



PROVIDER (MD / PA / NP)

Provider Guide

Onboarding & user manual for physicians, PAs, and NPs

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1. Welcome, provider

This guide is for **physicians, PAs, and NPs** using CAIER Schedule. Your scheduler builds the roster; you view your shifts, sync them to your calendar, request swaps, and submit time-off — all from one place.

2. First-time sign-in

1. Open the invite link from your scheduler, or go to er.caier.ai and enter your work email or mobile number.
2. We send a one-time code by email or text — enter it to sign in. There is no password.
3. Optionally add a **passkey** (Face ID / Touch ID / Windows Hello) so the next sign-in is one tap. You can also approve a desktop sign-in from your phone by matching the 2-digit code.
4. You'll land on **My schedule**.

3. Syncing your calendar (do this once)

1. Open **My schedule** → **Sync calendar**.
2. Copy the private iCal URL.
3. Add it as a *subscribed calendar* in Apple Calendar, Google Calendar, or Outlook.
4. Every publish and swap updates your calendar automatically.

Tip: The URL is private to you. If you ever share it accidentally, tap Regenerate to invalidate the old one.

4. Viewing your shifts

- **My schedule** — your assigned shifts by day, week, or month.
- **Schedule** — the whole department view (read-only for providers).
- Tap any shift to see start/end time, location, and colleagues on that shift.

5. Swaps, give-aways, and the Marketplace

1. Open **Requests** and click **New swap request**.
2. Pick the shift you want to give up. Leave the target blank to offer it to anyone, or choose a colleague (and optionally one of their shifts) for a straight trade.
3. Your scheduler and the other provider are notified; on accept, both calendars update automatically.

Marketplace shows every open shift plus anything colleagues have put up for grabs. A pickup is blocked when it creates a hard conflict (overlap, missing credential) and warns — but allows — soft conflicts (FTE, preferences, days-in-a-row).

6. Submitting time-off and preferences

- **My requests** — submit vacation, education, or personal days.
- **Preferences** — mark preferred and avoided shift types, weekdays, and your ideal / max days in a row.
- Preferences and approved time-off are honored by the builder and by your scheduler when assigning manually.

7. Notifications

- You'll get an email when the schedule is published or when a swap involves you.
- Turn on browser and mobile push under **Account** → **Notifications** for instant alerts.
- Some organizations also send SMS updates; opt in at /sms-opt-in.

8. Privacy

Your calendar URL is private and revocable. Your preferences and time-off notes are visible only to your scheduler and org admin — never to other providers. Names are scrubbed before any schedule data is sent to an AI model.

9. Troubleshooting

- Calendar not updating → re-copy the iCal URL from **My schedule** → **Sync calendar**.
- Missing shift → check with your scheduler; edits appear after a re-publish.
- Can't sign in → request a new one-time code on the sign-in page (check spam), or ask your scheduler for a re-invite. There is no password to reset.