



SCHEDULER

Scheduler Guide

Onboarding & user manual for schedulers

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1. Welcome — your job as a scheduler

As a **scheduler** you own the month: defining shift types, keeping the roster current, building drafts, and publishing so providers can sync their calendars. CAIER gives you both a manual grid and — on Intelligence — an AI builder that respects your rules, FTE targets, and circadian fairness.

2. One-time department setup

1. **Define shift types** under **Manage shifts** — Day / Evening / Night, start and end times, allowed weekdays.
2. **Confirm the roster** under **Physicians** — FTE target, credentials, seniority.
3. **Set preferences and rules** under **Rules** — max consecutive nights, weekend fairness, holiday policy, per-person constraints.
4. **Enable the right holidays** under **Holidays**.

Tip: Rules can be dictated — tap the mic in the Rules editor and speak a constraint in plain English. Conflicting rules are flagged in the rule conflicts panel before you build.

3. Building your first schedule

Manual (Essentials)

1. Open **Schedule** and pick the month.
2. Click **Build month** to create every empty slot, then click a cell to assign a provider.
3. Use the coverage strip to spot gaps; drag one assignment onto another to swap.
4. Press **Review & publish** when finalized.

AI build (Intelligence)

1. Open **Schedule** → pick the month → click **Build schedule** for the deterministic circadian-first fill, or use the dropdown beside it to run **AI-assisted refinement**.
2. Review the draft. Every assignment has a plain-English rationale, and the fit score shows coverage, FTE deviation, and CAI impact for the whole month.
3. Adjust by clicking a cell or dragging; lock assignments you want protected before re-running.
4. Resolve or delete any unfilled slots, then click **Review & publish**.

4. Importing an existing schedule (photo or file)

New to CAIER mid-month? Import the current schedule so providers see continuity.

1. Open **Upload schedule**.
2. On desktop: drop an Excel, CSV, or PDF. On mobile: tap **Take a photo of the schedule** and snap the printed rota.
3. The month is detected automatically; review the extracted providers and shifts and fix any name mismatches in the editor.
4. Choose whether to create new shifts or map onto existing ones (all departments in your org are available), then confirm.

Tip: iPhone HEIC photos are auto-converted. If a photo fails, avoid glare, keep the page flat, and rotate it upright before retrying. Import history lets you review or undo a prior import.

5. Handling swaps, give-aways, and time-off

- **Requests** (scheduler view) — approve, deny, or auto-swap; approved swaps update the published schedule and re-sync calendars.
- **Marketplace** — open shifts and shifts put up for grabs. Pickups that create a hard conflict (overlap, missing credential) are blocked; soft conflicts (FTE, preference, days-in-a-row) warn but allow.
- **Time off** — approve or deny requests; approved ranges block the builder from assigning that person.

6. Publishing, re-publishing, and calendar sync

1. Publish makes the month visible to providers.
2. Providers subscribe to a private iCal URL from **My schedule** → **Sync calendar**.
3. Re-publishing pushes updates to every subscribed calendar within ~15 minutes.
4. Use **Replace this month** if you need to overwrite with a new import.

7. Fairness insights and coverage checks

Open **Insights** to see the Circadian Alignment Index (CAI) alongside fairness, night burden, weekend equity, and coverage. The FTE drill-down lists every provider's actual versus target hours so you can trim or add shifts before publishing.

8. Troubleshooting

- Draft won't build → check that every shift type has at least one eligible provider and that rules aren't mutually exclusive (see the conflicts panel).
- Provider missing from the picker → confirm they're active on the roster and hold the required credential.
- Hours far from target → use the FTE drill-down, then trim the highest-surplus providers from the easiest-to-fill shifts.
- Calendar not updating → have the provider re-copy the iCal URL from My schedule.