

# ClairVia Online Quick Reference with Shift Opportunities

## Logging in to ClairVia Online

Open Internet Explorer. Go to Knowledge Link and choose Clinical Portal in the upper right corner. Choose Clairvia Scheduling from the list. Enter your **User Name** and **Password**. Click **Login to Clairvia Online**.

If your password does not work, check to be sure you can access your email. If you cannot, call the Help Desk (4-5334) to have your password reset. If you can access your email, but not Clairvia, email R Clairvia Support to log your issue. Clairvia Support **cannot** change passwords.

User name:

Password:

## Employee Home Page Menu Options

- [Home](#)
- [Schedule](#)
- [Tools](#)
- [Help](#)

- Home:** View current month's schedule, upcoming expirations, request status, opportunities, pending shift swaps, messages, and administrative notes.
- Schedule:** View your or your unit's monthly, weekly and daily schedule, sign up for opportunities or request to swap shifts with coworkers.  
Submit your work and time off requests.
- Tools:** Send and read messages in using Message page.  
Find colleagues on scheduled work dates using locator
- Help:** Provides online help menu for each feature.

## Employee Schedule View

December 2007						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1 Scheduled Off
2 Scheduled Off	3	4	5 7p-11p RN	6 11p-7a RN	7 0700 - 1930 RN	8 0700-1500 RN
9 0700-1500 RN	10	11	12 0700 - 1930 RN	13 7p-11p RN	14 11p-7a RN	15
16 3p-11p Charge	17 11p-7a RN	18	19 7p-11p RN	20 11p-7a RN	21 0700-1500 RN	22
23 0700-1500 RN	24	25	26 11p-7a RN	27 11p-7a RN	28 7p-11p RN	29 Scheduled Off
30	31					

## Competency Expirations

Employees and Schedulers can view upcoming competency expirations in the Competency Expiration section of the home page. Expired competencies have a red bullet point; pending expiration dates have a yellow bullet point.

4 Competency Expirations in the next 120 days				
Profile	Name	ID	Competency	Date
	6N Med Sur	GMiller	ACLS	02/28/2007
	6N Med Sur	GMiller	BCLS	01/31/2007
	6N Med Sur	GMiller	Nursing License	03/31/2007

## Message Center

Users can view the Administrative Note and any pending messages in the Message Center in the lower right corner of the home page.

**Message Center**

**Admin Note** Employee evaluations are due on the first of the month. Please make sure you have submitted to HR.

To read a message, click on the **Subject** link.

From	Subject	Date
Cornett, Patricia	<a href="#">trade</a>	2/16/2007

From: Cornett, Patricia  
 Date: 2/16/2007 3:48:00 PM  
 Subject: trade  
 Can you trade with me on Friday 2-23?

To send a message, go to the **[Messages]** link. Click on the white **Send a Message** link. Select the **Recipient Option** to send to someone in your unit/cost center (Show only users in the current Profile) or to someone elsewhere in your organization (Show all users in the Database).

Recipient Options:

Recipients:

Type a subject in the **Subject** field and your note in the **Text** field.

Subject:

Text:

When finished, click **[Send Message]** to send the message.

## Employee Locator

Use the **Tools | Locator** menu option to learn if an employee is scheduled on a certain day. Enter the Employee's name and Date. Click the **Search** button. If the employee is scheduled, their information will appear.

Employee

Date

Employee	Skill	Assnmt	Task	Start	End
Miller, Greg	RN	Day	7a-3p	700	1500

## Unit Schedule

To see the posted schedule for your unit, click on **Schedule | My Schedule** from the menu bar and deselect the **Show Only My Schedule** check box

Weekly Schedule

Task View [List View](#) [Employee View](#)

Show Opportunities  Show Shift Swaps  Show Only

<< 12/9/2007 >> Right

Task	Skill	Sun 12/9/07	Mon 12/10/07	Tue 12/11/07	Wed 12/12/07	Thu 12/13/07
7a-3p SUP 0700 - 1930 RN	RN		KAm-RN AJainford-RN	CLawson-RN DMarshall-RN	BHiggins-RN CMiller-RN	RKline-RN KQueen-RN
0700-1500 RN	RN		JWhite-RN	AZimmer-RN	AZimmer-RN	JWhite-RN
11a-3p RN	RN					
3p-11p	RN	RKline-RN LRichardson-NA	RWeber-RN MEntz-NA SHuyen-NA	CSmith-RN MEntz-NA JStater-NA	CSmith-RN SHuyen-NA JStater-NA	CSmith-RN CCambell-NA LRichardson-NA
7a-3p NA	NA					

Use the **Date Picker** menu to switch the week in view.

<<< [12/9/2007](#) >>>

## Submitting Requests

When you log in to ClairVia Online, you will see the **My Requests** menu on the right side of your screen. If you have submitted a request, you will be able to see the status of the request in the menu.

Date	Request	Status
3/16/2007	<a href="#">Assign to Off</a>	Pending
3/11/2007	<a href="#">Assign to V</a>	Approved

To submit a request, click **[Requests]** on the Navigator Bar.

<<< 03/14/2007 >>>

Show Needs

Add Note to Scheduler:

Task	Skill	Wed 3/14/07	Thu 3/15/07	Fri 3/16/07	Sat 3/17/07	Sun 3/18/07
7a-3p	RN	Hearn Hot	Hearn Hot	Hearn Hot	Hot Leonard Batis	Abramczak Agnew Janzen-RN
			Hot Request		Bekic Request	Hot Request
					Leonard Request	
V		Cornett	Cornett			
			Cornett Request			

Use the date picker or the arrow buttons on the left hand side of the screen to change the date. Use the scroll bar to the right of the calendar and scroll down to find the appropriate task.

**[Right click]** on the task and choose **[Request]**

If requesting consecutive days, hold the **CTRL** key and **[Right Click]** on multiple days. To submit the requests, click **[Save Changes]** in the top right corner of the screen. Your request will display in blue.

If you would like to send your scheduler a note, click on the request to outline it in yellow. Click the **Add Note to Scheduler** field above the dates and type in your note. When complete, click **[Save Changes]**.

When you log into ClairVia Online, the status of your request will be displayed in the **My Requests** menu on the right side of your screen as **Approved**, **Denied**, or **Pending**. On the **Requests** link, the colors will also reflect the request status:

**Approved = Green**    **Denied = Red**    **Pending = Blue**

### Logging out of ClairVia Online

Look in the Navigation Toolbar and click **Logout**. If you log out by mistake, click the **login page** link to return to ClairVia Online.

[Logout](#)

### Shift Opportunities

You can view available Shift Opportunities by clicking on **Schedule | My Schedule | Weekly View** from the menu bar. The *Show Opportunities* check box must be marked for the opportunities to be visible.

Opportunities			
Profile/Service	Skill	Date	Task
6N Med Surg	RN	12/24	<a href="#">0700 - 1930 RN</a>
6N Med Surg	RN	12/25	<a href="#">0700 - 1930 RN</a>

Click on the Opportunity link in the list or the schedule grid to open the View/Select Opportunities dialog.

Task	Skill	Sun 12/23/07	Mon 12/24/07	Tue 12/25/07
7a-3p SUP	MGR			
0700 - 1930 RN	RN		<a href="#">CRegister-RN Oppty</a>	<a href="#">PLawson-RN Oppty</a>
0700-1500		<a href="#">BHiggins-RN JJaderborg-</a>	<a href="#">JWhite-RN</a>	<a href="#">JWhite-RN</a>

Review the information in the View/Select Opportunities dialog. Select one of the buttons at the bottom of the window.

- **[Close]** closes the window without making taking action.
- The action button applies to the type of opportunity. The button will read **[Schedule Me]** or **[Consider Me]**.
- **[Remove From List]** deletes the opportunity from the employee list for consideration.

When selecting **Schedule Me** shift opportunities, the employee will automatically be added to the schedule. The shift will be removed from the list of available opportunities for all other eligible employees.

When selecting **Consider Me** shift opportunities, the employee will be added to a list for manager review. Once the shift opportunity is approved by the manager or scheduler, it will be removed from the list of available opportunities. The employee awarded the shift opportunity will receive an e-mail advising of their new schedule and will be added to the shift on the schedule page.

### Help Menu

For additional needs, click on **Help** in the menu bar.  
Revised 8/11



## Quick Reference Guide For Employees with Shift Opportunities

- Improve Healthcare Quality
- Advance Patient Safety Initiatives
- Increase Patient Throughput And Satisfaction
- Enhance Efficiency And Profitability
- Better Manage Workload Variability
- Support Staff Satisfaction And Retention

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