

Adding Companion Requests Using the Schedule Planner

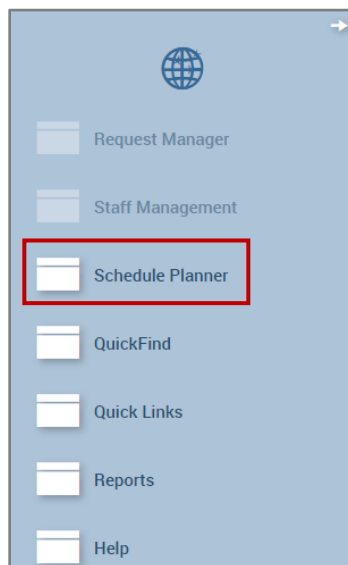
Purpose: To demonstrate how to enter companion requests using the Schedule Planner. As a Charge Nurse/Shift Manager, the Schedule Planner is located in the Related Items Pane. As a Scheduler, who also serves as a Charge Nurse/Shift Manager, the Schedule Planner will be on the right hand side after logging in.

Single Companion Request

- To access the *Schedule Planner*, open the *Related Items Pane* by clicking on the arrow



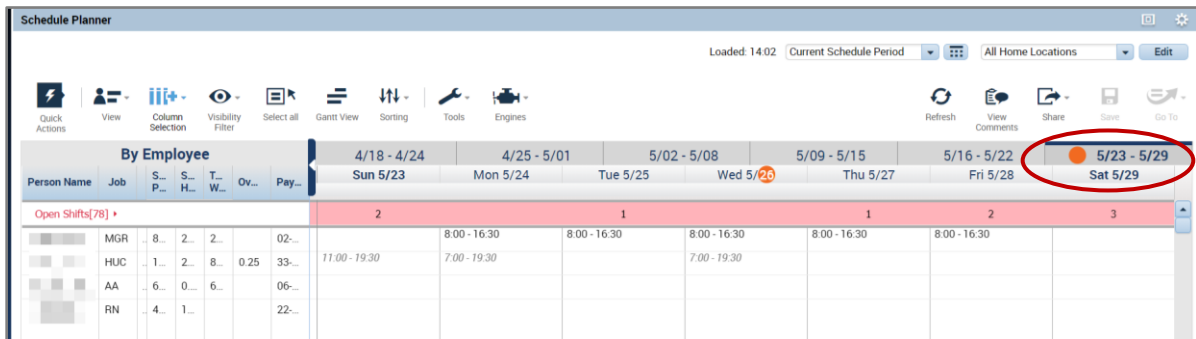
- Click Schedule Planner



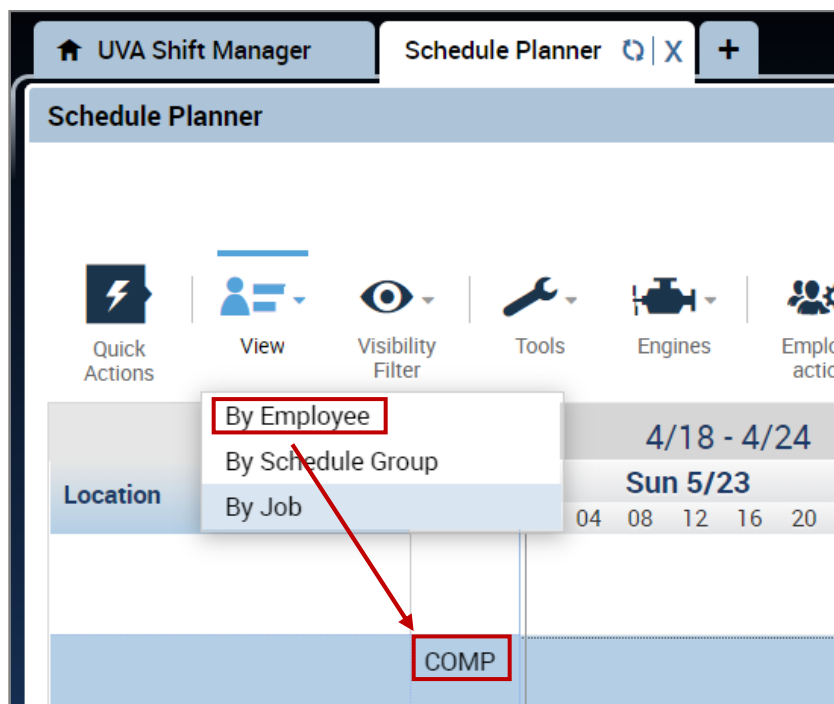
- Maximize the Schedule Planner



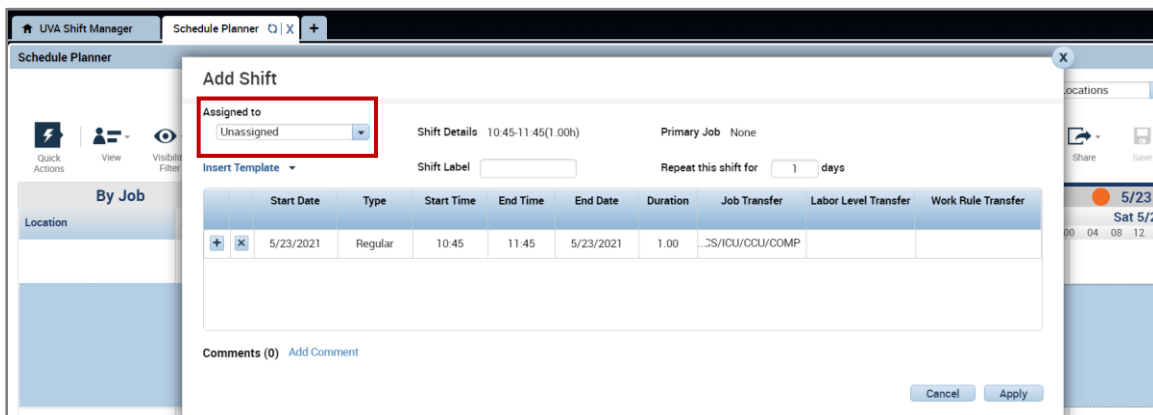
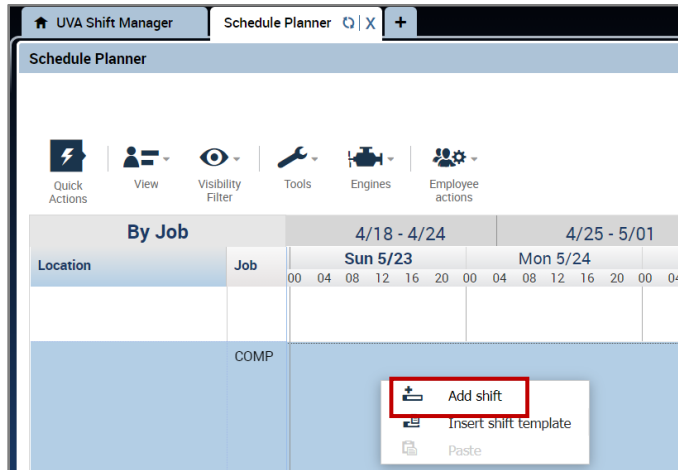
- Click the maximize icon to enlarge the schedule planner
 - To return it to normal click the icon again



- Select the week to view by clicking the date ribbon or select a specific date range
- Sort the schedule *By Job* and scroll down to the *Companion* job



- Right Click and select *Add shift*



- The *Add Shift* template opens
 - The shift is *Unassigned*
 - The *Shift Details* will change to the *Start Time* and *End Time* for the shift
 - The *Job Transfer* fills in for the department and companion role
 - In this case, the department is CCU and the job is Companion
 - *Add Comment* will be used to enter the required information to fill the shift
 - Once all details are entered, select *Apply*



Add Shift

Assigned to: Shift Details: 10:45-11:45(1.00h) Primary Job: None

Insert Template: Shift Label: Repeat this shift for: days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer
<input type="checkbox"/>	5/23/2021	Regular	19:00	23:00	5/23/2021	4.00	...S/ICU/CCU/COMP	

- Shift Details (example):
 - Start Time – 1900
 - End Time – 2300
 - Note: If the end time occurs the following day, the end date will automatically update
- Click Add Comment
- Select Companion Request from the dropdown list.
 - Add details
 - Do not identify the patient by name or use any non-compliant HIPAA information
 - Follow the policy to complete the information needed for a *Companion* to be assigned for the patient

Add Shift

Assigned to: Shift Details: 19:00-23:00(4.00h) Primary Job: None

Insert Template: Shift Label: Repeat this shift for: days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="checkbox"/>	5/23/2021	Regular	19:00	23:00	5/23/2021	4.00	...S/ICU/CCU/COMP		

Comments (1) [Add Comment](#)

Companion Request

Room 9091 - pulling at lines and tubes - Combative - S1 - Priority 1

[Add another note](#)

- Select Add to attach the comment to the request



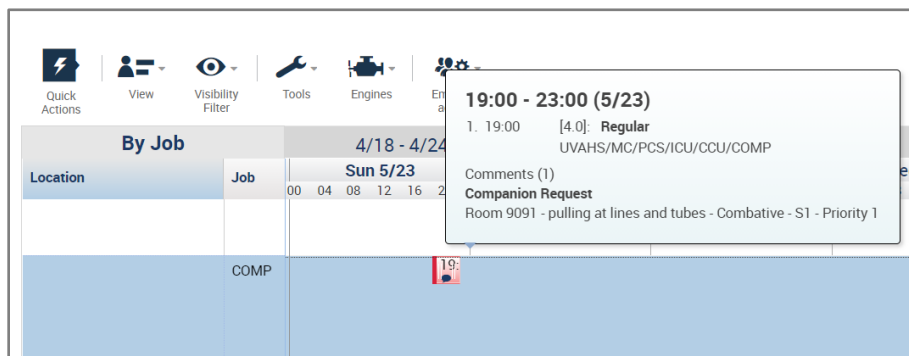
Comments (1) [Add Comment](#)

- ✕ Companion Request
- ✕ Room 9091 - pulling at lines and tubes - Combative - S1 - Priority 1

[Add another note](#)

[Cancel](#) [Apply](#)

- Click *Apply* to add the request to the schedule
 - Hovering on the chat bubble will display the shift details



- Click *Save*



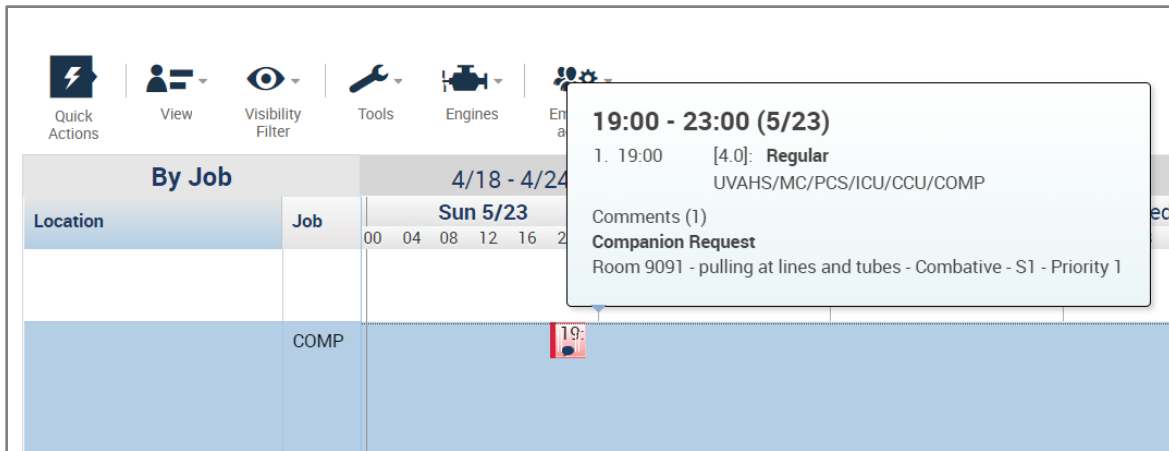
- Once the *Companion Request* is saved, the *Save* icon turns gray and becomes inactive
- If a companion is needed for more than 4 hours, a new companion request will need to be added
 - Enter a new request every 4 hours a *Companion* is needed

Adding Multiple Companion Requests

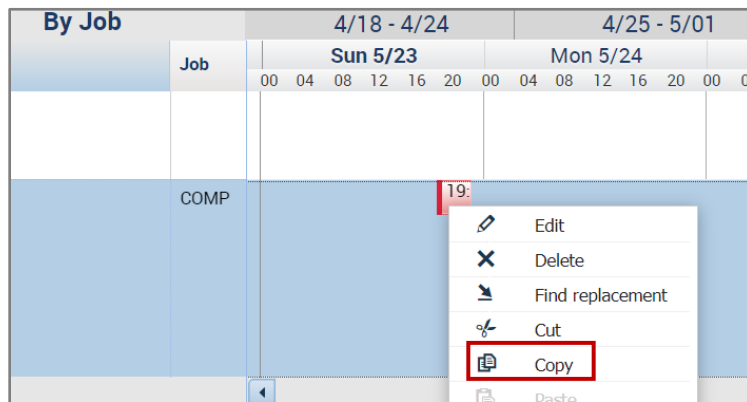
Note: A new request is needed for every 4 hours a companion is needed.

- View a previous *Companion request*. For this example, the request is for Room 9091 for the timeframe 1900 through 2300

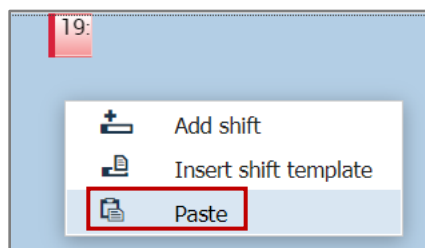
- If none of details have changed and a companion will be needed for the time frame 2300 through 0300 and 0300 through 0700. The initial companion request and be copied.
- Below are the details that explains how to copy a companion request.



- Right click on the *Companion Request*
- Select *Copy*

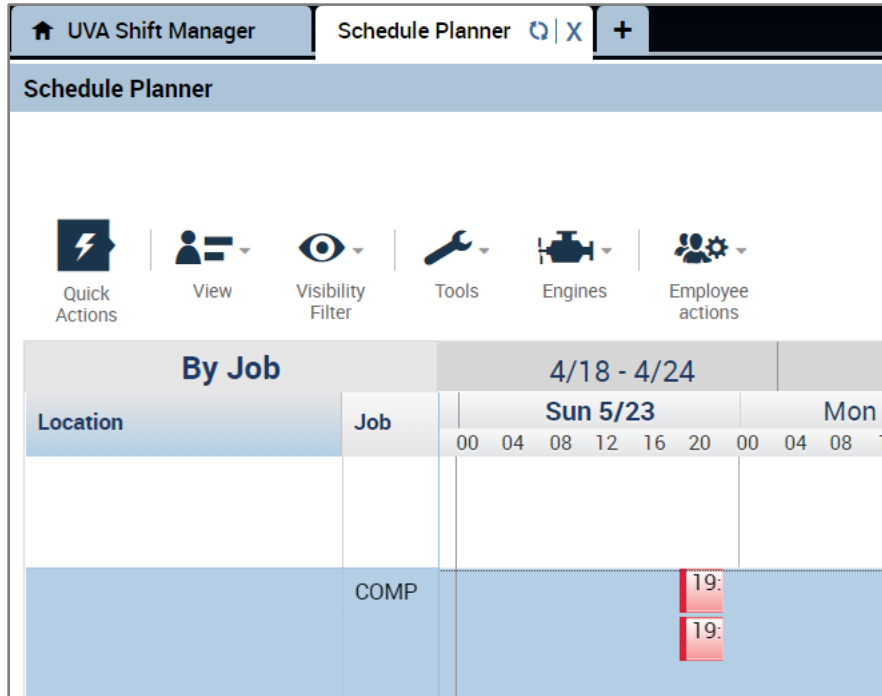


- Right Click and select *Paste*

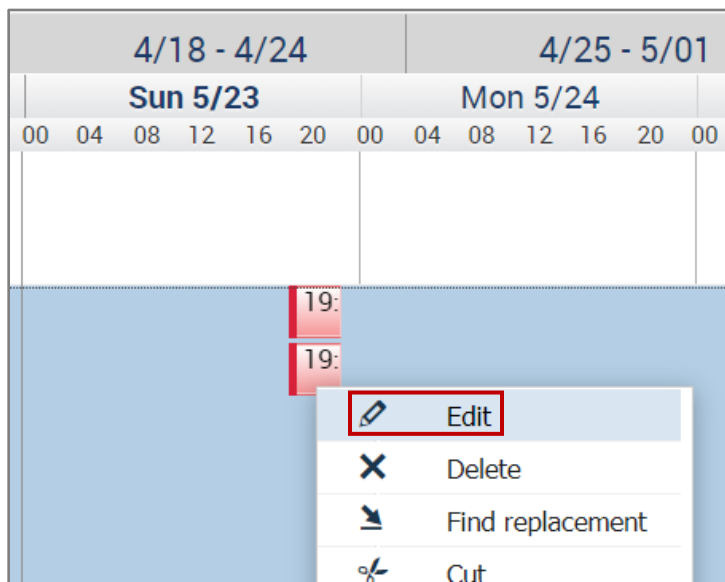




- Two *Companion Requests* exist for the same patient for the same timeframe



- Right Click on the shift and select *Edit*





- Change the *Start Time* to (2300) and *End Time* to (0300)

Edit Shift

Assigned to: Unassigned | Shift Details: 19:00-23:00(4.00h) | Primary Job: None

Insert Template: ▼ | Shift Label: | Repeat this shift for: days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="checkbox"/>	5/23/2021	Regular	23:00	3:00	5/24/2021	4.00	...S/ICU/CCU/COMP		

Comments (1) [Add Comment](#)

- Companion Request
- Room 9901 - Pulling at lines and tubes - Combative - S1 - Priority 1

[Add another note](#)

- The comments for the shift remains
- Repeat the process for the same patient to enter additional companion request if applicable
- Ensure the *Start Times*, *End Times*, *Start Dates*, *End Dates* for the shifts are correct
- The comments can be edited if necessary
- Remember to select *Apply* to add the changes to the shift
- Click *Save* to save the request

UVA Shift Manager | Schedule Planner

Quick Actions | View | Visibility Filter | Tools | Engines | Employee actions

By Job		4/18 - 4/24					4/25 - 5/01									
Location	Job	Sun 5/23					Mon 5/24					Tu				
		00	04	08	12	16	20	00	04	08	12	16	20	00	04	08
	COMP															



Additional Questions?

- Call the Help Desk at 434-924-5334
OR
- Go to KNOWLEDGELINK and enter a ticket online



See job aid located on the *Kronos Welcome Page* titled:
Submit a Help Desk Ticket On-line