

EVERYONE

Getting started

Create an account, set up your hospital, publish a first schedule

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1. Create your account

1. On the sign-in page, click **Start free trial**.
2. Enter your first and last name, mobile phone, work email and a password of at least 12 characters. NPI is optional, and so is an invite code if your group gave you one. No credit card is needed.
3. We email you a confirmation code. Enter it to finish signing in, or tap the link in the same email.

2. Choose your plan

After you sign in you'll see **Choose your plan**. Every account starts with a 60-day free trial on the plan you pick.

- **Solo** — just you: upload your schedule and sync your own calendar.
- **Essentials** — scheduling for a group: manual grid, imports, calendar sync and swaps.
- **Intelligence** — adds AI-assisted scheduling, circadian (CAI) analytics and rule management.
- **Complete** is available by request and adds learning from physician feedback.

After 60 days the workspace becomes read-only until you subscribe — nothing you built is lost. To change plans, use **Talk to us about upgrading** on **Billing** or contact support.

Under **Where do you want to start?** pick **Start with an empty workspace** to explore privately, or **Set up my real hospital** to onboard your team, then click **Continue**.

3. Org admin: create your hospital

1. Enter your hospital name, city, state and ZIP, then click **Create hospital**. Your organization is created with a first location, and you become its org admin.
2. Add more locations any time from **Locations** with **Add location**.

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4. Set up shifts, people, holidays and rules

1. Open **Shift types** and add every recurring shift: label, start and end time, category (Day, Mid, Night or Backup), days of week, allowed credentials, and location or sub-location.
2. Open **People** and click **Add provider** (name, credentials, optional email, FTE where 1.0 is full time). Org admins can add many at once with **Bulk-import physicians or shifts from a file**.
3. To collect each provider's preferences without an account, send them their personal link from **Physician setup links**.
4. Turn on the holidays your group observes in **Holidays**.
5. Write plain-English rules in **Rules & voice**, for example "no more than 3 nights in a row". Each rule can be switched on or off without rewriting it.

5. Scheduler: build and publish the first month

1. Open **Schedule Creation** and pick the month. In a multi-location organization, use the Locations picker — the selected locations build together.
2. Click **Build month** to run CASE, CAIER's scheduling engine. It fills every eligible shift while protecting approved time off, opt-outs, locks, credentials, rest rules and location limits. The completion panel lists open slots and providers below target.
3. Prefer to build by hand? Pick a provider in any cell instead — see **Create a manual schedule**.
4. Click **Review & publish** above the grid, then confirm. Providers see published shifts in **My schedule** and in their synced calendars.

6. Provider: link your profile and sync

1. If your scheduler gave you an invite code, enter it on the sign-up form; your provider profile links when you first sign in. No code? Ask your scheduler to link your account from **People** with **Link to provider**.
2. Open **My schedule** and click **Calendar sync**, then subscribe once in Google, Apple or Outlook.
3. Request time off in **Time off & rules**. To give up a shift, open it in My schedule and choose **Give up**, or post it in the **Shift marketplace**.

7. Let Meri help

- Open Meri from the command strip under the header, or from **Ask Meri**. Type, or tap the mic (**Speak to Meri**) to dictate.
- Meri shows a preview of every change and waits for you to confirm. Building, publishing and deactivating also need a typed confirmation word.
- She can only do what your role allows. If she can't do something yet, click **Ask the CAIER team to teach me this**. For a poor answer, choose **Send transcript** and add a note.

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