



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. CAIER gives you a manual grid and **CASE**, the production scheduling engine. CASE applies hard rules first, then balances coverage, FTE, fairness, and preferences without exposing proprietary scoring details.

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. Create empty shift slots, then click a cell or drag a provider to assign it.
3. Use the coverage strip to spot gaps.
4. Press **Review & publish** when finalized.

CASE build (Intelligence)

1. Open **Schedule**, pick the month and locations, then click **Build schedule**. Selected locations build together by default.
2. CASE fills every eligible slot by default while protecting approved time off, hard opt-outs, locks, credentials, rest rules, and location restrictions.
3. Review the completion panel for assignments, open slots, blocked writes, time limits, and provider target shortfalls.
4. Adjust cells or drag assignments, then click **Review & publish** when satisfied.

4. Date pins and FTE trimming

Date pins

- Click the pin in a date header to request that a provider work that date. Pins are especially useful for holidays.
- A hard pin reserves an eligible assignment; a soft pin is a preference. CASE chooses the shift on that date.
- Pins never override approved time off, credentials, overlap rules, or other hard safety rules.

Trim shifts above FTE

- Trimming is **off by default**, so CASE attempts to fill every eligible shift.
- To limit a draft to available FTE, enable **Rules** → **Apply the trim list automatically**.
- After CASE builds, trimming reopens the safest, easiest-to-refill assignments first. Locks and near-term shifts stay protected; providers remain at their preferred-FTE floor and never below required FTE; removed slots stay open.
- With automatic trimming off, use **Schedule actions** → **Trim shifts above target** to preview and approve the same process manually.

5. Preferences, nights, and multi-location builds

- Provider preferences include shift/day preferences, hard opt-outs, required and preferred FTE, streak limits, and personal religious holidays or birthdays as soft preferences.
- Night plans combine each provider's FTE share across locations, track frequency and anchors, protect at least 24 hours after a night, and prefer longer recovery after blocks.
- Set each provider's allowed locations, primary location, and optional FTE shares. Build selected locations together, or stage one location for review first.
- Certifications are profile labels; credentials control shift eligibility.

6. 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.

7. 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.

8. 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.

9. Fairness insights and coverage checks

Open **Insights** for circadian alignment and use **Reports** for hours-based night, weekend, holiday, FTE, and coverage comparisons. Schedule Review and Schedule Quality explain the current draft; Rebalance previews proposed changes before anything is applied.

10. Troubleshooting

- Draft will not build → check that every shift type has at least one eligible provider and that rules are not mutually exclusive.
- Provider missing from the picker → confirm they are active and hold the required credential.
- Hours exceed available FTE → enable automatic trim in Rules, or preview **Trim shifts above target** manually.
- Calendar not updating → have the provider re-copy the iCal URL from My schedule.