



Org Admin Guide

Onboarding & user manual for organization administrators

ORG ADMIN

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1. Welcome — what AIER Schedule does for org admins

AIER Schedule is an AI-assisted physician scheduling platform. As an **org admin** you own the workspace: hospitals, 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 **Create your hospital** — set name, timezone, and country under *Locations*.
- 2 **Add your first department** — every schedule lives inside a department.
- 3 **Pick a tier** — Essentials (manual + import), Intelligence (AI builder), or Complete (learning + voice rules).
- 4 **Invite your scheduler(s)** — go to *Physicians / Team*, add them with the *Scheduler* role.
- 5 **Invite providers** — bulk-import a roster from Excel, CSV, or a photo of the paper list.

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

3. User roles and permissions

- **Org admin** — hospitals, departments, users, billing, tier, org-wide settings.
- **Scheduler** — builds and publishes schedules; edits shift types, preferences, holidays.
- **Provider (physician / PA / NP)** — views assigned shifts, syncs their calendar, requests swaps, submits time-off.
- **Platform admin** — Lovable internal only, not assignable by customers.

4. Billing, trial, and tier upgrades

Your trial ends 60 days after signup. Add a payment method under *Billing* at any point — you keep trial pricing for the remainder of the trial. Upgrading tiers is instant; downgrades apply at the next billing cycle.

- Change tier: **Billing** → **Plan**.
- Update card, download invoices: **Billing** → **Payment method**.
- AI credits (Complete tier): tracked under **Billing** → **AI usage**.

5. Adding more hospitals or departments

One workspace can hold many hospitals; each hospital can hold many departments. Rosters, shift types, and holiday sets are scoped per department so a multi-site group can share billing without mixing schedules.

- 1 Open **Locations**.
- 2 Click *Add hospital* or *Add department*.
- 3 Assign schedulers per department under **Physicians / Team**.

6. Security, privacy, and data handling

- All data encrypted in transit and at rest.
- Row-level security ensures schedulers and providers only see their own department.
- Provider iCal feeds use private, revocable tokens — regenerate any time from **Physicians** → **Calendar tokens**.
- You can export or delete a department's data on request from **Billing** → **Data**.

7. Troubleshooting and support

- In-app **Help Assistant** (bottom-right bubble) answers most how-to questions.
- **/how-to** hosts step-by-step guides and downloadable PDFs.
- Email **support@aierschedule.org** for account or billing issues.