



ORG ADMIN

Org Admin Guide

Onboarding & user manual for organization administrators

CAIER Schedule · er.caier.ai · Updated August 2026

WHAT'S INSIDE

1. Welcome — what CAIER Schedule does for org admins
2. Day-one setup checklist
3. User roles and permissions
4. Billing, trial, and tier upgrades
5. Adding more locations (departments)
6. Security, privacy, and data handling
7. Troubleshooting and support

1. Welcome — what CAIER Schedule does for org admins

CAIER Schedule is an AI-assisted clinician scheduling platform. As an **org admin** you own the workspace: locations (departments), users, billing, and tier. Schedulers build the actual rosters; providers view and swap. This guide walks you from a brand-new signup through a published first month.

Tip: You get a 60-day free trial with every tier unlocked. No credit card required to start.

2. Day-one setup checklist

1. **Add your locations (departments)** under **Locations** — every schedule lives inside a location.
2. **Pick a tier** — Essentials (\$99/mo: manual scheduling + import) or Intelligence (\$399/mo: AI builder, CAI analytics, learning engine).
3. **Invite your scheduler(s)** — go to **Physicians / Team** and add them with the *Scheduler* role.
4. **Add providers** — open **Physicians** and click *Add provider* for each person (name, email, FTE). Provider bulk import isn't available yet; to import an existing month's *schedule*, use **Upload schedule**.
5. **Let Meri help** — the command strip under the header opens the setup assistant, which can walk you through each step and propose changes before applying them.

Tip: Preview the provider experience at </physician-preview> before inviting the whole team.

3. User roles and permissions

- **Org admin** — locations, users, billing, tier, org-wide settings.
- **Scheduler** — builds and publishes schedules; edits shift types, preferences, rules, holidays.
- **Provider** — views assigned shifts, syncs their calendar, requests swaps, submits time-off.
- **Platform admin** — CAIER internal only, not assignable by customers.

4. Billing, trial, and tier upgrades

Your trial ends 60 days after signup. Manage your plan and payment method from **Billing** — upgrade or manage opens a secure Stripe billing portal where you can update your card, download invoices, and change tier. Upgrading is instant; downgrades apply at the next billing cycle.

Both tiers are flat monthly fees with unlimited providers. AI usage on Intelligence is tracked in the admin AI usage report and isn't billed separately.

5. Adding more locations (departments)

One workspace can hold many locations. Rosters, shift types, rules, and holiday sets are scoped per location, so a multi-site group can share billing without mixing schedules. Org-wide views let you see and build every location as one.

1. Open **Locations**.
2. Click *Add location*.
3. Assign schedulers per location under **Physicians / Team**.

6. Security, privacy, and data handling

- All data encrypted in transit and at rest; row-level security keeps each org's data isolated.
- Schedulers and providers only see the locations they belong to.
- Names are scrubbed before any schedule is sent to an AI model for parsing or analysis.
- Provider iCal feeds use private, revocable tokens. Providers rotate their own token from **My schedule** → **Sync calendar** → **Regenerate**.
- For a data export or deletion request, email support@aiertechnologies.com.

7. Troubleshooting and support

- The in-app **Meri** assistant (command strip under the header) answers most how-to questions.
- /how-to hosts step-by-step guides and downloadable PDFs.
- Email support@aiertechnologies.com for account or billing issues.