















This Quick Reference Guide (QRG) reviews using the Assignment Manager.

Common Buttons & Icons

	Add Shift Note icon
	Shift Note icon
	Primary Caregiver icon
	Relief Caregiver icon
	Assignment down arrow
	Caregiver delete X icon
	Fully Assigned icon
	Not Fully Assigned icon
	Arrivals arrows icon
	Sticky Note icon
	Partially assigned icon
	Pending Discharge icon within Asgn Status in Acute Summary
	Discharging Patient icon within Asgn Status in Acute Summary
	New Arrival icon within ASGN Status in Acute Summary

Using Assignment Manager

Review Shift Utilization Information

➤ From the Clairvia Web Assignment Manager Dashboard:

STEP 1: Click **Assignment Manager** in the blue menu bar.

STEP 2: Click **Patient Assign** .

STEP 3: Edit the date by typing or using the Calendar icon as needed.

NOTE: It defaults in for the current day.

STEP 4: Click **Go** to refresh the screen if you altered the date.

STEP 5: Set your profile using the Profile drop-down arrow.

STEP 6: Set the Shift Partition.

STEP 7: Click **Go** to refresh the screen once all parameters are set.

STEP 8: Review the Utilization box for available versus demand hours.

STEP 9: Review the Charge Nurse field for those assigned to the displayed unit.

STEP 10: Review the Current Census for arrivals and departures expected for the shift.

Adding a Shift Note

STEP 1: Click **Assignment Manager** in the blue menu bar.

STEP 2: Click **Patient Assign** .

STEP 3: Click the **Add Shift Note** icon.

STEP 4: Click the free text comment field.

STEP 5: Type your comment.

STEP 6: Click **Save**.

STEP 7: Click **Close**.

NOTE: When the **Shift Note** icon displays with a sunburst it indicates there is a **Shift Note**.

Making Patient Assignments

➤ From the Clairvia Web Administrator Dashboard:

STEP 1: Click **Assignment Manager** in the blue menu bar.

STEP 2: Click **Patient Assign** .

STEP 3: Click **Patients** .

Assign a Charge Nurse

STEP 1: Click **Charge**.

NOTE: Caregivers listed in the **Select Charge Nurse** window have the appropriate skill set to cover as **Charge Nurse**.

STEP 2: Select the check box for the individual(s) you want to add as charge nurse.

NOTE: If you are going to split the role between two people over the course of the shift adjust the **Charge Start Time** and **Charge End Time** fields accordingly.

STEP 3: Click **Save**.

STEP 4: Click **Close**.

Auto-Generate Assignments

STEP 1: Click **Continuity** .

NOTE: You must save to keep the auto-generated changes.

STEP 2: Click **Reset** to clear the auto-generated assignments.

Creating Manual Caregiver Assignments

➤ From the Assignment Manager:

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

STEP 2: Click the caregiver you want to assign to a patient.

STEP 3: Click and drag the caregiver name over to the Primary or Relief Caregiver field for the patient you are assigning the caregiver to.

NOTE: To assign caregiver(s) to multiple patients at one time:

- Click the Caregiver(s) you want to assign.
- Click the Patient(s) you want to assign the Caregiver to.
- Click one of the selected caregivers and drag the name over to one of the selected patients.

STEP 4: Alter the assignment using the Assignment down arrow as needed.

STEP 5: Delete the caregiver from a patient using the caregiver X icon for the caregiver under the patient name.

STEP 6: Edit assigned hours by clicking the Start and End time fields to adjust as needed.

STEP 7: Review that patients have a Fully Assigned icon.

NOTE: The Not Fully Assigned icon displays, review and adjust as needed until they are fully assigned.

Creating Manual Non-Caregiver Assignments

➤ From the Assignment Manager:

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

STEP 2: Review the caregiver list Available Hrs column.

NOTE: Available hours not utilized for direct patient care can be used for other assigned duties.

STEP 3: Click **Duties**.

STEP 4: Click the needed item from the Additional Duties window and drag it to the appropriate staff you are assigning it to.

STEP 5: Click the Additional Duties window **Save** button once all additional duties are assigned.

Documenting Future Arrivals

➤ From the Assignment Manager Patient Assign page:

STEP 1: Click the **Arrivals** up arrow.

STEP 2: Click the **Future Arrival Sticky Note** icon in the Patient List pane.

STEP 3: Type your free text note as needed.

STEP 4: Save the Future Arrival Note.

STEP 5: Close the Future Arrival Note window.

STEP 6: Assign Primary and Relief caregivers to the future arrival patient.

- STEP 7:** Merge the patient with the future arrival once they arrive on the unit.
- Click the Merge patient icon for the Future Arrival.
 - Cancel the Message window until you get the patient you want to merge your future arrival with. Then click OK.
 - Click Save.

Manage Caregiver Assignment Hours

- From the Patient Assign page within Clairvia:

- STEP 1:** Click the **Assign** tab.
- STEP 2:** Click the caregiver **Start** field to alter their start time.
- STEP 3:** Enter the adjusted start time.
- STEP 4:** Click the caregiver **End** field to alter their end time.
- STEP 5:** Enter the adjusted end time.
- STEP 6:** Review the care hours and reassign where needed.

NOTE: You will see a **Partially Assigned** icon and get a system warning pop-up where adjustments are needed for patient care hours.

Float Caregivers to Your Unit

- From the Patient Assign page within Clairvia:

- STEP 1:** Click the **Assign** tab.
- STEP 2:** Click **Find Caregiver** .
- STEP 3:** Set the Find Caregiver window filters along the top.
- STEP 4:** Type the name of the person you want to float over if known.
- STEP 5:** Click **Find**.
- STEP 6:** Click the name of the caregiver you need.
- STEP 7:** Click **OK**.
- STEP 8:** Adjust the Float Caregiver's Start and End times to the appropriate times.
- STEP 9:** Click and drag the float caregiver's name to assign them to patients as needed.

NOTE: Use the **Assignment drop-down arrow** as appropriate to ensure the float caregiver is appropriately assigned.

- STEP 10:** Click **Save**.
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Complete the Final Check

➤ From the Assignment Manager Patient Assign page:

STEP 1: Click **Assignment Manager** .

STEP 2: Click **Patient Assignment Status** .

STEP 3: Use the Navigation Pane to set parameters.

STEP 4: Click **Go**.

STEP 5: Review the Patient Assignment Status View.

NOTE: **The goal is to have 2 green checkmarks indicating the shift is fully assigned. If you have a red X for a shift:**

- Click the red X icon.
- Click Patients.
- Click the Asgn Status header to sort by assignment status.
- Assign caregivers as appropriate. Follow your department policy regarding who completes staff assignments and when.

Print Summary by Caregiver Report

➤ From the Assignment Manager Patient Assign page:

STEP 1: Click Caregiver.

STEP 2: Click the Printer drop-down arrow.

STEP 3: Select the appropriate check box to how you want patient names to display.

NOTE: **If the report is going to be shared outside of the unit the Basic Format will hide patient names.**

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

STEP 5: Scroll down and click **Print**.