

Cerner Clairvia Training Manual

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Cerner Clairvia Training Manual

Cerner Clairvia training Manual

This training manual is developed to guide the training for new Head nurses, Charge nurses and acting Staff nurses joining the facilities gone live with Cerner Clairvia. It will also assist to standardize the training content and ensure the transfer of knowledge about Clairvia.

The materials are designed to be given on several sessions; each module includes its objective and total hours of training.

Training Course is divided into

1. Employee Info
2. Schedule Editor
3. Daily Editor
4. Assignment Manager
5. Report in Clairvia

Room and AV Requirements

- LCD Projector
- Computer for each staff member participating in training
- All devices must have access to the Clairvia Client and Clairvia Web.

Section 1: Employee Info

Employee Info Session

Objectives of the Session

At the end of the session, attendees will be able to

- State how to review employee data in Clairvia
- Identify the basic functionalities of Staff Manager Module.
- Illustrate generating a schedule using patterns and approved request
- Describe Clairvia standard Navigation and specific terminology
- Identify additional configuration options
- Demonstrate how to custom display order for employees and tasks to balance the schedule

Agenda of Employee Info Training

1. Welcome

- Introduction
- Review Agenda
- Review Session Objectives

2. Clairvia Demo

- Importance and overview
- Terminologies
- Solution Modules
- Basics and settings

3. Review of the Clairvia Basics **Functional**

- Logging in
- Options | Settings
- Program Navigation
- Help Menu

4. Employee Info Configurations

- General
- Positions
- Contact Information – Phone, Address, Emails
- Competencies
- Availability
- Skills
- Payroll and Notes
- Incompatibility
- Limits
- Patterns
- Float
- Permissions

Display Order

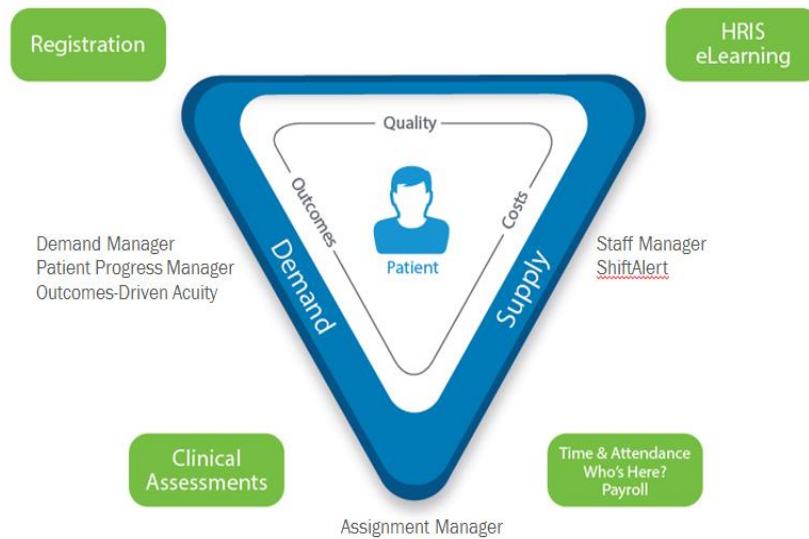
5. Hands On Training

Training Duration: 4hrs including Schedule Editor Training

What is Cerner Clairvia?

Cerner Clairvia solution is a workforce management system that automates staffing, scheduling and patient care assignments based on demand and acuity thereby managing daily and monthly schedule for all nursing caregivers with ease.

Cerner Clairvia Suite of Solutions



Clairvia Modules

1. **Staff Manager** - The Staff Manager solution gives you total command of staffing coverage, allocation and deployment, hour-by-hour, every day. It ensures correct staffing by providing accurate and actionable data-driven staffing information.
2. **Demand Manager** - Demand Manager continuously measures, tracks, and predicts patient-specific care demands, enabling health care organizations to allocate the correct staffing workload required to attain optimal clinical outcomes for every patient.

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It provides real time staffing targets driven by the patient care needs based on patient activity (admissions, discharges, transfers) and patient acuity.

3. **Outcomes-Driven Acuity** - The Outcomes-Driven Acuity is a groundbreaking methodology that focuses on each patient's clinical progress towards desired outcomes, staffing levels can be based on the skill sets required to move each patient to the next level of wellness.
4. **Patient Progress Manager** - Patient Progress Manager continuously monitors patient's progress during the episode of care to the expected length of stay (LOS). Nurses, case managers, discharge planners and physicians can communicate clear goals for each patient, optimizing the length of stay to ensure adequate reimbursement for high quality care.
5. **Assignment Manager** - The Assignment Manager facilitates the assignment of the best qualified caregiver based on the patient's needs and continuity of care.

Benefits

- Schedules are generated automatically to reduce scheduling time and efforts
- Update daily census scheduling on real time
- Reports are generated electronically , Administration will instantly access reports electronically and read the dash board
- Nurses have access to the schedule online
- improves productivity by matching caregiver supply to real-time patient demand
(Assignment Manager)
- measures patient demand for staffing in real-time providing decision support to adjust staffing based on patient care needs

Terminologies

Staff Manager Term	Current Term	Example/Explanation
Task	Shift	0700 1930 RN
Profile	Unit, Department or Cost Center	ICU
Workload Matrix	Staffing Grid	Grid that defines how the unit is staffed at the break points of occupancy
Core Coverage	Budgeted/Target Staffing	Standard staffing mix used to create a future schedule
Pattern	Skeleton, Track, Shell, Rotation, Block Schedule	Working 0700 1930 every third Saturday and Sunday
Skill	Job, Role	RN
Publish	Post	Schedule is "on the wall"
Requests	Team or Self Scheduling	Tasks scheduled by employees for themselves can be changed by the manager
Opportunities	Holes or needs on the schedule	Posted opportunities are visible only to employees with appropriate skills, competencies and availability
Shift Swap	Trades	Rules govern who can swap and what can be swapped

Solution Modules

Three Module of Clairvia Solution



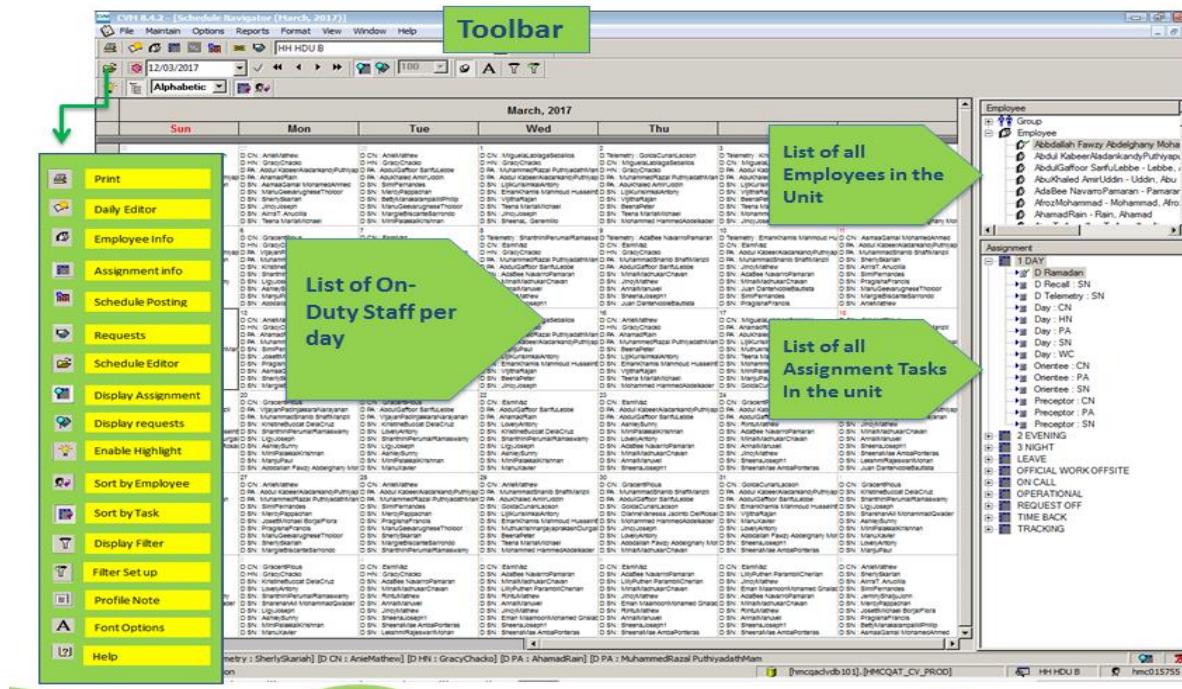
Basics and settings

Schedule Navigator Page

Schedule Navigator provides users with a home base from which they can access all of the program's functions. Schedules generated with CVM are viewed in the Navigator, which displays a month's worth of schedule data in a calendar grid. The Navigator is the first window that

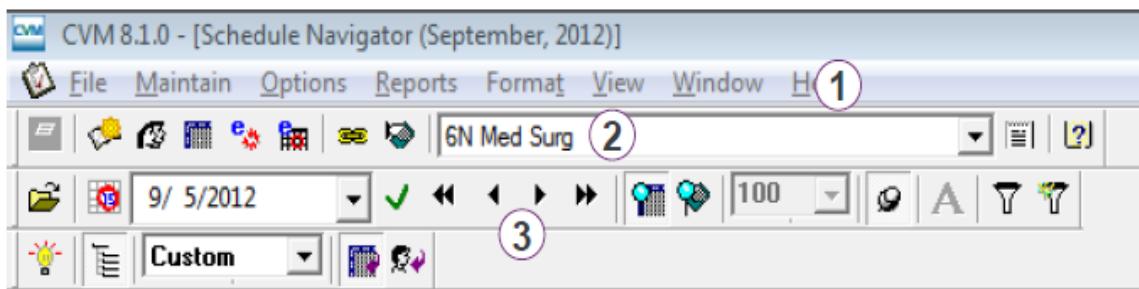
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displays when CVM opens. Users can apply the various display options in the Navigator to customize the schedule view.



Schedule Navigator contains common software elements such as menu, toolbars and icon

1. The menu bar
2. Profile Selection
3. Calendar navigation buttons



The Display Toolbar – Schedule Navigator

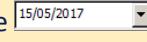
If the **Display** toolbar is not visible, choose **Display** from the **Toolbars** sub-menu on the **View** menu in either window.

Icon	Use
Enable Highlight 	Highlights the employee or task selected in the Employee/Assignment list in the Navigator.
Show/Hide Employee/Assignment View 	Displays a list of employees and assignments in the current profile.
Change Sort 	Changes the sort order of schedule data. In Employee View , the options are alphabetic and custom; in Assignment View , the options are alphabetic, custom, and auto.
Sort by Task 	Changes the sort order of schedule data. In Employee View , the options are alphabetic and custom; in Assignment View , the options are alphabetic, custom, and auto.
Sort by Employee 	Displays assignments with the employee abbreviation before the task abbreviation, and sorts the assignments by employee abbreviation.

The Navigation Toolbar – Schedule Navigator

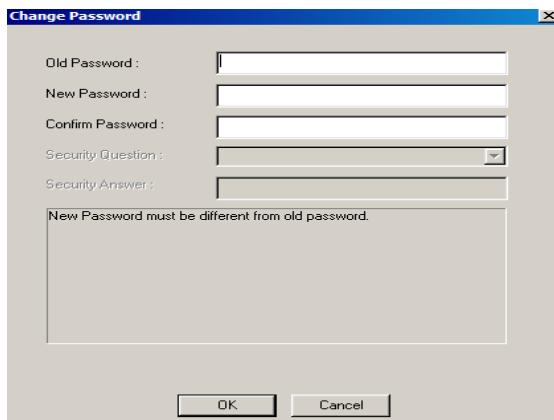
If this toolbar is not visible, users should choose **Navigation** from the **Toolbars** sub-menu on the **View** menu in either window.

When the Navigator is the active window, the toolbar contains the following buttons:

Icon	Use
Open Editor 	Opens the Schedule Editor.
Today 	Selects the current date as the first date in view.
Select Date 	Allows users to enter the date in this text box to display in the calendar view.
Commit Start Date Change 	Sets the first date visible on screen entered in the Select Date box.
Move One Year Back 	Moves the display back one year in the Navigator.
Prev Month 	Displays the prior month in the Navigator.

Next Month ►	Displays the next month in the Navigator.
Move One Year Forward ►►	Moves the display ahead one year in the Navigator.
Display Assignment	Displays all assignments in the Navigator.
Display Request	Displays only the assignments entered as requests.
Change Zoom	Allows users to select the magnification level from the Change Zoom list.
Fix View	Fits the entire calendar month currently displayed within the available Navigator window space. When this option is active, users cannot zoom in or out.
Font A	Allows users to change the fonts and colors they will see when viewing a schedule.
Display Filter	Turns the filter on and off.
Filter Setup	Opens a dialog box where users can set up a filter to narrow the display to the employees and assignments

Change Password: Option\Change Password



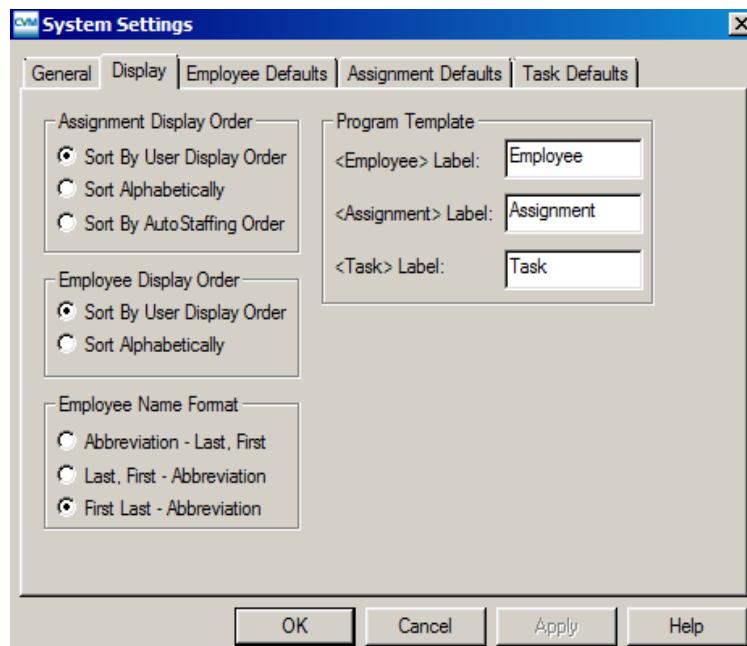
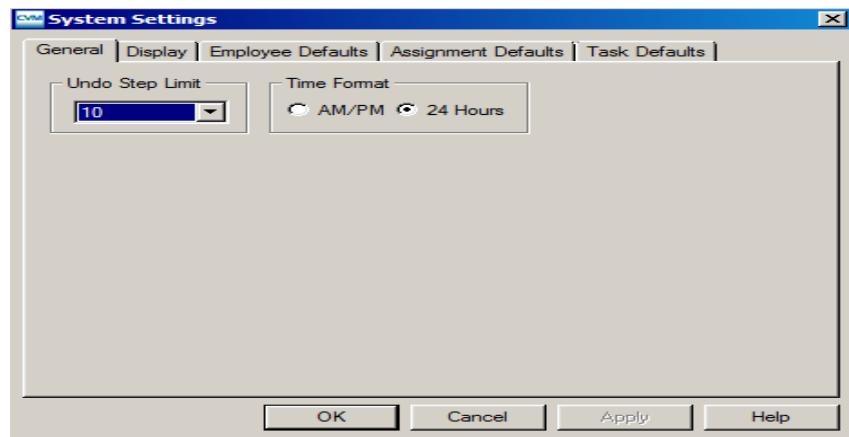
To change a password:

1. On the **Options** menu, click **Change Password**.
 2. Enter the current password in the **Old Password** box.
 3. Enter the new password in the **New Password** box. Passwords can be up to 32 characters long.
 4. Enter the new password again in the **Confirm Password** box.
 5. Click **OK**.
- For 1st time logging-in in Clairvia use HMC+Corp. Number as the Username and **No Password** required then change the password following the steps except step 2.

User Setting

Options/Setting opens the System Dialog. This dialog allows users to set:

- The Number of times can undo unsaved changes
- The time setting for AM/PM or 24 hours
- Display of the Employee and Task lists
- Display of dialog templates



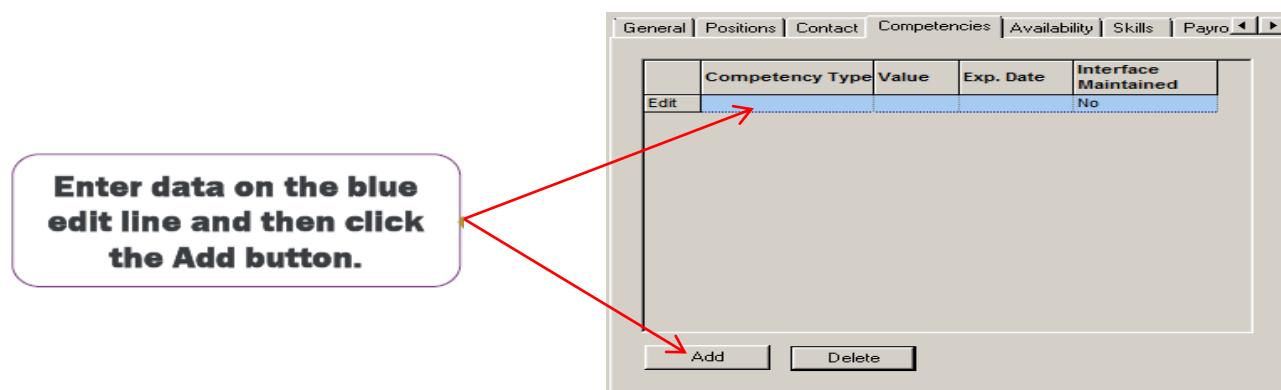
OK button vs. Apply button

- Most dialogs that allow users to change information contain the two buttons OK and Apply
- Click Apply to save changes in the dialog continue editing.
- Click OK to save changes and close the dialog window



"Blue Line" Editing

- Many screens in the solution will contain a blue line for adding information
- Users must first enter the information on the blue line and then select Add to add the data



Help Menu

There are three methods for getting help within the Clairvia Client module.

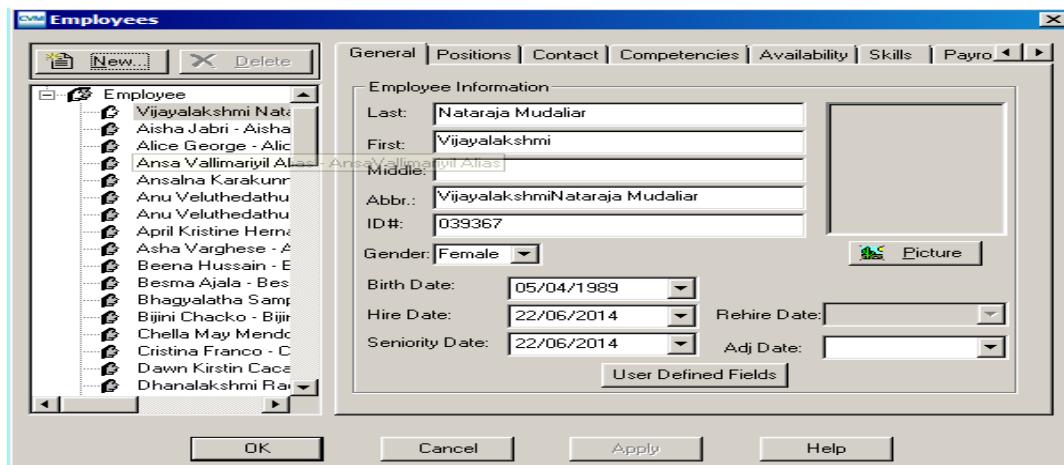
1. The Help menu is located on the menu bar
2. The Help icon button which, when clicked, will allow selection of a section of the screen to view help information for.
3. On most dialog boxes, there is a Help button along the bottom which will allow users to received context-sensitive help information.



Employee Info Configurations

General Tab - specific data imported through HRIS interface pertaining to the employee information such as Name, Corp. No., Hire Date, etc.

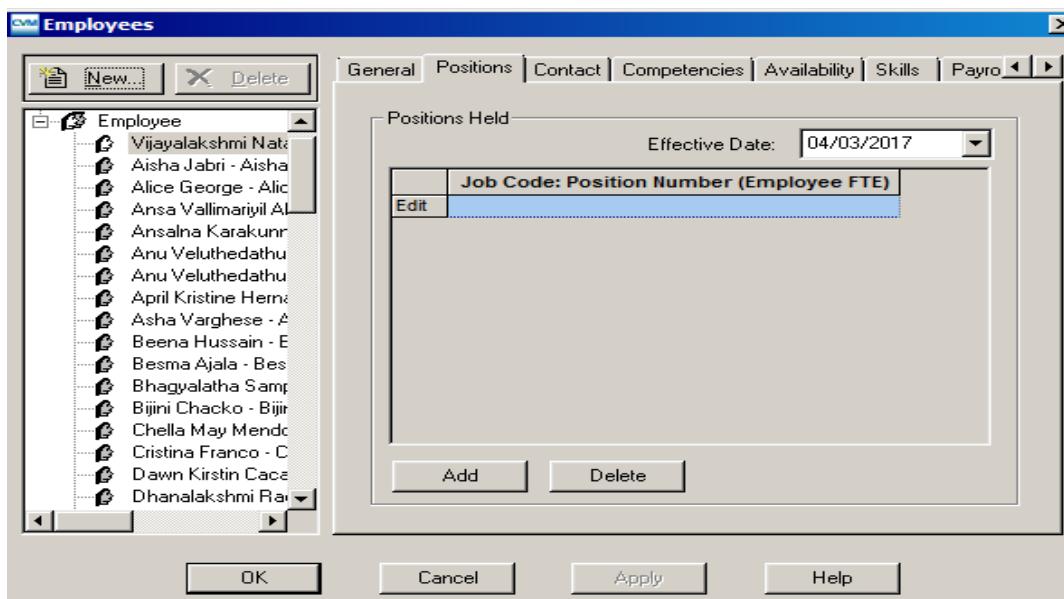
Note: Any changes in General Tab Information will be managed by HICT/Cerner Clairvia Team.
(E.g. misspelled Name, wrong Corp. No.)



Positions

Positions are typically associated with jobs defined by Concurrent Jobs, which roll up to profile skills, and an FTE status, and may have other attributes attached to them such as start/end dates and position statuses. Positions are the allocation of FTEs among positions by skill.

Note: Configuration in Position Tab will be done by HICT/Cerner Clairvia Team.



Contact Information

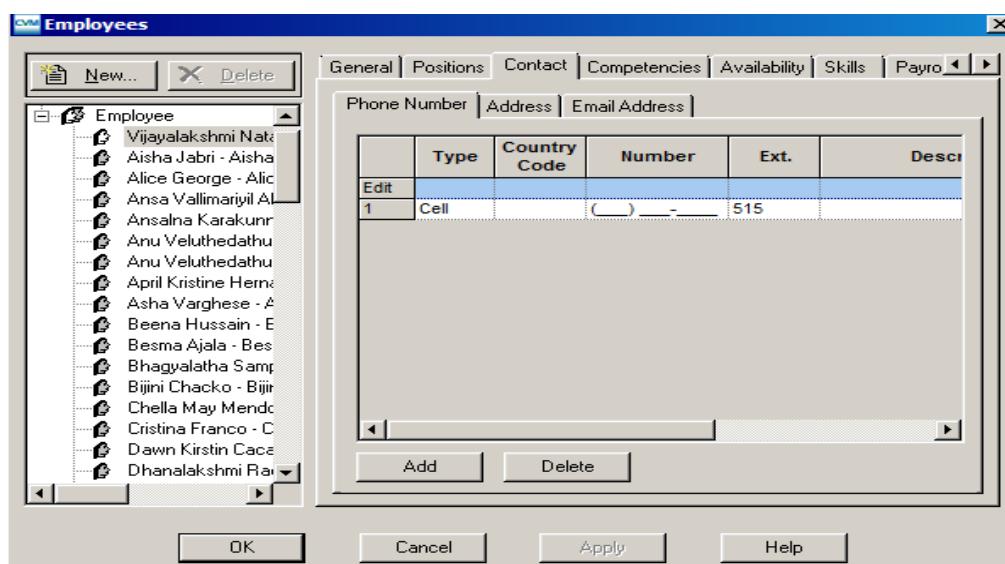
The Contact tab of the Employees dialog box contains basic facts about the employee, such as home address, email address, and phone number(s). Phone, Address, Emails

Select the Contact Tab to view employee contact information including:

- Employee phone number
- E-mail Address

Add a phone number

1. On the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box.
2. Click an **employee name**.
3. Click the **Contact** tab to bring it forward. The **Phone Number** tab is active by default.
4. In the **Edit** row of the **Phone Number** table, click the **Type** cell. Choose the type **Other** from the drop-down list.
5. In the **Edit** row, click the **Number** cell. Type the phone number.
6. Press **TAB** and type the Description of the phone number.
7. Click **Add**.
8. Click **Apply** to save the new phone number.
9. Click **OK** to close the dialog box.



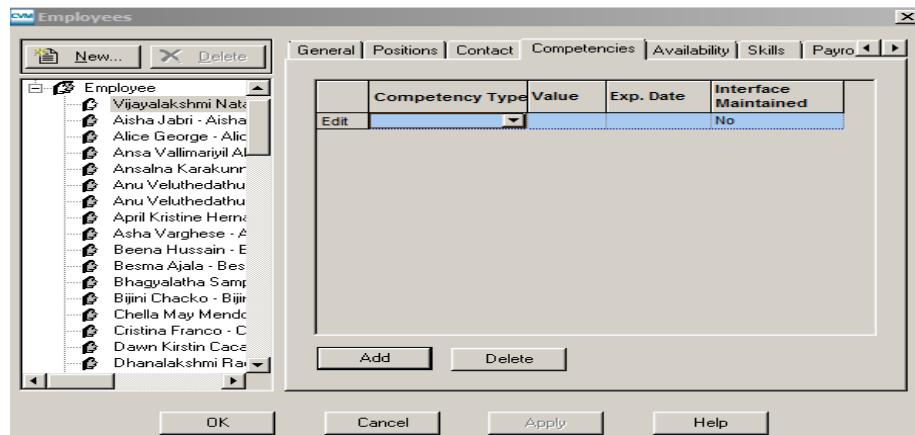
Competencies

CVM allows users to track employee competencies (such as licenses and certifications) and their related expiration dates. The program notifies managers and employees of upcoming competency expirations by displaying alerts in *CVM Web*.

- Yes/No indicator in the Interface Maintained field advise if the competency should be manually maintained

To add a competency type to an employee:

1. When the Navigator is the only open window, on the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box. Users can also open the Employees dialog box by clicking F7.
2. Click an employee name in the left pane.
3. Click the **Competencies** tab.
4. In the Edit row, click in the blue cell under **Competency Type**. Choose a type from the drop-down list. This field is required.
5. Click in the blue cell under **Exp. Date**. Enter a date in the field in the format mm/dd/yyyy. A user can enter a date from the date picker by clicking the down arrow. This date corresponds to the expiration date of the competency, and may indicate when a license or certificate expires.
6. Click **Add**.
7. Click **Apply** to save changes.
8. Click **OK** to close the dialog box.



- Competency Data** is displayed to staff in the Clairvia Web module to alert them of upcoming or expired competencies

2 Competency Expirations in the next 90 days				
Profile	Name	ID	Competency	Date
6N Med Sur	BBrady	BC1950	BLS	08/29/2012
6N Med Sur	BBrady	BC1950	ACLS	10/15/2012
6N Med Sur	BBrady	BC1950	RN License	11/13/2012

- ☐ This information is provided in various modules and provides the ability for scheduler to ensure the right resource is assigned to task

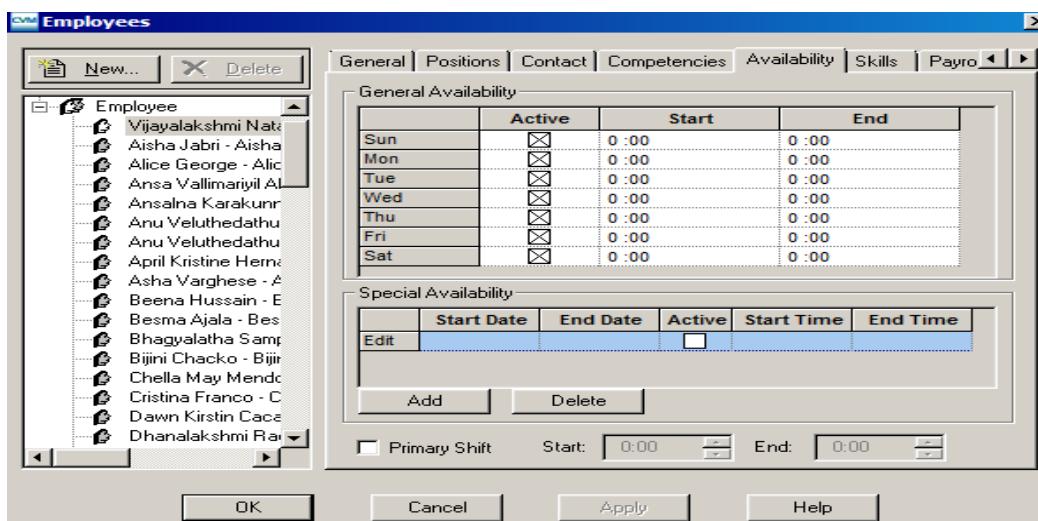
Skill	Caregiver	# Pts	Acuity Avg	Avail Hours	Asgn Hours	% Asgned	Start Time	End Time
RN	ARN, KAREN	0	0.00	8.00	0.00	0	1500	2300
RN	CHAPEL, C	Competencies: ACLS, CCRN, Balloon Pump					1500	2300

Availability

Employee availability is one of several factors that affect how CVM assigns employees to tasks during the Staffing Process.

By default, all employees are assumed to be available 24/7.

Note: Configuration in Availability tab is done by HICT/Cerner Clairvia Team.

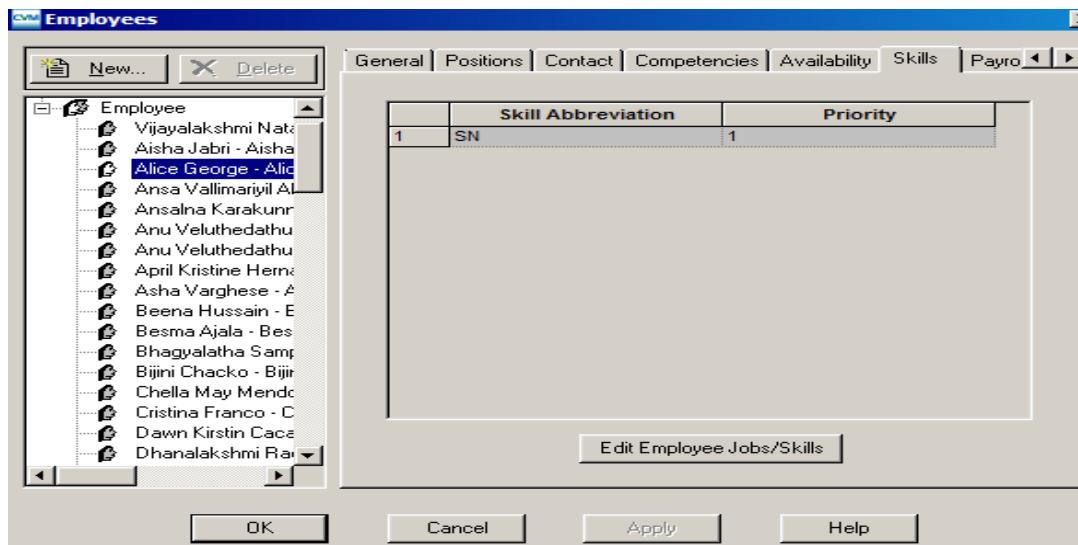


Skills

Skills are used to group employees within a department based on common abilities, licensure, or type of work performed.

Skills are used throughout CVM in analysis and as a basis for staffing employees to skill-based tasks. It also determines which shifts/opportunities the employee may view.

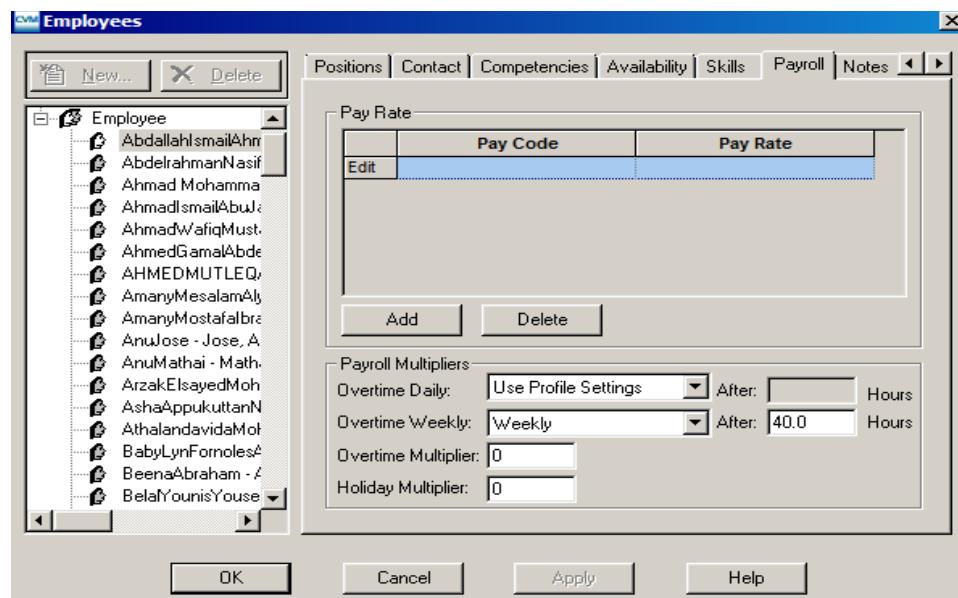
Note: Any changes in Employees Skill will be done by HICT/cerner Clairvia Team.



Payroll and Notes

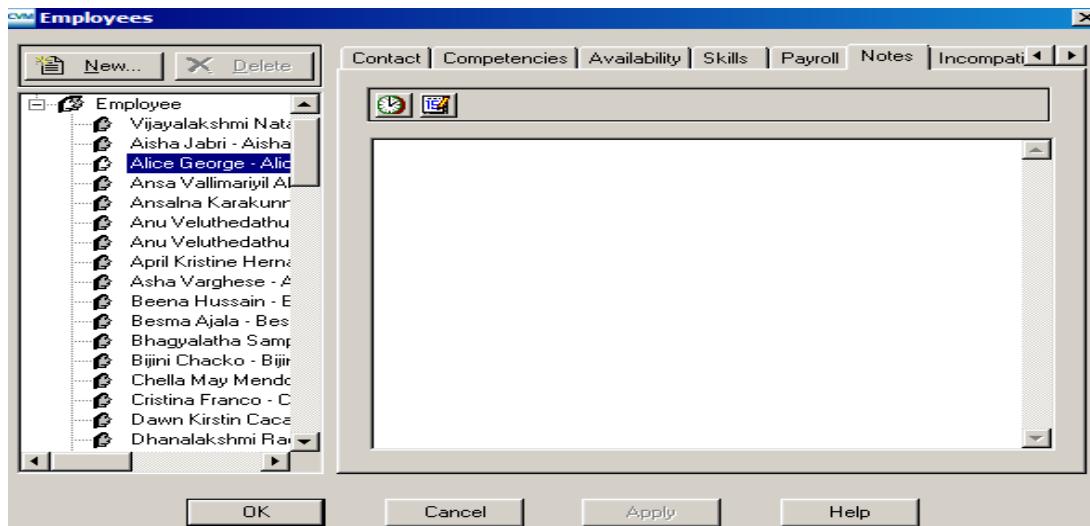
Setting payroll information for an employee involves matching a *pay code* with a *pay rate*. When an employee is assigned to a task that uses a specific pay code, they receive the corresponding pay rate.

Note: Payroll Tab is not utilized in HMC.



Notes

Allows manager/scheduler to add anecdotal notes per employee



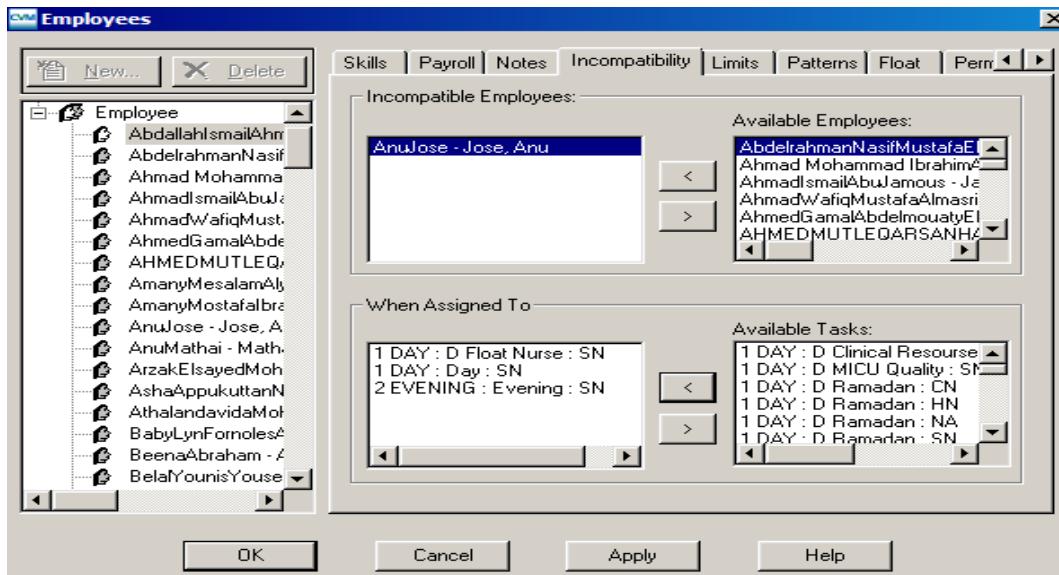
Making Notes

1. On the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box.
2. Click the **Notes** tab.
3. Click **Time**  to include the current time in the note.
4. Click **Today**  to include today's date in the note.
5. Type the text of the note in the blank field.
6. Click **Apply** to save changes.
7. Click **OK** to close the dialog box.

Incompatibility

On the **Incompatibility** tab of the Employees dialog box, users designate which employees will not be assigned to work with the selected employee. These **incompatible** employees may have overlapping skill sets or may prefer not to work together.

- Provides the ability to designate employees that should not work together(ex: policy that family members should not be assigned to work the same shift)
- The solution honors incompatibility configuration when generating a schedule for the unit



Assigning Incompatible Employees

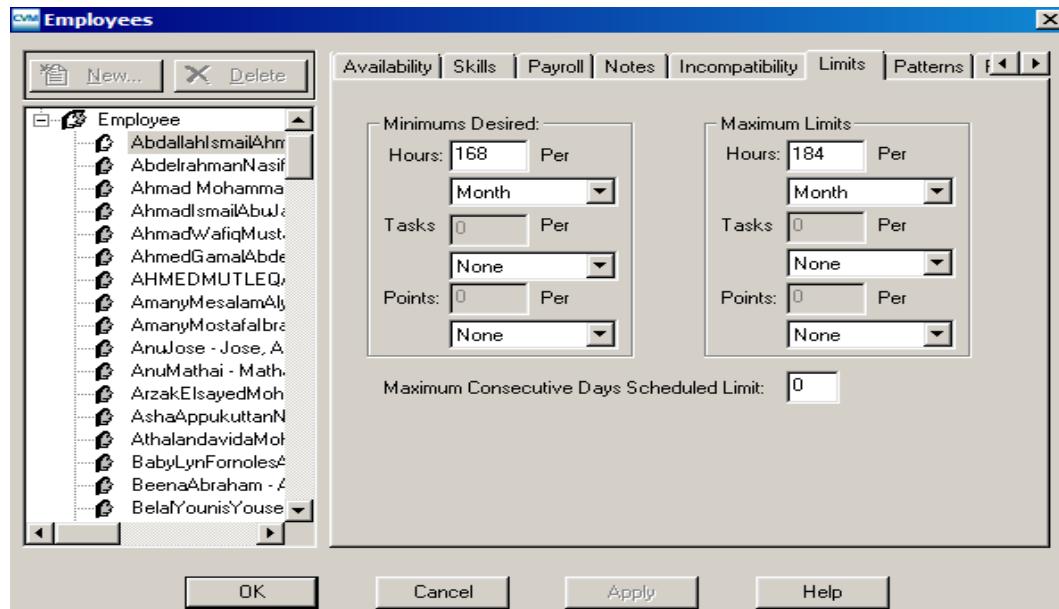
1. On the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box.
Users can also open the Employees dialog box by pressing F7.
2. Click an employee in the left pane.
3. Click the **Incompatibility** tab.
4. Under **Incompatible Employees**, select an employee from the list of **Available Employees**.
5. Click the left arrow button to move the employee. <
6. Under **When Assigned To**, select one or more tasks from the list of **Available Tasks**.
7. Click the left arrow button to move the task. <
8. Click **Apply** to save changes.
9. Click **OK** to close the dialog box.

Limits

The fields on the Employees **Limits** tab set minimums and maximums for the number of hours, tasks, or points an employee can work during a selected time frame (day, week, month, or year), and for the number of days an employee can work consecutively.

- Maximum limits are utilized by the schedule generation process as upper limit for scheduling
- Minimum limits are utilized to identify staff that have not been scheduled to their minimum hourly commitment

Note: Setting the Limits is done by HICT/Cerner Clairvia Team.

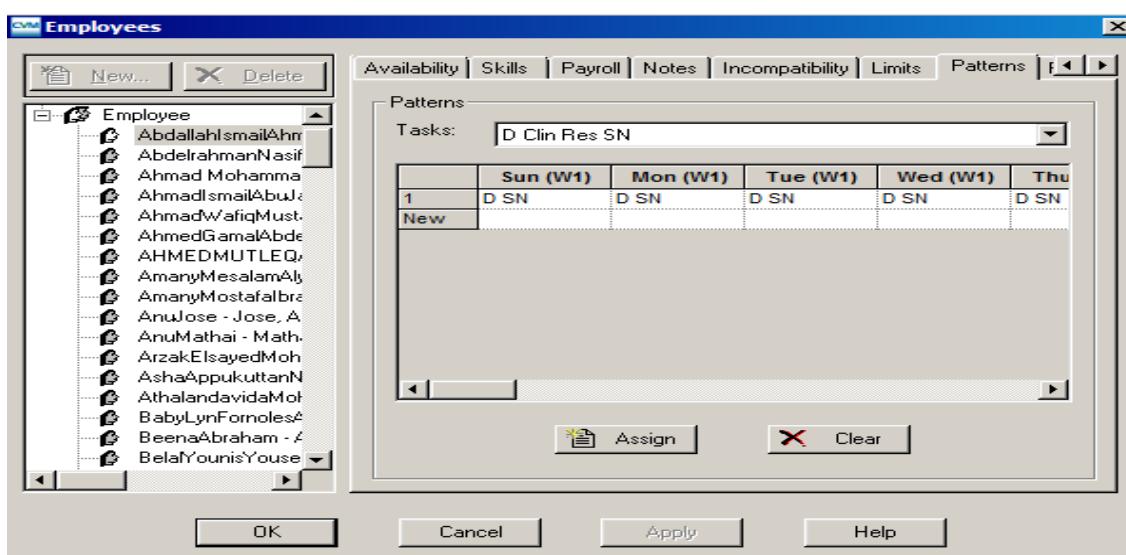


Patterns

Employee patterns are also known as *master schedules*.

- Patterns are consistently repeating schedules that will allow for an efficient schedule generation that is aligned to department requirements
- Once configured, the solution will populate each new schedule with this information upon generation
- Employee patterns in the Employees dialog box are only limited by staff size. Users cannot staff an employee to a task using a pattern if that task's staff size has been reached.

Note: Don't change the Pattern unless you are designated by the HN to do modification on the current existing Pattern.



Setting an Employee Pattern

1. On the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box.
2. Click the employee to assign a pattern.
3. Click the **Patterns** tab.
4. Choose the **Task** from the drop-down list.
5. In the **New** row, place the cursor in the day of the **Schedule** period.
6. Click **Assign**.
7. Do the same process to complete the entire Weeks.
8. Click **Apply** to save changes.
9. Click **OK** to close the dialog box.

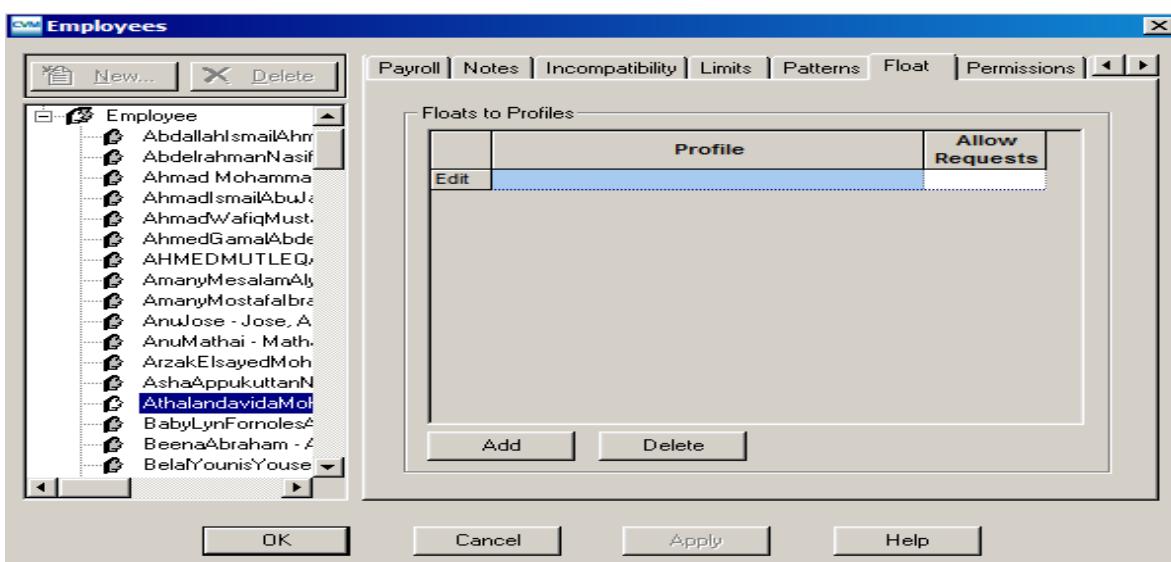
Removing an Employee Pattern

1. On the Maintain menu, click Employee Info. This opens the Employees dialog box. Click the Patterns tab (users may need to use the scroll arrows beside the tabs to access the Patterns tab).
2. Place the cursor in the cell with the pattern that needs to be removed.
3. Click Clear.
4. Click **Apply** to save changes.
5. Click **OK** to close the dialog box.

Float

All employees have home profiles, but they may also be assigned to a single float profile or to multiple float profiles. When a schedule for one of these profiles requires an employee from outside the profile, the scheduler uses the Float Window to display available employees who can float to the profile.

Schedulers can only assign float employees to tasks; they cannot modify any float employee's information.



Adding a Float Profile to an Employee

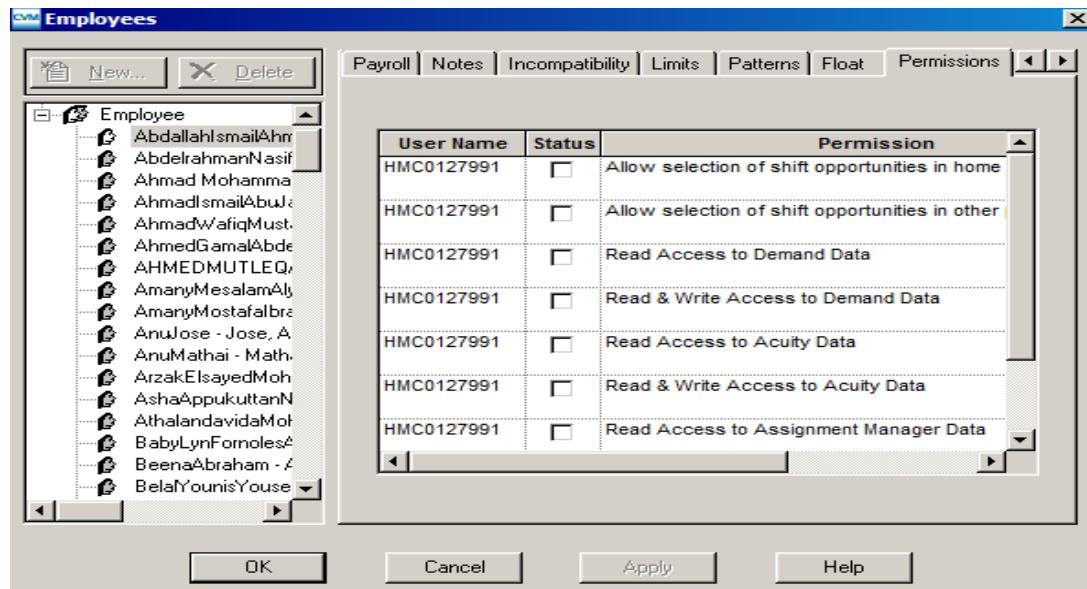
1. When the **Navigator** is the active window, on the **Maintain** menu, click **Employee Info**. This opens the Employees dialog box.
2. Click an **employee name** from the list on the left.
3. Click the **Float tab**. (Users may need to use the scroll arrows beside the tabs to scroll to the Float tab.)
4. Click in the blue cell to the right of the word **Edit**. A drop-down list arrow displays.
5. Choose the **float profile** from the list.
6. Choose an Allow Requests option. Choosing **Yes** allows the employee to make requests in the selected float profile; choosing **No** prevents the employee from making requests.
7. Click **Add**.
8. Click **Apply** to save changes.
9. Click **OK** to close the dialog box.

Permissions

Employees must have the right security permissions to use certain features of CVM. Existing employees may have had some permission set by default.

- Employee-level permission indicate access to opportunities, Demand Manager, Patient assignment and Acuity modules of the solution

Note: Setting Permission is done by HICT/Cerner Clairvia Team.



External ID Number

The External Resource Management interface uses the same logic as the HRIS interface to validate and insert employees into CVM. Users write information to this table using the **External ID Number** tab of the Employee Info dialog box.

Display Order

- Using the Display Order feature, users able to set Employees, Task or Skills into a custom order for profile
- This information provides managers/scheduler flexibility as how they look at the schedule
- Also provides the employees with a user defined order of task in Clairvia Web

Setting the Employee Display Order

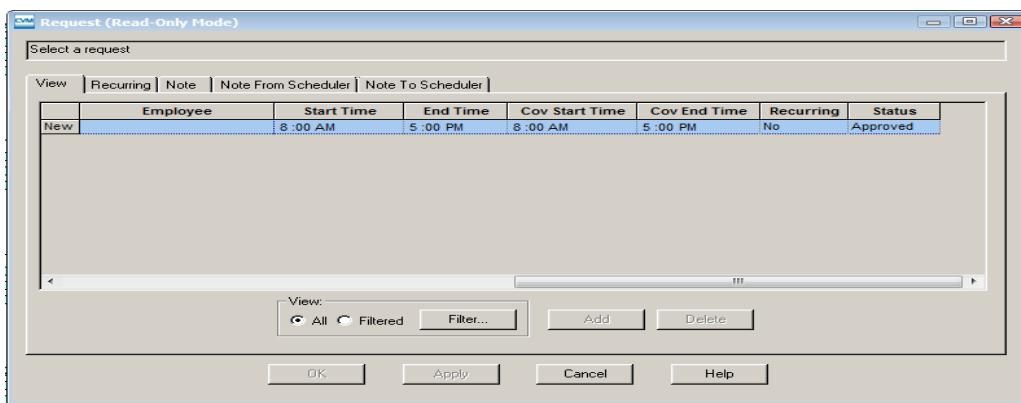
1. When the **Navigator** is the only active dialog box, on the **Options** menu, click **Display Order**. This opens the Display Order dialog box.
2. Click the **Employee** tab.
3. Drag and drop an employee to the desired position in the order.
4. Repeat Steps 2 and 3 until the desired order has been achieved.
5. Click **Apply** to save changes.
6. Click **OK** to close the dialog box.

Setting the Task Display Order

1. On the **Options** menu, click **Display Order**. This opens the Display Order dialog box.
2. Click the **Task** tab.
3. Drag and drop a task to the desired position in the order.
4. Repeat Steps 2 and 3 until the desired order has been achieved.
5. Click **Apply** to save changes.
6. Click **OK** to close the dialog box.

Requests

Enter staff requests related recurring request and **annual leave**



New	Employee	Start Time	End Time	Cov Start Time	Cov End Time	Recurring	Status
New		8:00 AM	5:00 PM	8:00 AM	5:00 PM	No	Approved

Adding Annual Leave Plan

1. From the Maintain menu, select **Requests > Requests**. This opens the Request dialog box. You can also open the Request dialog box by clicking **Request** or pressing **F10**.
2. On the View tab, select an **Employee** from the menu in the **New** row of the table. If the display settings are set to show employees alphabetically, you see employee names in the following order.
4. Select the **Assignment _Leave** from the menu.
5. Select the **Task_Annual Leave** from the menu.
6. Select task's **Start Date** and **End Date**.
10. New requests have a default status of Approved.
11. Click **Add**.
11. Click **Apply** to save your changes.
12. Click **OK** to close the dialog box.

Section 2: Schedule Editor

Schedule Editor Training

Objectives of the Session

At the end of the session, attendees will be able to

- To understand the request management process
- To demonstrate generating a schedule
- To be able to troubleshoot conflicts
- To be able Balance, analyze, and publish a schedule
- To illustrate generating schedule-related reports
- To be able to configure the manager's web view

Schedule Editor Training Agenda

- Schedule Editor Format
- Core Coverage
- Scheduling: Conflicts
- Generating Schedule
- Schedule Generation: Publish
- Schedule Generation: Pending Requests
- Modifying an Employee Assignment
- Request Management
- Balancing the Schedule
- Opportunities
- Hands on Training

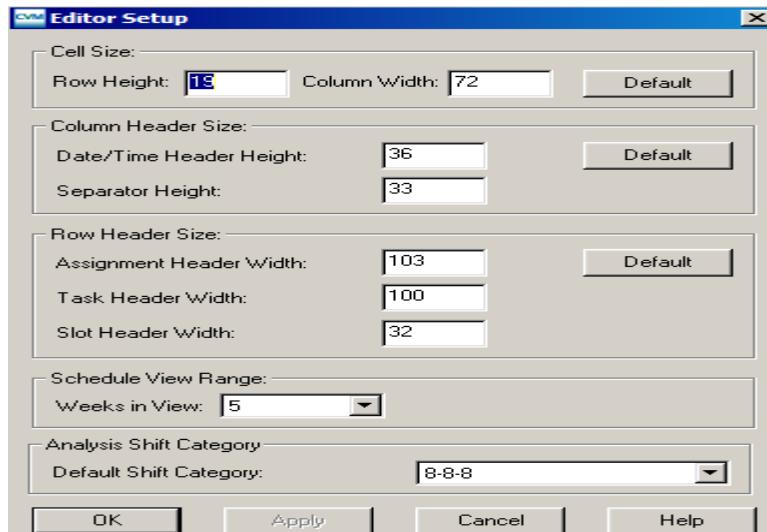
Training Duration: 4 hours including Employee Info

Schedule Editor

Schedule Editor Format

On the Schedule Editor window, from the Format menu, select Editor Setup

- Editor Setup allows users to customize the Schedule Editor window
- Set Schedule View Range to the Number of weeks in the schedule
- Click OK



Core Coverage

Core Coverage represents the minimum number of employee who should be scheduled for each shift Category Partition/Skill combination

- Core Coverage numbers are entered in order to be available for future schedule balancing
- Based on Unit's budgeted data

CVM 8.4.2 - [Core Coverage (Read-Only Mode)]									
File Edit Maintain Options Reports View Window Help									
All Filtered Skill All Filtered Shift Category Part									
Shift Category Partition	Skill	Sun W1	Mon W1	Tue W1	Wed W1	Thu W1	Fri W1	Sat W1	
0600 1400	SN	6	6	6	6	6	6	6	
1400 2200	SN	5	5	5	5	5	5	5	
2200 0600	SN	5	5	5	5	5	5	5	
0600 1400	NA	1	1	1	1	1	1	1	
1400 2200	NA	1	1	1	1	1	1	1	
2200 0600	NA	1	1	1	1	1	1	1	
0600 1400	HN	1	1	1	1	1	0	0	
1400 2200	HN	0	0	0	0	0	0	0	
2200 0600	HN	0	0	0	0	0	0	0	
0600 1400	WC	1	1	1	1	1	0	0	
1400 2200	WC	0	0	0	0	0	0	0	
2200 0600	WC	0	0	0	0	0	0	0	
0600 1400	CN	1	1	1	1	1	1	1	
1400 2200	CN	1	1	1	1	1	1	1	
2200 0600	CN	1	1	1	1	1	1	1	
0600 1400	PCA	0	0	0	0	0	0	0	
1400 2200	PCA	0	0	0	0	0	0	0	
2200 0600	PCA	0	0	0	0	0	0	0	

Cerner Clairvia Training Manual

- Core Coverage variance can be identified in the “Schedule Analysis” window of the Schedule Editor.

		Wed 01/03/2017	Thu 02/03/2017	Fri 03/03/2017	Sat 04/03/2017	Sun 05/03/2017	Mon 06/03/2017	Tue 07/03/2017	Wed 08/03/2017	Thu 09/03/2017
Assignment	Task									
1 DAY	Day : SN		ArchanaKri JohnMercy BijiSreedha MaryGrace JohnMercy SobiaSivan	ArchanaKri BijiSreedha MareenaTh SamahBent Shamsudhe	ArchanaKri SamahBent LorenaVela SuniSamso Open Oppt Open Oppt	AnuAntony BalrajChet BabyThoma TestKKTwo SuniSamso ElenaAlvara	BalarajChet AnuAntony TestKKTwo BabyThoma BincyRenjith ElennaAlvara	AshaKattat MichaelAng MarcelinaB ElenaAlvara TestKKTwo MarcelinaB	AshaKattat MichaelAng MarcelinaB Aleyamma JohnMercy ReynanteA	ArchanaKri MareenaTh BijiSreedha MaryGrace SamahBent

Shift Category Partition	Skill	Census	Wed 01/03/2017	Thu 02/03/2017	Fri 03/03/2017	Sat 04/03/2017	Sun 05/03/2017	Mon 06/03/2017	Tue 07/03/2017	Wed 08/03/2017	Thu 09/03/2017
0600 1400	HN		1.00 0.00	1.00 0.00	0.00 0.00	0.00 0.00	1.00 0.00	1.00 0.00	1.00 0.00	1.00 0.00	1.00 0.00
0600 1400	CN		0.00 -1.00	0.00 -1.00	1.00 0.00	1.00 0.00	2.00 1.00	2.00 1.00	2.00 1.00	0.00 -1.00	0.00 -1.00
0600 1400	SN		3.00 -3.00	6.00 0.00	6.00 0.00	5.00 -1.00	8.00 2.00	8.00 2.00	7.00 1.00	5.00 -1.00	6.00 0.00
0600 1400	PCA		0.00 0.00								
0600 1400	WC		0.00 -1.00	0.00 -1.00	0.00 0.00	0.00 0.00	0.00 -1.00	0.00 -1.00	0.00 -1.00	0.00 -1.00	0.00 -1.00
0600 1400	NA		0.00 -1.00	0.00 -1.00	1.00 0.00	1.00 0.00	1.00 0.00	1.00 0.00	1.00 0.00	0.00 -1.00	0.00 -1.00
1400 2200	HN		0.00 0.00								
1400 2200	CN		2.00 1.00	2.00 1.00	0.00 -1.00	0.00 -1.00	0.00 -1.00	0.00 -1.00	0.00 -1.00	2.00 1.00	2.00 1.00

Scheduling: Conflicts

Employee Incompatibility - An employee will not be assigned to a task if another employee designated as incompatible is already assigned to the task. Incompatibility is set in the **Incompatibility** tab of the Employees dialog box, opened by choosing **Employee Info** from the **Maintain** menu.

- Due to incompatibility, the selected employee should not work with another employee already assigned to the schedule task.
- This Type of conflict can be overridden

Max Hours

- Assignment the employee to the selected task will exceed the maximum number of hours the employee is expected to work.
- This type of conflict can be overridden

Not Sameday Compatible

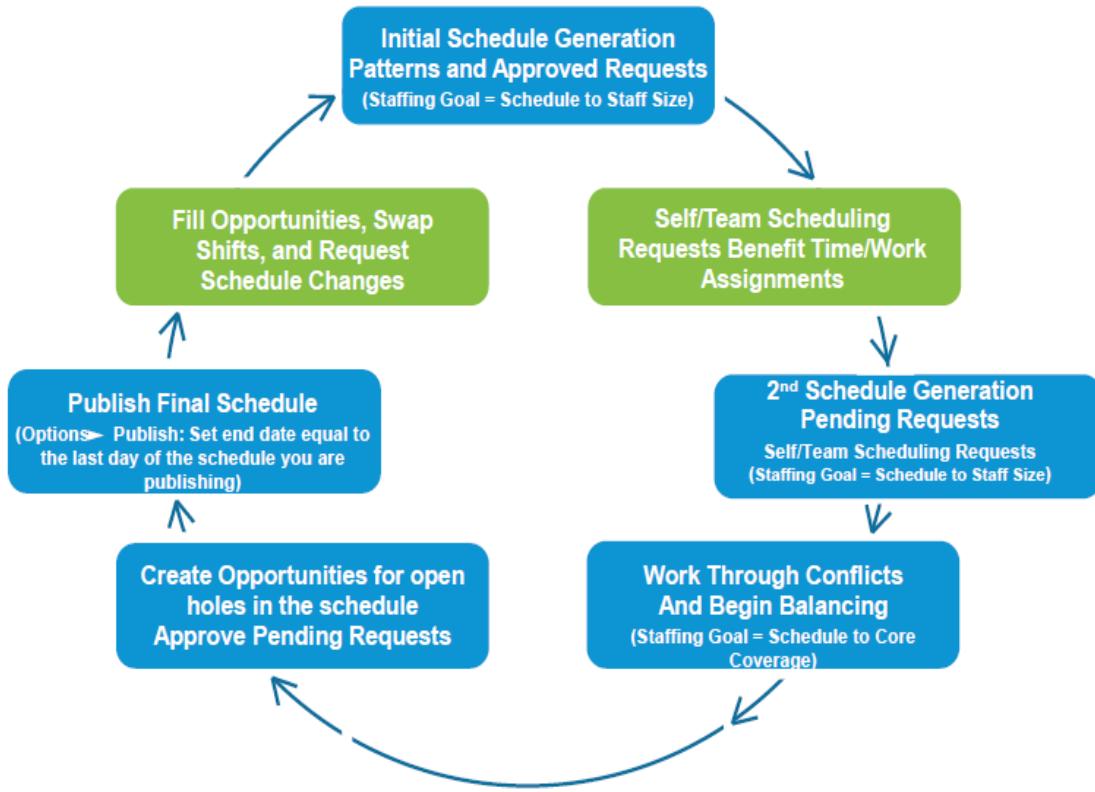
- The selected employee is already assigned to a task on the given day and the tasks are not sameday compatible. Sameday compatibility is set on the Sameday Tab of Assignment dialog box
- This type of conflict can be overridden

Staff List

- The selected staff is not on the staff list of the selected task.
- This type of conflict can be overridden.

Scheduling: Generating Schedule

Schedule Generation: Schedule Cycle



Why Do We Use the Schedule Generation Cycle?

- To ensure all necessary steps are taken for a complete schedule posting
- To keep schedule steps in the order needed to provide an accurate schedule to the employees
- To synchronize the schedule presentation times so employees receive schedules and opportunities in a standardized time and manner

Schedule Generation

Schedulers use the Schedule Editor window to generate and modify schedules. To open the Schedule Editor, either choose **Schedule Editor** from the **Maintain** menu, or click **Open Editor** , or double-click a cell in the Navigator to open the Schedule Editor to that date.

The Schedule Editor Navigation Toolbar

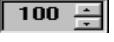
In the Schedule Editor, the Navigation toolbar contains the following buttons to help users generate and view schedule information.

Icon	Use
Save Schedule 	Saves changes made to the schedule.
Refresh 	Refreshes the Schedule Editor view.
Undo 	Cancels the most recent change or action.
Redo 	Repeats the most recent change or action canceled with the Undo command.
Cancel Generation 	Stops the schedule generation process.
Pause Generation 	Pauses the schedule generation process.
Today 	Selects the current date as the first date in view.
Select Date  01/05/2017	Allows users to select another date to view.
Commit Start Date Change 	Moves the date displayed in the Schedule Editor to the date users selected in the Select Date field.
Availability Window 	Opens the Availability window, displaying which employees are available for the selected date and which employees are unavailable, with their conflicts.
Highlight Items 	Allows users to choose an employee or task to highlight in the schedule.
Lock 	Locks a selected cell or range of cells so that these cells are unaffected by schedule generation. When viewing the Schedule Editor by employee, users cannot lock empty cells.
Show Holes 	Highlights holes in the schedule. The Show Holes option is not available when viewing the Schedule Editor by employee.
Create Open Shift 	Marks the selected cell as an open shift for future review and action.
Create Opportunity 	Marks the selected cell as an open shift for future review and action.
Fill Schedule Vacancies 	Fills all open cells in the schedule with opportunities. This option is only available when the staffing goal is set to either Schedule to Core Coverage or Schedule to Staff Size.
Opportunity Worklist 	Opens the Opportunity Worklist window so users can edit opportunities.
Create ShiftAlert 	Creates a ShiftAlert opportunity in the selected cell.

The Schedule Editor Display Toolbar

The **Display** toolbar contains different options depending on whether the Navigator or the Schedule Editor is the active window. In either window, if the **Display** toolbar is not visible, choose **Display** from the **Toolbars** on the **View** menu.

In the Schedule Editor, the **Display** toolbar contains the following buttons that control how the schedule information.

Icon	Use
View by Assignment 	Changes the Schedule Editor display. Assignments display in the column on the left while employees display in the grid.
View by Employee 	Changes the Schedule Editor display. Employees display in the column on the left while assignments display in the grid. See Generating Schedules in Employee View in this chapter for more information.
Change Sort  Custom ▾	Allows users to select the display order of rows of tasks or employees.
Change Zoom  100 ▾	Allows users to select the desired magnification from the Change Zoom list.
Font  A	Opens the Editor Font Setup, which allows users to change the cell, column header, and row header in the schedule.
Display Filter 	Turns the filter on or off.
Filter Setup 	Narrows the display of employees and assignments when the filter is on.
Hide Empty Coverage Rows 	Hides rows in the Schedule Analysis dialog box that do not contain data (employees or assignments). This bottom pane of the Schedule Editor displays totals for coverage, and is visible when users choose Tools from the View menu.
Staffing Goal  Schedule to Staff Size ▾	Allows the user to choose which method to use when generating a schedule.

Moving within the Schedule Editor

Users can click from one cell of the Schedule Editor to another using the mouse, or they can move from one cell to another using keyboard commands. They can also use the horizontal scroll bar to move through schedule dates.

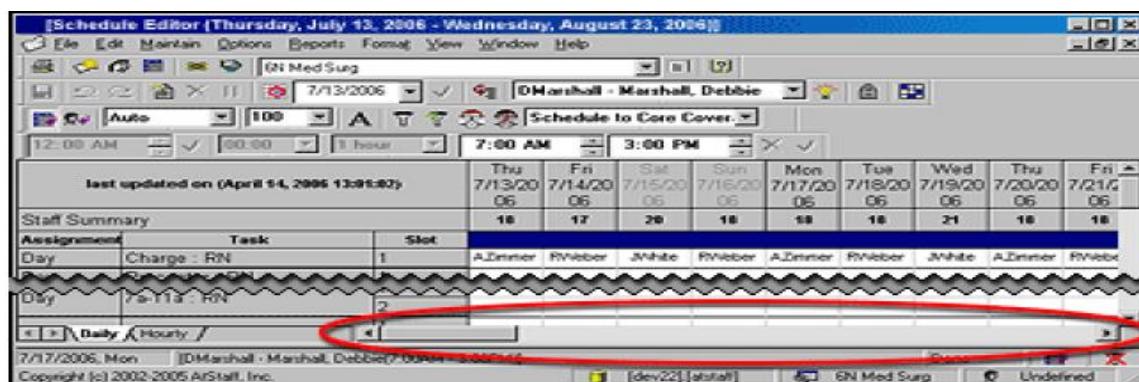
Moving with the Mouse

When using the mouse to move between cells, users should keep the following information in mind.

- Clicking once on a cell selects it.
- Right-clicking on a cell opens a context menu of available options.
- Double-clicking on a cell opens the Availability dialog box.

Moving with the Horizontal Scroll Bar

Users can scroll through the days shown in Schedule Editor with the horizontal scroll bar.



- The scroll bar moves through the viewable days, which are determined by the current selected date and the **Schedule View Range** (set by choosing **Editor Setup** from the **Format** menu).
- To move beyond the current schedule view range, users can click the arrows on either end of the horizontal scroll bar.

Setting the Staffing Goal

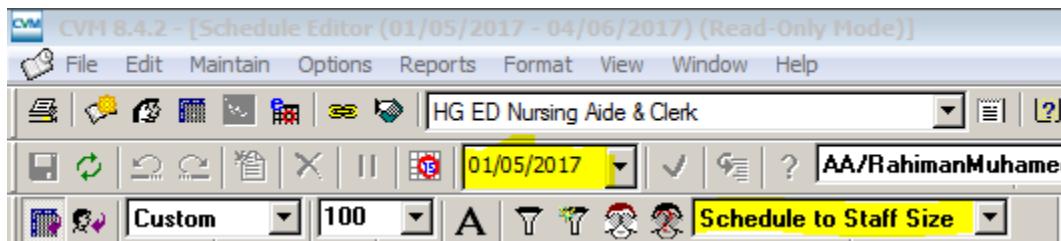
A drop-down list in the **Display** toolbar of the Schedule Editor allows the user to choose among four methods of AutoStaffing.

- Schedule to Staff Size** -This option prompts the AutoStaffing Engine to attempt to fill all open slots for each assignment based on the staff number requirements entered on the **Task** tab of the **Assignments** dialog box.
- Schedule to Core Coverage** -This option prompts the AutoStaffing Engine to staff to those values set in the Core Coverage dialog box.
- Staff to Plan** -This option prompts the AutoStaffing Engine to staff to those values set in the Workload Planner.
- Staff to Demand** -This option prompts the AutoStaffing Engine to staff to Demand target values.

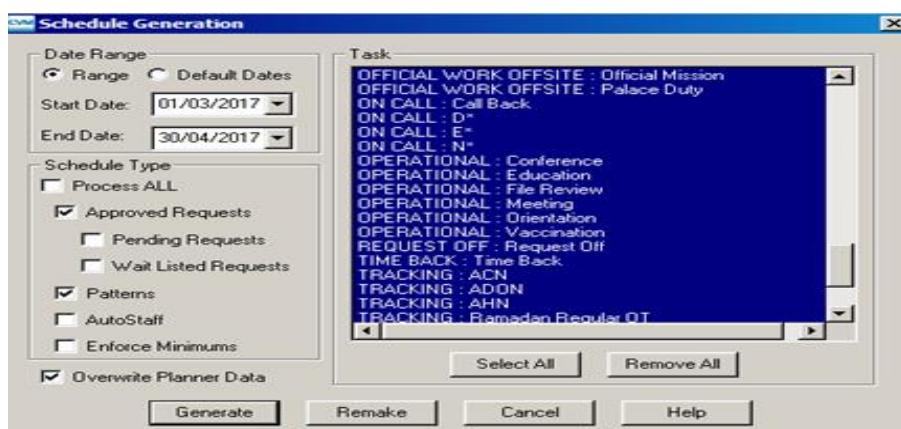
Generating a Preliminary Schedule (Done on the 1st day of the month)

1. Open Schedule Editor. To open the Schedule Editor, either choose **Schedule Editor** from the **Maintain** menu, or click **Open Editor** , or double-click a cell in the Navigator to open the Schedule Editor to that date.
2. Enter a **start date**. Click **Commit Start Date Change** .
3. Confirm that the method selected in the **Staffing Goal** drop-down list reflects the appropriate needs.

Select **Schedule to Staff Size** from Staffing Goal.



4. On the **File** menu, click **New Schedule**. This opens the Schedule Generation dialog box. Users can also open the Schedule Generation dialog box by clicking **New Schedule**.
5. Choose a **Date Range**.
 - To select a range of dates other than the default, click **Range** and then select a **Start Date** and an **End Date**
6. Choose the desired Schedule Type option.
 - Select **Approved Requests** to process approved requests. Approved requests are processed in order by approval date. Schedule Editor shows approved requests in red.
 - Select **Patterns** to process patterns. Schedule Editor shows patterns in green.



7. Under the Task section, **select all tasks** to be scheduled during the selected period.
8. Select **Overwrite Planner Data**.
9. Click **Generate**.
10. **Save** the schedule by going to the File menu and clicking Save Schedule, or by pressing **CTRL+S**).

Schedule Generation: Publish

Setting the Schedule Publish Dates

CVM allows users to designate **Schedule Publishing** start and end dates. These dates are used by CVM Web when displaying schedule data to employees. Web users will only see schedule data that falls between the start and end dates defined on this screen.

To access the dialog box while in the Navigator or Schedule Editor:

1. On the **Options** menu, click **Publish**. This opens the Schedule Publishing dialog box.
2. Change the **End Date** to the last day of the upcoming schedule. Best practice is to set the Start Date for the first schedule and then not change it for the future schedules in order for staffs to view their previous months schedule in the web.
3. Click **Apply** to save changes.
4. Click **OK** to close the dialog box.

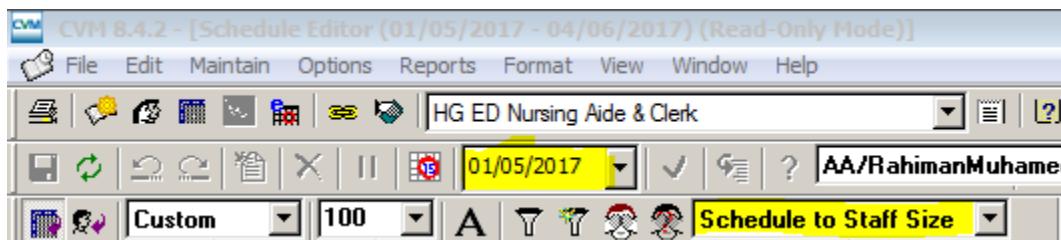


Schedule Generation: Requests (Done on the 16th of the month)

Once the request deadline is reached, pending requests need to be generated onto the schedule

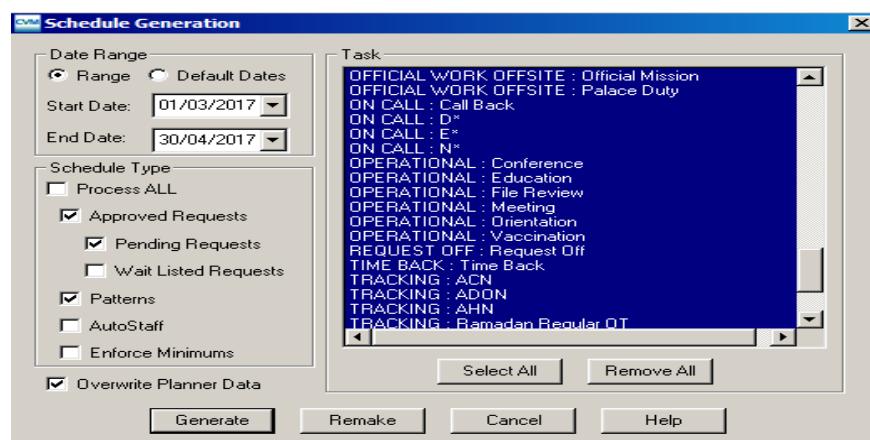
1. Change the Publish date to the last day of the current schedule in order to avoid the staffs to view their schedule in the web that are not yet finalized.
2. Open Schedule Editor. To open the Schedule Editor, either choose **Schedule Editor** from the **Maintain** menu, or click **Open Editor** , or double-click a cell in the Navigator to open the Schedule Editor to that date.
3. Enter a **start date**. Click **Commit Start Date Change** .
4. Confirm that the method selected in the **Staffing Goal** drop-down list reflects the appropriate needs.

Choose **Schedule to Staff Size** from Staffing Goal.



5. On the **File** menu, click **New Schedule**. This opens the Schedule Generation dialog box. Users can also open the Schedule Generation dialog box by clicking **New Schedule**.
6. Choose a **Date Range**.

- To select a range of dates other than the default, click **Range** and then select a **Start Date** and an **End Date**
7. Choose the desired Schedule Type option.
- Select **Approved Requests** to process approved requests. Approved requests are processed in order by approval date. Schedule Editor shows approved requests in **red**.
 - Select **Patterns** to process patterns. Schedule Editor shows patterns in **green**.
 - Select **Pending Requests** to process pending requests. Pending requests are processed in order by date entered; they will appear in **orange**.
 -



8. Under the Task section, select **all tasks** to be scheduled during the selected period.
9. Click **Overwrite Planner Data** to replace data entered in the Workload Planner with the data from the corresponding period in the Core Coverage dialog box.
10. Click **Generate**.
11. Save the schedule by going to the **File** menu and clicking **Save Schedule**, or by pressing **CTRL+S**.

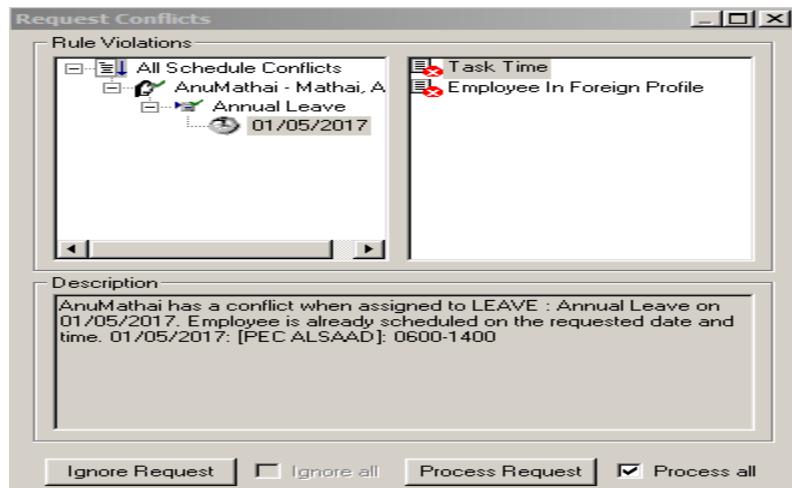
Generating vs. Remaking a Schedule

- Click **Generate** to instruct CVM to try to fill remaining holes in the schedule automatically. Note that generating a schedule does not change existing assignments.
- Click **Remake** to rebuild the schedule from scratch. When users choose **Remake**, CVM first clears the entire schedule, then creates a new schedule based on the user's selected options

Schedule Generation: Pending Requests

Any request resulting in a conflict will open a conflict dialog box when requests are generated onto the schedule

- Select **Process All** then click **Process Request**.



The fill types and their default colors are:

- Staffed by Pattern: **Green**
- Staffed Manually: **Purple**
- Approved Float Assignment: **Pink**
- Pending Request: **Orange** for home profile requests, ***Orange italic text*** for float requests (that is, requests from employees whose primary home profile is not the one selected).
- Approved Request: **Red** for home profile requests, ***Red italic text*** for float requests

Using the Availability Window

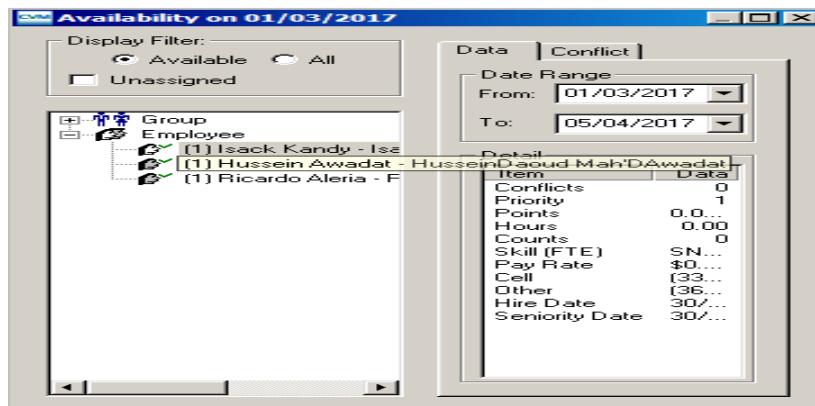
There will be times when users may need to make changes. For the selected cell in the Schedule Editor, the Availability window shows users who is available to staff that cell, their priority, and why any members of the staff list are not available.

1. Select the desired view by either **Employee** or **Assignment**.
 - When viewing by **Assignment**, the Availability window shows who is available to staff that cell and why any members of the staff list are not available.
 - When viewing by **Employee**, the Availability window shows which tasks are available to be assigned to the selected employee. While the dialog box is on-screen, users can click another cell in the Schedule Editor, and the information shown will reflect the newly selected cell.
2. While using the Schedule Editor, there are four ways to open the Availability window and review individual employee assignments.
 - On the **View** menu, click **Availability Window**
 - Click the **Availability Window** icon 
 - Right-click a cell in the Schedule Editor and choose **View Availability Window** from the context menu or,
 - Double-click a cell in the Schedule Editor.

Controlling the Display

To control which employees are listed, click one of the following.

- Available** to list just those employees who are on the staff list that do not have a scheduling conflict with the selected cell. An available employee is marked by a **green** check.
- All** to show all employees in the profile. An **X** next to an employee's name indicates that the employee is not on the staff list.
- Unassigned** to show all employees not assigned that day, whether they have a conflict or not.
- Both **Available** and **Unassigned** to display a list of employees who are on the staff list and are not assigned.
- Both **All** and **Unassigned** to display all employees in the profile who are not working who do not have conflicts.



Modifying an Employee Assignment

Users can modify an employee assignment in one of four ways.

- Drag an employee name from the Availability dialog box and drop it on the selected cell in the Schedule Editor.
- On the **Edit** menu, click **Insert** to move the selected employee in the **Availability window** to the selected cell in the schedule.
- Double-click the selected cell to move the selected employee into that cell.
- Type the Task abbreviation in the selected cell.
- ❖ After modifying the assignment, click **Save Schedule** to save the changes.

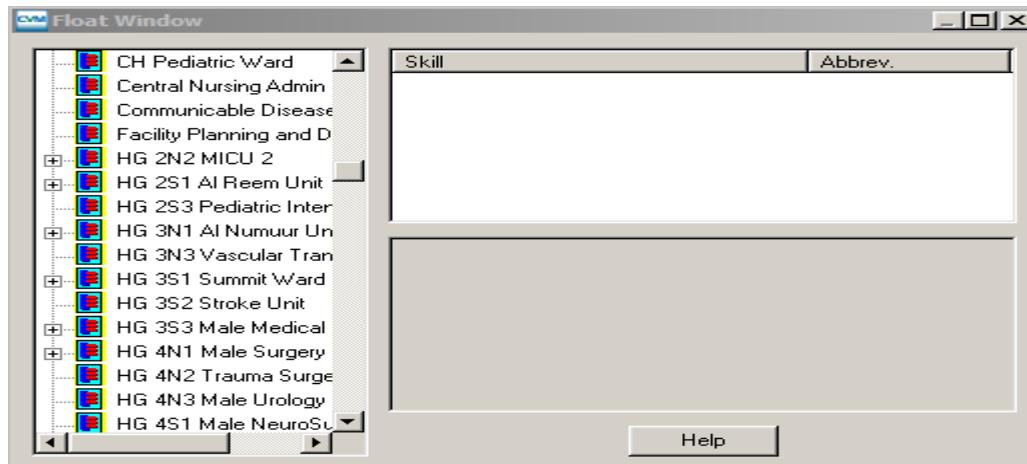
Using the Float Window

Employees from other profiles must have already been designated as float employees for the current profile. Floating employees display in **pink** text in the Schedule Editor.

To use float employees:

1. The Float Window can only be enabled with a cell is selected in Schedule Editor in view by assignment. Click the cell to be staffed in the Schedule Editor.
2. On the **View** menu, click **Float Window** or right-click in the cell and choose **View Float Window** from the context menu. The control tree displays a list of all the profile in the

CVM database. The + next to a profile name indicates that the profile contains employees who can float to the current profile.



3. Double-click the **profile name** to expand its list of employees. Employees who are both eligible to float and available to be staffed display with a green check next to their name.
4. Click on the employee name and drag it to the cell to be employee name displays in **pink**, indicating the cell was filled by a manual edit.
5. Click **Save Schedule** to save the change.

Modifying the Hours of a Selected Assignment

1. In the Schedule Editor, click a cell to which an employee is assigned.
2. On the toolbar, change the **Start Working Hour** and **End Working Hour**.



3. Click **Commit Time Change**.
4. Click **Save Schedule** to save the change.

How Shift Swaps Appear in the Editors

Schedulers can view shift swap information in Client by choosing **Schedule Editor** or **Daily Editor** from the **Maintain** menu. The following letters indicate swap status when they appear next to an employee's name.

1. **(CS)** Completed Swap
2. **(PSM)** Pending Swap Awaiting Manager Approval
3. **(RS)** Requested Swap
4. **(S)** Swap Invitee

Increasing Slots

If more employees are needed to work a task on a selected day or more tasks are to be assigned to employee, users can increase the slot size for that day only.

1. From the Navigator window, on the **Maintain** menu, click **Schedule Editor**. This opens the Schedule Editor window.

2. Right-click a cell to select an individual task-day combination and choose **Increase Slot** from the context menu. An additional cell appears for the added assignment or employee.

Census last updated on May 13, 2017 12:00:22			Mon 01/05/2017	Tue 02/05/2017	Wed 03/05/2017
Staff Summary			42	39	40
Abbr.	Employee	Slot			
Brian Colla	BrianColladoRacela - Racela, Brian	1	E SN	E SN	E SN
		2			

Request Management

- From the Web, you can able to approve or deny requests
 - However, this will NOT automatically displays on the schedule in Staff Manager.
 - The scheduler must generate the schedule to display the requests in the Schedule Editor.
- Best practice** is to utilize Staff Manager to both manage and display requests.
- All Requests appear in the Request Maintenance window from the Maintain menu, select Request_Request.

Request Approval

Requests can be approved either individually or all at once.

Individually

1. Click the cell holding a pending request
2. Right-click and select Request from the context menu.
3. Select **Convert to Approved Request**.
4. Click the **Save Schedule** icon.

As a group

1. Click the upper left corner of the Schedule Editor window above the Assignment column.
2. Right-click and select Request from the context menu.
3. Select Convert to Approved Request.
4. Click the **Save Schedule** icon.

Census last updated on August 16, 2012 09:47:55		Sun 09/16/12	Mon 09/17/12	Tue 09/18/12	Wed 09/19/12
Shift Summary		24	8	9	8
Assignment	Task/Shift				
Night	7p-7a : CC	RCarter			
Night	7p-7a : CT	MMoore			
		SWaters	SWaters	SWaters	ALowe
		RDuncan	MFrench	BGarner	SRingler
		IInglis	MMoore	MMoore	MMoore
		CPope	RDuncan	MFrench	MFrench
		WGregor	IInglis	LAucklan	LAucklan
		GHilton	CPope	RDuncan	IInglis
		EHurley			
		REngland			
		SHamiso			

Deny Requests

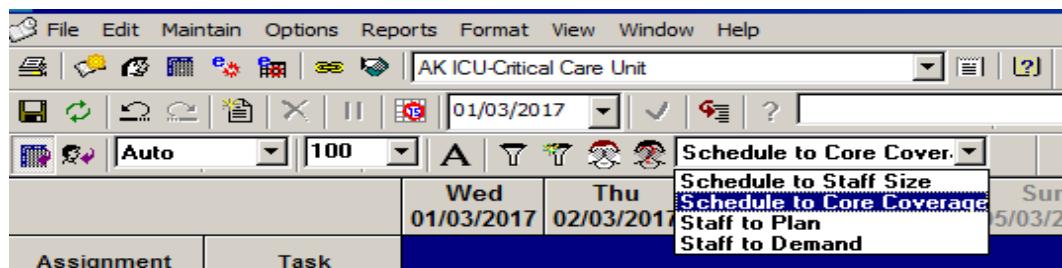
Requests that were not approved via the approval process in Schedule Editor should be denied in the Requests window.

1. Go to the **Schedule Navigator** window.
2. From the **Maintain** menu, select **Requests _Requests**.
3. Double-click the Status column heading to sort requests by status.
4. Locate the Pending requests and select **Denied** from the drop down menu.
5. Click **Apply** or **Ok** to save.

DUTY OFF : Duty Off is Requested by FerdinandMichaelVillanoDeloso - Deloso, Ferdinand from 29/05/2017 to 29/05/2017														
View Recurring Note Note From Scheduler Note To Scheduler														
	Employee	Profile	Action	Assignment	Task	Start Date	End Date	Start Time	End Time	Cov Start Time	Cov End Time	Recurring	Status	
New	RubyBensyMathew - Mathew,		Assign	1 DAY	Day : CN	06/05/2017	06/05/2017	8:00 AM	5:00 PM	8:00 AM	5:00 PM	No	Denied	
	FerdinandMichaelVillanoD		Assign	DUTY OFF	Duty Off	29/05/2017	29/05/2017	6:00 AM	2:00 PM	6:00 AM	2:00 PM	No	Pending	
	Ahmad Mohammed IbrahimAls		Assign	2 EVENING	Oriente : SN	12/05/2017	13/05/2017	2:00 PM	10:00 PM	2:00 PM	10:00 PM	No	Pending	
	AhmedFernandoJamilus - Jamil		Assign	1 NIGHT	Night : SN	12/05/2017	12/05/2017	11:00 PM	8:00 AM	11:00 PM	8:00 AM	No	Approved	

Balancing the Schedule

- Balance the schedule using the Schedule to Core Coverage Staffing Goal.



- The Coverage Totals tab at the bottom of Schedule Editor shows where the schedule requires balancing.
- Point the cursor at the top number to see the Core Coverage target.

Shift Category Partition	Skill	Census	Wed 01/03/2017	Thu 02/03/2017
0600 1400	HN		1.00	1.00
			0.00	0.00
0600 1400	CN		0.00	0.00
			-1.00	-1.00
0600 1400	SN		3.00	6.00
			-3.00	-6.00
0600 1400	PCA		1.00	1.00
			1.00	1.00

- The columns on the left identify the Shift Category Partition and skill of each coverage row.
- The top number represents the number of FTEs scheduled

- The bottom number represents the FTE variance **between** the staff scheduled and the target

Shift Category	Skill	Census	Sun 10/07/12	Mon 10/08/12	Tue 10/09/12	Wed 10/10/12	Thu 10/11/12
7a-3p	RN		7 00	5 00	6.00	4.00	6.00
			1.00	-1.00	0.00	-2.00	0.00
3p-11p	RN		5 00	4 00	6.00	3.50	5.00
			0.00	-1.00	1.00	-1.50	0.00

Coverage Totals are color-coded to provide quick identification of where action needs to be taken.

- Red means staffing is over the target.
- Blue means staffing is under the target.
- Black means staffing is on target.

Opportunities

- Opportunities can be either **Consider Me** or **Schedule Me**.
- Opportunities can be **Overtime Approved** on posting.

Creating an Opportunity

While in Schedule Editor

1. Right-click on a single unfilled cell on the schedule and choose **Add Opportunity** from the pop-up menu.
2. Click **Save**  to save changes.

or:

1. Click a single unfilled cell on the schedule.
2. Click **Add Opportunity** .
3. Click **Save**  to save changes.

Section 3: Daily editor and Demand manager

Daily editor and Demand manager Training

Session Objective

At the end of this session, attendees will be able to:

- Identify the importance Daily editor and Demand manager
- Demonstrate making daily edits within Staff Manager
- Understand the layout and utilization of the Daily Editor tool within Staff Manager
- Demonstrate editing existing schedules
- Add assignment notes to the schedule
- Create shift opportunities

Daily editor and Demand manager Training Agenda:

1. Daily editor

- Importance of Daily editor
- Set up
- Schedule Grid
- Profile Selection Panel
- Coverage Total Panels
- Adding/removing staff in the schedule
- Assignments notes
- Open Opportunities

2. Demand manager

- Overview
- HL7 Census
- Target to Schedule

Training Duration: 4 Hours including Assignment Manager

Importance of Daily editor

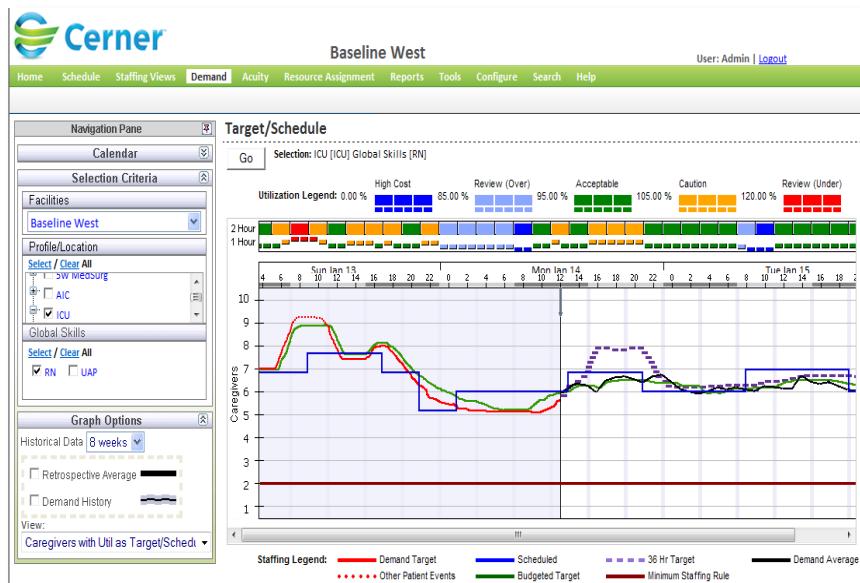
Daily edits to the schedule are per each shift such as: split shifts, sick calls, pull In/out (float) and assignment Notes for the following reasons

Cerner Clairvia Training Manual

1. To ensure decisions made using solution tools are based on the most current information
2. Variances on reports are correct

Tue 10/30/2012 6N Med Surg 0700 1500 in Hours						
Census: 24						
Skill	Target	Actual	Clin Adj	Adj Var	Notes	
CHG	8.00	8.00	0.00	0.00		
RN	48.00	48.00	0.00	0.00		
LPN	48.00	8.00	0.00	-40.00		
MGR	8.00	8.00	0.00	0.00		
NA	16.00	16.00	0.00	0.00		
US	8.00	8.00	0.00	0.00		
Total	136.00	96.00	0.00	-40.00		
CHG	Lambert, Shan	0700-1500	CHG	0700, 8.0 0.60		
RN	Jansen, Silvia	0700-1500	RN	0700, 8.0 1.00		
RN	Lawson, Chris	0700-1500	RN	0700, 8.0 1.00		
RN	Meyer, Deana	0700-1500	RN	0700, 8.0 1.00		
RN	Moresco, Janet	0700-1500	RN	0700, 8.0 0.80		
RN	Queen, Adelle	0700-1500	RN	0700, 8.0 1.00		
RN	Tovarich, Dou	0700-1500	RN	0700, 8.0 1.00		
RN	Ulry, Suzanne	0700-1500	ORI	0800, 0.0 0.40		
LPN	Register, Chan	0700-1500	LPN	0700, 8.0 1.00		
MGR	Zimmer, Ana	0700-1500	MGR	0700, 8.0 1.00		
NA	Nguyen, Sue	0700-1500	NA	0700, 8.0 1.00		
NA	Richardson, Li	0700-1500	NA	0700, 8.0		

3. Staffing targets calculated in Demand Manager and Acuity are correct



4. Assignment Manager is accurate

Cerner Clairvia Training Manual

Edit Patient Assignment - Windows Internet Explorer

Edit Patient Assignments												Date: 01/14/2013	Profile: ICU	Shift Category Partition: Evening (1500 - 2300)																																																																																																	
1	2	3	4	5	6	7	8	9	10	11	12	-																																																																																																			
0	0	0	0	0	1	0	4	0	1	0	0																																																																																																				
												Find Caregivers	Assign:	Charge	Continuity	Devices/Duties	Relief	+ A	D	- B	G	2																																																																																									
<table border="1"> <thead> <tr> <th>Skill</th> <th>Caregiver</th> <th># Pts</th> <th>Acuity Avg</th> <th>Avail Hours</th> <th>Asgn %</th> <th>Asgn</th> <th>Start Time</th> <th>End Time</th> </tr> </thead> <tbody> <tr><td>RN</td><td>ARN, KAREN</td><td>2</td><td>9.50</td><td>8.00</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>CHAPEL, CHRISTY</td><td>0</td><td>0.00</td><td>8.00</td><td>0.00</td><td>0</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>CORNETT, PATRICIA</td><td>2</td><td>8.50</td><td>4.00</td><td>3.38</td><td>84.5</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>HEARN, BETHANY</td><td>2</td><td>9.50</td><td>8.00</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>KHAN, NANCY</td><td>1</td><td>10.00</td><td>8.00</td><td>5.00</td><td>62.5</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>PAGE, DONNA</td><td>2</td><td>9.00</td><td>8.00</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>SOBHA, ABRAHAM</td><td>0</td><td>0.00</td><td>8.00</td><td>0.00</td><td>0</td><td>1500</td><td>2300</td></tr> <tr><td>RN</td><td>WATERSON, REBECCA</td><td>2</td><td>8.50</td><td>4.00</td><td>3.38</td><td>84.5</td><td>1500</td><td>2300</td></tr> <tr><td>UAP</td><td>FEATHERSTONE, HA...</td><td>9</td><td>9.22</td><td>8.00</td><td>6.50</td><td>81.3</td><td>1500</td><td>2300</td></tr> <tr><td>SIT</td><td>WILSON, MARIE</td><td>1</td><td>10.00</td><td>8.00</td><td>8.00</td><td>100.0</td><td>1500</td><td>2300</td></tr> </tbody> </table>												Skill	Caregiver	# Pts	Acuity Avg	Avail Hours	Asgn %	Asgn	Start Time	End Time	RN	ARN, KAREN	2	9.50	8.00	7.34	91.8	1500	2300	RN	CHAPEL, CHRISTY	0	0.00	8.00	0.00	0	1500	2300	RN	CORNETT, PATRICIA	2	8.50	4.00	3.38	84.5	1500	2300	RN	HEARN, BETHANY	2	9.50	8.00	7.34	91.8	1500	2300	RN	KHAN, NANCY	1	10.00	8.00	5.00	62.5	1500	2300	RN	PAGE, DONNA	2	9.00	8.00	7.34	91.8	1500	2300	RN	SOBHA, ABRAHAM	0	0.00	8.00	0.00	0	1500	2300	RN	WATERSON, REBECCA	2	8.50	4.00	3.38	84.5	1500	2300	UAP	FEATHERSTONE, HA...	9	9.22	8.00	6.50	81.3	1500	2300	SIT	WILSON, MARIE	1	10.00	8.00	8.00	100.0	1500	2300	
Skill	Caregiver	# Pts	Acuity Avg	Avail Hours	Asgn %	Asgn	Start Time	End Time																																																																																																							
RN	ARN, KAREN	2	9.50	8.00	7.34	91.8	1500	2300																																																																																																							
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RN	WATERSON, REBECCA	2	8.50	4.00	3.38	84.5	1500	2300																																																																																																							
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SIT	WILSON, MARIE	1	10.00	8.00	8.00	100.0	1500	2300																																																																																																							
												Room Bed	Patient Name	Acuity	Care Hrs	Status																																																																																															
												RN HEARN, BETHANY	AlertSec 0%RN	9	4.42	F	P1																																																																																														
												RN HEARN, BETHANY	Direct 100%RN	1500	2300	x																																																																																															
												UAP FEATHERSTONE, HANNAH	Direct 100%UAP	1500	2300	x																																																																																															
												RN ARN, KAREN	AlertSec 0%RN	1500	2300	x																																																																																															
												JONES, ANNE	10	5.50	F	P1																																																																																															
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												RN ARN, KAREN	AlertSec 0%RN	1500	2300	x																																																																																															
												RIKER, THOMAS	10	5.50	F	P1																																																																																															
												RN ARN, KAREN	Direct 100%RN	1500	2300	x																																																																																															
												UAP FEATHERSTONE, HANNAH	Direct 100%UAP	1500	2300	x																																																																																															
												RN SOBHA, ABRAHAM	AlertSec 0%RN	1500	2300	x																																																																																															
												LONG, LEWIS	12	7.00	P1																																																																																																
												CC: D 075: VIRAL MENINGITIS W CC/MCC																																																																																																			

3. Staff are referencing up to date schedules to know when to work

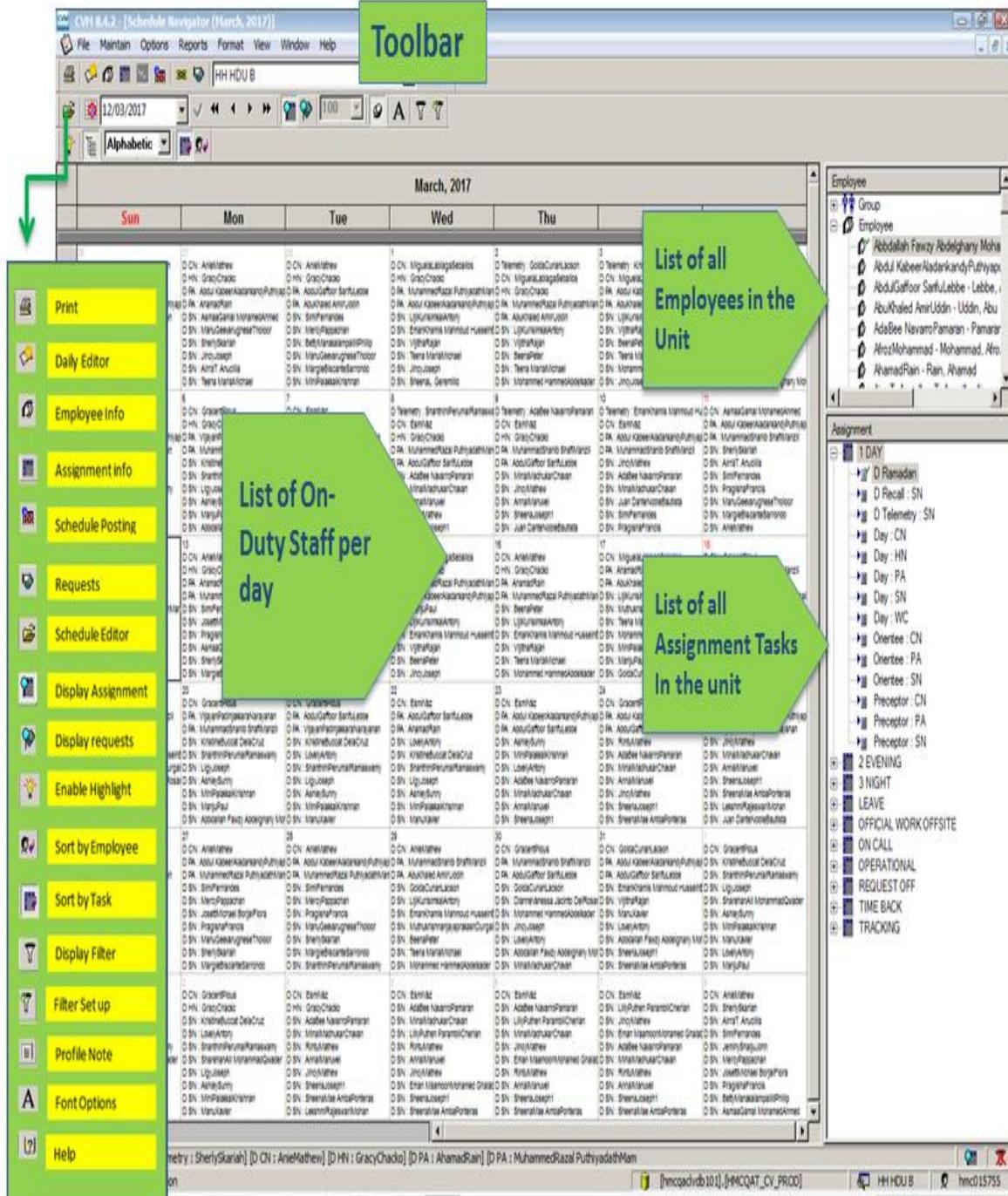
Welcome Greg Miller
Today is Monday, Jan 14, 2013

My Schedule

January 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2 0700 1930 RN	3 0700 1930 RN	4	5
6	7 0700 1930 RN	8	9 0700 1930 RN	10 0700 1930 RN	11	12
13	14 0700 1930 RN	15	16 0700 1930 RN	17 0700 1930 RN	18 0700 1930 RN	19
20	21 0700 1930 RN	22 0700 1930 RN	23 0700 1930 RN	24 0700 1930 RN	25	26
27	28 0700 1930 RN	29	30 0700 1930 RN	31		

Daily Editor Overview

Schedule Navigator Page



The screenshot displays the Cerner Clairvia Schedule Navigator Page for March 2017. The interface includes a toolbar at the top, a date selector, and a grid view of staff assignments for each day of the month. A vertical sidebar on the left contains a list of navigation and configuration options. Three green arrows on the right point to specific sections of the interface:

- A green arrow points to the 'Employee' list on the right side of the screen.
- A green arrow points to the 'Assignment Tasks' list on the right side of the screen.
- A green arrow points to the 'List of On-Duty Staff per day' section in the center of the grid.

Toolbar:

- File
- Maintain
- Options
- Reports
- Format
- View
- Window
- Help

Employee List:

- Group
- Employee
 - Abdullah Fawzy Abdellahy Moha
 - AbduKabeerAlAdeekAndFuwyak
 - AbduGaffoor SaifLebbe - Lebbe, I
 - Abulkhaled AmrUddin - Uddin, Abu
 - AdaBee NavaroPanaran - Panaran
 - AlzMohammad - Mohammad, Alr
 - AhmedRai - Rai, Ahmed

Assignment Tasks List:

- 1 DAY
 - D Recal : SN
 - D Telemetry : SN
 - Day : CN
 - Day : HN
 - Day : PA
 - Day : SN
 - Day : WC
 - Orientee : CN
 - Orientee : PA
 - Orientee : SN
 - Preceptor : CN
 - Preceptor : PA
 - Preceptor : SN
- 2 EVENING
- 3 NIGHT
- LEAVE
- OFFICIAL WORK OFFSITE
- ON CALL
- OPERATIONAL
- REQUEST OFF
- TIME BACK
- TRACKING

List of On-Duty Staff per day:

This section shows the staff assigned to each day of the month. The grid includes columns for Day, Employee Name, and Task Type. A red arrow points to the 'Assignment Tasks' list on the right.

Day	Employee Name	Task Type
1	Abdelrahman Almousawi	Day : CN
2	Abdelrahman Almousawi	Day : CN
3	Abdelrahman Almousawi	Day : CN
4	Abdelrahman Almousawi	Day : CN
5	Abdelrahman Almousawi	Day : CN
6	Abdelrahman Almousawi	Day : CN
7	Abdelrahman Almousawi	Day : CN
8	Abdelrahman Almousawi	Day : CN
9	Abdelrahman Almousawi	Day : CN
10	Abdelrahman Almousawi	Day : CN
11	Abdelrahman Almousawi	Day : CN
12	Abdelrahman Almousawi	Day : CN
13	Abdelrahman Almousawi	Day : CN
14	Abdelrahman Almousawi	Day : CN
15	Abdelrahman Almousawi	Day : CN
16	Abdelrahman Almousawi	Day : CN
17	Abdelrahman Almousawi	Day : CN
18	Abdelrahman Almousawi	Day : CN
19	Abdelrahman Almousawi	Day : CN
20	Abdelrahman Almousawi	Day : CN
21	Abdelrahman Almousawi	Day : CN
22	Abdelrahman Almousawi	Day : CN
23	Abdelrahman Almousawi	Day : CN
24	Abdelrahman Almousawi	Day : CN
25	Abdelrahman Almousawi	Day : CN
26	Abdelrahman Almousawi	Day : CN
27	Abdelrahman Almousawi	Day : CN
28	Abdelrahman Almousawi	Day : CN
29	Abdelrahman Almousawi	Day : CN
30	Abdelrahman Almousawi	Day : CN
31	Abdelrahman Almousawi	Day : CN

Assignment Tasks List:

This section shows the assignment tasks for each day of the month. A red arrow points to the 'Assignment Tasks' list on the right.

Day	Task Type
1	Day : CN
2	Day : CN
3	Day : CN
4	Day : CN
5	Day : CN
6	Day : CN
7	Day : CN
8	Day : CN
9	Day : CN
10	Day : CN
11	Day : CN
12	Day : CN
13	Day : CN
14	Day : CN
15	Day : CN
16	Day : CN
17	Day : CN
18	Day : CN
19	Day : CN
20	Day : CN
21	Day : CN
22	Day : CN
23	Day : CN
24	Day : CN
25	Day : CN
26	Day : CN
27	Day : CN
28	Day : CN
29	Day : CN
30	Day : CN
31	Day : CN

On-Duty Staff List:

This section shows the staff assigned to each day of the month. A red arrow points to the 'On-Duty Staff' list on the right.

Day	Employee Name
1	Abdelrahman Almousawi
2	Abdelrahman Almousawi
3	Abdelrahman Almousawi
4	Abdelrahman Almousawi
5	Abdelrahman Almousawi
6	Abdelrahman Almousawi
7	Abdelrahman Almousawi
8	Abdelrahman Almousawi
9	Abdelrahman Almousawi
10	Abdelrahman Almousawi
11	Abdelrahman Almousawi
12	Abdelrahman Almousawi
13	Abdelrahman Almousawi
14	Abdelrahman Almousawi
15	Abdelrahman Almousawi
16	Abdelrahman Almousawi
17	Abdelrahman Almousawi
18	Abdelrahman Almousawi
19	Abdelrahman Almousawi
20	Abdelrahman Almousawi
21	Abdelrahman Almousawi
22	Abdelrahman Almousawi
23	Abdelrahman Almousawi
24	Abdelrahman Almousawi
25	Abdelrahman Almousawi
26	Abdelrahman Almousawi
27	Abdelrahman Almousawi
28	Abdelrahman Almousawi
29	Abdelrahman Almousawi
30	Abdelrahman Almousawi
31	Abdelrahman Almousawi

Schedule Daily Editor Page

Toolbar

Maintain Options Reports Format View Window Help

HH HOU 8

12/03/2017 3 Start Date ✓ X PER PER 60 A 100

Assignment (A) Task (A) Skill (A)

DAY D Ramadan default

DAY D Recall SN

DAY D Telemetry S

Day CN

Day HN

Day PA

MohammedRazal PuthyadathMammu

Sheenal_Geremillo

MercyPappachan

JosettMichael_BorjaFlora

EmanKhamis Mahmud_HusseinElkara

SheenaMal_AmbaPonteras

ManuGeevarugheseTholoor

MargeBiscanteSamro

AiraT_Anucilla

Sheenal_Geremillo

AfrozMohammad

AmalHassen A OAI S

Day SN

Day WC

Orienteen CN

Orienteen PA

Orienteen SN

Preceptor CN

Preceptor PA

Preceptor SN

E Ramadan default

E Recall SN

E Telemetry SN

Evening CN

Evening PA

Evening SN

MiguelLabiaqSeballos

Abdul_Kabeer_Abadankandy_Puthiyapu

AbdulGaffoor_SanfuLe

GoldsCunanLaco

LijiKurisimkaAnton

EmanKhamis Mahmud_Hus

VijithaRajan

BeevaPeter

Teena MariaMicha

GoldaCunanLaco | LijiKurisimkaAntony

JincyMathew | SheenaJoseph1

VijithaRajan | BeevaPeter

12/03 Sun2

13/03 Mon2

CN 1 1 1 1 1

HN 1 0 0 1 0

PA 2 2 1 2 2

SN 9 9 7 8 8

WC 2 0 0 2 0

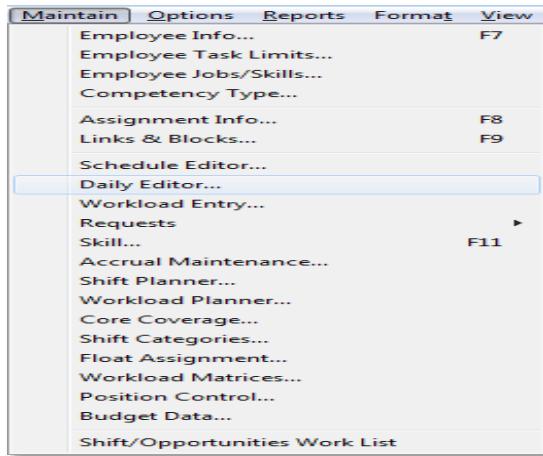
Profile Auth. Posts All Employees View Task

Find at the start of Name

Employee	A/U	Paid Hours	11/03 Sat2	12/03 Sun2
Abdullah Faw	A	40	N Telemetry	N SN
Abdul Kabeer	A	40	D PA	E PA
Abdu/Gaffoor	A	40	E PA	E PA
Abu/Khaled A	A	40	N PA	N PA
AnushKunjuku	A	0		
AshleySunny	A	40	N SN	N SN
BeevaPeter	A	40	E SN	E SN
EhteramHass	A	0		
GoldaCunanLac	A	40	E SN	E SN
GracenPious	A	40	N CN	N CN
JeminyShaijU	A	0		
JincyJoseph	A	40	E SN	E SN
JincyMathew	A	40	/	E SN
KristineBuccat	A	40	N SN	N SN
LigyJoseph	J	40	N SN	N SN
LijiKurisimka	A	40	E S	
LillyPuthen Pa	A	0		
LovelyAntony	A	40		
ManuPaul	P	40		
Marwa Abdalla	A	0		
MiguelLabiaq	A	32		
Mohammed H	A	40	E SN	E SN
SabahIbrahim	A	0		
ShalakaSamu	A	0		
SharthinPeru	A	40	N SN	N SN
maiRamaswa	A	0		
SharehanAli M	A	0		
SheenaJoseph	A	40	/	E SN
Teena MariaMicha	A	40	E SN	E SN
VijithaRajan	A	40	SL	E SN
AdaBee				
NavaroPamar	U	40	E SN	E
AfrozMoham	U	40	/	D WC
AhamadRain	- U	40	/	D PA
AiraT_Anucilla	U	40	D SN	D SN
AmalHassen	U	40	/	D WC
RezaA.Moham	U	40	/	D PA

Two ways to open:

1. From Maintain menu, select **Daily Editor**.

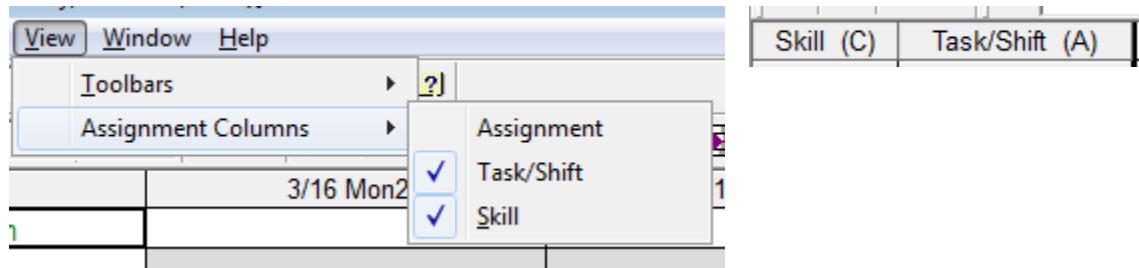


2. Click Daily Editor icon on the taskbar.

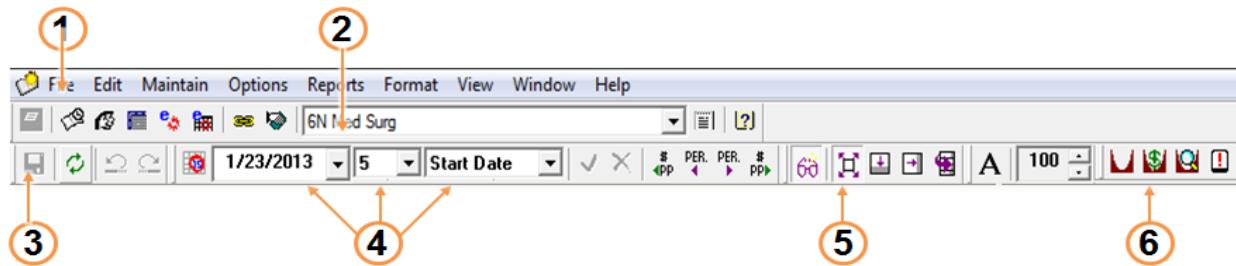


Daily Editor Setup

Assignment Columns



Solution Basics: Daily Editor



1. The Menu bar
2. Profile Selection menu
3. Save button
4. Calendar and Period Selection menus
5. Auto Expand Grid Cells
6. Add Opportunities icon; drag the icon to a schedule cell to add an opportunity.

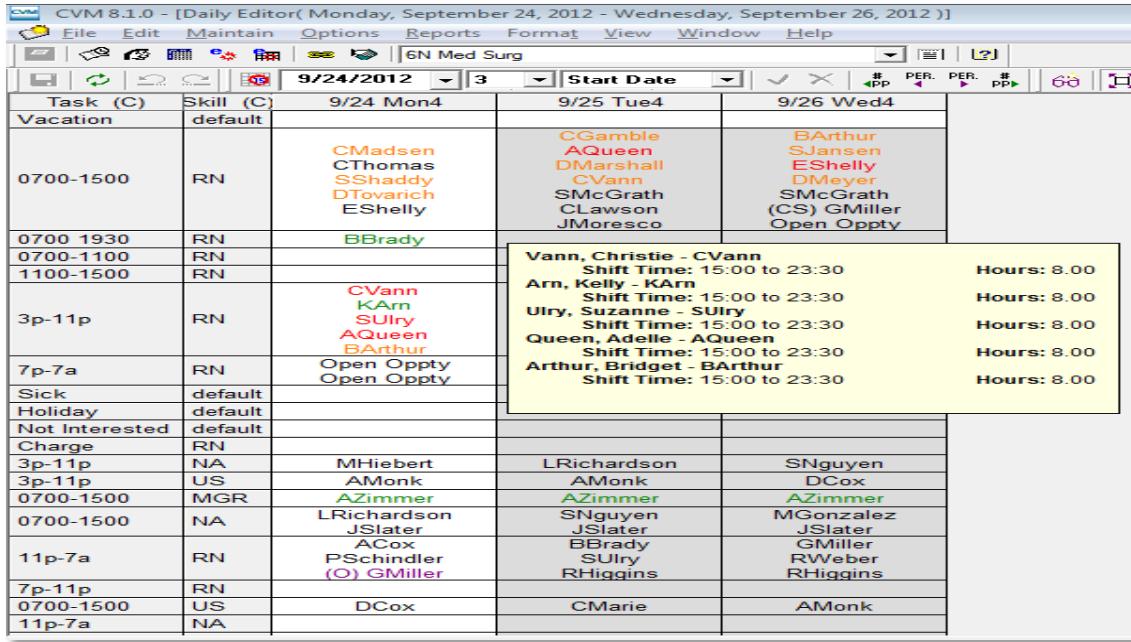
Display: Auto Expand Grid Cells

Skill (C)	Task/Shift (A)	2/28 Sat3	3/1 Sun4	3/2 Mon4
CHG	0700 1930	ITrend		
CHG	0700 1930 ...			
CHG	1900 0700			
CHG	Call Back			
RN	0300 0700			
RN	0600 1430			
RN	0700 1100			
RN	0700 1530 ...			
RN	0700 1530 ...			
RN	0700 1930	SDee JFavro	SCarr SDee	SCarr GHilton1 NCole JFred...

Schedule Grid

- Displays schedule information from Schedule Editor
- Colors are the same as seen in Schedule Editor
 - Green = Pattern
 - Purple = Manual edit
 - Red = Approved Request
 - Orange = Pending Request
 - Pink = Pull (Float)
- Hover over assigned names for additional information

Cerner Clairvia Training Manual



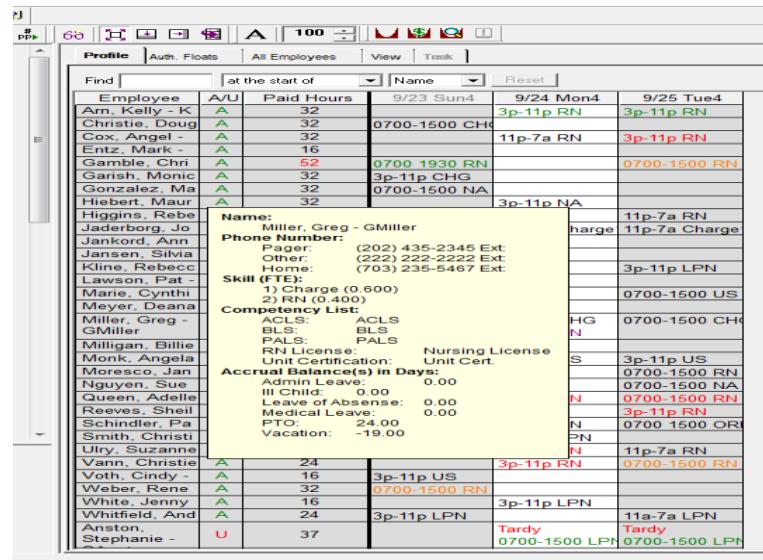
Task (C)	Skill (C)	Start Date	Employee List
Vacation	default	9/24 Mon4	CMadsen CThomas SShady DTovarich EShelly
	RN	9/25 Tue4	CGamble AQueen DMarshall CVann SMcGrath CLawson JMoresco
		9/26 Wed4	BArthur SJansen EShelly DMeyer SMcGrath (CS) GMiller Open Oppty
0700-1500			
0700-1930	RN		BBrady
0700-1100	RN		
1100-1500	RN		
3p-11p	RN		CVann KArn SUrly AQueen BArthur
7p-7a	RN		Open Oppty Open Oppty
Sick	default		
Holiday	default		
Not Interested	default		
Charge	RN		
3p-11p	NA		MHiebert
3p-11p	US		AMonk
0700-1500	MGR		AZimmer
0700-1500	NA		LRichardson JSlater
11p-7a	RN		ACox PSchindler (O) GMiller
7p-11p	RN		
0700-1500	US		DCox
11p-7a	NA		

Vann, Christie - CVann
Shift Time: 15:00 to 23:30
Arn, Kelly - KArn
Shift Time: 15:00 to 23:30
Ulry, Suzanne - SUlry
Shift Time: 15:00 to 23:30
Queen, Adelle - AQueen
Shift Time: 15:00 to 23:30
Arthur, Bridget - BArthur
Shift Time: 15:00 to 23:30

Hours: 8.00
Hours: 8.00
Hours: 8.00
Hours: 8.00
Hours: 8.00
Hours: 8.00

Profile Selection Panel

- Shows paid hours, total hours, overtime hours, and overtime hours if scheduled.
- Shows the employees schedule for the day before and day following the schedule date.
- Hover over panel cells for additional information



Employee	AVU	Paid Hours	9/23 Sun4	9/24 Mon4	9/25 Tue4
Arn, Kelly - K	A	32		3p-11p RN	3p-11p RN
Christie, Doug	A	32	0700-1500 CHG		
Cox, Angel -	A	32		11p-7a RN	3p-11p RN
Entz, Mark -	A	16			
Gamble, Chri	A	52	0700 1930 RN		0700-1500 RN
Garish, Monic	A	32	3p-11p CHG		
Gonzalez, Ma	A	32	0700-1500 NA		
Hiebert, Maur	A	32		3p-11p NA	
Higgins, Rebe					11p-7a RN
Jaderborg, Jo					Charge
Jankord, Ann					
Jansen, Silvia					
Kline, Rebecca					
Lawson, Paul					
Marias, Cynthia					
Meyer, Deana					
Miller, Greg - GMiller					
Milligan, Billie					
Monk, Angela					
Moresco, Jan					
Nguyen, Sue					
Queen, Adelle					
Reeves, Shell					
Schindler, Pa					
Smith, Christi					
Ung, Suanne					
Vann, Christie	A	24		3p-11p RN	0700-1500 RN
Voth, Cindy -	A	16	3p-11p US		
Weber, Rene	A	32	0700-1500 RN		
White, Jenny	A	16		3p-11p LPN	
Whitfield, And	A	24	3p-11p LPN		11a-7a LPN
Anston, Stephanie -	U	37		Tardy	Tardy
				0700-1500 LPN	0700-1500 LPN

Authorized Floats Selection Dialog

- Displays employees able to float into the unit.
- Click on Plus sign to left of unit to expand list
- Hover over panel cells for additional information.

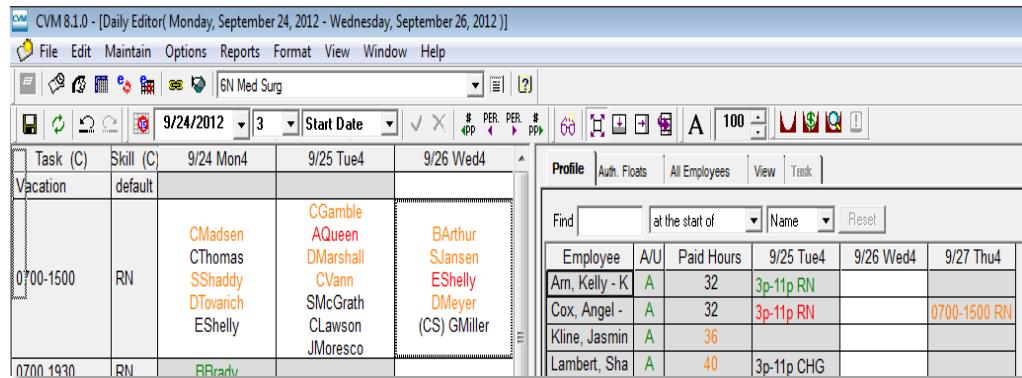
Profile Auth. Floats All Employees View Tasks						
Find RN	at the start of	Skill	Reset			
Profiles / Employee A/U	Paid Hours	9/23 Sun4	9/24 Mon4	9/25 Tue4		
4W Med Tele						
Auckland, Lu ▲	0					
Barclay, Anna ▲	0					
Chapman, Kristie ▲						
Dolce, Linnea ▲						
Duncan, Ron ▲						
Frenichs, Mis ▲						
Gardner, Brad ▲						
Gormley, Kristie ▲						
Graham, Mar ▲						
Gregory, Vwan ▲						
Hector, Mar ▲						
Hicks, Chris ▲						
Hilton, Geoffer ▲						
Hurley, Elsa ▲						
Indred, Sabrina ▲						
Jackson, Se ▲						
Lowe, Anne ▲						
Overton, Nina ▲						
Pap, Holly ▲						
Pollman, Stef ▲	0					
Pope, Carrie ▲	0					
Quigler, Nad ▲	0					
Rosen, Naomi ▲	0					
Waters, Sara ▲	0					
+ 5W Oncology						
+ 5N Mother Baby						
+ 8N Neuro Rehab						
+ 9E CCU						
+ Agency						
+ Float Pool						

Coverage Total Panels

- Displays the number of each skill per partition.
- Color-coded based on calculated needs.
- Hover over the total boxes for additional variance and the patient census
- Variances are used by management to determine if extra staff are needed or if floats are necessary

Leave	default					
Jury Duty	default					
Medical Leave	default					
Family Medical Lv.	default					
Admin Leave	default					
III Child	default					
Already Called	default					
Skill (A)		9/24 Mon4				
CHG		1	1	1		
LPN		1	1	1		
MGR		0	0	0		
NA		2	1	0		
RN		6	5.50	3		
US		1	1	0		
0700 1500 (07:00 to 15:00)						
Schedule: 1.00 Coverage Ratio Hours: 8.00						
Plan: 1.00 Coverage Ratio Hours: 8.00						
Variance: 0.00 Coverage Ratio Hours: 0.00						
Census: 23						
Exception: Sitter: 0, 1:1: 0						
1500 2300 (15:00 to 23:00)						
Schedule: 1.00 Coverage Ratio Hours: 8.00						
Plan: 1.00 Coverage Ratio Hours: 8.00						
Variance: 0.00 Coverage Ratio Hours: 0.00						
Census: 24						
Exception: Sitter: 0, 1:1: 0						
2300 0700 (23:00 to 07:00)						
Schedule: 1.00 Coverage Ratio Hours: 8.00						
Plan: 1.00 Coverage Ratio Hours: 8.00						
Variance: 0.00 Coverage Ratio Hours: 0.00						
Census: 21						
Exception: Sitter: 0, 1:1: 0						
Census last updated on: September 24, 2012 20:31						

Scheduling Employees with the Daily Editor

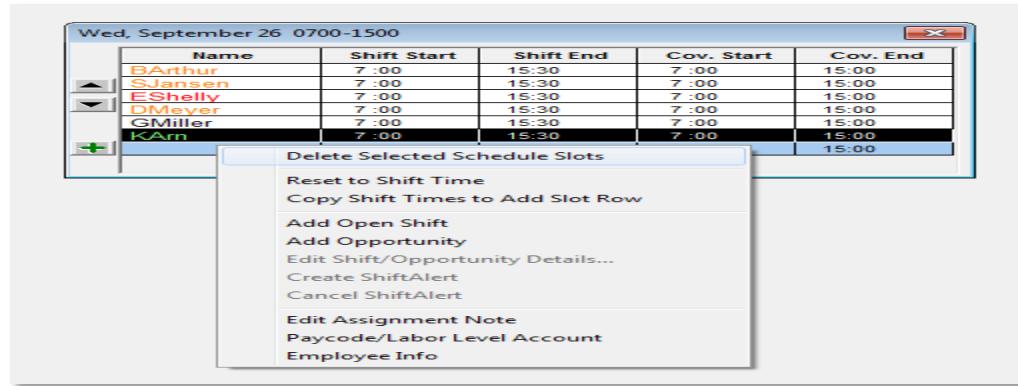


There are 3 ways to schedule employees with the Daily Editor

1. **Drag and drop** an employee from the Selection dialog boxes to the open cell in the Daily Editor
2. Select the **task cell**, then **double-click on an employee name** in the Selection dialog boxes
3. Select the **task cell**, select an employee name in the Selection dialog boxes, and press **ENTER** form the keyboard
 - Ensure that the correct employees are assigned to correct tasks
 - Important to keep the schedule accurate and up to date
 - Edits made here will update the available resources in Assignment Manager

Removing Employee

1. Double-click the task containing the employee you want to delete. This opens the slot dialog box.
2. Right-click the employee's name and select **Delete Selected Schedule Slot** from the context menu or select the employee then Click **Delete** button in the keyboard.
3. Click **Yes** when prompted to confirm your deletion
4. Click Close  to close the Slot dialog box. The employee's name disappears from the Daily Editor cell.
5. Click Save. 



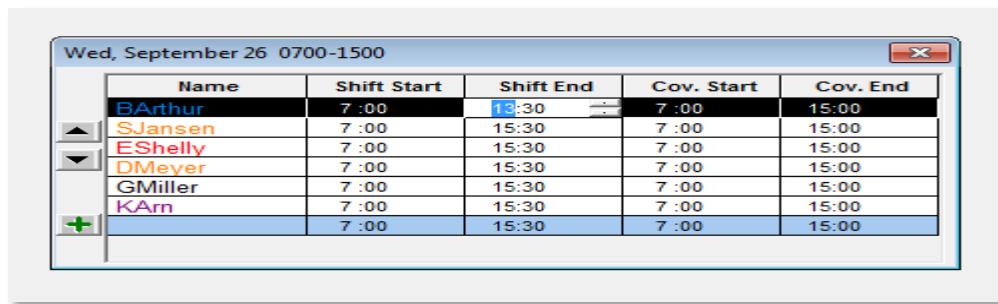
Editing Start and End Times

Importance

- Ensures staff are represented correctly on the schedule
- Split Shifts are correctly documented
- Assignment Manager is kept up to date for staff with patient assignments

Steps

- Double-click the task containing the start or end time you want to edit.
- Click the start or end time to be edited inside the Slot Dialog box then adjust the time accordingly.
- Close the Slot Dialog box to save your changes.



Assignments notes

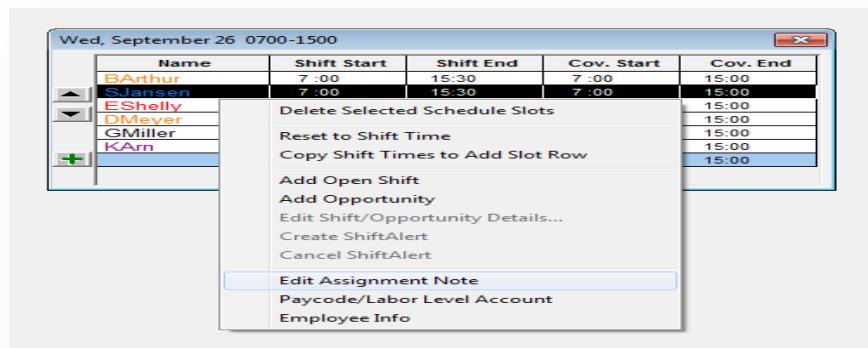
Importance of adding assignments notes

- Assignment notes are visible to everyone and allow the communication of information about that specific employee's task

- For example: The notes will be able to denote why a person isn't working the full duration of a shift, as well as who is working the remaining hours in that shift

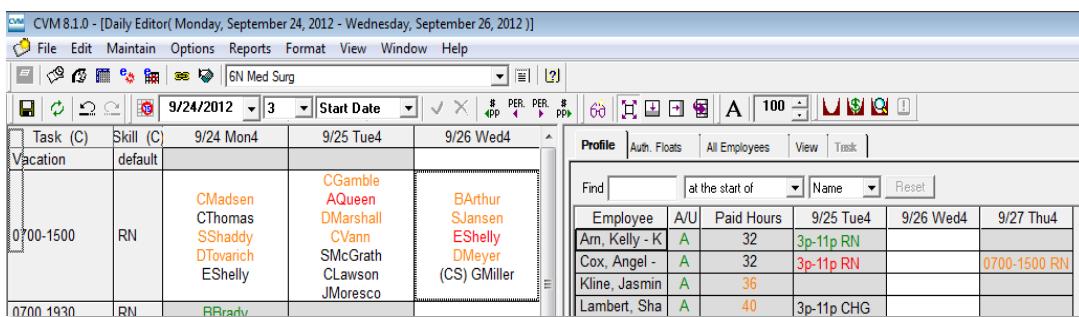
Steps

- Double-click the task to enter an Assignment Note.
- Right-click the employee and select Edit Assignment Note from the context menu.
- Type your note in the text box and click OK.
- Close the Slot Dialog box to save your note



Adding Open Opportunities

- Drag and drop the Open Opportunity icon onto the task with the opening.
- Used to denote all open shifts in one location online



Assigning Tracking Task

- This is utilized by the Ambulatory, Outpatient, OT, Labor Room and Emergency Unit to assign Nurses in their Daily/Shift Assignment.
- Tracking Task or Daily/Shift assignment must be assigned with regular Task (D SN, E SN, and N SN). Otherwise it will not generate any hours in the timecard
- Arrange the Tracking task or Daily/Shift Assignment in the Display Order as per user preference to Sort the task arrangement in the daily editor or schedule editor. The Assignment, Task, and Skill columns can be sorted by clicking on their header cells.



The screenshot shows the CVM 8.5.2 Daily Editor interface. The title bar reads "CVM 8.5.2 - [Daily Editor(31/05/2017 - 02/06/2017)]". The menu bar includes File, Edit, Maintain, Options, Reports, Format, View, Window, Help. Below the menu is a toolbar with various icons. The main area displays a grid titled "HG 2N1 MICU 1". The grid has columns: Assignment (A), Task (D), Skill (D), and Start Date. The data in the grid is as follows:

Assignment (A)	Task (D)	Skill (D)	Start Date
DAY	Preceptor	SN	31/05 Wed5
DAY	Preceptor	NA	
DAY	Preceptor	CN	

The Assignment column has two sort options.

- Ascending alphabetical order (A)
- Descending alphabetical order (D)

The Task and Skill columns have three sort options.

- Ascending alphabetical order (A).
- Descending alphabetical order (D).
- Custom (C).

- The user can use the **View Tab** in the Daily Editor to minimize the task selection.
 - The **View** tab displays all assignments and skills defined for the selected profile. The Schedule Grid adjusts to include only those assignments and skills selected, with support for multi-select
 - The **View** tab works in conjunction with the View toolbar button.  The button must be clicked to activate the selection(s) in the View tab. A black check beside the name indicates that the toolbar is currently on display.

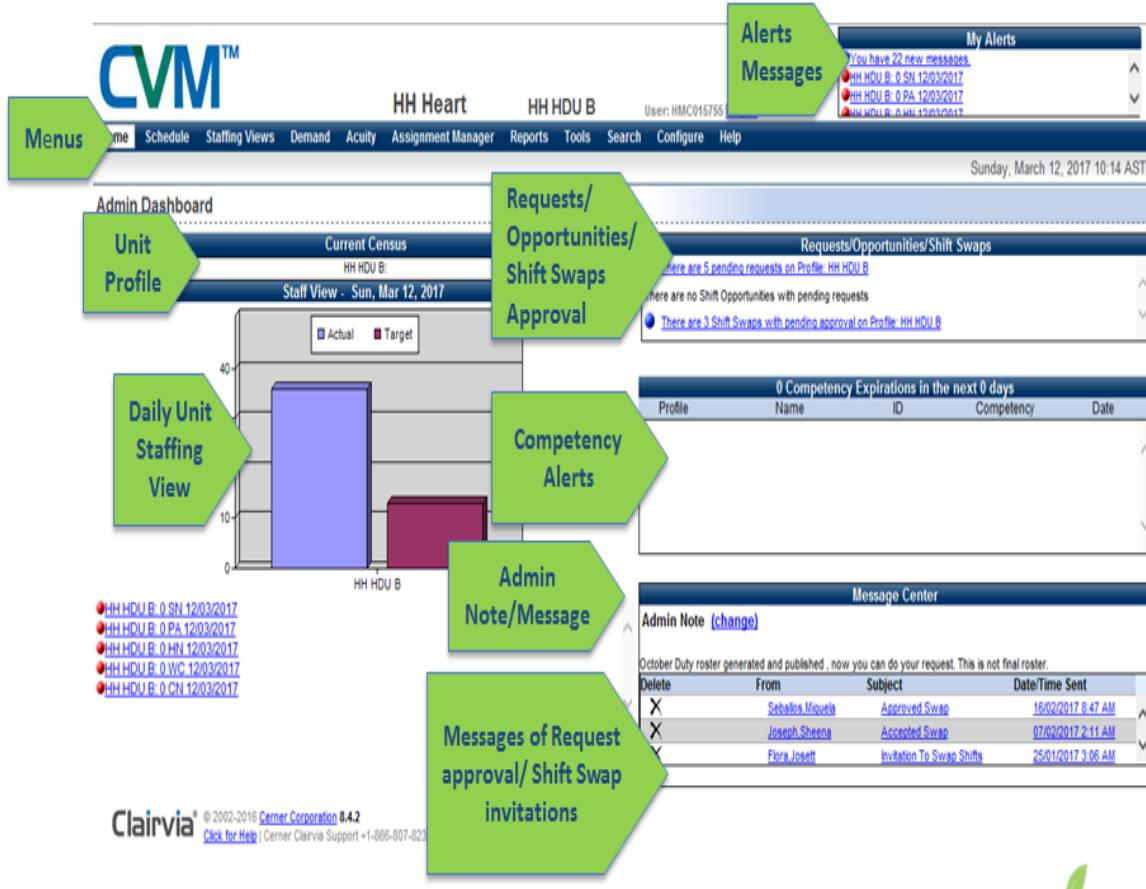
Demand Manager

Demand Manager provides real time staffing targets driven by the patient care needs based on:

- Volume
- Patient activity (admissions, discharges, transfers, events such as sitters or codes)

- Patient condition from Acuity
- Length of stay by unit average or patient diagnosis

CVM Web Homepage



The screenshot shows the CVM Web Homepage with several green callout boxes highlighting different features:

- Menus**: Points to the top navigation bar.
- Unit Profile**: Points to the "Current Census" section.
- Daily Unit Staffing View**: Points to the bar chart showing Actual vs Target staffing levels.
- Requests/Opportunities/Shift Swaps Approval**: Points to the "Requests/Opportunities/Shift Swaps" section.
- Competency Alerts**: Points to the "Competency Expirations in the next 0 days" section.
- Admin Note/Message**: Points to the "Admin Note (change)" section.
- Messages of Request approval/ Shift Swap invitations**: Points to the "Message Center" section.

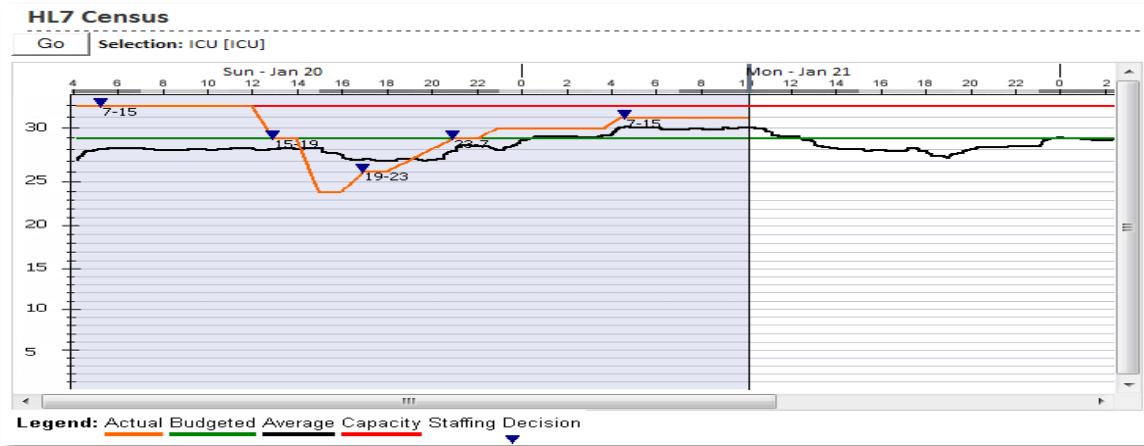
Other visible sections include "Alerts" (with 22 new messages), "My Alerts" (with 5 pending requests and 3 shift swaps), and "Current Census" (HH HDU B, Staff View - Sun, Mar 12, 2017).

HL7 Census

Health Level-7 or HL7 refers to a set of international standards for transfer of clinical and administrative data between software applications used by various healthcare providers.

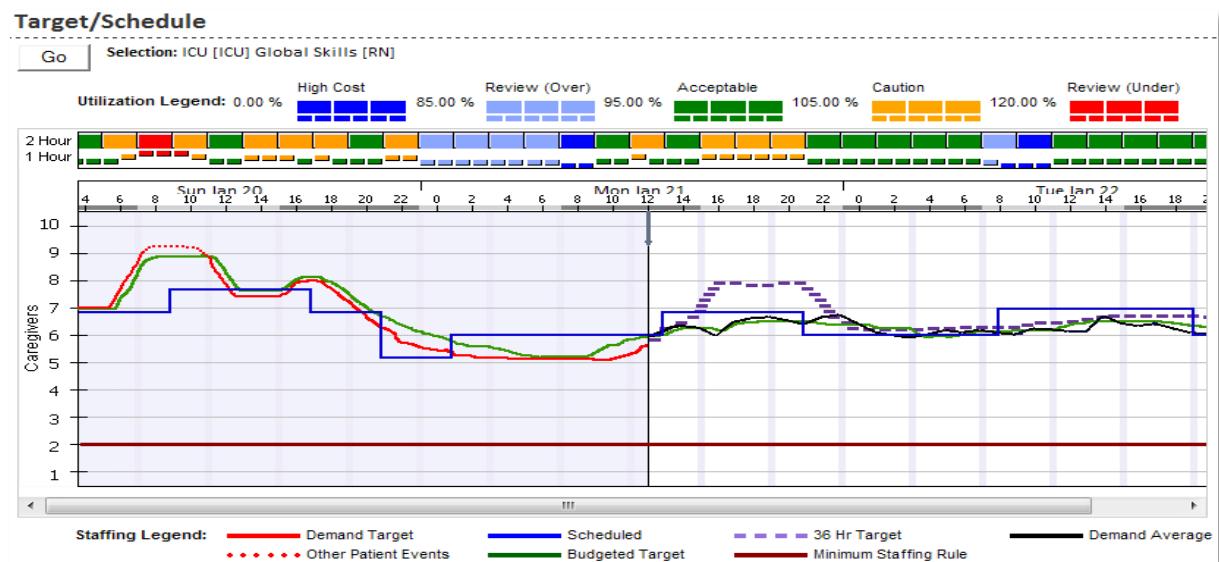
- HL7 Census provides a graphical view of the number of patients on the unit along with a comparison to the unit capacity, average daily census and average census by day of week and time of day over the past 6 weeks
- Allows managers to staff prospectively based on the historic needs of the unit

Cerner Clairvia Training Manual



Target to Schedule

- Graphical view of the variance between the scheduled staff and the staffing need based on patient movement on the unit
- A Utilization Bar provides an At a Glance view of the utilization of scheduled staff according to patient needs



Section 4: Assignment Manager

Assignment Manager

Session Objective:

At the end of the session, attendees will be able

- To explain the usage of Assignment Manager
- To understand the functionalities of patient assignment
- To understand functionalities of Patient Pattern Management
- To demonstrate how to assign nurses with patients and special duties/tasks.

Assignment Manager Training Agenda:

- Benefits of Assignment Manager
- Overview
- Caregiver roles and hours
- Patient Assignment
 - Adding patient Assignment
 - Patient Pattern Management
 - Editing Departure time
 - Continuity of Care
 - Future patient arrivals
 - Patient Assignment status
- Duty Assignment
 - Overview
 - Assigning Additional Duties
 - Assignment printable view
- Hands on Training

Duration: 4 Hours including Daily Editor

Benefits of Assignment Manager

- Assignment Manager integrates the data captured by Staff Manager, Demand Manager, Patient Progress Manager, and Outcomes-Driven Acuity
 - Integrated with staffing data in Staff Manager—uses actual schedules to identify the caregivers available to be assigned within the selected time period

- Integrated with patient data of Demand Manager, Patient Progress Manager & Outcomes-Driven Acuity—the care hours by patient & shift are calculated in real time to support equitable assignments
- Assignments are date/time stamped & stored electronically to support accreditation & regulatory compliance with assignment documentation

Assignment Manager Overview

Assignment Manager leverages the staffing data of Staff Manager and the patient data of Demand Manager and Outcomes-Driven Acuity, to automate the assignment of caregivers to patients, personnel to departments.

Assignment Manager facilitates balanced workload assignments across caregivers while ensuring patient accountability throughout the shift and to support time-based assignment of any personnel to a department for efficient communication.

Key Features

- **Patient Assign**
 - ✓ Assign for Continuity automatically assigns patients to the same caregivers, starting with the most recent assignments.
 - ✓ Automatic calculation of number of patients, average acuity by caregiver and percent assigned, providing real-time metrics to evaluate equitability.
 - ✓ Access to each caregiver's competencies assists in assigning the appropriate caregiver to each patient.
- **Duty Assign** - Duty Assign accounts for non-patient assignments, keeping an electronic record of caregiver time spent in non-patient related activities or responsibilities such as checking crash carts or counting medications.
- **Relief Assign** - Relief Assign electronically tracks break coverage for each caregiver's assigned patients.
- **Patient Assignment Status View**

Patient Assign Overview

Every inpatient nursing unit needs an efficient way to assign caregivers to patients and then report on those assignments. You make assignments every day for each shift where health care professionals provide direct care. Changes in staff schedules, patient turnover, and changes in demand for nursing care contribute to the need to update to these assignments throughout the day.

- **Patient Assign** makes it easier for you to assign caregivers to patients and to update, track, and report on assignment data. **Patient Assign** integrates the data captured by Staff Manager, Demand Manager, and Outcomes-Driven Acuity. Thus, Patient Assign

users can leverage their data to provide more precise and equitable assignments that reflect the true patient care needs.

Patient Assignment Caregiver Roles & Care Hours

Patient Assign uses **Caregiver Roles** to record and report the precise relationship between an assigned caregiver and a patient during a shift

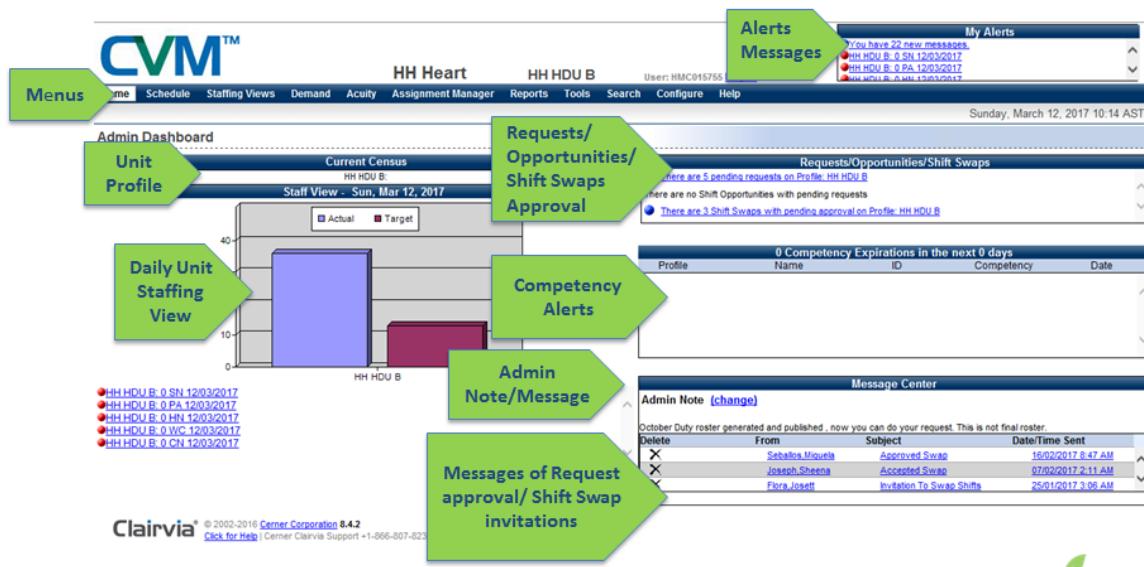
Examples of roles include:

- RN 100%
- CN 0%

Care Hours are the amount of nursing care time — based on Demand, projected LOS and Acuity — that the patient needs, as calculated for the current shift

- Care hours will fluctuate up or down as the patient's condition or LOS is updated
- Care hours are adjusted based on the expected departure and discharge dates in Demand Manager
- Care hours are prorated for new arrivals based on time on unit during the current shift

CVM Web Home Page



The screenshot shows the CVM (Clairvia) web interface with several key features highlighted by green callout boxes:

- Menus**: Located at the top left.
- Unit Profile**: Shows the "Current Census" for HH Heart and HH HDU B, with a bar chart comparing Actual and Target staffing levels.
- Daily Unit Staffing View**: Displays staffing levels for HH HDU B.
- Requests/Opportunities/Shift Swaps Approval**: A section showing pending requests and shift swaps.
- Competency Alerts**: A section showing competency expirations.
- Admin Note/Message**: A message center for admin notes and messages.
- Messages of Request approval/Shift Swap invitations**: A section for messages related to request approval and shift swap invitations.
- My Alerts**: A summary of new messages and alerts.
- Alerts Messages**: A detailed view of messages.
- Request Center**: A section for managing requests and shift swaps.
- Message Center**: A detailed view of messages sent.

At the bottom, there is a footer with the text: "Clairvia® © 2002-2016 Cerner Corporation 8.4.2 Click for Help | Cerner Clairvia Support +1-866-807-8233".

The Employee Dashboard

The Dashboard is your *CVM Web* home page. It provides content based on your security level. All users have an Employee Dashboard, while managers also have an Admin Dashboard. Depending on the application settings, the Dashboard displays one or more of the following areas:

My Schedule

The My Schedule section is your employee calendar. It displays your schedule for the current month along with the task abbreviation for all scheduled tasks. A blue border encloses the current date.

Colored circles mark days with requests.

- A **blue** circle indicates a pending request.
- A **green** circle indicates an approved request.
- A **red** circle indicates a denied request.

My Schedule							
January 2013							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		1	2 0700 1930 RN	3 0700 1930 RN	4	5	
6	7 0700 1930 RN	8	9 0700 1930 RN	10 0700 1930 RN	11	12	
13	14 0700 1930 RN	15 0700 1930 RN	16 ● 0700 1930 RN	17 0700 1930 RN	18 0700 1930 RN	19	
20	21 0700 1930 RN	22 0700 1930 RN	23 0700 1930 RN	24 0700 1930 RN	25 ● 0700 1930 RN	26	
27	28 0700 1930 RN	29	30 0700 1930 RN	31			

Competency Expiration Alerts

A competency is any employee license or certification. The Competency Expiration Alerts section lists any competencies you have that are due to expire.

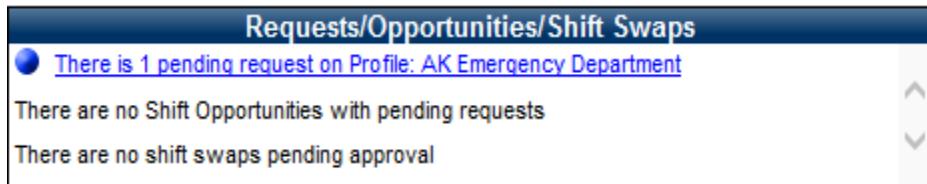
How Competency Alerts Work

- Managers enter competencies and expiration dates (if any) in CVM Client.
- Managers set the competency expiration threshold. This is the range, in days, when CVM Web should show an alert. A threshold of 60 means the application should post an alert starting 60 days before the expiration date.
- When an expiration date is within the threshold, CVM Web lists the competency in your Competency Expiration Alert section. A yellow circle marks competencies within the alert threshold. A red circle marks expired competencies.

2 Competency Expirations in the next 90 days				
Profile	Name	ID	Competency	Date
● 6N Med Sur	BBrady	BC1950	BLS	08/29/2012
● 6N Med Sur	BBrady	BC1950	ACLS	10/15/2012
● 6N Med Sur	BBrady	BC1950	RN License	11/13/2012

My Requests

The My Requests section lists your requests and their status (approved, pending, or denied). You can click a listed request to open it on the My Requests page.



Requests/Opportunities/Shift Swaps

There is 1 pending request on Profile: AK Emergency Department

There are no Shift Opportunities with pending requests

There are no shift swaps pending approval

My Opportunities

My Opportunities section contains these items.

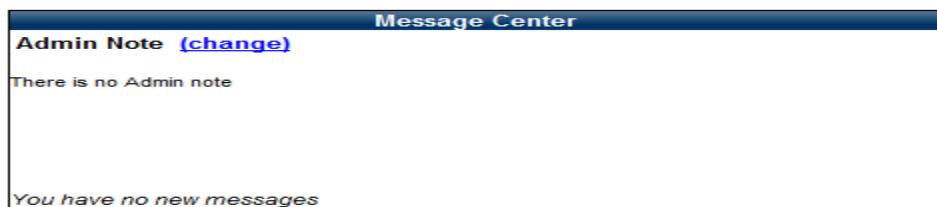
- Your opportunities that are pending approval
- A link to all opportunities on the Weekly Schedule page
- Your total opportunities awards

My Shift Swaps Pending Approval

For profiles using the optional Shift Swap feature, this section lists your shift swaps pending approval. It also links to all shift swaps on the Weekly Schedule page.

The Message Center

The Message Center lists any messages sent to you through CVM Web. It also displays any Admin Notes from profile managers.



Message Center

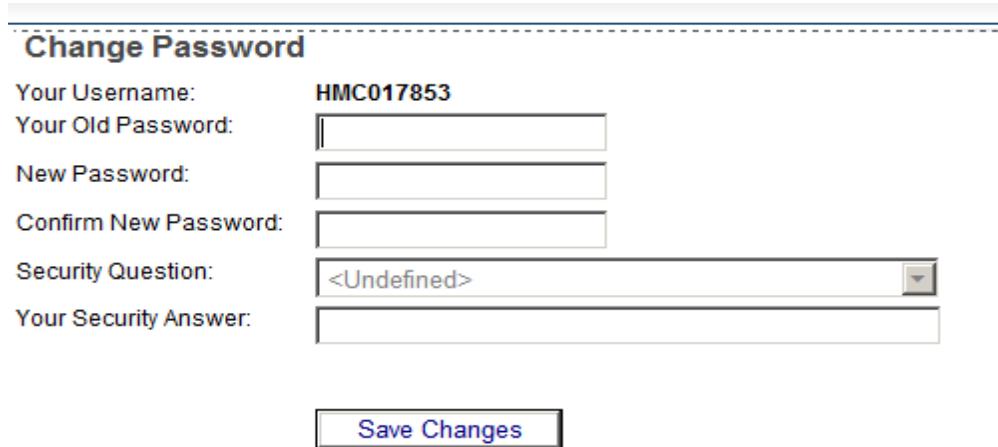
Admin Note [\(change\)](#)

There is no Admin note

You have no new messages

Changing Passwords

1. From the Tools menu, My Information select Change Password. This opens the Change Password page. CVM Web will already have entered your Username information.



The screenshot shows a 'Change Password' form. At the top, it says 'Your Username: HMC017853'. Below that are four input fields: 'Your Old Password', 'New Password', 'Confirm New Password', and 'Your Security Answer'. To the right of 'Your Security Answer' is a dropdown arrow. At the bottom is a 'Save Changes' button.

2. Enter the old password in the Your Old Password box.
3. Enter a new password in the New Password box.
4. Confirm New Password by entering the new password again.
5. Click Save Changes.

Note: For New User or reset password skip step no. 2

Demand Manager

The Demand Manager application extends CVM's capabilities by providing users with more precise demand management. It measures, predicts, and tracks the demand for patient services that drives how facilities use resources, especially staffing.

- Manages each patient's hospital stay—door to door—to desired outcomes.
 - Supports the facility's ability to provide safe, high-quality patient care.
 - Provides for efficient patient throughput.
- Demand Manager calculates nursing care needs using demand workload tables and acuity levels (from Outcomes-Driven Acuity patient assessments). It connects each care phase with patient events such as admissions, transfers and discharges as well as changes in acuity level.
 - Demand Manager determines each patient's real-time and projected demand for staffing by tracking the patient along a progress pattern. The application adjusts staffing requirements automatically as patients' conditions change and events occur.
 - This application is available for acute care inpatient (patients assigned to a bed) profiles and locations. It requires a live real-time Registration Import, completed Demand Workload tables, and defined global skills.

Patient Pattern Management

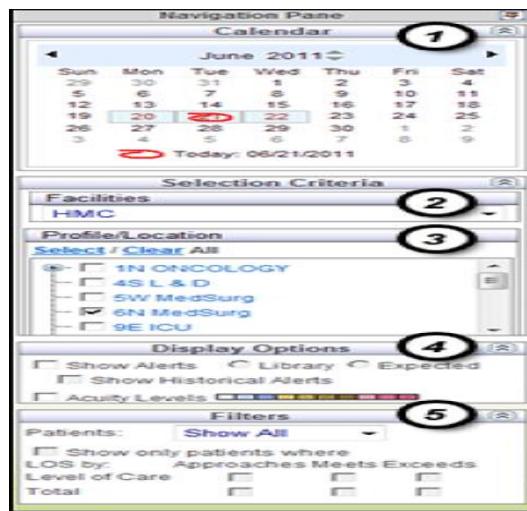
Patient progress management begins with optimal best practice goals for each patient's clinical progress through their stay, then allows you to compare and manage each patient's progress against these goals in real-time. Patient outcomes management reviews clinical patient outcomes for each patient, continuously comparing each patient's actual outcomes to desired outcome goals.

The Patient Pattern Management Page

The Patient Pattern Management page allows you to see at a glance where patients are in their progress patterns. The page itself is divided into two sections: the Navigation Pane and the Pattern Display pane.

The Navigation Pane includes the following sections.

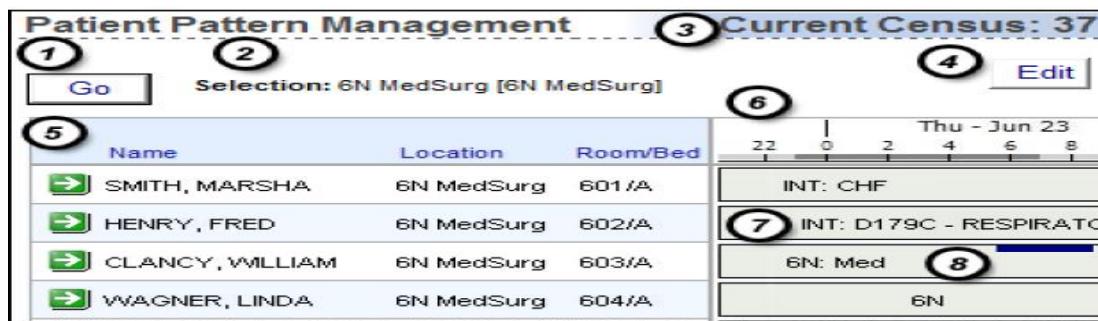
1. **Calendar** - Selecting a date with the calendar displays patient pattern information for the selected day and the days before and after.
2. Selection Criteria: **Facilities** - This menu only appears in organizations with multiple facilities. You select a facility to populate the Profile/Location menu.
3. Selection Criteria: **Profile/Location** - You select profiles and locations by selecting their check boxes. To select or clear all profile check boxes, click the desired link under Select / Clear All.
4. Display Options - You can display Alerts, Acuity Levels, or both.
5. Filters - There are two filters, the **Patients filter** and the **Alerts filter**.
 - Patients: Show Current is the default selection when the current date is in view. This displays all patterns for patients without a processed departure event as of the current time.
 - Alerts: This filter limits the number of patients shown based on their current LOS alert status by Level of Care, Total, or both. For each LOS option, you can limit patients to those who are approaching, meeting, or exceeding the selected LOS at the current moment (that is, the time you made your selections and clicked GO).



The Pattern Display pane contains the following sections.

1. **Go button** - Clicking Go puts your Navigation Pane selections into effect.
2. **Selections** - The page lists selected LOS Filter, Alerts, profiles and locations beside the Go button using the format LOS Filter.
3. **Current Census** - The census for the current date and time. If you select multiple profiles, the Current Census will be the total for those profiles.
4. **Edit button** - Clicking Edit opens the Administer Patient Pattern window, where you can update a patient's pattern, departure date, discharge date, etc.
5. **Patient Details** - On the left side of the patient pattern graph, the header bar lists the columns Name, Location, and Room/Bed. To sort the data by any of these columns, click the column header. The default sort is ascending order by Room/Bed.
 The page displays data by patient in a Last Name, First Name format with the associated location, room, and bed. To the left of each patient's name is a green arrow button ; clicking the button opens the Patient Encounter Information window with a detailed list of manual, Registration, and expected ADT transactions for that patient and the patient's individual progress pattern.
6. **Timeline** - The timeline displays the day of week, date, and hour currently on display. It also marks the length of shift category partitions in light and dark gray.
7. **Patient Pattern Bar Graphs** - The page displays a bar graph for each patient. If you set alerts to show, alerts will display in the pattern bar for any patient in an alert state at NOW.
8. **Other Patient Event Bar** - A navy blue bar in a patient's pattern bar graph displays an Other Patient Event. The length of the bar marks the duration of the event, with the

start of the bar aligned to the start time of the event, and the end of the bar aligned to the end time.



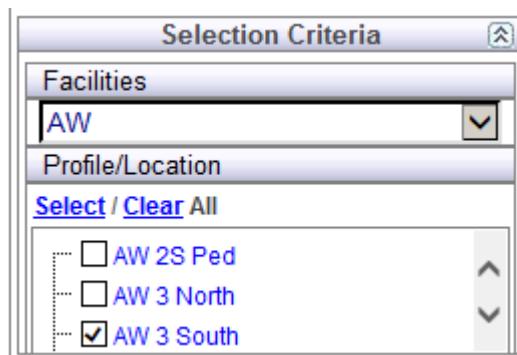
Dates in Demand Manager

The two most important dates in Demand Manager are the departure date and the discharge date.

1. The **departure date** is the date a patient is expected to leave the current location (for patients with location-based patterns) or transfer out of the current level of care (for patients with a criteria-based pattern).
2. The **discharge date** is the date a patient is expected to leave the facility.

Edit Pattern or Departure Time

1. From the Demand menu, select **Patient Pattern Management**. This opens the Patient Pattern Management page.
2. Select the patient patterns to be displayed. Click **Go**.



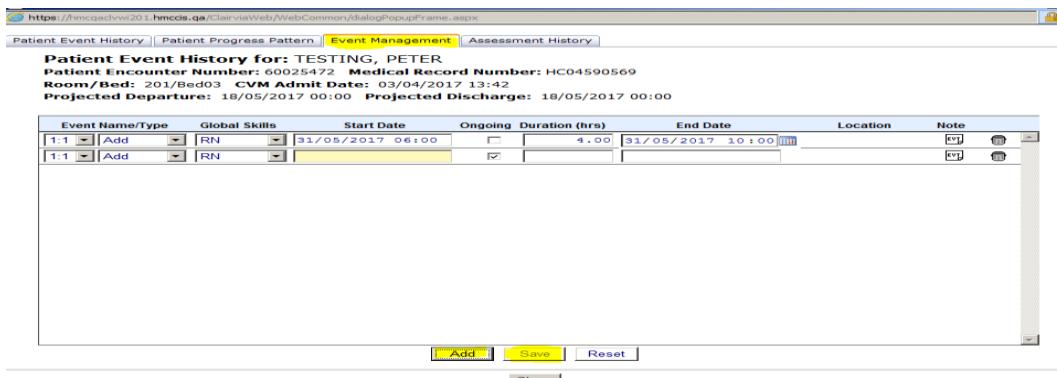
3. Click **Edit**. This opens the Administer Patient Pattern window. This window also displays all the patients on the Patient Pattern Management page.
4. Edit the Departure Date for those who currently has a projected departure or discharge date prior to the current shift.

Administer Patient Pattern							
Patient	Location	Room Bed	Pattern	Criteria	Departure	Discharge	Cas
	AW 3 SOUTH	351 ISO...	3 SOUTH	LOCATION	m 31/05/2017 16:00	31/05/2017 16:00	
	.. AW 3 SOUTH	352/Bed...	3 SOUTH	LOCATION	04/06/2017 14:40	04/06/2017 14:40	
	.. AW 3 SOUTH	352/Bed...	3 SOUTH	LOCATION	04/06/2017 12:25	04/06/2017 12:25	

- Click **Save** Button to save the Changes.

Creating an Other Patient Event

- There are Patient Events that are not captured by Demand Manager, its need to be added in the **Event Management**. The event **Duration** (hrs) will be added to the care hour in demand. (E.g. procedures done in other facilities which the nurse accompanying the patient or VIP patient with 1:1 Patient/Nurse ratio.)
- From the **Demand** menu, select **Patient Pattern Management**. This opens the Patient Pattern Management page.
 - Click the **History**  button to the left of the patient's name. This opens the Patient Encounter Information window.
 - Click the **Event Management tab** to open it. The tab displays the patient's name, Patient Encounter Number, Medical Record Number, Room/Bed, CVM Admit Date, and Projected Discharge date. If there are no previous events on file, the Other Event table will be blank.
 - Click **Add** to create a new event row.



The screenshot shows the 'Patient Event History' window for patient 'TESTING, PETER'. The 'Event Management' tab is selected. At the top, it displays the patient's name, encounter number (60029572), medical record number (HCO4590569), room/bed (201/Bed03), CVM admit date (03/04/2017 13:42), and projected discharge date (18/05/2017 00:00). Below this is a table for adding new events:

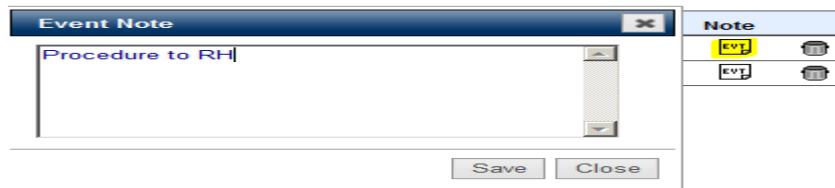
Event Name/Type	Global Skills	Start Date	Ongoing	Duration (hrs)	End Date	Location	Note
1:1	Add	31/05/2017 06:00		4.00	31/05/2017 10:00		
1:1	Add						

At the bottom of the window are buttons for 'Add', 'Save', 'Reset', and 'Close'.

- Select an **Event Name/Type**.

- Available Event Names are 1:1, 2:1, or 3:1. These names indicate the caregiver to patient ratio needed for the event. Select the ratio needed for the new event.
- Available Event Types are **Add** and **Replace**.

6. Select a **Global Skill**: This is the caregiver global skill required for the event.
7. Enter a **Start Date** or select a date with the date picker.
8. Enter **Duration**. This is the duration of events in hours, using decimal points for fractions, such as 1.0 or 2.75.
9. If applicable, enter an **End Date** or select a date with the date picker.
10. Add an **event note**.



- a. Click the Note icon to enter or edit a note connected with the event.
 - b. The Event Note window opens. Enter information about the event, such procedure, Care companion, or Accompany pt. off floor.
 - c. Click **Save**. This closes the window and returns you to the Event Management tab.
11. Click **Save**. The window updates the row with the location information.
 12. Click **Close** to return to the Patient Pattern Management page.

Patient Assign Navigation Page

The Patient Assignment page gives you one central point from which to view and act on patient assignment information. The page is divided into two sections.

1. **Selection and General Information:** This section lets you change the date, profile, and partition shown and provides basic information about the patients and caregivers for the selected view.
2. **Summary Table:** This section provides a summary of current patient assignments by patient or caregiver.



The Selection and General Information section of the Patient Assignment page

- ❑ **Acuity Summary and Acuity Summary Table:** CVM Web displays an Acuity Summary table showing the current number of patients in each acuity level and the average patient acuity.
- ❑ **Utilization Table:** This table summarizes the demand hours and available hours, utilization percentage, and skill to patient ratio for each caregiver skill configured for Demand Manager or set to Pt. Events in Clairvia Client staffed or required during the selected partition.
- ❑ **Selection bar:** Here you can select the date, profile, and shift partition you want to view.
- ❑ **Charge Nurses(s) Box:** This box displays the currently assigned charge nurse. If the box is empty, no charge nurse has been assigned.
- ❑ **Current Census:** The number of patients currently in the selected profile.
- ❑ **Go button:** Once you make your selections, click Go. The page refreshes to show the new data.
- ❑ **Summary View Tabs:** Click the tabs to switch from a patient assignment summary by patient to a summary by caregiver
- ❑ **Assign Toolbar:** This toolbar holds the buttons that open the different parts of Patient Assign.
- ❑ **Patients:** Click this button to assign caregivers to patients.
- ❑ **Duties:** Click this button to assign additional duties to caregivers.
- ❑ **Relief:** Click this button to assign relief caregivers.
- ❑ **Shift Note:** Click this button to create, view, and edit shift notes. When there is no note available, the icon has a blue plus (+) sign. When there is a note on file, the icon has a red star.
- ❑ **Printable View:** Click this button to open a printable view of the current patient assignment information.

The Summary by Patient table

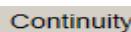
Assign Status	Room Bed	Hx	Patient	Acuity Level	Hrs Asgn	Hrs UnAsgn	Notes/Duties	Skill	Caregivers	Care Hours	Role	Assign Start/End
	pd 601		DANIELS, MELISSA 123456789	7	0.00	2.50	Kidney Transplant	0	0	2.50		
	602		HENRY, FRED 000111222	9	0.00	4.42	Spinal Disorders &...	0	0	4.42		
	603		CLANCY, WILLIAM 789456123	10	0.00	5.50	Major Chest Procedures... Immediate Post Op	0	0	5.50		
	604		FRIENDLY, FRANK 741852693	9	0.00	4.42	Lymphoma & Leukemia W...	0	0	4.42		
	pd 605		WAGNER, LINDA 569258147	9	0.00	3.42	Major Chest Procedures... Immediate Post Op	0	0	3.42		
	606		ROGERS, BRUCE 876543210	10	0.00	5.50	Cardiac congenital...	0	0	5.50		
	607		KEELY, MARIA 987654321	9	0.00	4.42	Intracranial Hemorragh... 5/P Head CT Scan	0	0	4.42		
	608		JONES, ANNE 222333444	10	0.00	5.50	Cardiac Valve & Oth...	0	0	5.50		
	609		RICKER, THOMAS 111777333	10	0.00	4.42	Major Gastrointestinal...	0	0	4.42		

- Expand/Collapse Row icons** : Click these icons to expand or collapse the caregiver information rows. By default, the page opens with all rows expanded.
- Assignment Status Icon:** The Assignment Status icon tells you at a glance whether the patient has had any caregivers with a Required Role assigned. There are three status icons:
 - Unassigned : CVM considers a patient unassigned if no one has assigned a required role to that patient at any point during the partition.
 - Partially Assigned : CVM considers a patient partially assigned if someone has assigned that patient a required role, but for only part of the partition.
 - Fully Assigned : CVM considers a patient fully assigned if someone has assigned a required role to that patient for the full length of the partition or the length of time the patient is in the profile during the partition
- Sort arrow** : The sort arrow shows which column the table is currently sorted by and whether the sort is in ascending order (up arrow) or descending order (down arrow). You can sort the table by any column by clicking the column heading.
- Assignment History Icon** : Click this icon to open the Assignment History window. This window displays all assignments made for the selected patient.
- Arrival and Departure Icons**
 - A **blue A** indicates a patient who has been admitted or transferred in during this shift or for a future arrival that has been assigned to a caregiver.
 - A **green pd** indicates a patient who is *projected* to be *transferred out* during this shift.
 - A **green pD** indicates a patient who is *projected* to be *discharged* during this shift.
 - A **green d** indicates a patient who *has been* transferred out during this shift. CVM automatically ends a patient's current assignment once receiving a transfer out event from the Registration Import.

- A green **D** indicates a patient who *has been* discharged during this shift. CVM automatically ends a patient's current assignment once receiving a discharge event from the Registration Import.
 - A red **pd** or **pD** indicates a patient who currently has a projected departure or discharge date prior to the current shift on the *Demand Manager* Administer Patient Pattern window.
- Room/Bed:** Where the patient currently is. When viewing past assignments, this column displays the room/bed the patient was in. Click the room/bed column to sort the patient list by ascending or descending order
- Patient Name:** Names are shown in LAST NAME, FIRST NAME format.
- Acuity Level:** CVM Web displays the patient's current acuity level. An arrow next to the acuity level means the patient's acuity level has changed since the current assignment was saved. If the arrow points up, the acuity level has increased; if the arrow points down, the acuity level has decreased.
- Care Hours:** The amount of care time, based on demand, that the patient needs as calculated for the current shift category partition.
- Patient Encounter Note Icon** : Click the icon to open the Patient Encounter Note window, which enables users to read and edit patient notes. Hovering over Note icon displays the note message text in a tooltip. If no information is available, the Note will be blank.
- Skill:** The caregiver's primary skill, such as RN or CN.
- Caregiver Name:** Names are shown in LAST NAME, FIRST NAME format.
- Caregiver Role:** The caregiver's role for the assigned patient. You can change a caregiver's role by making another selection from the Role list.
- Start Time:** The time the caregiver begins caring for the patient. This can be the shift partition start time, or you can enter a different time in 24-hour format.
- End Time:** The time the caregiver stops caring for the patient. This can be the shift partition end time, or you can enter a different time in 24-hour format.

The Add Patient Assignments Window

The Assign buttons

- Charge** : Click this button to select and assign charge nurses for the shift. The application marks your selected nurses with the Charge Nurse Icon.
- Continuity** : Click this button to assign caregivers to the same patients they had on previous shifts, if the caregivers are available.
- Duties** : Click this button to assign other additional duties to caregivers
- Relief** : Click this button to enter relief times for caregivers and to assign relief caregivers
- Shift Note** : Click this button to add, view, and edit shift notes.

The Caregiver Table

Skill	Caregiver	# Pts	Acuity Avg	Avail Hrs	Asgn Hrs	% Asgn	Start	End
RN	Al Musallam, Redab	3	5.33	8.00	4.59	57.3	[1400]2200
RN	Buenaventura, Maria Luz	4	6.00	8.00	10.04	125.5	[1400]2200
RN	D. Reyno, Mark	4	5.00	8.00	8.03	100.3	[1400]2200
RN	Globel T. Bandolin, Maria	5	4.60	8.00	9.56	119.5	[1400]2200
RN	Koshy, Shinu	4	5.75	8.00	9.79	122.4	[1400]2200
RN	Sghaier, Fadhel	5	4.80	8.00	9.73	121.7	[1400]2200
CN	 Discipulo, Arrien	0	0.00	8.00	0.00	0.0	[1400]2200

The Caregiver table displays information on the caregivers available for the current location and shift partition. It also displays information about the patients assigned to those caregivers.

The Caregiver table contains the following information about caregivers.

- Skill:** The skill associated with the caregiver's scheduled task for this shift category partition, such as RN, UAP, or LPN. Managers maintain employee skills in *CVM Client*.
- Caregiver:** The caregivers scheduled for your selected shift listed by name in LAST NAME, FIRST NAME format.
- # Pts:** The number of patients currently assigned to the caregiver.
- Acuity Avg:** This column displays the average acuity for the caregiver's patients.
- Avail Hrs:** Standing for *Available Hours*, this value displays the total hours the caregiver is available for this shift partition. For example, an RN working an 8-hour shift that is 100% productive would have 8.00 Avail Hrs
- % Asgn:** Standing for *Percent Assigned*, the application calculates this value as Hours Assigned divided by Hours Available. A caregiver with 8.00 Hours Available and 6.00 Hours Assigned has a % Asgn value of 75.0%.
- Employee Note:** The employee assignment note entered in Schedule Editor or Daily Editor for the caregiver for the shift. You can select the employee note icon to see the information entered for the employee.
- Start:** The scheduled time the caregiver begins working the shift. You can change this time by entering a new time in 24-hour format into the box.
- End:** The scheduled time the caregiver stops working the shift. You can change this time by entering a new time in 24-hour format into the box.

Assigning Caregivers to Patients

- Click on the **Patient** button on the Assign Toolbar to open the **Add Patient Assignment** window

Cerner Clairvia Training Manual



Acuity Level	RN	LPN	UAP
1	47.1	0.0	6.5
2	40.0	0.0	8
3	0.0%	0.0%	0.25%
Avg. Patient Acuity:	11.77		
Skill/Patient Ratio:	1:2.00	0:10.00	1:10.00

Room	Hx	Patient	Acuity Level	Hrs Asgn	Hrs UnAsgn	Notes/Duties	Skill	Caregivers	Care Hours	Role	Assign Start/End
601	pd	DANIEL, MELISSA 123456789	7	0.00	2.50	Kidney Transplant	o		2.50		
602		HENRY, FRED 000111222	9	0.00	4.42	Spinal Disorders &...	o		4.42		
603		CLARK, WILLIAM 987654321	10	0.00	5.50	Major Chest Procedures... Immediate Post-Op...	o		5.50		
604		FRIENDLY, FRANK 741857698	9	0.00	4.42	Lymphoma & Leukemia W...	o		4.42		
605	pd	WAGNER, LINDA 876543210	9	0.00	3.42	Major Chest Procedures... Immediate Post-Op...	o		3.42		
606		ROGERS, BRUCE 876543210	10	0.00	5.50	Cardiac congenital...	o		5.50		
607		KEELEY, MARIA 987654321	9	0.00	4.42	Intracranial Hemorragh... S/P Head CT Scan	o		4.42		
608		DOWNING, ANNE 2233334444	10	0.00	5.50	Cardiac Valve & Oth...	o		5.50		
609		RICKER, THOMAS 1112223333	10	0.00	4.42	Major Gastro/intestinal...	o		4.42		

9

Note: When you see a patient with a red pd or pD, you should review and change the patient's projected departure and discharge dates and times using the Administer Patient Pattern window. Because workload is affected by the presence of projected departures and discharges during the shift and affects the assignment of patients, all patient assignment users should keep this data current.

- By default, the page opens to the current date, the current shift, and your profile. To change this information:
 - Enter a new date in the Date box or use the date picker.
 - Select a Profile from the list.
 - Select a Shift Partition from the list.
 - Click **Go**. The page refreshes to display the selected information.
- If applicable click **Assign for Continuity**. This automatically assigns caregivers, by role; to the patients they had on previous shifts, if those caregivers are available.
- Select one or more caregiver rows by clicking on them. Drag the row or rows to the patient you want to assign them to. Drop the rows on the patient Primary Caregiver row, as marked by the Primary icon. This assigns the caregivers to the patient.
- To change the caregiver's role for any of the patients assigned; for example CN assigned to a patient change a caregiver's role from 0% CN to *Direct 100% RN Hr*.
- Click **Save**.
- Click **Close** to return to the Patient Assignment page

Editing Patient Assignments

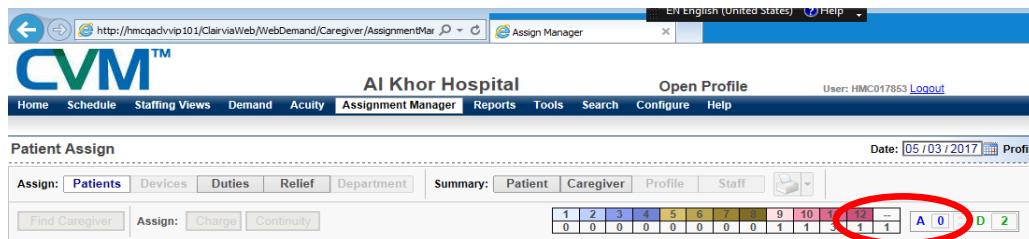
- To remove a caregiver from a patient
 - Select the caregiver's row in the Patient table.
 - Click the red X at the end of the caregiver's row.
 - A warning dialog appears with the message **Are you sure you want to remove this caregiver?** Click **OK**.
- To edit a caregiver-patient assignment start or end times:
 - Select the caregiver's row in the Caregiver table.
 - Enter a new time in the Assignment Start time or End time boxes or both.

Handling New Arrivals

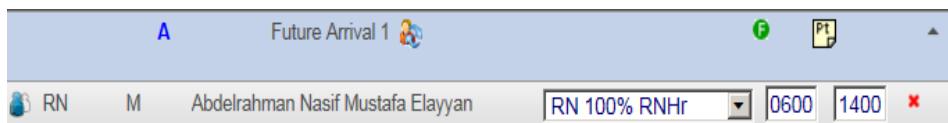
If you expect a new arrival or arrivals during the current shift category partition and want to pre-assign staff to them, you can add the expected arrival manually. CVM will generate care hours for the new patient after processing the patient's arrival message.

To add a future arrival

The **blue A**, the application displays the number of expected arrivals in blue. You can manually add any new arrivals you expect during the current shift by clicking the blue plus sign (+). To remove a manually added arrival, click the blue minus (-) sign.

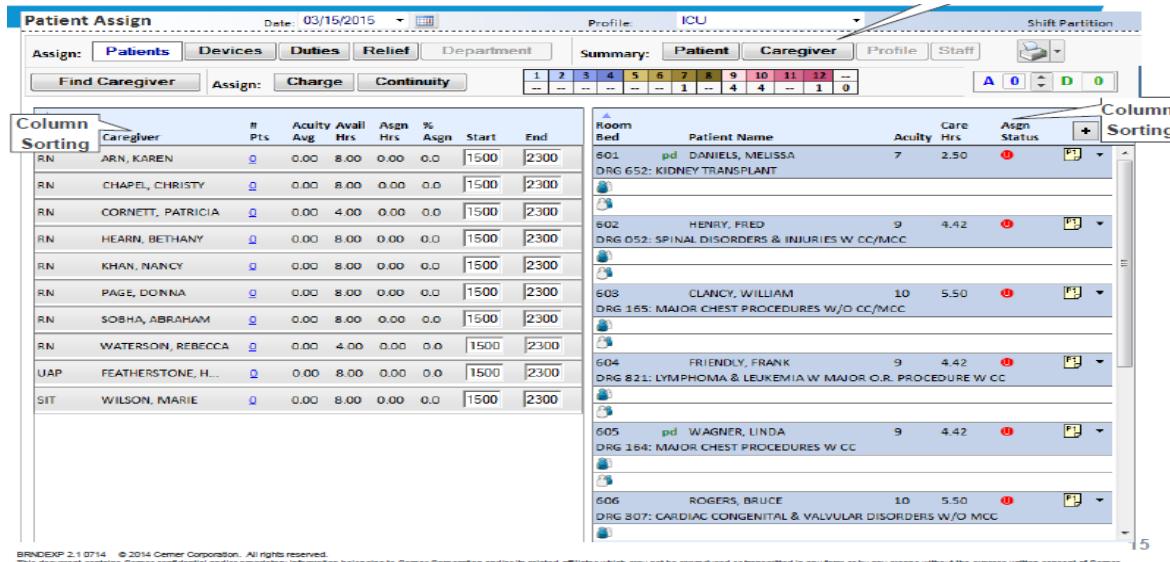


- Open the Add Patient Assignments window as described in the section [Assigning Caregivers to Patients](#).
- Click the triangle pointing up  above the Patients table. CVM Web adds a new patient row reading Future Arrival 1. Additional arrivals are numbered in order (that is, Future Arrival 2, Future Arrival 3).
- Assign a caregiver to the future arrival.



- Click **Save**.
- To delete a manually added future arrival
 - Select the Future Arrival row in the Patient table.
 - Click the blue minus sign (-) above the Patients table.
 - Click **Save**.
- To replace a future arrival with a new patient:
 - Click the patient icon  in the future arrival row to replace the future arrival with a new patient.
 - An alert box opens displaying the message **Do you want to assign patient [Patient Name] to Future Arrival 1?** Click **OK**.

Add Patient Assignments View



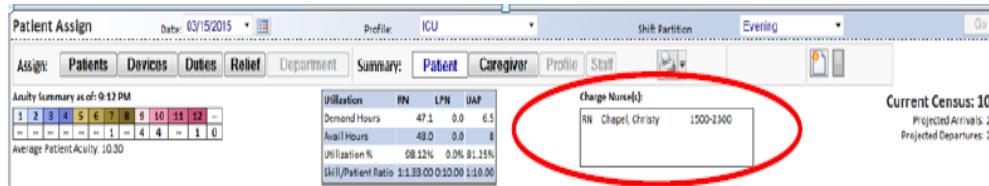
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Charge Nurse Assignment

- From the Assignment Manager menu, select **Patient Assign**. This opens the Patient Assignment page.
- Review the Date, Profile, and Shift Partition information at the top of the page. If any changes are needed, make them and click **Go** before proceeding to the next step.
- In the Assign toolbar, click **Patients**. This opens the Add Patient Assignments window.
- Click **Charge**. This opens the Select Charge Nurse window.
- Select the check box beside each caregiver who should be a charge nurse for this shift partition.
- Click **Save**.
- Click **Close** to return to the Add Patient Assignments window. The window now displays a charge nurse icon beside your selected caregiver or caregivers.
- Click **Save**.
- Click **Close** to return to the Patient Assignment page, or continue to edit patient assignments.



- The assigned Charge Nurse will also be viewable on the main Patient Assignment page and on printed reports



Assign for Continuity

The Assign for Continuity feature decreases the time it takes to make assignments by pulling in recent assignments (in the last 48 Hours)

Click the **Continuity** button to pull in recent assignments

Skill	Caregiver	# Pts	Acuity Avg	Avail Hrs	Asgn Hrs	% Asgn	Start	End
RN	ARN, KAREN	2	9.5	8.00	7.34	91.8	1500	2300
RN	CHAPEL, CHRISTY	0	0.00	8.00	0.00	0.0	1500	2300
RN	CORNELL, PATRICIA	2	8.50	4.00	3.38	84.5	1500	2300
RN	HEARN, BETHANY	2	9.50	8.00	7.34	91.8	1500	2300
RN	KHAN, NANCY	1	10.00	8.00	5.00	62.5	1500	2300
RN	PAGE, DONNA	2	9.00	8.00	7.34	91.8	1500	2300
RN	SOBHA, ABRAHAM	0	0.00	8.00	0.00	0.0	1500	2300
RN	WATERSON, REBECCA	2	8.50	4.00	3.38	84.5	1500	2300
UAP	FEATHERSTONE, H...	0	9.22	8.00	6.50	81.3	1500	2300
SIT	WILSON, MARIE	1	10.00	8.00	8.00	100.0	1500	2300

Room Bed	Patient Name	Care Acuity	Hrs	Asgn Status	+ -
607	KEELY, MARIA	9	4.42	F	P
DRG 065: INTRACRANIAL HEMORRHAGE OR CEREBRAL INFARCTION W CC					
607	HEARN, BETHANY	Direct	100%RN		X
607	FEATHERSTONE, HANNAH	Direct	100%UAP		X
607	SOBHA, ABRAHAM	AlertSec	0%RN		X
608	JONES, ANNE	10	5.50	F	P
DRG 216: CARDIAC VALVE & OTH MAJ CARDIOTHORACIC PROC W CARD CATH W M...					
608	HEARN, BETHANY	Direct	100%RN		X
608	FEATHERSTONE, HANNAH	Direct	100%UAP		X
608	KHAN, NANCY	AlertSec	0%RN		X
609	RIKER, THOMAS	10	5.50	F	P
DRG 871: MAJOR GASTROINTESTINAL DISORDERS & PERITONEAL INFECTIONS W M...					
609	ARN, KAREN	Direct	100%RN		X
609	FEATHERSTONE, HANNAH	Direct	100%UAP		X
609	SOBHA, ABRAHAM	AlertSec	0%RN		X

Primary Caregiver Row

- Assign all caregivers in the first row next to the icon .

Room Bed	Patient Name	Acuity	Care Hrs	Asgn Status	+ -
607	KEELY, MARIA	9	4.42	F	P
DRG 065: INTRACRANIAL HEMORRHAGE OR CEREBRAL INFARCTION W CC					
Assign Caregivers on this row- flows to EMR					
Do Not Use					

Note: Secondary Caregiver Row is not configured in HMC.

Assign Caregiver to Patients

1	2	3	4	5	6	7	8	9	10	11	12	-																																																																																																																																																										
0	0	0	0	0	0	0	2	6	7	1	2	0																																																																																																																																																										
Find Caregiver																																																																																																																																																																						
<table border="1"> <thead> <tr> <th>Skill</th><th>Caregiver</th><th># Pts</th><th>Acuity</th><th>Avaln Hrs</th><th>Asgn Hrs</th><th>% Asgn</th><th>Start</th><th>End</th><th>Assign:</th><th>Charge</th><th>Continuity</th><th>Devices/Duties</th><th>Relief</th> </tr> </thead> <tbody> <tr><td>RN</td><td>ARN, KAREN</td><td>2</td><td>9.50</td><td>8.00</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>CHAPEL, CHRISTY</td><td>0</td><td>0.00</td><td>8.00</td><td>0.00</td><td>0</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>CORNELL, PATRICIA</td><td>2</td><td>8.50</td><td>4.00</td><td>3.38</td><td>84.5</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>HEARN, BETHANY</td><td>2</td><td>9.50</td><td>8.00</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>KHAN, NANCY</td><td>1</td><td>10.00</td><td>8.00</td><td>6.00</td><td>62.5</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>PAUL, Competencies IABP, CIVVH</td><td>0</td><td>8.00</td><td>7.34</td><td>7.34</td><td>91.8</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>SOBHA, ABRAHAM</td><td>0</td><td>0.00</td><td>8.00</td><td>0.00</td><td>0</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>RN</td><td>WATERSON, REBECCA</td><td>2</td><td>8.50</td><td>4.00</td><td>3.38</td><td>84.5</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>PCA</td><td>FEATHERSTONE, HANNAH</td><td>9</td><td>9.22</td><td>8.00</td><td>6.50</td><td>61.3</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>SIT</td><td>WILSON, MARIE</td><td>1</td><td>10.00</td><td>8.00</td><td>8.00</td><td>100.0</td><td>1500</td><td>2300</td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>													Skill	Caregiver	# Pts	Acuity	Avaln Hrs	Asgn Hrs	% Asgn	Start	End	Assign:	Charge	Continuity	Devices/Duties	Relief	RN	ARN, KAREN	2	9.50	8.00	7.34	91.8	1500	2300						RN	CHAPEL, CHRISTY	0	0.00	8.00	0.00	0	1500	2300						RN	CORNELL, PATRICIA	2	8.50	4.00	3.38	84.5	1500	2300						RN	HEARN, BETHANY	2	9.50	8.00	7.34	91.8	1500	2300						RN	KHAN, NANCY	1	10.00	8.00	6.00	62.5	1500	2300						RN	PAUL, Competencies IABP, CIVVH	0	8.00	7.34	7.34	91.8	1500	2300						RN	SOBHA, ABRAHAM	0	0.00	8.00	0.00	0	1500	2300						RN	WATERSON, REBECCA	2	8.50	4.00	3.38	84.5	1500	2300						PCA	FEATHERSTONE, HANNAH	9	9.22	8.00	6.50	61.3	1500	2300						SIT	WILSON, MARIE	1	10.00	8.00	8.00	100.0	1500	2300					
Skill	Caregiver	# Pts	Acuity	Avaln Hrs	Asgn Hrs	% Asgn	Start	End	Assign:	Charge	Continuity	Devices/Duties	Relief																																																																																																																																																									
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RN	CORNELL, PATRICIA	2	8.50	4.00	3.38	84.5	1500	2300																																																																																																																																																														
RN	HEARN, BETHANY	2	9.50	8.00	7.34	91.8	1500	2300																																																																																																																																																														
RN	KHAN, NANCY	1	10.00	8.00	6.00	62.5	1500	2300																																																																																																																																																														
RN	PAUL, Competencies IABP, CIVVH	0	8.00	7.34	7.34	91.8	1500	2300																																																																																																																																																														
RN	SOBHA, ABRAHAM	0	0.00	8.00	0.00	0	1500	2300																																																																																																																																																														
RN	WATERSON, REBECCA	2	8.50	4.00	3.38	84.5	1500	2300																																																																																																																																																														
PCA	FEATHERSTONE, HANNAH	9	9.22	8.00	6.50	61.3	1500	2300																																																																																																																																																														
SIT	WILSON, MARIE	1	10.00	8.00	8.00	100.0	1500	2300																																																																																																																																																														
Drag & Drop Caregivers to Patients																																																																																																																																																																						
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>																																																																																																																																																																						
Assignment Status																																																																																																																																																																						

Duties

http://hmccqadvip101/ClairviaWeb/WebDemand/Caregiver/AssignmentManager

CVM™

Al Khor Hospital

Home Schedule Staffing Views Demand Acuity Assignment Manager Reports Tools Search Co

Patient Assign

Available Caregivers

Sort:

Assign: Patients Devices Duties Relief Department | Summary: Patient Caregiver

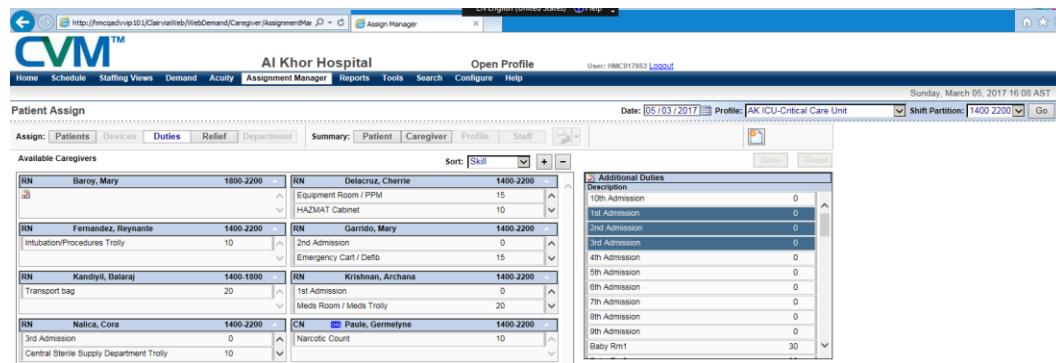
The 'Duties' button is circled in red.

Assigning Additional Duties

These are non-patient activities the staffs are assigned to, often in addition to their patient care assignments, such as stocking IV trays, checking crash carts, and checking refrigerator temperatures. If you configured your additional duties with the time expected to complete those duties, that time is included as part of the caregiver's assigned hours during the shift.

- From the Assignment Manager menu, select **Patient Assign**. This opens the Patient Assignment page with the **Summary by Patient** tab active.
- By default, the page displays the personnel scheduled for the current date and shift category partition in the profile you last updated. To change to a different date, profile, or shift category partition, follow these steps.
 - Select a date from the Date menu or use the Date Picker.

- b. Select a profile from the Profile menu.
 - c. Select a Shift Category Partition from the Shift Partition menu.
 - d. Click **Go**. This updates the page to display the data for the Shift Category Partition you selected.
3. In the Assign toolbar, click **Duties**.



4. The Additional Duties table displays the duties configured globally for your organization and the time in minutes defined to complete the duty. Select a duty from the Additional Duties table on the right, drag it to the Available Caregivers table on the left, and drop the duty on the desired caregiver's Add Duty row, which is marked with the Duty icon. Both tables update to show the new information.
 - In the Available Caregivers table, the duty appears under the caregiver's name.
 - In the Additional Duties table, the duty row darkens. This means the duty is assigned to one or more caregivers for the shift.
5. When you have completed assigning duties, click **Save**.
6. Click **Close** to close the window. This returns you to the Patient Assignment page, which now displays the updated assignment information.

Assignment Shift Notes

The purpose of an Assignment Shift Note is to document or justify the patient or department assignments for the selected shift. This can be used if the additional Duties for employee are currently not available in the list.

If there is no shift note on file, the Shift Note icon displays a blue plus (+) sign.

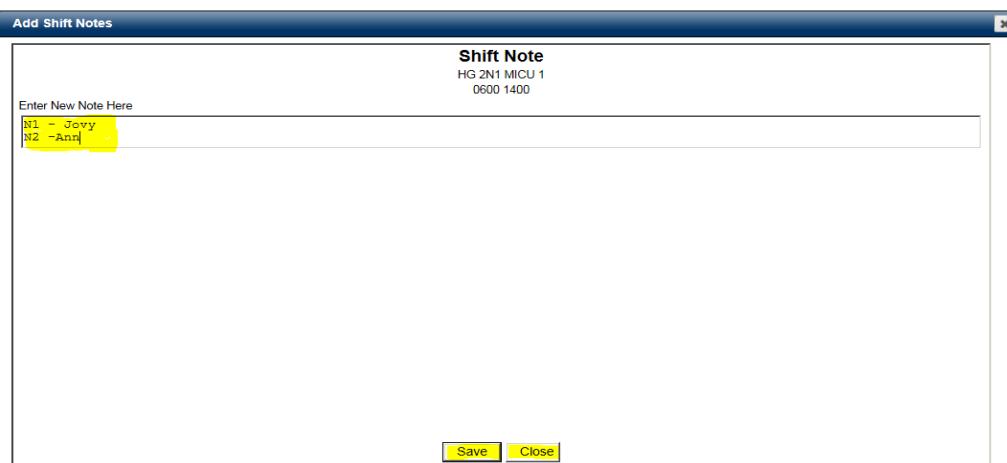


If there is a shift note on file, the Shift Note icon displays a star.



Adding a Shift Note

1. While on the Patient Assignment page, the Department Assignment page, or the Add Patient Assignments window, click the **Shift Note** icon  . This opens the Shift Note window.
2. Type the note text in the Enter New Note Here box.
3. Click **Save**. The note appears below the Enter New Note Here box and displays your account name and the date and time.
4. Click **Close** to return to the previous page. The Shift Note icon changes to show a note on file.



Viewing a Shift Note

1. When the Shift Note icon  has a star, it means there is a note on file. Click the icon to open the Shift Note window.
2. View the note or notes. You may need to use the scroll bar to see all notes available.
3. Click **Close** to return to the previous page.

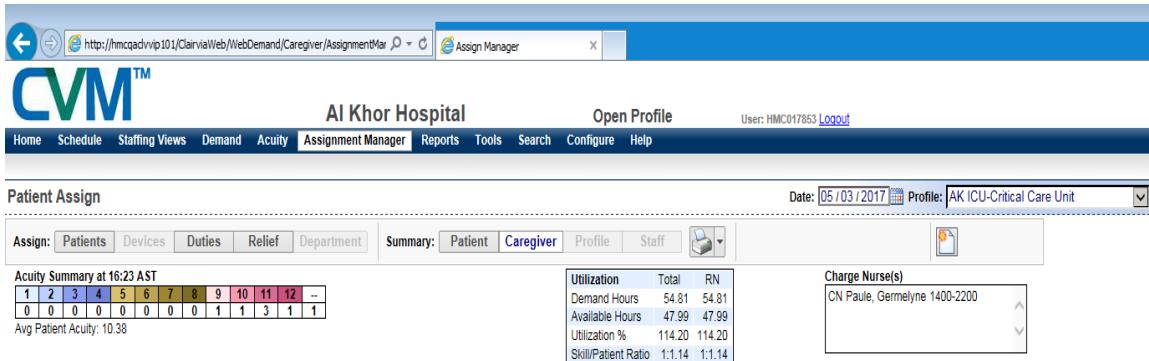
Editing a Shift Note

1. When the Shift Note icon  has a star, it means there is a note on file. Click the icon to open the Shift Note window.
2. View the note or notes. You may need to use the scroll bar to see all notes available.
3. Make changes to the desired note.
4. Click **Save**. The revised note moves to the top of the notes list, since it is now the most recent note.
5. Click **Close** to return to the previous page.

Patient Assignment Printable View

Printing Patient Assignments

Once you have made patient assignments, including device, duty, and relief caregiver assignments, you can use the Print icon to open a printable view of the Patient Assignment page. Selecting Suppress Pt. Names will remove the patient names from the printable view. Any shift assignment notes and additional duty assignments print at the bottom of the last page.



	Utilization	Total	RN
Demand Hours	54.81	54.81	
Available Hours	47.99	47.99	
Utilization %	114.20	114.20	
Skill/Patient Ratio	1:1.14	1:1.14	

Charge Nurse(s)
CN Paule, Germelyne 1400-2200

1. From the Assignment Manager menu, select **Patient Assign**. This opens the Patient Assignment page.
2. Select the table to be printed.
 - If selecting the Summary By Patient view, continue with step 3.
 - If selecting the Summary By Caregiver view, continue with step 3.
3. If you do not want patient names included in the printout, select Suppress Pt. Names.
4. In the Assign toolbar, click the **Print** button . This opens the Print Preview window in Adobe Reader.
5. Hover your cursor near the bottom of the Print Preview window until the Adobe toolbar displays. Click the Adobe Reader Print icon to open the Print dialog box.



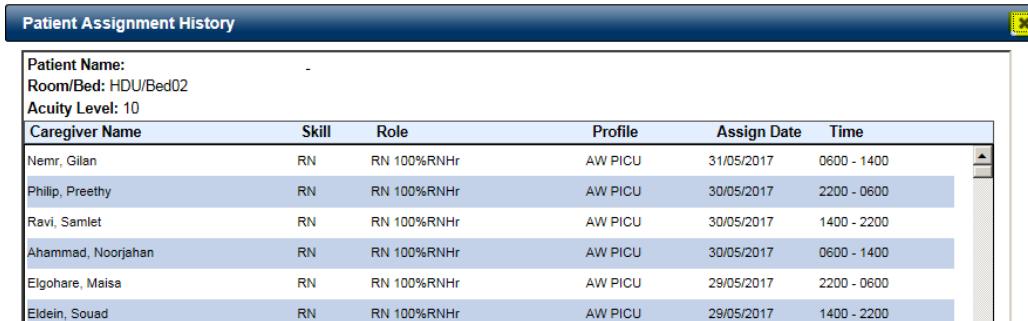
6. Click **OK**.

The Patient Assignment History Window

The Patient Assignment History window displays all caregiver assignments made for the selected patient in reverse chronological order by date and time.

Opening the Patient Assignment History Window

1. From the Assignment Manager menu, select **Patient Assign**. This opens the Patient Assignment page.
2. Click the **History icon** ➔ beside the desired patient. This opens the Patient Assignment History window for that patient.
3. When finished reviewing the history information, click the Close icon to close the window.

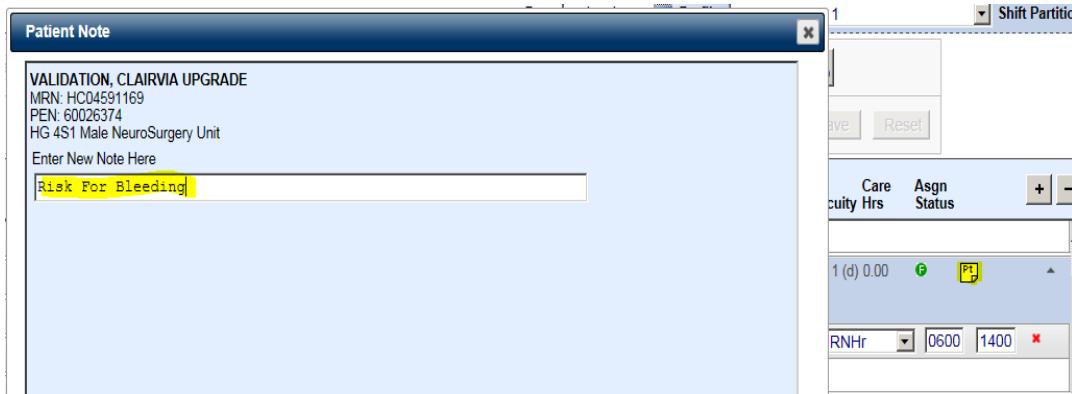


Patient Assignment History						
Patient Name:	-					
Room/Bed:	HDU/Bed02					
Acuity Level:	10					
Caregiver Name	Skill	Role	Profile	Assign Date	Time	
Nemr, Gilan	RN	RN 100%RNHR	AW PICU	31/05/2017	0600 - 1400	
Philip, Preethy	RN	RN 100%RNHR	AW PICU	30/05/2017	2200 - 0600	
Ravi, Samlet	RN	RN 100%RNHR	AW PICU	30/05/2017	1400 - 2200	
Ahammad, Noorjahan	RN	RN 100%RNHR	AW PICU	30/05/2017	0600 - 1400	
Elgohare, Maisa	RN	RN 100%RNHR	AW PICU	29/05/2017	2200 - 0600	
Eldein, Souad	RN	RN 100%RNHR	AW PICU	29/05/2017	1400 - 2200	

Adding a Patient Encounter Note

You can add Patient Encounter notes to current patients or to future arrivals. For future arrivals, the notes should be used to distinguish between expected inbound patients.

1. From the Assignment Manager menu, select **Patient Assign**. This opens the Patient Assignment page.
2. In the Assign toolbar, click **Caregivers**. This opens the Add Patient Assignments window.
3. Click the **Patient Encounter Note icon** at the end of the patient's row. This opens the Patient Encounter Note window for that patient.
4. Enter the note text in the Enter New Note Here box.



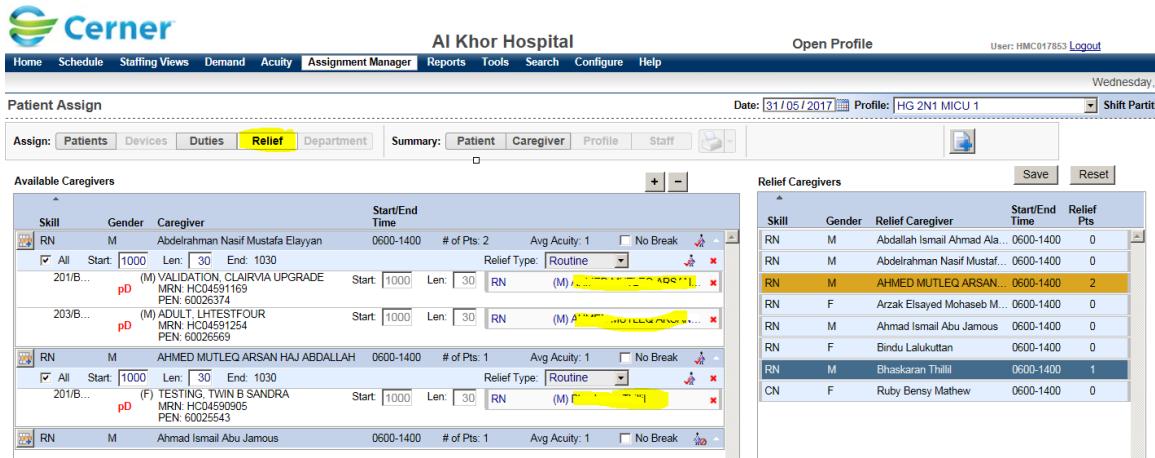
5. Click **Save**. The note appears below the Enter New Note Here box and is marked with your account name and the date and time.
6. Click **Close** to return to the previous window.

Deleting a Patient Encounter Note

1. From the **Assignment Manager** menu, select **Patient Assign**. This opens the Patient Assignment page.
2. In the Assign toolbar, click **Caregivers**. This opens the Add Patient Assignments window
3. Click the **Patient Encounter Note icon** at the end of the patient's row. This opens the Patient Encounter Note window for that patient.
4. View the note or notes. You may need to use the scroll bar to see all notes available.
5. Clear all text within the note box.
6. Click **Save**. The note box disappears.
7. Click **Close** to return to the previous window.

Assigning Relief Caregivers

Regulatory bodies and local policy overseeing staffing ratios, patient safety, and more, require you to assign and document relief coverage during caregiver meals, breaks, or other times caregivers are absent from the unit. This ensures that appropriate patient coverage and staffing ratios are maintained at all times.



Skill	Gender	Caregiver	Start/End Time	# of Pts:	Avg Acuity:	No Break
RN	M	Abdelrahman Nasif Mustafa Elayyan	0600-1400	2	1	<input type="checkbox"/>
All	Start: 1000 Len: 30 End: 1030					
201B...	(M) VALIDATION CLAIRVIA UPGRADE	Start: 1000 Len: 30	RN (M)			
pD	MRN: HC04591169 PEN: 60026374					
203B...	(M) ADULT_LHTESTFOUR	Start: 1000 Len: 30	RN (M)			
pD	MRN: HC04591254 PEN: 60026569					
RN	M	AHMED MUTLEQ ARSAN HAJ ABDALLAH	0600-1400	1	1	<input type="checkbox"/>
All	Start: 1000 Len: 30 End: 1030					
201B...	(F) TESTING TWIN B SANDRA	Start: 1000 Len: 30	RN (M)			
pD	MRN: HC04590905 PEN: 60025343					
RN	M	Ahmad Ismail Abu Jamous	0600-1400	1	1	<input type="checkbox"/>

Skill	Gender	Relief Caregiver	Start/End Time	Relief Pts
RN	M	Abdallah Ismail Ahmad Al...	0600-1400	0
RN	M	Abdelrahman Nasif Mustaf...	0600-1400	0
RN	M	AHMED MUTLEQ ARSAN...	0600-1400	2
RN	F	Arzak Elsayed Mohaseb M...	0600-1400	0
RN	M	Ahmad Ismail Abu Jamous	0600-1400	0
RN	F	Bindu Lalukuttan	0600-1400	0
RN	M	Bhaskaran Thillai	0600-1400	1
CN	F	Ruby Bensy Mathew	0600-1400	0

To assign relief caregivers, use the following steps:

- From the **Assignment Manager** menu, select **Patient Assign**. This opens the Patient Assignment page with the Summary by Patient tab active.
- By default, the page displays the staff scheduled for the current date and shift category partition in the profile you last updated. To change to a different date, profile, or shift category partition, follow these steps:
 - Select a date from the Date menu or use the Date Picker.
 - Select a profile from the Profile menu.
 - Select a Shift Category Partition from the Shift Partition menu.
 - Click **Go**. This updates the page to display the data for the Shift Category Partition you selected.
- In the Assign toolbar, click **Relief**. This opens the Add Shift Notes, Devices/Duties, Relief pop-up window with the Relief tab active.
 - When you first open the window, the Available Caregivers table displays all caregivers with the No Break check box selected. You must **deselect No Break** in a caregiver's row to assign relief. This adds the No Relief Assigned icon  to the caregiver's row.
 - Click the **Add Relief Type icon**  beside a caregiver in the Available Caregivers table. This adds a Relief Type table below the caregiver. The table includes the Relief Type row and a row for each of the caregiver's assigned patients.

- If you want, you can edit the following items in the Relief Type row.
- The **All check box**: The All check box is selected by default. If you want to assign different relief caregivers to each patient, you should deselect the All check box. When All is selected, CVM automatically adds the relief caregiver to all patients assigned to the primary caregiver during the relief period.
- **Relief Assignment Start time**: By default, the break Start is set for the mid-point of the shift. You can change the break start time by entering a new time in the box.
- **Relief Type**: The type of caregiver relief, either Routine or Non-Routine. Routine is for expected breaks, such as meal times. Non-Routine is for unexpected absences from the unit, such as time off unit to transport a patient or a planned but not routine absence to attend a meeting or class.
- Drag a caregiver from the Relief Caregivers table and drop it on a patient's row in the Available Caregivers table in the box marked with the Relief icon . The table updates to display the relief caregiver's skill and name in the Relief box. If the All check box is selected, the skill and name are displayed in each patient row under the primary caregiver.
- If you want, you can add a second relief period for a caregiver by clicking the Add Relief Type icon again and assigning additional relief caregivers. You would want to do this if you had a caregiver who needed Routine relief for a normally scheduled meal break, and a second Non-Routine relief to attend a class or meeting.
- Repeat steps 1 through 8 until you have assigned relief caregivers for each primary caregiver with a relief period entered.
- Click **Save**.

Patient Assignment Step-by-Step Summary

Step 1	Open Demand / Patient Pattern Manager
Step 2	Review Departure Dates in the next 24 hours
Step 3	Open Assignment Manager / Patient Assign
Step 4	Select Date, Profile and Shift partition , click Go
Step 5	Click the Patient button / Add Patient Assignment opens

-
- Step 6** Click the **Charge** button / Assign Charge Nurse
- Step 7** Click the **Continuity** button / Historical Assignments Populate
- Step 8** Drag and Drop Caregivers to Patient
- Step 9** Click the **Future Arrivals +** icon / Add Arrivals (If applicable)
- Step 10** Review **Caregiver Table** (# pts., Acuity Average, Avail Hour, Assign Hr/% Assign)
- Step 11** Balance assignments (Click the “**X**” on the Caregiver row to remove an assignment)
-
- Step 12** Click the Duties button / Assign Duties (Add assignment Note if Needed)

Section 5: Cerner Clairvia Reports

Cerner Clairvia Reports

Session Objectives

At the end of the session, attendees will be able to:

- Identify the available CVM reports
- Generate Staffing and Patient-related reports from CVM Web
- Numerate the available CVM Staff Manager reports
- Generate scheduling related CVM Staff Manager Reports
- Understand the purpose/use of the different reports

Cerner Clairvia Reports Training Agenda:

1. Web Reports

- Enterprise staffing
- Schedule: Daily Staffing Board
- Schedule: Daily Staffing Board for Demand and Outcomes Driven Acuity
- Schedule: Schedule
- Schedule: Housewide Staffing
- Schedule: Housewide Staffing for Demand and Outcomes Driven Acuity
- Management: Productivity for Demand and Outcomes Driven Acuity
- Management: Productivity Hours Report

2. Staff Manager Reports

- Schedule: Employee list by Assignment
- Statistical: Assignment Data by Employee
- Float: Float in
- Float: Float out
- Administrative: Schedule Data Audit
- Administrative: Shift Swap Audit Report

3. Hands on Training

Training Duration: 2 Hours

Enterprise Staffing

Generating the Enterprise Staffing View

- Enterprise Staffing provides a comprehensive view of staffing resources and needs across the enterprise
- The view is designed to provide you with the key information you need to make staffing decisions, including volume, target and scheduled staffing, last float date and last cancel dates by employee.
- You can have the data display differently by selecting from a variety of parameters; this gives you the ability to view staffing needs at several different levels (for example, enterprise, facility, and service line levels).
- These parameters also allow you to drill down within the profile to view staffing at both the shift category, skill levels, and by employee.

Enterprise Staffing

Selection Criteria		Staffing	
Service Line	Facilities	Profile	Shift Categories
ED ED Obs/Gyn ED PED Endo HEM/ONC IV Unit LR MedSurg	AK AW CH HG HH	AK Emergency Department	(AK Emergency Department)
Shift Category Partitions with Spillover	Global Skills	<input type="text" value="Start Date (dd/mm/yyyy)"/> <input type="button" value="Calculate Targets Using"/> <input type="button" value="Display By"/> <input type="button" value="Days to View"/> <input type="button" value="Show Acuity Summary Table"/> <input type="button" value="Show Employee's Display Employee's"/> <input type="button" value="Show Global Skill Totals"/> <input type="button" value="Show Global Skill Totals By Profile"/> <input type="button" value="Show Utilization"/> <input type="button" value="Report By"/>	<input type="text" value="01 / 03 / 2017"/> <input type="button" value="Demand-driven Acuity"/> <input type="button" value="Profile"/> <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Name <input type="radio"/> Abbreviation <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Hours <input type="radio"/> FTEs
0600 1400 (Spill: Front 31 - Back 31) 1400 2200 (Spill: Front 31 - Back 31) 2200 0600 (Spill: Front 31 - Back 31)	RN PCA CASE MGR WC EDUC COORD DIR TECH SUP MGR	<input type="button" value="Display View"/> <input type="button" value="Clear Form"/>	

Enterprise Staffing

Selection Criteria | Staffing

Enterprise Staffing with Demand-driven Acuity by Profile

Acuity Summary for selected profiles as of: 09:27 AST

1	2	3	4	5	6	7	8	9	10	11	12	--
0	0	0	0	0	0	0	1	4	2	1	0	0

Selection: Global Skills [RN]

Wednesday, March 01, 2017

Totals By Global Skill

Skill	Target	Sched	Var	Util	Ratio
RN	180.05	136.00	-44.05	132%	--

Serv Line Facility Profile

Serv Line	Facility	Profile	Vol	Target	Sched	Var	Ratio	Avg Acuity
Crit Adult	AK	AK ICU-Critical Care Unit	8	180.05	136.00	-44.05	1.240	9.92

A: 0 D: 0 Ti: 1 TO: 1

Skill	Target	Sched	Var	Ratio
RN	180.05	136.00	-44.05	--

Skill	Employee	Start	Hours	Last Float	Last Cancel
RN	Antony, Anu	600	8.00	09/10/16	--
RN	Barreto, Michael	600	8.00	23/09/16	--
RN	Chakkappan, Swapna	600	8.00	15/09/16	--
RN	Hussin, Hanan	600	8.00	--	--
RN	Pamintuan, JayJay	600	8.00	05/10/16	--
RN	Samonte, Lorena	600	8.00	10/10/16	--
RN	Thomas, Nithila	600	8.00	25/11/16	--
RN	Datu, Blanca	1400	8.00	17/12/16	--
RN	Elnaghi, Ahmed Hamdi	1400	8.00	--	--
RN	Fernandez, Reynante	1400	8.00	19/12/16	--
RN	Renjith, Bincy	1400	8.00	14/12/16	--
RN	Castro, Beverly	2200	8.00	18/12/16	--

Reports: CVM Web Reports

Schedule Daily Staffing Board

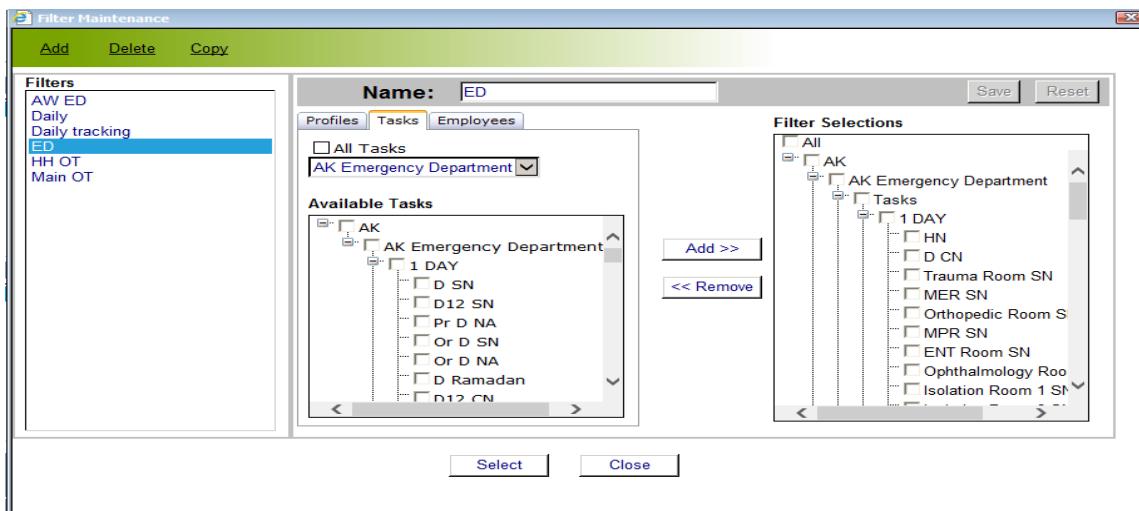
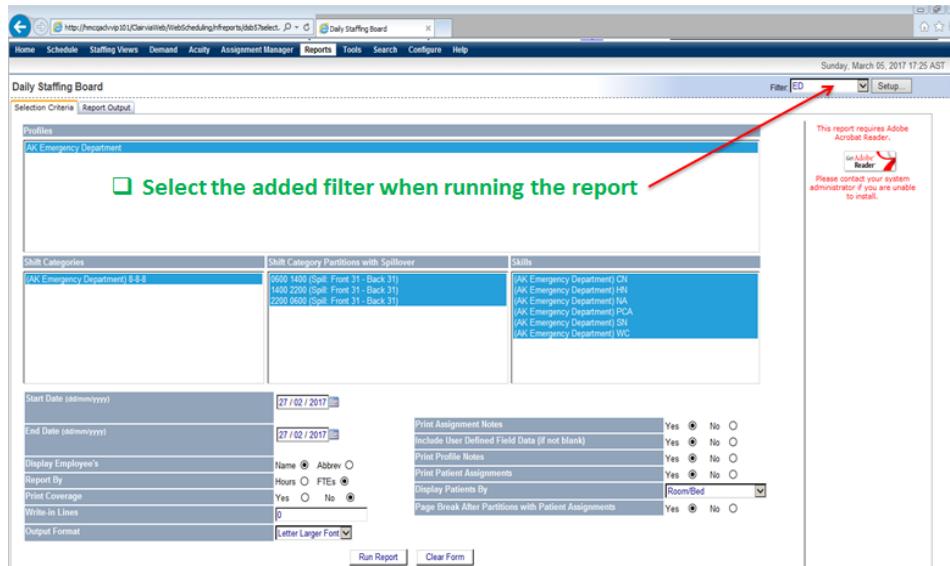
The Daily Staffing Board report displays—by profile, shift category, and skill—those employees assigned for your selected date. It also displays planned hours, as entered in the Workload Planner of *CVM Client*, and the variance between them and the schedule data generated and edited in the Schedule Editor in *CVM Client*. The parameters you select while running the report are saved by your user login once you click Run Report.

Running the Daily Staffing Board Report

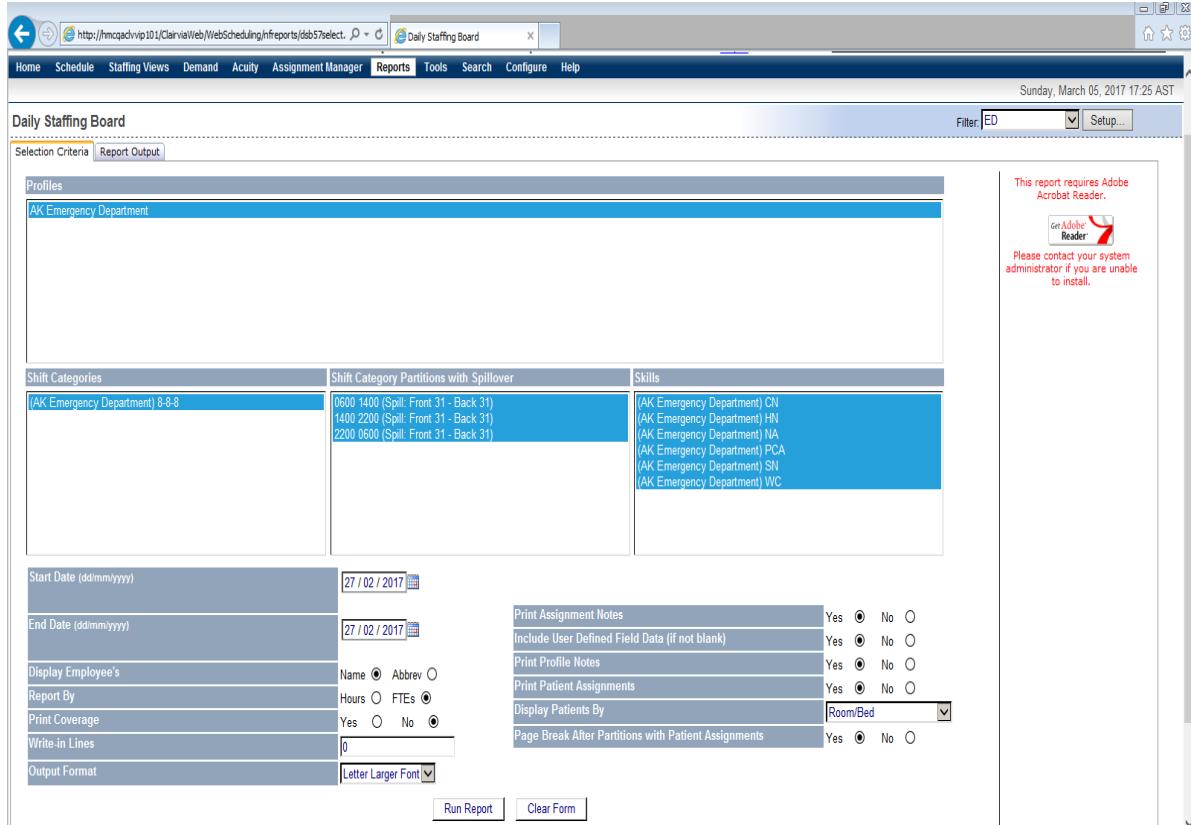
- From the **Reports** menu, select **Schedule Daily Staffing Board**. This opens the selection criteria page.
- Select one or more **Profiles**. Use CTRL+click to select multiple items. Use SHIFT+click to select a range of items. If you are logged in as a manager you can select from all the profiles in the database. If you are logged in as an employee with report access, you can select only from the profiles you have security access to.
- Select a **Shift Category**. Since each report uses only one shift category, *CVM Web* does not allow you to select multiple items for this option.
- Select one or more **Shift Category Partitions** with Spill-Over.
- Select one or more **Skills**.
- Enter the **Start Date** in mm/dd/yyyy format or use the date picker.
- Enter the **End Date** in mm/dd/yyyy format or use the date picker. If running the report for one day, enter the same date used in the Start Date box.
- Select a **Display Employee's** option. The report can display the employee's **Name** or **Abbreviation**.

9. Select a **Report By** option. The report can display data by **Hours** or **FTEs**.
 10. Select a **Print Coverage** option. If you select **Yes**, the coverage grid will print; if **No**, the grid will not print.
 11. Enter the number of **Write-in Lines**. These lines print at the bottom of the report. They can be used for note-taking, recording data, or any other purpose. If you do not want any write-in lines, enter 0 (zero) in this box.
 12. Select an Output Format
 - Selecting **Letter formats** the report for letter-sized paper using the normal font size.
 - Selecting **Legal formats** the report for legal paper using the normal font size.
 - Selecting **Letter Larger Font** formats the report for letter-sized paper using a larger font size.
 - Selecting **Legal Larger Font** formats the report for legal paper using a larger font size.
 13. Select a **Print Assignment Notes** option. If you select **Yes**, the report prints all Client assignment notes for the dates and employees you included in the report. If you select **No**, no notes print.
 14. Select an **Include User Defined Field** (if not blank) option. If you select **Yes**, the report will print all non-blank user defined fields (UDFs) associated with staffing reports in the client_rules table. If you select **No**, no UDFs print.
 15. Select a **Print Profile Notes** option. If you select **Yes**, the report prints any available profile not under the profile name. If you select **No**, no notes print.
 16. Select a **Print Patient Assignments** option. If you select **Yes**, the report prints any patient assignments made in the selected profiles for the selected dates. If you select **No**, no patient assignments print.
 17. Select a **Display Patients By** option (only available if you selected to print patient assignments). You can select to identify patients by Room/Bed only or by Room/Bed/Patient Name.
 18. Select a **Page Break After Partitions with Patient Assignments** option (only available if you selected to print patient assignments). Selecting **Yes** starts a new page after a partition with patient assignments. Selecting **No** continues printing the next partition on the same page.
 19. Click **Run Report**.
- Managers can add and save filters to limit the data shown on the schedule and request pages. They can use filters on many report pages as well to limit the selection criteria and the data being reported.**

Cerner Clairvia Training Manual



Cerner Clairvia Training Manual



The screenshot shows the 'Daily Staffing Board' report interface. At the top, there's a navigation bar with links like Home, Schedule, Staffing Views, Demand, Acuity, Assignment Manager, Reports, Tools, Search, Configure, and Help. The date is shown as Sunday, March 05, 2017 17:25 AST.

The main area displays 'Selection Criteria' and 'Report Output' tabs. Under 'Selection Criteria', there are fields for Start Date (27/02/2017), End Date (27/02/2017), Display Employee's Name (radio buttons for Name or Abbrev), Report By (radio buttons for Hours or FTEs), Print Coverage (radio buttons for Yes or No), Write-in Lines (text input field with value '0'), and Output Format (dropdown menu set to 'Letter Larger Font').

Under 'Report Output', there are several options: Print Assignment Notes (Yes or No), Include User Defined Field Data (Yes or No), Print Profile Notes (Yes or No), Print Patient Assignments (Yes or No), Display Patients By (dropdown menu set to 'Room/Bed'), and Page Break After Partitions with Patient Assignments (Yes or No).

A note on the right side states: 'This report requires Adobe Acrobat Reader. Please contact your system administrator if you are unable to install.' with a link to 'Get Adobe Reader'.

Daily Staffing Board Report sample for daily tracking task or Shift assignment

Daily Staffing Board - Monday, 27/02/2017
AK Emergency Department

Profile Note:								
		0600-1400: 0600-1400		Visits: 0				
Skill	UDF	Task Abbr.	Employee	Time-On	FTEs	Float-In	Comments/Assignment Notes	
SN		Assessment-Female SN	Jacobo, Jenny	600	0.00			
		Assessment-Male SN	De Mesa, Angelo Wilberto	600	0.00			
		ENT Room SN	Vinluan, Noreen	600	0.00			
		Isolation Room 1 SN	Vinluan, Noreen	600	0.00			
		MER SN	Baddong, Zorayda	600	0.00			
		MER SN	Padernal, Ma.	600	0.00			
		MPR SN	Yohannan, Jessy	600	0.00			
		Observation Room-Female SN	Alih, Sitti	600	0.00			
		Observation Room-Female SN	Michael, Mimi	600	0.00			
		Observation Room-Male SN	Decena, Gino Antonio	600	0.00			
		Observation Room-Male SN	Reyes, Maricel	600	0.00			
		Ophthalmology Room SN	Vinluan, Noreen	600	0.00			
		Orthopedic Room SN	Yohannan, Jessy	600	0.00			
		Trauma Room SN	Chenny, Chippy	600	0.00			
		Trauma Room SN	Varughese, Bincymary	600	0.00			
		Triage 1 SN	Silvedonio, Vergel	600	0.00			
		Triage 2 - Female SN	Chakkalakal, Kavitha	600	0.00			
		Triage 2 - Male SN	Sunny, Anu	600	0.00			
NA	D NA		Mohamed, Abdelbagi	600	1.00			
	D NA		Mohamed, Ibrahim	600	1.00			
HN	HN		Mercado, Ann	600	1.00			
	D WC		Hameed, Mohamed	600	1.00			
CN	D WC		Msehli, Hedia	600	1.00			
	D CN		Bardaje, Annielyn	600	1.00			
	D CN		Jahanian, Afshin	600	1.00			

Schedule: Daily Staffing Board for Demand & Outcomes Driven Acuity

The Daily Staffing Board for Demand and Outcomes-Driven Acuity report displays—by profile, shift category, and global skill—those employees scheduled for the chosen date. It also displays the demand target hours for global skills defined for Demand, Patient Events, or both, as calculated by Demand Manager, and the variance between them and the schedule data generated and edited in the CVM Client Schedule Editor.

- This report is utilized by Inpatient units

The source of the target staffing hours the report uses in its calculations depends on the reporting period you select.

- Past to Present:** For dates in the past and for the present (with *present* meaning the time you run the report) the report uses actual patient demand and actual patient events to calculate the Target Staffing value

Present to Near Future: For time ranges from the present up to 36 hours in the future, the Target Staffing value includes:

- Current demand workload values adjusted for time of day and acuity levels (when implemented).
- Projected departure and discharge event workload, calculated by using the pattern end date as originally assigned or by using updated dates and times entered on the Administer Patient Pattern window (or updated through an alternate source solution) for each patient.
- Workload associated with actual and projected Other patient events.
- Target Staffing for non-direct care staff global skills, such as managers and clerical staff, is pulled from the workload matrix, which is stored in Workload Planner.

Future: If the report is run for a period that starts more than 36 hours from now, the Target is calculated using the 6-week historical average by day of week and time of day and includes workload associated with actual demand, including actual ADT events.

Running the Daily Staffing Board for Demand and Outcomes-Driven Acuity Report

1. From the **Reports** menu, select **Schedule Daily Staffing Board for Demand and Outcomes-Driven Acuity**. This opens the selection criteria page.
2. Select one or more **Profiles**. Use CTRL+click to select multiple items. Use SHIFT+click to select a range of items. If you are logged in as an administrator, you can select from all the profiles in the database. If you are logged in as an employee who manages profiles, the Profile(s) list will only display those profiles to which you have access.
3. Select one or more **Locations**. As you select profiles, the page automatically updates the Locations list with the profile locations.
4. Select a **Shift Category**. Since each report uses only one shift category, *CVM Web* will not allow you to select multiple items for this option. In addition, if you select multiple profiles or locations, but the shift categories for the selections have identical values, the menu will only show one shift category.
5. Select one or more **Shift Category Partitions** with Spill-Over.
6. Select one or more **Global Skills**.
7. Enter the **Start Date** in mm/dd/yyyy format or use the date picker.
8. Enter the **End Date** in mm/dd/yyyy format or use the date picker. If you want to run the report for one day, enter the same date you entered in the Start Date box.
9. Select a **Display Employee's** option. The report can display the employee's **Abbreviation or Name**.
10. Select a **Report By** option. The report can display data by **Hours** or **FTEs**.
11. Select a Print Coverage option. If you select **Yes**, the coverage grid will print; if you select **No**, the grid will not print.
12. Select a **Show Utilization** option. If you select **Yes**, the report will list percent utilization; if you select **No**, the report will not show utilization.

13. Enter the number of **Write-in Lines**. These lines will print at the bottom of the report. You can use them for note-taking, recording data, or any other purpose. If you do not want any write-in lines, 0 (zero) in the box.
14. Select an **Output Format**.
 - Selecting **Letter** formats the report for letter-sized paper using the normal font size.
 - Selecting **Legal** formats the report for legal paper using the normal font size.
 - Selecting **Letter Larger Font** formats the report for letter-sized paper using a larger font size.
 - Selecting **Legal Larger Font** formats the report for legal paper using a larger font size.
15. Select a **Print Assignment Notes** option. If you select **Yes**, the report will print all Client assignment notes for the dates and employees included in the report. If you select **No**, no notes will print.
16. Select an **Include User Defined Field** (if not blank) option. If you select Yes, the report will print all non-blank user defined fields (UDFs) associated with staffing reports in the client_rules table. If you select No, no UDFs will print.
17. Select a **Print Profile Notes** option. If you select Yes, the report will print any available profile not under the profile name. If you select No, no notes will print.
18. Select a **Print Patient Assignments** option. If you select Yes, the report will print any patient assignments made in the selected profile or profiles for the selected date or dates. If you select No, no patient assignments will print.
19. Select a **Display Patients By** option (only available if you chose to print patient assignments). You can select to identify patients by Room/Bed only or by Room/Bed/Patient Name.
20. Select a **Page Break After Partitions with Patient Assignments** option (only available if you chose to print patient assignments). Selecting Yes starts a new page after a partition with patient assignments. Selecting No continues printing the next partition on the same page.
21. Click **Run Report**.

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Daily Staffing Board for Demand and Outcomes-driven Acuity

Filter [Inc]

Selection Criteria | Report Output

Profiles	Locations		
AK ICU-Critical Care Unit AK Medical Unit 2W2 AK NICU-Neon. Int. Care Unit AK Obs Gyne 1E1 AK Pediatric & Orthopedic 1W1 AK Surgical Unit 2E2 AW 2S Ped AW 3 North AW 3 South AW 4N AAU	AK ICU-CRITICAL CARE UNIT		
Shift Categories	Shift Category Partitions with Spillover	Global Skills	
(AK ICU-Critical Care Unit) 8-8-8	0600 1400 (Spill: Front 31 - Back 31) 1400 2200 (Spill: Front 31 - Back 31) 2200 0600 (Spill: Front 31 - Back 31)	Unassigned RN PCA CASE MGR WC EDUC COORD DIR TECH SUP	
Start Date (dd/mm/yyyy)	22/11/2016		
End Date (dd/mm/yyyy)	22/11/2016		
Display Employee's	Name <input checked="" type="radio"/> Abbrev <input type="radio"/>	Print Assignment Notes Include User Defined Field Data (If not blank)	Yes <input checked="" type="radio"/> No <input type="radio"/>
Report By	Hours <input type="radio"/> FTEs <input checked="" type="radio"/>	Print Profile Notes	Yes <input checked="" type="radio"/> No <input type="radio"/>
Print Coverage	Yes <input checked="" type="radio"/> No <input type="radio"/>	Print Patient Assignments	Yes <input checked="" type="radio"/> No <input type="radio"/>
Show Utilization	Yes <input checked="" type="radio"/> No <input type="radio"/>	Display Patients By	Room/Bed <input type="button" value="▼"/>
Write-in Lines	0	Page Break After Partitions with Patient Assignments	Yes <input checked="" type="radio"/> No <input type="radio"/>
Output Format	Letter <input type="button" value="▼"/>		
<input type="button" value="Run Report"/> <input type="button" value="Clear Form"/>			

Daily Staffing Board for Demand and Acuity - Tuesday, 22/11/2016

AK ICU-Critical Care Unit

Profile Note:							
Unassigned location			0600 1400: 0600-1400		PCH: 6	Av Ac: 9.26	
A: 0 D: 0 TI: 1 TO: 0							
Global Skill	UDF	Task Abbr.	Employee	Time-On	FTEs	Float-In	Comments/Assignment Notes
Default		Education	Dabu, Blanca	600	0.00		
	/	Ahmed, Reda	700	0.00			
	/	Antony, Amu	700	0.00			
	/	Baroy, Mary	700	0.00			
	/	Chikhaoui, Samah	700	0.00			
	/	Fernandez, Reynante	700	0.00			
	/	Nair, Bijji	700	0.00			
	/	Malica, Corn	700	0.00			
	/	Thittappillil, John	700	0.00			
Profile Counts:				Global Skill	Acuity Target	FTEs	Variance
				RN	6.03	6.00	-0.03
							100%

Location: AK ICU-CRITICAL CARE UNIT				0600 1400: 0600-1400		PCH: 6	Av Ac: 9.26	
A: 0 D: 0 TI: 1 TO: 0								
Global Skill	UDF	Task Abbr.	Employee	Time-On	FTEs	Float-In	Comments/Assignment Notes	
RN		D SN	Barreto, Michael	600	1.00			
		D SN	Cherian, Mariamma	600	1.00			
		D SN	Delacruz, Cherrie	600	1.00			
		D SN	Gabriel, Elena	600	1.00			
		D SN	Samonte, Lorena	600	1.00			
		HN	Hussin, Hanan	600	1.00			

AK ICU-CRITICAL CARE UNIT Counts:		Global Skill	Acuity Target	FTEs	Variance	Utilization
		RN	6.03	6.00	-0.03	100%

Schedule: Schedule

The Schedule Report displays employees and their task assignments by profile and skill for one, two, three, four, and six weeks. You can also select to run this report by month.

- This report displays daily FTE (Full Time Equivalent) totals by shift category partition and skill.

Running the Schedule Report

1. From the **Reports** menu, select **Schedule_Schedule Report**. This opens the Schedule Report page.
2. Select one or more **Profiles**. You can select to report on multiple profiles, up to seven. Use CTRL+click to select multiple items. Use SHIFT+click to select a range of items. Administrative users may select from all the profiles in the database. Employees with report access will see only those profiles for which they have security permissions.
3. Select a **Shift Category**. This report uses only one shift category.
4. Select one or more **Shift Category Partition** with Spill-Over.
5. Select one or more **Skills**.
6. Select one or more **Tasks**.
7. Select a **Date**. Enter a date in mm/dd/yyyy format, or click the button next to the Date box to view the date picker.
8. Select from the following additional parameters.
 - Number of Weeks:** This option allows you to select the number of weeks and, in some cases, whether to print on letter-sized paper, legal-sized paper, or ledger paper. Available choices are:
 - 1 Week (automatically prints on letter-size paper)
 - 2 Weeks (automatically prints on letter-size paper)
 - 3 Weeks (automatically prints on letter-size paper)
 - 4 Weeks (Letter)
 - 4 Weeks (Legal)
 - 6 Weeks (Letter)
 - 6 Weeks (Legal)
 - 6 Weeks (ledger)
 - Month (Letter)
 - Month (Legal)
 - Display Format By:** Select **by profile** or **by all employees**.
 - Grouping Employees By Partition:** If selected, employees will be grouped by partition.
 - Include Profile Based Unscheduled Employees:** Selecting **Yes** for this option includes all employees based on the profiles selected, regardless of whether an employee has been scheduled on this profile.
 - Display Name Format:** Select **full name** or **abbreviation**.
 - Employee Sort By:** Select to sort **by Skill and then Employee Name, Employee Name Only, or by Employee Custom Display Order**.

- Include Phone Number:** If you select **Yes** for this option, the report will display employees' phone numbers.
 - Exclude Scheduled Tasks:** If you select **Yes** for this option, the report will display a blank schedule. This option requires that yes be selected for the Include Profile Based Unscheduled Employees option. Selecting Yes will also automatically force Total By to be None, Float In Display to be Do not display, Float Out Display to be Do not display, and for all Shift Category Partitions and Tasks to be unavailable.
 - Show Task:** The choices for this option are
 - Show **abbreviation** (displays task abbreviation only)
 - **Abbreviation with scheduled start/end times when different** (always displays task abbreviation, but only displays start/end times when they are different from the default start/end times for the task)
 - **Abbreviation and coverage start/end times**
 - Mark Filled Opportunities with (O):** If you select **Yes**, then scheduled assignments resulting from filled opportunities will show an (O) before the task name.
 - Show Unfilled Opportunities and Open Shifts:** The options here are:
 - Schedule Only; Don't Show Opportunities/Open Shifts
 - Show Opportunities/Open Shifts and Schedule
 - Show Opportunities/Open Shifts Only
 - Include Paid Hours by Employee:** If you select **Yes** for this option, the report will display the paid hours for home profile employees for the pay period (Float employees paid hours will not display).
 - Total By:** Select to view the calculated totals for staff, FTEs, hours, or none.
 - Calculate Totals By:** Select either employee skill or task skill.
 - Float In Display:** Choices for displaying float-in employees are:
 - Separate Table
 - Show in Red
 - Show with (In)
 - Display After Profile Based Employees
 - Do not Display.
 - Float Out Display:** Float employees are any employees working in a profile where they do not hold a primary or secondary job. Choices for displaying float-out employees are:
 - Separate Table
 - Show in Blue
 - Show with (Out)
 - Do not Display.
 - Show Notes:** If checked, notes will be printed in the page footer. If not checked, no notes will be printed.
 - Enter the number of Write-in Lines.** These lines will print at the bottom of the report. They can be used for note-taking, recording data, or any other purpose. If no lines are desired, enter 0 in this box.
9. Click **Run Report**.

Cerner Clairvia Training Manual

Schedule

Selection Criteria | Report Output

Profiles	Shift Categories
AK NICU-Neon. Int. Care Unit AK Nursing Admin AK Obs Gyne 1E1 AK Obs-Gyne OPD AK PEC AK Pediatric & Orthopedic 1W1 AK Recovery Room AK Surgical Unit 2E2 AW 2S Ped AW 3 North	(AW 3 North) 8-8-8
Shift Category Partitions with Spillover	0600 1400 (Spill: Front 31 - Back 31) 1400 2200 (Spill: Front 31 - Back 31) 2200 0600 (Spill: Front 31 - Back 31)
Skills	(AW 3 North) HN (AW 3 North) NA (AW 3 North) SN (AW 3 North) WC
Tasks	(AW 3 North) (AW 3 North)Absent Hrs (AW 3 North)Accomp (AW 3 North)ACN

- Make sure the entire shift Category partitions, Skill & task are selected.
- Selecting filters depends on the user preference.

Date (dd/mm/yyyy)	01 / 12 / 2016 
Number Of Weeks	<input type="text"/>
Display Format By	<input checked="" type="radio"/> Profile <input type="radio"/> All Employees
Group Employees By Partition	<input type="checkbox"/> Group By Shift Category Partition
Include Profile Based Unscheduled Employees	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display Name Format	<input checked="" type="radio"/> Full Name <input type="radio"/> Abbreviation
Employee Sort By	<input type="radio"/> Skill and then Employee Name <input type="checkbox"/> Break out by Job Skill <input type="radio"/> Employee Name Only <input checked="" type="radio"/> Employee Custom Display Order <input type="radio"/> Yes <input checked="" type="radio"/> No
Include Phone Number	<input type="radio"/> Yes <input checked="" type="radio"/> No
Exclude Scheduled Tasks	<input checked="" type="radio"/> Abbreviation <input type="radio"/> Abbreviation w/ Scheduled Start/End Times When Different <input type="radio"/> Abbreviation And Coverage Start/End Times
Show Task	<input type="radio"/> Yes <input checked="" type="radio"/> No <input checked="" type="radio"/> Show Opportunities/Open Shifts Only
Mark Filled Opportunities with (O)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show Unfilled Opportunities and Open Shifts	<input type="radio"/> Schedule Only: Don't Show Opportunities/Open Shifts <input checked="" type="radio"/> Show Opportunities/Open Shifts and Schedule <input type="radio"/> Show Opportunities/Open Shifts Only
Include Paid Hours By Employee	<input checked="" type="radio"/> Yes <input type="radio"/> No
Total By	<input checked="" type="radio"/> FTEs <input type="radio"/> Staff <input type="radio"/> Hours <input type="radio"/> None
Calculate Totals By	<input type="radio"/> Employee Skill <input checked="" type="radio"/> Task Skill
Float In Display	<input checked="" type="radio"/> Separate Table <input type="radio"/> Show in Red <input type="radio"/> Show with '(In)' <input type="radio"/> Display After Profile Based Employees <input type="radio"/> Do not Display
Float Out Display	<input checked="" type="radio"/> Separate Table <input type="radio"/> Show in Blue <input type="radio"/> Show with '(Out)' <input type="radio"/> Do not Display
Show Notes	<input checked="" type="checkbox"/> Show Notes in Page Footer
Write-in Lines	<input type="text"/> 0
<input type="button" value="Run Report"/> <input type="button" value="Clear Form"/>	

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Schedule for 01/12/2016 - 31/12/2016
AK ICU-Critical Care Unit

Employee	Skill	01/12 Th	02/12 Fr	03/12 Sa	<input type="checkbox"/> Date
Hussin, Hanan 40/40/40/40/	CN 1.00	HN /	/	/	<input type="checkbox"/> Employee
Montealto, Annie 56/56/56/56/	CN 1.00	AL AL	AL	AL	<input type="checkbox"/> Skills
Chikhaoui, Samah 48/40/32/40/	SN 1.00	D CN	D CN	D CN	<input type="checkbox"/> Paid Hours per week
Fernandez, Dave 40/40/40/40/	SN 1.00	E CN	N CN	E OCN	<input type="checkbox"/> Task
Paule, Germelyne 40/40/40/40/	SN 1.00	DO SN /	E CN	E SN	

Float In

Float Out

Employee	Skill	01/12 Th	02/12 Fr	03/12 Sa	04/12 Su	05/12 Mo	06/12 Tu	07/12 We	08/12 Th	09/12 Fr	10/12 Sa	11/12 Su	12/12 Mo	13/12 Tu	14/12 We	15/12 Th	16/12 Fr	17/12 Sa	18/12 Su
Castro, Beverly 40/40/40/40/	SN 1.00																		D SN AK W2 Med
Nalica, Cora 40/40/40/40/	SN 1.00																		E SN AK W2 Med
Garrido, Mary 48/40/32/40/	SN 1.00																		N SN AK W2 Med
Dabu, Blanca 32/32/40/40/	SN 1.00																		N SN AK W2 Med

Totals by Task Skill (in FTEs)

Shift Partition	Skill	01/12 Th	02/12 Fr	03/12 Sa	04/12 Su	05/12 Mo	06/12 Tu	07/12 We	08/12 Th	09/12 Fr	10/12 Sa	11/12 Su	12/12 Mo	13/12 Tu	14/12 We	15/12 Th	16/12 Fr	17/12 Sa	18/12 Su	19/12 Mo	20/12 Tu	21/12 We	22/12 Th	23/12 Fr	24/12 Sa
0600 1400	PCA	1.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00	0.00	0.00	0.00	1.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00
0600 1400	NA	0.00	0.00	1.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	1.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00	
0600 1400 Totals		10.00	7.00	8.00	9.00	9.00	9.00	10.00	10.00	8.00	7.00	8.00	9.00	9.25	9.00	10.00	7.00	7.00	8.00	8.00	10.00	9.00	9.00	6.00	7.00
1400 2200	CN	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
1400 2200	SN	6.00	5.00	5.00	5.00	5.00	6.00	6.50	5.00	5.00	6.00	6.00	5.00	4.00	5.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00	5.00	5.00	5.00
1400 2200	PCA	1.00	0.00	0.00	1.00	1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.00
1400 2200	NA	0.00	1.00	1.00	1.00	0.00	1.00	0.00	1.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	1.00	0.00	1.00	0.00	1.00	1.00	0.00	1.00	0.00
1400 2200 Totals		8.00	7.00	7.00	8.00	7.00	8.00	8.00	8.50	7.00	7.00	8.00	8.00	6.00	7.00	6.00	6.00	6.00	6.00	6.00	7.00	7.00	7.00	7.00	7.00
2200 0600	CN	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
2200 0600	SN	4.00	6.00	5.00	5.00	6.00	6.00	5.00	5.00	5.00	5.00	6.00	6.00	5.00	5.00	5.00	5.00	4.00	4.00	5.00	5.00	5.00	5.00	5.00	4.00
2200 0600	PCA	0.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00
2200 0600	NA	1.00	0.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00
2200 0600 Totals		6.00	8.00	7.00	7.00	8.00	8.00	7.00	7.00	7.00	7.00	8.00	7.00	7.00	7.00	7.00	6.00	6.00	7.00	7.00	7.00	7.00	7.00	6.00	

- The number of hours worked or FTEs assigned to work for each shift category partition/skill combination worked during the shift category

Schedule Housewide Staffing

The Housewide Staffing report displays, by profile and skill, the planner-based staffing (core or target) and actual hours or FTEs scheduled with one or more variances. Target hours are taken from the Workload Planner in *CVM Client*, which may be based on core values or workload values. The list of employees scheduled, their skill, start time, and total hours worked also display. *CVM Web* saves the options you select for each report by your user login once you click Run Report.

- The Housewide Staffing report can be utilized by the Nursing supervisors to determine staffing needs or variances for Ambulatory or OPD unit.
- This cannot be run for more than 12 Shift Category Partitions. If you need a report for 12 or more Shift Category Partitions, run the Daily Staffing Board report instead

Running the Housewide Staffing Report

1. From the **Reports** menu, select **Schedule Housewide Staffing**. This opens the selection criteria page.
2. Complete **Section 1: Select and Order Profiles, Shift Categories, Partitions, and Skills**.
 - a. Select one or more **Profiles**. Select multiple profiles by holding down the CTRL key while clicking on the profile names. If you are logged in as an administrator, you can select from all the profiles in the database. If you are logged in as an employee who can manage profiles, only those profiles to which you have access will display in the Profiles list. If a filter has been applied to the report, its name will display in the Filter box.
 - b. Select a **Profile Order**. Determine the order in which the profiles will print by highlighting the profile to be moved and using the up and down arrow buttons to the right of the Profile Order table to move the highlighted profile within the list.
 - c. Select a **Shift Category**. The report uses only one shift category from the list of selected profiles; this parameter enables you to pick that shift category.
 - d. Select one or more **Shift Category Partitions** with Spillover.

- e. Select one or more **Skills**.
3. Complete **Section 2: Select Other Parameters**.
 - a. Select to Report **By hours or FTEs**.
 - b. Select a **Date**. The default value for this box is either today's date (the first time the report is used) or the last date used (if the report has been run before). To select a new date, either enter a date in mm/dd/yyyy format, or click the button next to the Date box to view the date picker.
 - c. Select to Display **Employee's name or abbreviation**.
 - d. Select **Suppress Coverage Tables** (Yes or No). If Yes is selected, the coverage table containing the counts by skill will not display. The census (or other workload value) and staffing ratios (if selected) will display.
 - e. Select **Suppress Staffing List** (Yes or No). If Yes is selected, the report will be limited to the coverage tables and the list of staff will not appear.
 - f. Enter the **number of Write-in Lines**. These are lines that display at the bottom of the report when it is printed. They can be used for note-taking, recording data, or any other purpose. If no lines are desired, enter 0 in this box.
 - g. Select Include **Staffing Ratios** (Yes or No). If Yes is selected, the target nurse-to-patient ratio for each profile, as that target has been entered in the budget data, will be included in the report.
 - h. Select Include **Employee FTE** (Yes or No). If Yes is selected, each employee's FTE will print/display on a second row, under the start time and hours.
 - i. Select Include **Assignment Notes** (Yes or No). If Yes is selected, when an assignment note has been entered for a task/shift scheduled, it will print on a second row, below the employee name/abbrev, and will wrap to a third line if necessary.
 - j. Select Include **UDF** (Yes or No). If Yes is selected, when a user defined field (UDF) has been associated with staffing reports (as set in the client_rules table), it will be included in the report.
 - k. Select Include **Profile Note** (Yes or No). If Yes is selected, any profile note that has been entered in CVM Administrator will print in the report.
 - l. Select Include **Employee Scheduled Paid Hours** (Yes or No). If Yes is selected, the report will display employees' paid hours for the pay period.
 - m. Select Include **Total Coverage Table** (Yes or No). If Yes is selected, the coverage table with totals by profile skill for each selected shift category partition will be included in the report.
4. Complete **Section 3: Select Display/Print Options**.
 - a. Select to print **Columns by Profile or Partition** by clicking the corresponding button.
 - b. Enter the **Number of Columns/Paper Size**. To minimize wrapping of text, the maximum number of columns is limited to 4.
 - c. Select **Page Break at X** (Yes or No). The exact phrase displayed for this parameter depends on whether you selected to print columns by Profile or Partition in Step 3a.
 - When Columns by Profile is selected, this parameter reads Page Break at New Partition. Selecting Yes forces a page break prior to printing the

profiles for the next shift category partition. When the report is configured to run with Columns by Profile for multiple shift category partitions, selecting Yes forces a page break prior to printing the profiles for the next shift category partition. This setting is ignored when you select Columns by Partition.

- When Columns by Partition is selected, this parameter reads Page Break at New Profile. Selecting Yes forces a page break prior to printing the shift category partitions for the next profile.
- d. Select **Start New Row(s) With**. When the report is configured with Columns by Profile in Step 3a, this parameter enables you to select the profile or profiles that should print in the first column of a new row.
- e. Select **Start New Page With**. This option works with Start New Row(s) With. When you select multiple profiles in the Start New Row(s) with option, this option enables you to put one or more of those profiles on a new page.
- f. Select **Print in Partition Order** (Yes or No). This parameter is designed to print the Housewide Staffing Report for multiple partitions in succession. If users select Yes, they will be allowed to select the First Shift Category Partition (Step 3f). If users select No, the partitions will display and print starting with the first/anchor partition of the profile selected in Step 1d.
- g. Select a **First Shift Category Partition**. This is the first shift category partition that the report should begin with for the date selected. This option is unavailable if you selected No in Step 3e.
- h. Enter the **Number of Shift Category Partitions to Print**. This is the number of shift category partitions to print, starting with the first shift category partition indicated in Step 3f and going forward from there. The limit for this box is 12.
- i. Select to **Shade Staff List by Skill** (Yes or No). If you select yes, the staff list will alternate with gray and white shading by profile skill. If you select no, the staff list will not contain any shading.
- j. Select a **Staff List Format** (Truncated or Wrapped). The Truncated format limits printing to what fits within the column (this varies based on the characters and whether the text is in upper/lower case) for skill, task abbreviation, and float from profile. If Wrapped is selected, the text in the skill, task abbreviation, and float from profile will wrap, using as many rows as needed to print the text.
- k. Select to **Display Float from Profile name or abbreviation**. Click Name to display the float from profile name; click Abbrev to display the profile's abbreviation.
- l. Enter a numeric value for the **Truncate Float Profile** at Character box. This box enables you to select the number of characters displayed for the float profile. For example, if you select 7, seven characters of the float profile will display.
- m. Click **Run Report**.

Cerner Clairvia Training Manual

Housewide Staffing

Selection Criteria Report Output Filter

① Choose and Order Profiles, Shift Categories, Shift Category Partitions, and Skills

Profiles	Profile Order
AK ICU-Critical Care Unit AK Labor & Delivery/Obs Gyne ED AK Main Operating Theater AK Medical Unit 2W2 AK NICU-Neon. Int. Care Unit AK Nursing Admin AK Obs Gyne 1E1 AK Obs-Gyne OPD AK PEC AK Pediatric & Orthopedic 1W1	AK PEC  

Shift Categories	Shift Category Partitions with Spillover	Skills
[AK PEC] 8-8-8	0600 1400 (Spill: Front 60 - Back 60) 1400 2200 (Spill: Front 60 - Back 60) 2200 0600 (Spill: Front 60 - Back 60)	(AK PEC) CN (AK PEC) HN (AK PEC) NA (AK PEC) SN (AK PEC) WC

② Choose Other Parameters

Report By	Hours <input type="radio"/> FTEs <input checked="" type="radio"/>
Date (dd/mm/yyyy)	23 / 02 / 2017 
Display Employee's	Name <input checked="" type="radio"/> Abbrev <input type="radio"/>
Suppress Coverage Tables	Yes <input type="radio"/> No <input checked="" type="radio"/>
Suppress Staffing List	Yes <input type="radio"/> No <input checked="" type="radio"/>
Write In Lines	<input type="text"/>

Include Staffing Ratios	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Employee FTE	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Assignment Notes	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include UDF	Yes <input type="radio"/> No <input checked="" type="radio"/>
Include Profile Notes	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Employee Scheduled Paid Hours	Yes <input type="radio"/> No <input checked="" type="radio"/>
Include Total Coverage Table	Yes <input checked="" type="radio"/> No <input type="radio"/>

③ Choose Display/Print Options

Columns By	Profile <input checked="" type="radio"/> Partition <input type="radio"/>
Number of Columns / Paper Size	<input checked="" type="radio"/> 1  <input type="radio"/> Letter 
Page Break at New Partition	Yes <input checked="" type="radio"/> No <input type="radio"/>
Start New Row(s) With :	<input type="text"/>
AK PEC	
Start New Page With :	<input type="text"/>
AK PEC	

Print in Partition Order	Yes <input type="radio"/> No <input checked="" type="radio"/>
First Shift Category Partition	<input type="text"/>
0600 1400 (Spill: Front 60 - Back 60) 1400 2200 (Spill: Front 60 - Back 60) 2200 0600 (Spill: Front 60 - Back 60)	
Number of Shift Category Partitions to Print	<input type="text"/> 4
Shade Staff List by Skill	Yes <input checked="" type="radio"/> No <input type="radio"/>
Staff List Format	Truncated <input checked="" type="radio"/> Wrapped <input type="radio"/>
Display "Float from" Profile	Name <input type="radio"/> Abbrev <input checked="" type="radio"/>
Truncate Float Profile at Character:	<input type="text"/> 7

Housewide Staffing Report

Thu 23/02/2017 HH Emergency Department

0600 1400 in FTE

Volume: 0					
Target 1:00 Actual 1:00					
Skill	Target	Actual	Clin Adj	Adj Var	Notes
HN	1.00	1.00	0.00	0.00	
CN	1.00	1.00	0.00	0.00	
SN	11.00	12.38	0.00	1.38	
WC	3.00	3.00	0.00	0.00	
NA	4.00	3.00	0.00	-1.00	
Dflt	0.00	0.88	0.00	0.88	
Total	20.00	21.25	0.00	1.25	
HN	Watt,Sapdiya	D HN		0600, 1.00 1.00	
CN	Ng,Yvette	D CN		0600, 1.00 1.00	
SN	Inguito,Imelda	D ABG		0600, 0.00 1.00	
SN	Manalo,Joanna Sheila	D Airway		0600, 0.00 1.00	
SN	Panda,Sarjini	D AR 3, 4, 5		0600, 0.00 1.00	
SN	Bartolome,Mark	D AR 6,7, 8		0600, 0.00 1.00	
SN	Inguito,Imelda	D AR 9,10, SR 5		0600, 0.00 1.00	
SN	Panda,Sarjini	D Coaguchek		0600, 0.00 1.00	
SN	Bartolome,Mark	D Code Responder		0600, 0.00 1.00	

Schedule: Housewide Staffing for Demand & Outcomes Driven Acuity

The Housewide Staffing for Demand/Outcomes-Driven Acuity Report displays, by profile and global skill, the target staffing based on patient demand, actual and projected patient events, employee hours or FTEs scheduled, and variances. The list of employees scheduled, their skill, start time, and total hours worked also displayed.

- The Housewide Staffing report can be utilized by the Nursing supervisors to determine staffing needs or variances for Inpatient unit,

The source of the target staffing hours the report uses in its calculations depends on the reporting period you select.

- Past to Present:** For dates in the past and for the present (with *present* meaning the time you run the report) the report uses actual patient demand and actual patient events to calculate the Target Staffing value.
- Present to Near Future:** For time ranges from the present up to 36 hours in the future, the Target Staffing value includes:
 - Current demand workload values adjusted for time of day and acuity levels.
 - Projected departure and discharge event workload, calculated by using the pattern end date as originally assigned or by using updated dates and times

- entered on the Administer Patient Pattern window (or updated through an alternate source solution) for each patient.
- Workload associated with actual and projected Other patient events.
 - Target Staffing for non-direct care staff global skills, such as managers and clerical staff, is pulled from the workload matrix, which is stored in Workload Planner.
- **Future:** If the report is run for a period that starts more than 36 hours from now, the Target is calculated using the 6-week historical average by day of week and time of day and includes workload associated with actual demand, including actual ADT events.

Running the Housewide Staffing for Demand/Outcomes-Driven Acuity Report

1. From the **Reports** menu, select **Schedule Housewide Staffing for Demand and Outcomes-Driven Acuity Report**. This opens the selection criteria page.
2. Complete **Section 1:** Select and Order Profiles, Shift Categories, Partitions, and Skills.
 - a. Select one or more **Profiles**. Select multiple profiles by holding down the CTRL key while clicking on the profile names. If you are logged in as an administrator, you can select from all the profiles in the database. If you are logged in as an employee who can manage profiles, only those profiles to which you have access will display in the Profiles list.
 - b. Select a **Profile Order**. Determine the order in which the profiles print by highlighting the profile to be moved and using the up and down arrow buttons to the right of the Profile Order table to move the highlighted profile within the list.
 - c. Select a **Shift Category**. The report uses only one shift category from the list of selected profiles; this parameter lets you pick that shift category.
 - d. Select one or more **Shift Category Partitions**. To select multiple items, hold down the CTRL key while clicking on the item, or, to select a range of items, hold down the SHIFT key and click the first and last items in a range.
 - e. Select one or more **Global Skills**.
3. Complete **Section 2:** Select Other Parameters.
 - a. Select to **Report By hours or FTEs**.
 - b. Select a **Date**. The default value for this box is either today's date (the first time you run this report) or the last date used (if you have run this report before). To select a new date, either enter a date in mm/dd/yyyy format, or click the button next to the Date box to view the date picker.
 - c. Select to **Display Employee's name or abbreviation**.
 - d. Select **Suppress Coverage Tables** (Yes or No). If you select Yes, the coverage table containing the counts by skill will not display. The census (or other workload value) and staffing ratios (if selected) will display.
 - e. Select **Suppress Staffing List** (Yes or No). If you select Yes, the report will be limited to the coverage tables and the list of staff will not appear.

- f. Enter the number of **Write-in Lines**. These are lines that display at the bottom of the report when it is printed. They can be used for note-taking, recording data, or any other purpose. If you do not want any lines, enter 0 (zero).
 - g. Select Show **Utilization** (Yes or No). If you select Yes, the report will list percent utilization. If you select No, the report will not show utilization. Percent utilization equals Target Hours or FTEs divided by Actual/Scheduled Hours or FTEs. If you selected to Suppress Coverage Tables, this column will not display.
 - h. Select Include **Staffing Ratios** (Yes or No). If you select Yes, the target nurse-to-patient ratio for each profile (as that target has been entered in the budget data) will be included in the report.
 - i. Select Include **Employee FTE** (Yes or No). If you select Yes, each employee's FTE will display on a second row, under the start time and hours.
 - j. Select Include **Assignment Notes** (Yes or No). If you select Yes, when someone has entered an assignment note for a scheduled task, it will print on a second row, below the employee name or abbreviation, and will wrap to a third line if necessary.
 - k. Select Include **UDF** (Yes or No). If you select Yes, when a user defined field (UDF) has been associated with staffing reports (as set in the client_rules table), it will be included in the report. You should contact Cerner Corporation Support if you need assistance configuring CVM to pull the staffing UDF.
 - l. Select Include **Profile Notes** (Yes or No). If you select Yes, any profile note that has been entered in *CVM Administrator* will print in the report.
 - m. Select Include **Employee Scheduled Paid Hours** (Yes or No). If you select Yes, the report will display employees' paid hours for the pay period.
 - n. Select **Suppress Non-Skill Based Tasks in Actual** (Yes or Not). If you select Yes, any task not associated with a skill will not be included in either the Coverage or the Total Coverage tables, and the hours for that task will not be included in the totals. This option only applies if Suppress Coverage Tables or Include Total Coverage Table or both are set to Yes.
 - o. Select Include **Total Coverage Table** (Yes or No). If you select Yes, the coverage table with totals by global skill for each selected shift category partition will be included after each shift category partition.
4. Complete **Section 3: Select Display/Print Options**.
 - a. Select to print **Columns by Profile** or **Partition** by clicking the corresponding button.
 - b. Enter the **Number of Columns/Paper Size**. To minimize wrapping of text, the maximum number of columns is limited to 4.
 - c. Select **Page Break at [X]** (Yes or No). The exact phrase displayed for this parameter depends on whether you selected to print columns by Profile or Partition in Step 3a.
 - When you select Columns by Profile, this parameter reads **Page Break at New Partition**. Selecting Yes forces a page break prior to printing the profiles for the next shift category partition. When you configure the report to run with Columns by Profile for multiple shift category partitions, selecting Yes forces a page break prior to

printing the profiles for the next shift category partition. The report ignores this setting when you select Columns by Partition.

- When you select Columns by Partition, this parameter reads Page Break at New Profile. Selecting Yes forces a page break prior to printing the shift category partitions for the next profile.
- d. Select **Start New Row(s) With**. When you configure the report with Columns by Profile in Step 3a, this parameter lets you select the profile or profiles that should print in the first column of a new row. The report assumes that the first profile begins on the first row, so it is not necessary to highlight the first profile in the list.
- e. Select **Start New Page With**. This option works with Start New Row(s) With. When you select multiple profiles in the Start New Row(s) With menu, this option lets you put one or more of those profiles on a new page.
- f. Select **Print in Partition Order** (Yes or No). This option lets you print the Housewide Staffing Report for multiple partitions in succession. If you select Yes, you can select the First Shift Category Partition (Step 3f). If you select No, the report displays the partitions starting with the first or anchor partition of the profile you selected in Step 1d.
- g. Select a **First Shift Category Partition**. This is the first shift category partition that the report should begin with for your selected date. This option is not available if you selected No in Step 3e.
- h. Enter the **Number of Shift Category Partitions to Print**. This is the number of shift category partitions to print, starting with the first shift category partition indicated in Step 3f and going forward from there. The limit for this option is 12.
- i. Select to **Shade Staff List by Skill** (Yes or No). If you select Yes, the staff list will alternate with gray and white shading by profile skill. If you select No, the staff list will not contain any shading.
- j. Select a **Staff List Format** (Truncated or Wrapped). The Truncated format limits printing to what fits within the column (this varies based on the characters and whether the text is in upper or lower case) for skill, task abbreviation, and float from profile. If you select Wrapped, the text in the skill, task abbreviation, and float from profile will wrap, using as many rows as needed to print the text.
- k. Select to **Display Float from Profile name or abbreviation**. Select Name to display the float from profile name; select Abbrev to display the profile's abbreviation.
- l. Enter a numeric value for the **Truncate Float Profile at Character box**. This option lets you select the number of characters displayed for the float profile. For example, if you enter 7, seven characters of the float profile will display.
- m. Click **Run Report**.

Cerner Clairvia Training Manual

Housewide Staffing for Demand and Outcomes-driven Acuity

Filter: Inc

Selection Criteria | Report Output

① Choose and Order Profiles, Shift Categories, Shift Category Partitions, and Skills

Profiles	Profile Order
AW 5S Surg AW 6N Med AW 6S Med AW BU 1st AW BU 4S AW HDU AW MICU AW NICU AW PICU AW SICU	AW 5S Surg

Shift Categories	Shift Category Partitions with Spillover	Global Skills
(AV 5S Surg) 8-8-8	0600 1400 (Spill: Front 31 - Back 31) 1400 2200 (Spill: Front 31 - Back 31) 2200 0600 (Spill: Front 31 - Back 31)	Unassigned RN PCA CASE MGR WC EDUC COORD DIR TECH SUP

② Choose Other Parameters

Report By	Hours <input type="radio"/> FTEs <input checked="" type="radio"/>
Date (dd/mm/yyyy)	23/02/2017 <input type="button" value="Calendar"/>
Display Employee's	Name <input checked="" type="radio"/> Abbrev <input type="radio"/>
Suppress Coverage Tables	Yes <input type="radio"/> No <input checked="" type="radio"/>
Suppress Staffing List	Yes <input type="radio"/> No <input checked="" type="radio"/>
Write In Lines	0 <input type="text"/>
Show Utilization	Yes <input checked="" type="radio"/> No <input type="radio"/>

Include Staffing Ratios	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Employee FTE	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Assignment Notes	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include UDF	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Profile Notes	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Employee Scheduled Paid Hours	Yes <input type="radio"/> No <input checked="" type="radio"/>
Suppress Non-Skill Based Tasks in Actual	Yes <input checked="" type="radio"/> No <input type="radio"/>
Include Total Coverage Table	Yes <input checked="" type="radio"/> No <input type="radio"/>

③ Choose Display/Print Options

Columns By	Profile <input checked="" type="radio"/> Partition <input type="radio"/>
Number of Columns / Paper Size	1 <input type="button" value="▼"/> Letter <input type="button" value="▼"/>
Page Break at New Partition	Yes <input checked="" type="radio"/> No <input type="radio"/>
Start New Row(s) With :	
AW 5S Surg	
Start New Page With :	

Print in Partition Order	Yes <input checked="" type="radio"/> No <input type="radio"/>
First Shift Category Partition	
0600 1400 (Spill: Front 31 - Back 31) 1400 2200 (Spill: Front 31 - Back 31) 2200 0600 (Spill: Front 31 - Back 31)	
Number of Shift Category Partitions to Print	4 <input type="text"/>
Shade Staff List by Skill	Yes <input checked="" type="radio"/> No <input type="radio"/>
Staff List Format	Truncated <input checked="" type="radio"/> Wrapped <input type="radio"/>
Display "Float from" Profile	Name <input type="radio"/> Abbrev <input checked="" type="radio"/>
Truncate Float Profile at Character:	7 <input type="text"/>

Housewide Staffing for Demand and Outcomes-driven Acuity Report

Thu 23/02/2017 AW 5S Surg

0600 1400 in FTE

Volume: 22 A: 0 D: 2 TI: 4 TO: 5					
Target 1:0.00 Actual 1:3.14 Av Ac: 5.34					
Global Skill	Acuity Target	Actual	Var	Util	Notes
RN	8.88	7.00	-1.88	127%	
Total	8.88	7.00	-1.88	127%	
RN	Ali,Hussam	D SN		0600, 1.00 1.00	
RN	Essid,Darne	D SN		0600, 1.00 1.00	
RN	G. Clemente,Benjamin	D SN		0600, 1.00 1.00	AW 4NS
RN	Issa,Abdullah	D SN		0600, 1.00 1.00	
RN	Mathew,Rincy	D SN		0600, 1.00 1.00	

Management: Productivity for Demand & Outcomes Driven Acuity

The Productivity for Demand and Outcomes-Driven Acuity Report displays Demand Target Staffing. Demand Target Staff Count or Hours for global skills configured for Demand or Patient Events is based on volume, patient activity, and acuity.

The source of the target staffing hours the report uses in its calculations depends on the reporting period you select.

- Past to Present:** For dates in the past and for the present (with *present* meaning the time you run the report) the report uses actual patient demand and actual patient events to calculate the Target Staffing value.
- Present to Near Future:** For time ranges from the present up to 36 hours in the future, the Target Staffing value includes:
 - Current demand workload values adjusted for time of day and acuity levels (when implemented).
 - Projected departure and discharge event workload, calculated by using the pattern end date as originally assigned or by using updated dates and times

entered on the Administer Patient Pattern window (or updated through an alternate source solution) for each patient.

- Workload associated with actual and projected Other patient events.

Target Staffing for non-direct care staff global skills, such as managers and clerical staff, is pulled from the workload matrix, which is stored in Workload Planner.

- **Future:** If the report is run for a period that starts more than 36 hours from now, the Target is calculated using the 6-week historical average by day of week and time of day and includes workload associated with actual demand, including actual ADT events. The impact of other events is not included in the historical average.

Running the Productivity for Demand and Outcomes-Driven Acuity Report

1. From the **Reports** menu, select **Management Productivity for Demand and Outcomes-Driven Acuity Report**. This opens the Productivity for Demand/Outcomes-Driven Acuity Report page.
2. Select a **Profile** or select multiple profiles by holding the CTRL key while clicking on the profile name. The profiles displayed are limited to profiles configured for *Demand Manager*. If you are logged in as an administrator, you can select from all the profiles in the database. If you are logged in as an employee who can manage profiles, the Profiles list will only display those profiles to which you have access.
3. Select a **Start Date**. You can enter a date in mm/dd/yyyy format or select one with the date picker.
4. Select a **Time Period**. Enter a numeric value in the box, then select Days, Weeks, or Months. For example, if you enter 12 in the box and then click Days, the report will show 12 days of data starting with the date you selected in the Start Date box.
5. Select **what to Report On**: Hours, Staff Count, Hours/UOS (Hours per Unit of Service), or a combination.
 - Reporting in **Hours** provides data based on target and productive hours.
 - Reporting by **Staff Count** takes the productive hours and divides by the length of the shift category partition.
 - Reporting in **Hours/UOS** takes the productive hours and divides them by the volume reports. This affects only those values that report in hours.
6. Select **what the Report Includes**:
 - a. Summary
 - b. Detail by Partition/Skill
 - c. Detail by Skill
7. Select to include **Graphs in Hours/UOS with Cumulative Variances**. The Cumulative Variance graph plots the cumulative variance between productive hours per unit of service and target hours per unit of service.
8. Select Export Type: PDF or CSV (Comma Separate Values)
9. Click **Run Report**.

Productivity for Demand and Outcomes-driven Acuity

Selection Criteria	Report Output						
<table border="1"> <tr> <td>Profile(s)</td> <td>Start Date (dd/mm/yyyy) <input type="text" value="01 / 01 / 2017"/></td> </tr> <tr> <td>AK ICU-Critical Care Unit AK Medical Unit 2W2 AK NICU-Neon. Int. Care Unit AK Obs Gyne 1E1 AK Pediatric & Orthopedic 1W1 AK Surgical Unit 2E2 AW 2S Ped AW 3 North AW 3 South AW 4N AAU AW 4N Surg AW 5N Surg AW 5S Surg AW 6N Med AW 6S Med AW BU 1st</td> <td> Time Period <input type="text" value="1"/> <input type="radio"/> Days (up to 60) <input type="radio"/> Weeks (up to 52) <input checked="" type="radio"/> Months (up to 12) Report On <input type="checkbox"/> Hours <input checked="" type="checkbox"/> Staff Count <input type="checkbox"/> Hours/UOS <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Detail By Partition/Skill <input checked="" type="checkbox"/> Detail By Skill Graph Hours/UOS <input checked="" type="checkbox"/> Cumulative Variances Export Type <input checked="" type="radio"/> PDF <input type="radio"/> CSV (Comma Separated Values) </td> </tr> <tr> <td colspan="2"> <input type="button" value="Run Report"/> <input type="button" value="Clear Form"/> </td> </tr> </table>		Profile(s)	Start Date (dd/mm/yyyy) <input type="text" value="01 / 01 / 2017"/>	AK ICU-Critical Care Unit AK Medical Unit 2W2 AK NICU-Neon. Int. Care Unit AK Obs Gyne 1E1 AK Pediatric & Orthopedic 1W1 AK Surgical Unit 2E2 AW 2S Ped AW 3 North AW 3 South AW 4N AAU AW 4N Surg AW 5N Surg AW 5S Surg AW 6N Med AW 6S Med AW BU 1st	Time Period <input type="text" value="1"/> <input type="radio"/> Days (up to 60) <input type="radio"/> Weeks (up to 52) <input checked="" type="radio"/> Months (up to 12) Report On <input type="checkbox"/> Hours <input checked="" type="checkbox"/> Staff Count <input type="checkbox"/> Hours/UOS <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Detail By Partition/Skill <input checked="" type="checkbox"/> Detail By Skill Graph Hours/UOS <input checked="" type="checkbox"/> Cumulative Variances Export Type <input checked="" type="radio"/> PDF <input type="radio"/> CSV (Comma Separated Values)	<input type="button" value="Run Report"/> <input type="button" value="Clear Form"/>	
Profile(s)	Start Date (dd/mm/yyyy) <input type="text" value="01 / 01 / 2017"/>						
AK ICU-Critical Care Unit AK Medical Unit 2W2 AK NICU-Neon. Int. Care Unit AK Obs Gyne 1E1 AK Pediatric & Orthopedic 1W1 AK Surgical Unit 2E2 AW 2S Ped AW 3 North AW 3 South AW 4N AAU AW 4N Surg AW 5N Surg AW 5S Surg AW 6N Med AW 6S Med AW BU 1st	Time Period <input type="text" value="1"/> <input type="radio"/> Days (up to 60) <input type="radio"/> Weeks (up to 52) <input checked="" type="radio"/> Months (up to 12) Report On <input type="checkbox"/> Hours <input checked="" type="checkbox"/> Staff Count <input type="checkbox"/> Hours/UOS <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Detail By Partition/Skill <input checked="" type="checkbox"/> Detail By Skill Graph Hours/UOS <input checked="" type="checkbox"/> Cumulative Variances Export Type <input checked="" type="radio"/> PDF <input type="radio"/> CSV (Comma Separated Values)						
<input type="button" value="Run Report"/> <input type="button" value="Clear Form"/>							

Productivity for Demand and Outcomes-driven Acuity Report: 01/01/2017 - 31/01/2017

Productivity Staff Count Summary Report

	Cumulative Volume	Average Acuity	Prod. Staff	Target Staff	Var Prod-Target Staff	Util T/P	Other Staff	Float Staff	Agency Staff	Trav/Contract Staff
AW 5N Surg	637.33	5.76	24.59	30.57	-5.98	124.32%	0.00	1.86	0.00	0.00
Total	637.33	5.76	24.59	30.57	-5.98	124.32%	0.00	1.86	0.00	0.00

Productivity for Demand and Outcomes-driven Acuity Report: 01/01/2017 - 31/01/2017

Productivity Staff Count with Detail by Partition and Skill for AW 5N Surg

	Volume	Average Acuity	Prod. Staff	Target Staff	Var Prod-Target Staff	Util T/P	Other Staff	Float Staff	Agency Staff	Trav/Contract Staff
AW 5N Surg	637.33 CUM									
0600 1400	22.90 AVG									
RN		10.01	13.01	-3.00	129.98%	0.00	0.72	0.00	0.00	
Subtotal	710.00 CUM	5.83	10.01	13.01	-3.00	129.98%	0.00	0.72	0.00	0.00
1400 2200	17.97 AVG									
RN		7.43	8.78	-1.35	118.28%	0.00	0.50	0.00	0.00	
Subtotal	557.00 CUM	5.79	7.43	8.78	-1.35	118.28%	0.00	0.50	0.00	0.00
2200 0600	20.81 AVG									
RN		7.15	8.78	-1.63	122.65%	0.00	0.63	0.00	0.00	
Subtotal	645.00 CUM	5.66	7.15	8.78	-1.63	122.65%	0.00	0.63	0.00	0.00
Total	20.56 Daily AVG	5.76	24.59	30.57	-5.98	124.32%	0.00	1.86	0.00	0.00

Productivity Staff Count with Detail by Skill for AW 5N Surg

	Volume	Average Acuity	Prod. Staff	Target Staff	Var Prod-Target Staff	Util T/P	Other Staff	Float Staff	Agency Staff	Trav/Contract Staff
AW 5N Surg	637.33 CUM									
RN		24.59	30.57	-5.98	124.32%	0.00	1.86	0.00	0.00	
Total	20.56 Daily AVG	5.76	24.59	30.57	-5.98	124.32%	0.00	1.86	0.00	0.00

Management: Productivity Report

The Productivity report provides managers and administrators with timely analysis of productivity over any period, both retrospectively and prospectively. Managers can view data such as actual vs. budgeted time, percent utilization, actual Hours per Patient Day (HPPD), and budgeted HPPD. The report also has the ability to display productivity of staff as easy to read graphs.

Running the Productivity Report

1. From the Reports menu, select **Management Productivity Report**. This opens the Productivity Report page.
2. Select a Profile or select multiple profiles by holding the CTRL key while clicking on the profile name. If you are logged in as an administrator, you can select from all the profiles in the database. If you are logged in as an employee who can manage profiles, only those profiles to which you have access will display in the Profile(s) list.
3. Select a Start Date. You can enter this in mm/dd/yyyy format or select a date with the date picker.
4. Select a Time Period. Enter a numeric value in the box, then select Days, Weeks, or Months.
5. Select what to Report On: Hours, FTEs, Hours/UOS (Hours per Unit of Service), or a combination.
 - Reporting in Hours provides data based on target, budget, and productive hours.
 - Reporting in FTEs produces different results depending on the length of the report interval and the number of days the profile is identified as Open.
 - Reporting in Hours/UOS provides data based on target, budget, and productive hours per unit of service.
6. Select what the Report Includes:
 - Summary
 - Detail by Partition/Skill
 - Detail by Skill.
7. Select to include Graphs in Hours/UOS with Variances, Cumulative Variances, or both
8. Click Run Report.

Cerner Clairvia Training Manual

Productivity Rep.
Who's Here

Selection Criteria
Report Output

Profile(s)

- AW PICU
- AW SICU
- CD Clinic
- Central Nursing Admin
- CH Adm Srv
- CH DCU
- CH ED
- CH Female Unit
- CH ICU
- CH Male Unit
- CH NICU
- CH Nur Srv
- CH Obs Gyne Unit
- CH OPD
- CH OT
- CH Pediatric Ward

Start Date (dd/mm/yyyy)

Time Period

Days (up to 60)
 Weeks (up to 52)
 Months (up to 12)

Report On Hours FTEs Hours/UOS

Report Includes Summary Detail By Partition/Skill Detail By Skill

Graph Hours/UOS Variances Cumulative Variances

Export Type PDF CSV (Comma Separated Values)

Run Report
Clear Form

Productivity Report: 01/06/2016 - 30/06/2016

Productivity Hours with Detail by Partition and Skill for AW PICU

	Volume	Prod. Hours	Budget Hours	Target Hours	Var Prod-Budget Hours	Var Prod-Target Hours	Util T/P	Float Hours	Agency Hours	Trav/Contract Hours	Overtime Hours	Budget Overtime Hours	Var OT Hours-Budget OT	Overtime \$	Budget Overtime \$	Var OT \$-Budget OT \$
AW PICU	0.00 CUM															
0600 1400	0.00 AVG															
HN		184.00		176.00	8.00	95.65%	0.00	0.00	0.00	0.00				\$0.00		
CN		248.00		240.00	8.00	96.77%	0.00	0.00	0.00	8.00				\$0.00		
SN		1,440.00		1,680.00	-240.00	116.67%	64.00	0.00	0.00	24.00				\$0.00		
WC		152.00		176.00	-24.00	115.79%	0.00	0.00	0.00	0.00				\$0.00		
NA		240.00		240.00		100.00%	120.00	0.00	0.00	0.00				\$0.00		
Default		49.00		0.00	49.00	0.00%	0.00	0.00	0.00	112.00				\$0.00		
Subtotal	0.00 CUM	2,759.00	0.00	2,512.00	2,759.00	91.05%	184.00	0.00	0.00	144.00	0.00	144.00	\$0.00	\$0.00	\$0.00	\$0.00
1400 2200	0.00 AVG															
CN		248.00		240.00	8.00	96.77%	0.00	0.00	0.00	8.00				\$0.00		
SN		1,312.00		1,680.00	-368.00	128.05%	56.00	0.00	0.00	24.00				\$0.00		
NA		216.00		240.00	-24.00	111.11%	56.00	0.00	0.00	8.00				\$0.00		
Subtotal	0.00 CUM	1,776.00	0.00	2,160.00	1,776.00	-384.00	121.62%	112.00	0.00	0.00	40.00	0.00	40.00	\$0.00	\$0.00	\$0.00
2200 0600	0.00 AVG															
CN		248.00		240.00	8.00	96.77%	0.00	0.00	0.00	8.00				\$0.00		
SN		1,216.00		1,680.00	-464.00	138.16%	48.00	0.00	0.00	56.00				\$0.00		
NA		208.00		240.00	-32.00	115.38%	104.00	0.00	0.00	8.00				\$0.00		
Subtotal	0.00 CUM	1,672.00	0.00	2,160.00	1,672.00	-488.00	129.19%	152.00	0.00	0.00	72.00	0.00	72.00	\$0.00	\$0.00	\$0.00
Total	Daily AVG	6,207.00	7,200.00	6,832.00	-993.00	-625.00	110.07%	448.00	0.00	0.00	256.00	0.00	256.00	\$0.00	\$0.00	\$0.00

Reports: Staff Manager Reports

Statistical: Assignment Data By Employee

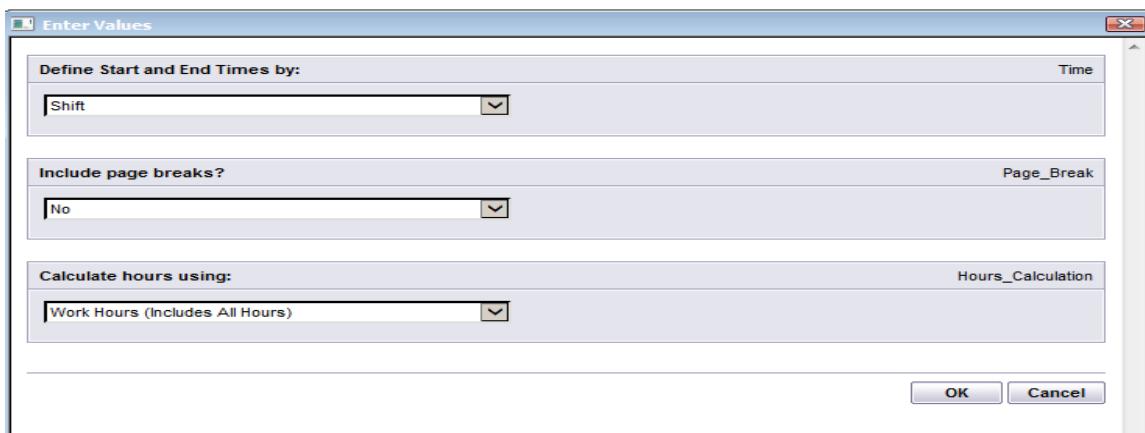
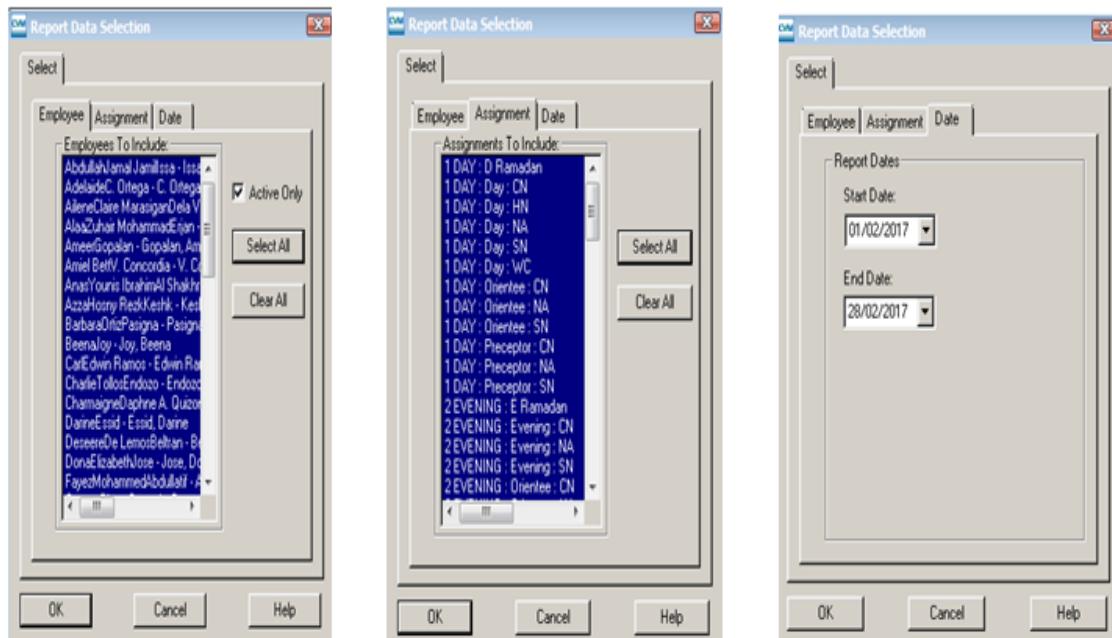
This report displays (by assignment) the cumulative number of points, task, and work hours (listed by employee) during a defined period. The report parameters allow users to limit the assignments and employees displayed.

To run the report:

- On the **Reports** menu, point to **Statistical** and click **Assignment List by Employee**. This opens a report data selection dialog box.

2. On the **Select** tab, set report parameters. Available parameters include employees, assignments, and start/end dates. To run the report for active employees only, select the **Active Only** check box.
3. Click **OK**. This opens a dialog box that allows the user to choose how to display the date, by shift or coverage.
4. Choose **Yes** or **No**.
5. Click **OK** to execute the report.

- Select all the employee, assignment and set the date range.



Assignment Statistical List by Employee
01/02/2017 to 28/02/2017
AW 5S Surg

CVM™

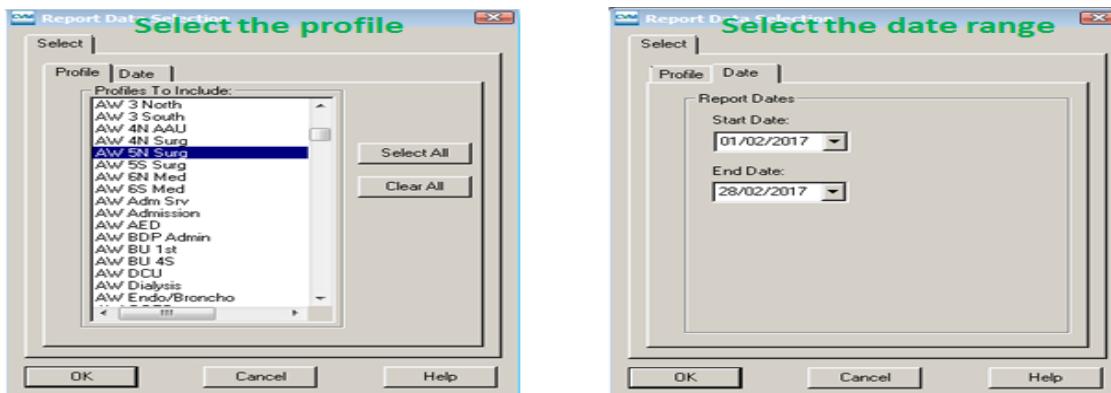
Employee	Assignment	Abbreviation	Points	Count	Work Hours
Abdullahif, Fayed M	1 DAY	D NA	17.000	17	136.00
	3 NIGHT	N NA	3.000	3	24.00
	DUTY OFF	/	7.000	7	56.00
	LEAVE	SWFP	1.000	1	8.00
	Totals:		28.000	28	224.00
Ahmed, Mohammed M	1 DAY	D NA	9.000	9	72.00
	2 EVENING	E NA	6.000	6	48.00
	3 NIGHT	N NA	5.000	5	40.00
	DUTY OFF	/	8.000	8	64.00
	Totals:		28.000	28	224.00
Al Mamun, Sahadat H	1 DAY	D NA	7.000	7	56.00
	2 EVENING	E NA	2.000	2	16.00
	3 NIGHT	N NA	5.000	5	40.00
	DUTY OFF	/	5.000	5	40.00
	LEAVE	AL	8.000	8	64.00
	TIME BACK	TIME BACK	1.000	1	8.00
	Totals:		28.000	28	217.00
Al Meet, Reahma A	DUTY OFF	/	2.000	2	16.00
	LEAVE	AL	24.000	24	192.00
	LEAVE	SWFP	2.000	2	16.00
	Totals:		28.000	28	224.00

Float: Float in

This report allows managers to view all employees that have floated into their department during a defined period. Managers can view employees, employees' home units, and assignments worked within the department, with all data summarized and totaled at the end of the report.

To run the report:

1. On the **Reports** menu, point to **Float** and click **Float In**. This opens a report data selection dialog box.
2. On the **Select** tab, set report parameters. Available parameters include profile and start/end dates.
3. Click **OK**. This opens a dialog box that allows the user to choose whether to include **Assignment Notes**.
4. Choose **Yes** or **No**.
5. Click **OK** to run the report.



Float In Report
01/02/2017 to 28/02/2017
AW 5N Surg

CVM™

Date	Employee	Skill	Employee Primary Profile	Task	Start	End	Hours
27/2	Mark A. Gaya, Ian	SN	AW 4N Surg	D SN	600am	200pm	8.00
	P. Mervin, Mayeth	SN	AW 4N Surg	D SN	600am	200pm	8.00
	Abaya, Ma. Juela	SN	AW 4N Surg	D SN	600am	200pm	8.00
	Al Musallam, Redab A.	SN	AW 4N Surg	Or D SN	600am	200pm	8.00
	Hourani, Arwa	SN	AW 4N Surg	Or D SN	600am	200pm	8.00
	H. Mendoza, Maria Therese	SN	AW 4N Surg	E SN	200pm	1000pm	8.00
	Xailes S. Mario, Marius	SN	AW 4N Surg	N SN	1000pm	200am	8.00
	Y R/O, Ariana	SN	AW 4N Surg	N SN	1000pm	200am	8.00
	Wilson, Shincy Mary	SN	AW 4N Surg	/	600am	200pm	8.00
	Celeste, Joannie L.	SN	AW Admission	/	600am	200pm	8.00
	Cabais, Bryan J.	SN	AW 4N Surg	AL	600am	200pm	8.00
28/2	Wilson, Shincy Mary	SN	AW 4N Surg	Or D SN	600am	200pm	8.00
	Al Musallam, Redab A.	SN	AW 4N Surg	Or D SN	600am	200pm	8.00
	Hourani, Arwa	SN	AW 4N Surg	Or D SN	600am	200pm	8.00
	Carino, Mark Augustus C.	SN	AW 4N Surg	E SN	200pm	1000pm	8.00
	Abaya, Ma. Juela	SN	AW 4N Surg	/	600am	200pm	8.00
	Celeste, Joannie L.	SN	AW Admission	/	600am	200pm	8.00
	Cabais, Bryan J.	SN	AW 4N Surg	AL	600am	200pm	8.00
	Xailes S. Mario, Marius	SN	AW 4N Surg	SWFP	600am	200pm	8.00

AW 5S Surg 15.00
 AW Admission 32.00
 AW 4N Surg 1,672.00
1,720.00

Hours Worked (01/02/2017 to 28/02/2017)

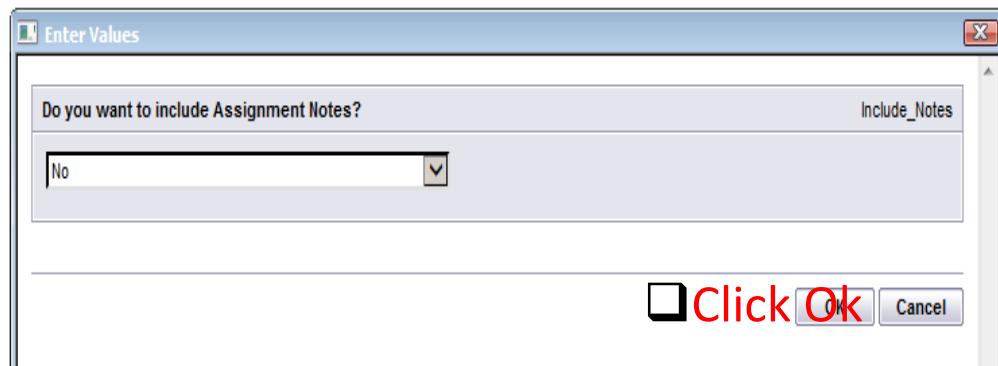
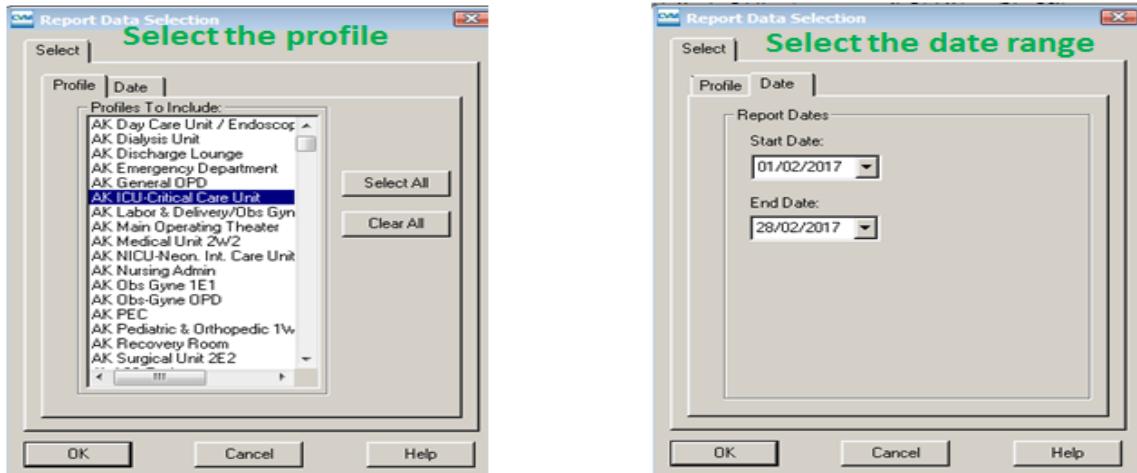
Float: Float out

This report allows managers to view all employees that have floated out of their department during a defined period. Managers can view employees, departments floated into, and the assignments worked in those departments, with all data summarized and totaled at the end of the report.

To run the report:

1. On the **Reports** menu, point to **Float** and click **Float Out**. This opens a report data selection dialog box.
2. On the **Select** tab, set report parameters. Available parameters include profile and start/end dates.
3. Click **OK**. This opens a dialog box that allows the user to choose whether to include **Assignment Notes**.

4. Choose Yes or No.
5. Click OK to run the report.



Float Out Report
01/12/2016 to 31/12/2016
AK ICU-Critical Care Unit



Date	Employee	Skill	Profile Floated To	Task	Start	End	Hours
05/12	Mahammad, Kais	NA	AK PEC	E NA	200pm	1000pm	8.00
10/12	Mahammad, Kais	NA	AK PEC	E NA	200pm	1000pm	8.00
12/12	Ahmed, Reda A	NA	AK PEC	E NA	200pm	1000pm	8.00
13/12	Ahmed, Reda A	NA	AK PEC	E NA	200pm	1000pm	8.00
14/12	Renjith, Bincy	SN	AK Medical Unit 2W2	D SN	600am	200pm	8.00
16/12	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00
17/12	Cherian, Aleyamma	SN	AK Medical Unit 2W2	E SN	200pm	1000pm	8.00
	Cherian, Aleyamma	SN	AK Medical Unit 2W2	EOT SN	600pm	1000pm	4.00
	Datu, Blanca A	SN	AK Medical Unit 2W2	N SN	1000pm	600am	8.00
	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00
18/12	Castro, Beverly M	SN	AK Medical Unit 2W2	D SN	600am	200pm	8.00
	Nalica, Cora D	SN	AK Medical Unit 2W2	E SN	200pm	1000pm	8.00
	Garrido, Mary G	SN	AK Medical Unit 2W2	N SN	1000pm	600am	8.00
19/12	Fernandez, Reynante A	SN	AK Medical Unit 2W2	D SN	600am	200pm	8.00
	Mahammad, Kais	NA	AK PEC	E NA	200pm	1000pm	8.00
23/12	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00
24/12	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00
30/12	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00
31/12	Mahammad, Kais	NA	AK PEC	D NA	200pm	1000pm	8.00

AK Medical Unit 2W2	60.00
AK PEC	88.00
<hr/>	
Hours Worked (01/12/2016 to 31/12/2016)	148.00

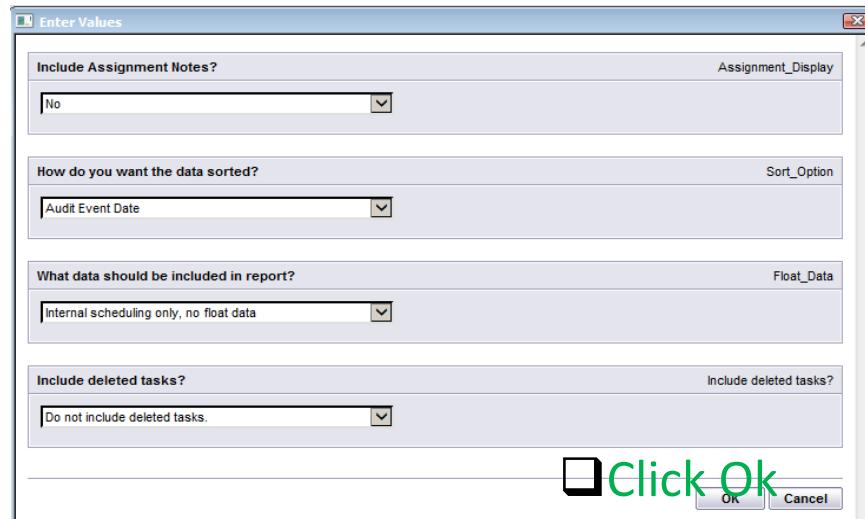
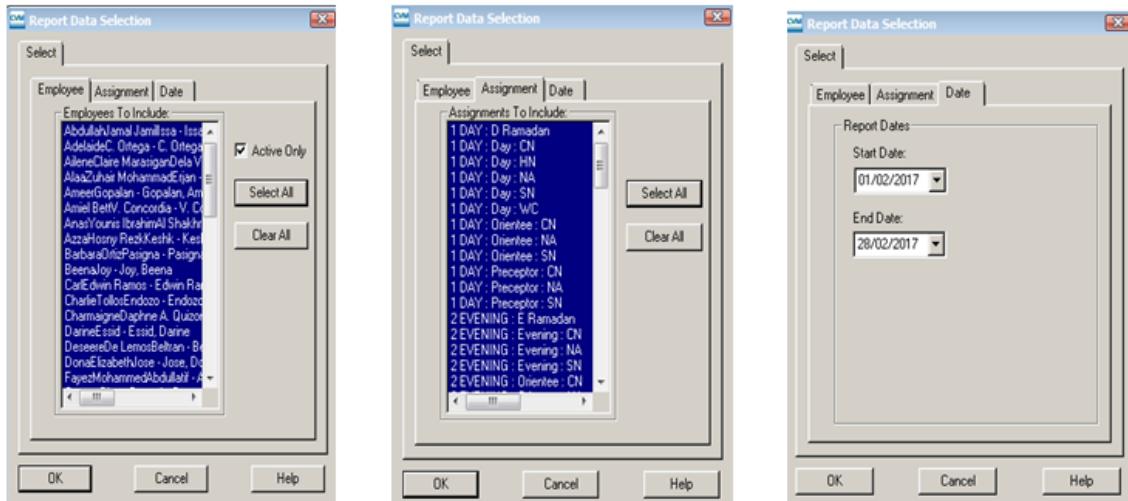
Administrative Schedule Data Audit

This report displays employee schedule information. Users can choose whether to include notes and the display order for the report.

To run the report:

- On the **Reports** menu, point to **Administrative** and click **Schedule Data Audit**. This opens a report data selection dialog box.
- On the **Select** tab, set report parameters. Available parameters include:
 - Employees.** To run the report for active employees only, select the **Active Only** check box.
 - Assignments**
 - Start** and **End** dates. These are the assigned (scheduled) dates.
- Click **OK**. This opens a dialog box that allows users to include assignment notes, how to sort data, and what data should be included in the report.
- Choose the appropriate options.
 - Include Assignment Notes** (Yes, No)
 - How do you want the data sorted?** (Audit Event Date or Assignment Date)
 - What data should be included in report?** (Internal scheduling and float in data, Internal scheduling only, no float data, internal scheduling and float-out data, All scheduling data, including float-in and float-out)
 - Include Deleted Task?** (Do not include deleted task, Include tasks deleted from the system, Include data for deleted task only, Do not include deleted tasks)

- Select the entire employee, assignment and the date range.



Schedule Data Audit Report

01/12/2016 to 31/12/2016

AW 5S Surg

CVM™

Internal scheduling only, no float data

Event Date User	Event Action/ Fill Type	Assign Date	Employee Name/ Abbreviation	Task Abbr	Start Time	End Time	Cov Start	Cov End	Pay Code
16/09/2016 8:37:17AM Erjan, Alaa/HMCQACLVCT X103	INSERT Manual Edit	01/12/2016	Erjan, Alaa Z AlaaZuhair MohammadErj	AL	600	1400	600	1400	
16/09/2016 8:37:17AM Erjan, Alaa/HMCQACLVCT X103	INSERT Manual Edit	02/12/2016	Erjan, Alaa Z AlaaZuhair MohammadErj	AL	600	1400	600	1400	
16/09/2016 8:37:17AM Erjan, Alaa/HMCQACLVCT X103	INSERT Manual Edit	03/12/2016	Erjan, Alaa Z AlaaZuhair MohammadErj	AL	600	1400	600	1400	
20/09/2016 12:16:17PM Sarahan, Mohammad/HMCQAC LVCCTX101	INSERT Pattern	02/12/2016	C. Ortega, Adelaide AdelaideC. Ortega	/	600	1400	600	1400	
20/09/2016 12:16:17PM Sarahan, Mohammad/HMCQAC LVCCTX101	INSERT Pattern	01/12/2016	Dela Vega, Ailene C AileneClaire MarasiganDe'	/	600	1400	600	1400	
20/09/2016 12:16:17PM Sarahan, Mohammad/HMCQAC LVCCTX101	INSERT Pattern	02/12/2016	V. Concordia, Amiel Bett Amiel BettV. Concordia	/	600	1400	600	1400	
20/09/2016 12:16:17PM Sarahan, Mohammad/HMCQAC LVCCTX101	INSERT Pattern	01/12/2016	Al Shakhriti, Anas Y AnasYounis IbrahimAl Sh:	/	600	1400	600	1400	
20/09/2016 12:16:17PM Sarahan, Mohammad/HMCQAC LVCCTX101	INSERT Pattern	01/12/2016	Keshk, Azza H AzzaHosny RezkKeshk	/	600	1400	600	1400	

Administrative: Shift Swap Audit Report

This report displays employee-initiated swap information.

Running the Shift Swap Audit Report

1. On the Reports menu, point to Administrative and click Shift Swap Audit. This opens a report data selection dialog box.
2. On the Select tab, set report parameters. Available parameters include profiles and start/end dates.
3. Click OK. This opens a dialog box that allows the user to choose whether to sort by Audit Event Date or by Shift Swap Occurrence.
4. Choose the appropriate option.
5. Click OK to run the report.

Note: Choosing **Audit Event Date** will sort the data by the date an edit was made to a swap, whereas choosing **Shift Swap Occurrence** will group all transactions related to a swap together followed by a sort by audit event date.



Shift Swap Audit Report

01/04/2017 to 30/04/2017

AW 6NMed

Event Date	Event Action/ Type	Invitor Name	Task Abbr / Schedule Date	Invitee Name	Task Abbr / Schedule Date	Profile	Status	Manager's Name
28/03/2017 3:46:53	INSERT Invitation	Thomas, Manju	E SN 03/04/2017	Tharol, Premalatha N	E SN 03/04/2017	AW 6N Med	Pending	Tinu, Smitha
28/03/2017 3:46:53	Adding Request	Thomas, Manju	D SN Request		E SN 03/04/2017	AW 6N Med	New	Tinu, Smitha
28/03/2017 3:46:53	Employee(s) Invited	Thomas, Manju	D SN Request		E SN 03/04/2017	AW 6N Med	Pending	Tinu, Smitha
28/03/2017 3:49:14	INSERT Invitation	Thomas, Manju	E SN 02/04/2017	Tharol, Premalatha N	E SN 02/04/2017	AW 6N Med	Pending	
28/03/2017 3:49:14	Adding Request	Thomas, Manju	D SN Request		E SN 02/04/2017	AW 6N Med	New	
28/03/2017 3:49:14	Employee(s) Invited	Thomas, Manju	D SN Request		E SN 02/04/2017	AW 6N Med	Pending	
29/03/2017 6:34:17	Invitation Accepted	Thomas, Manju	E SN Invitation	Tharol, Premalatha N	E SN 03/04/2017	AW 6N Med	Pending Manager Approval	Tinu, Smitha
29/03/2017 6:34:17	Request Accepted	Thomas, Manju	D SN Request		E SN 03/04/2017	AW 6N Med	Pending Manager Approval	Tinu, Smitha
29/03/2017 14:03:27	Invitation Cancelled	Thomas, Manju	E SN Invitation	Tharol, Premalatha N	E SN 03/04/2017	AW 6N Med	Cancelled	Tinu, Smitha
29/03/2017 14:03:27	Invitation Approved	Thomas, Manju	E SN Invitation	Tharol, Premalatha N	E SN 03/04/2017	AW 6N Med	Approved	Tinu, Smitha
29/03/2017 14:03:27	Request Approved	Thomas, Manju	D SN Request		E SN 03/04/2017	AW 6N Med	Approved	Tinu, Smitha