

## Staff Assignment & Assignment List

This reference guide will provide information for the following roles:

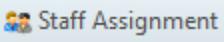
- Person in charge of creating assignments for staff
- Person who needs to update assignments for staff
- Clinician who needs to view his or her individual assignment



**NOTE:** A manual process of allocating staff to patients may also still exist outside the Clinical Information System (CIS).

If you are someone who is designated with the responsibility of making staff assignments, use the steps below to create a Staff Assignment for your unit or care area.

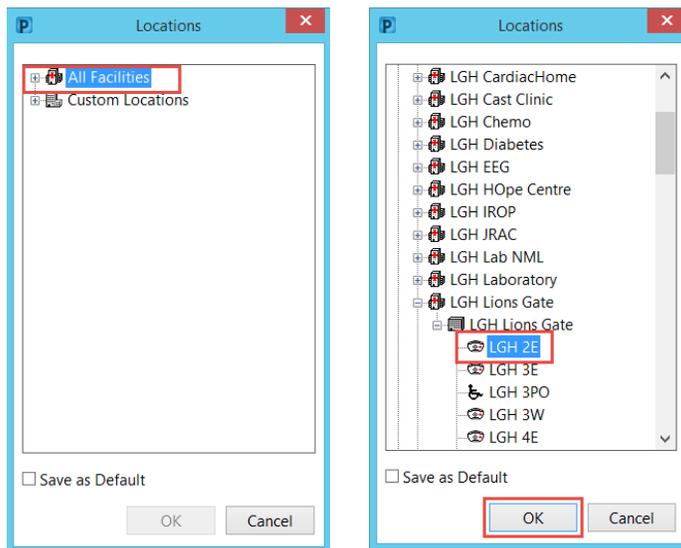
### Access Staff Assignment

1. Select **Staff Assignment**  from the Toolbar.

If this is your first time using Staff Assignment, you will see an **Available Shifts** window display.

2. Confirm the displayed date is correct or adjust if needed.
3. Select the shift you will be making assignments for (ex. 12 Hour Day Shift, 12 Hour Night Shift). Click **OK**, and a **Locations** window display.
4. Select the **plus sign** next to **All Facilities** from the Locations box.
5. Clicking on the **plus sign** next to the facility then select your specific unit. Click **OK**.

In the example below, 2E at Lions Gate hospital is the unit being chosen.



6. Confirm your assignment type is set up for your discipline (ex. Nursing) and your unit and shift are correct.



**NOTE:** When you access Staff Assignment from now on, you will not see the same windows pop up. The screen will default to the last location you set up on Staff Assignment. To modify the shift or location, right click anywhere on the grey bar and select the desired option from the menu that appears.

## Add Care Providers

1. Select the **yellow scroll**  from the row of icons in the top left corner of the Staff Assignment screen to add clinicians to the assignment list.

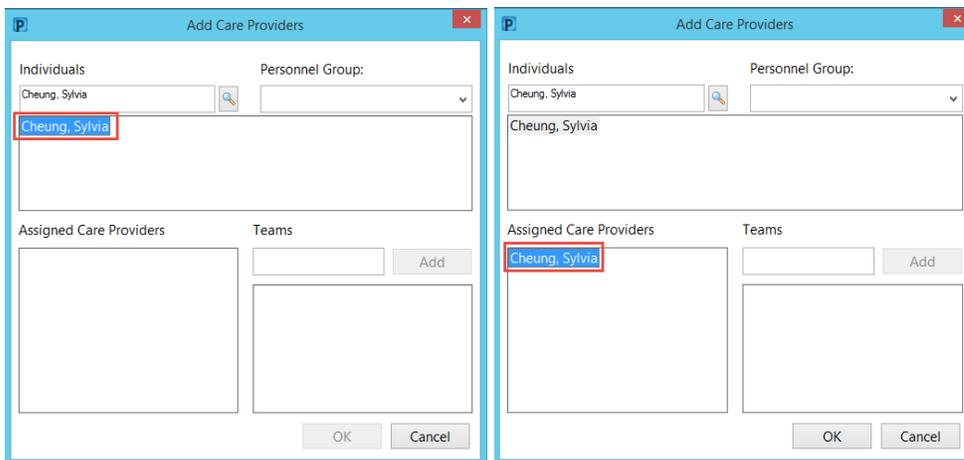
In the **Add Care Providers** window, the Individuals search box will allow you to look by Last name, First name format (ex. Cheung, Sylvia) for the individual clinicians you will be creating assignments for.



**NOTE:** If you click the **magnifying glass**  icon beside the Individuals search box, the **Provider Selection** window will open. This window displays additional search criteria you can use to find a person.

Once you have found the person you are looking for:

2. Click and hold onto the person’s name and drag it to the **Assigned Care Providers** field.



Continue to search for and drag and drop all the clinicians’ names for the shift into the **Assigned Care Providers** field until complete.

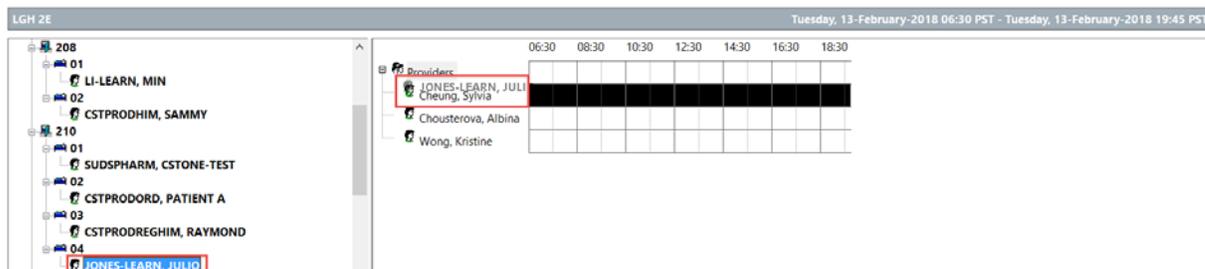
3. Click **OK** when finished.

## Assign Patients to Care Providers

1. Click **head icon** next to the patient’s name on the left side of the screen. Drag it over to the clinician who will be caring for the patient on the right side of the screen.



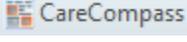
**NOTE:** In order to ensure the patient is assigned to the correct clinician, make sure the head icon of the patient floats over the head icon of the clinician before dropping it (‘head to head’).



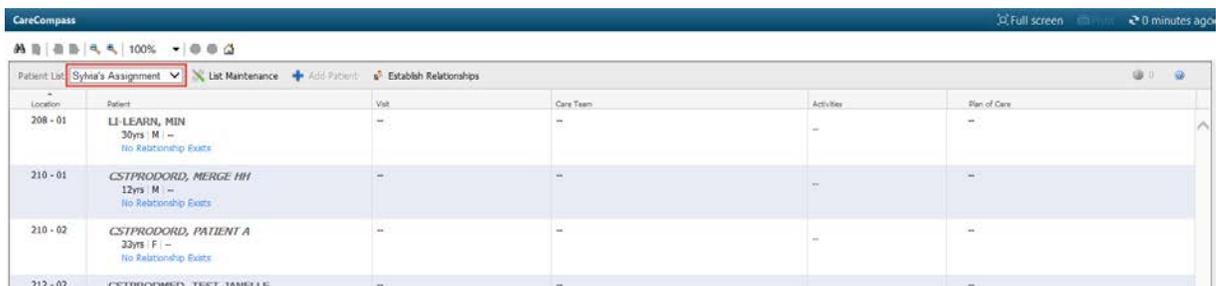
2. Click **floppy disk**  icon in the top left hand corner to save the assignments.
3. Click **Refresh**  icon in the top right corner to refresh window and make sure all of your assignments have been saved.

## Display Assignments in CareCompass

If you are a clinician who needs to access your patient assignment for the day, use the steps below to display the assignment list in CareCompass.

1. Select **CareCompass**  from the Toolbar.
2. Select **List Maintenance**.
3. Select your assignment list from the **Available lists** (left column) and move it over to the **Active lists** (right column). Click **OK**.
4. Confirm your correct patient assignment is displaying on the CareCompass screen.

Until you establish a relationship with your patients in the system, the only information visible about them is their location, name and basic demographics.



Location	Patient	Visit	Care Team	Activities	Plan of Care
208 - 01	LI-LEARN, MIN 30yrs M - <a href="#">No Relationship Exists</a>	--	--	--	--
210 - 01	CSTPRODORD, MERGE HH 12yrs M - <a href="#">No Relationship Exists</a>	--	--	--	--
210 - 02	CSTPRODORD, PATIENT A 22yrs F - <a href="#">No Relationship Exists</a>	--	--	--	--
212 - 02	CSTPRODORD, TEST-JANELLE	--	--	--	--



### NOTES:

- If you have not previously created an assignment based list, you will need to do so before your assignment can be displayed in CareCompass. You can create a new list directly from the Modify Patient Lists window.
- Ensure that you select Assignment as the Patient List Type, create a name for your list and then select Finish.

## Additional Information for Staff Assignment

A patient, bed or room can be assigned when creating assignments:

- Click on the head, bed or door icons respectively and drag until you reach the head beside the individual clinician's name.

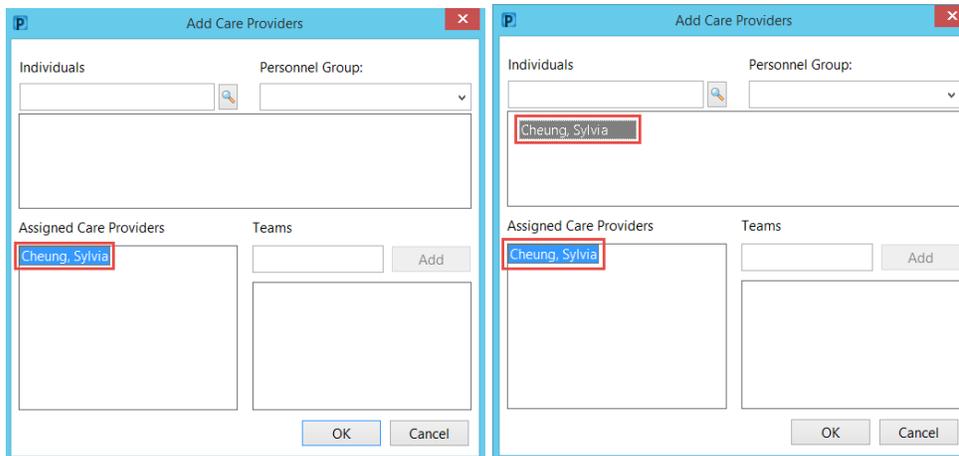
To remove a patient from an assignment:

- Right-click on their name (on the right side of the pane) and select Delete.

To remove a clinician from the Staff Assignment:

1. Click on the **yellow scroll**, select the individual's name under Assigned Care Providers.
2. Drag the name into the field above. Click **OK** when finished.

A clinician must have any patients, beds or rooms assigned to them cleared, before they can be removed from the assignment list.



To decrease the interval setting:

- Select Zoom In from the Options menu.

To increase the interval setting:

- Select Zoom Out from the Options menu.

A patient can be assigned to more than one clinician at a time and can also be assigned for only a portion of a shift.

The shift selected can be up to 3 days ahead of the current time, but it is highly recommended that the assignments still be reviewed just prior to the actual shift.

If tracking purposes of patient-staff ratio is needed, this will remain on paper as the CIS is unable to retain staff assignment beyond the previous day.