

SCHEDULER

Create a manual schedule

A start-to-finish walkthrough for building a month by hand

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1. Add providers to the roster

Open **People** and click **Add provider**. Enter first, middle and last name, credentials, an optional email, and FTE (1.0 is full time). Initials and a color are assigned automatically.

To remove someone who left, use **Deactivate** — history is kept. **Delete permanently** also unassigns every shift they ever had.

2. Create shift types

- Open **Shift types**.
- **Label** and **key** — the short name shown on the calendar.
- **Start and end** — cross-midnight shifts are supported; hours fill in automatically.
- **Location / sub-location** — where the shift is worked.
- **Category** — Day, Mid, Night or Backup.
- **Allowed credentials** and **days of week** — who can work it and when it runs.

3. Set department preferences and rules

- In **Rules & voice** set **Weekend includes Friday** and **Required annual hours (1.0 FTE)**.
- Per-provider limits — days in a row, nights in a row, rest after nights — live in **People → Edit provider**.
- Type or dictate plain-English rules; the AI turns them into structured rules.
- Manual edits aren't checked against rules. CASE builds always keep at least 11 hours between shifts, 24 hours after a night and 48 hours before a day shift.

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4. Import an existing schedule (optional)

Open **Import schedule**, or **Replace this month** on the Schedule toolbar. Excel and CSV grids in known layouts parse instantly; other layouts, PDFs and photos go to AI. Review the preview and fix unmatched names before confirming.

5. Fill the grid

- On **Schedule Creation**, **Add unfilled shifts** creates empty slots for the month or one shift type; the **+** on a day adds one.
- Pick a provider from the dropdown in any cell. Choose **— Unfilled —** to reopen it.
- Drag a name from **Live totals** or the highlight chips onto a cell to assign; dropping on a filled cell replaces the occupant.
- Drag one shift onto another to swap their providers.
- Hard-locked shifts and locked months can't be edited until unlocked.
- Use the unfilled and double-booked alert above the grid and the **Live totals** panel to spot gaps and hours versus FTE.

6. Pin dates when someone must work

In the Calendar view, click the pin in a date header and choose a provider. A **Hard** pin reserves an eligible assignment; a **Soft** pin is a preference. The shift is picked during a CASE build, and pins never override approved time off or safety rules.

7. Review and publish

Click **Review & publish** above the grid and confirm. Providers see the month in **My schedule** and their calendars refresh on their own schedule. You can keep editing after publishing; changes appear on providers' next refresh. Use **Lock Month** to freeze it.

Need to start over before publishing? **Discard draft** removes the draft after saving a snapshot.

8. Let Meri help

- Open Meri from the command strip under the header, or from **Ask Meri**. Type, or tap the mic (**Speak to Meri**) to dictate.
- Meri shows a preview of every change and waits for you to confirm. Building, publishing and deactivating also need a typed confirmation word.
- She can only do what your role allows. If she can't do something yet, click **Ask the CAIER team to teach me this**. For a poor answer, choose **Send transcript** and add a note.

Meri can assign, reopen, swap and pin shifts, add unfilled shifts and publish — "put Dr. Patel on the 12th night", "open up the 3rd day shift".

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