



Scheduler Guide

Onboarding & user manual for schedulers

SCHEDULER

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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. AIER gives you both a manual grid and — on Intelligence and Complete — an AI builder that respects your rules and preferences.

2. One-time department setup

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

Tip: On Complete tier you can add rules by voice — tap the mic in the Rules editor and speak a constraint.

3. Building your first schedule

Manual (Essentials)

- 1 Open **Schedule** and pick the month.
- 2 Click a cell to assign a provider to a shift slot.
- 3 Use the coverage strip to spot gaps.
- 4 Press **Publish** when finalized.

AI Build (Intelligence / Complete)

- 1 Open **Schedule** → pick the month → click **Build with AI**.
- 2 Review the draft; use *Regenerate cell* or drag-and-drop to adjust.
- 3 Publish when satisfied. Providers get notified and can sync their calendars.

4. Importing an existing schedule (photo or file)

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

- 1 Open **Upload schedule**.
- 2 On desktop: drop an Excel, CSV, or PDF.
- 3 On mobile: tap **Take a photo of the schedule** and snap the printed rota.
- 4 Review AI-detected physicians and shifts; fix any name mismatches.
- 5 Confirm to import into the month.

Tip: iPhone HEIC photos are auto-converted. If a photo fails, avoid glare, keep the page flat, and rotate upright before retrying.

5. Handling swaps and time-off requests

- **My requests** (provider view) — providers submit swap and time-off requests.
- **Requests** (scheduler view) — approve, deny, or auto-swap.
- Approved swaps update the published schedule and re-sync calendars automatically.

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 FRIC (fatigue + fairness) and coverage scores. Use these to defend a published schedule to your team or spot systemic issues.

8. Troubleshooting

- Draft won't build → check that every shift type has ≥ 1 eligible provider.
- Provider missing from picker → confirm they're active on the roster.
- Calendar not updating → have the provider re-copy the iCal URL from My schedule.