes after the employee left their shift.

NOTE: **Ensure to add 30 minutes to when the employee left for the Coverage End time to display accurately.**

STEP 3: For the PTOUNSCHED task, click the **Task Start** time cell; then enter the time the employee left their shift.

STEP 4: Click within any column header.

- The Coverage Start time updates accordingly.

STEP 5: Click **OK**.

NOTE: **To confirm the changes that were made display, hover over the employee's shift in the Employee Pane.**

STEP 6: Click the **Save** icon.

Float an Employee

- **From the Clairvia Daily Editor Page:**

STEP 1: Click the **Auth. Floats** tab to view staff authorized to float to the currently selected profile.

NOTE: **The field at the top of the tab can be used to find staff who meet specified criteria, such as last name. Once the criteria are entered, profiles of staff who meet the criteria are displayed.**

STEP 2: Click the **Plus** icon next to a profile.

- A list of staff authorized to float to the currently selected profile displays.

NOTE: **If someone cannot be found on the Authorized Floats tab, they may be located on the All employees tab instead, provided there is access to those units.**

STEP 3: Drag and drop the employees to be floated into the appropriate task in the Schedule Pane.

NOTE: **If an employee is floated in the middle of their shift, the Schedule Conflict Resolution window will display and the conflict will need to be resolved.**

A. **With the Edit Task times option selected by default, click Yes.**
B. **On the row displaying the employee's originally scheduled task, click the Task End cell; then enter the time the employee left their unit.**

C. **In the row displaying the task and profile to which the employee is being floated, click the Task Start cell and enter the time the employee will start their shift in the unit they are floating to.**
D. **Click within any column header to ensure the Coverage Start time updates appropriately.**
E. **Click OK.**

STEP 4: Click the Save Icon

Modify Task Times

- **From the Clairvia Daily Editor page:**

STEP 1: Double-click the appropriate task cell in the Schedule Pane.

STEP 2: On the appropriate employee row, update the Shift Start and/or Shift End time(s).

STEP 3: Click the Close button. 

NOTE: To confirm the changes that were made display, hover over the task cell.

STEP 4: Click the **Save** icon.

Add an Assignment note

- **From the Clairvia Daily Editor page:**

STEP 1: Double-click the cell where an assignment note needs to be added.

STEP 2: Click the employee's name.

STEP 3: Right-click the row; then click **Edit Assignment Note**.

STEP 4: Click the **Assignment note** field; then enter the note.

STEP 5: Click **OK.**

STEP 6: Click the **Close** Button. 

NOTE: To confirm the changes that were made display, hover over the task cell or ensure the change displays in the Employee Pane.

STEP 7: Click the **Save** icon.