

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

Rev. 6.01.21







o Click the maximize icon to enlarge the schedule planner

• To return it to normal click the icon again

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- 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

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• Right Click and select Add shift

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- 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
 - o Once all details are entered, select Apply

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- Shift Details (example):
 - o Start Time 1900
 - o 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

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• Select Add to attach the comment to the request



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	Add another note	
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- Click Apply to add the request to the schedule
 - o Hovering on the chat bubble will display the shift details

Quick Actions	View	Visibility Filter	Image: Second	
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• 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.

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 \circ $\;$ 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

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- 1 -	Add shift	
<u>_</u>	Insert shift template	
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Two Companion Requests exist for the same patient for the same timeframe 1 UVA Shift Manager Schedule Planner 🖏 🗙 🕂

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Right Click on the shift and select Edit •

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• Change the Start Time to (2300) and End Time to (0300)

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- 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

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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