



Rosterly Assistant

Every job. One schedule.

The guide

Free for healthcare workers

assistant.rosterly.online

Inside

1. Getting started
2. Today
3. Adding shifts, visits and appointments
4. The Calendar
5. Reminders
6. Tasks, Credentials and Notes
7. Connecting to Rosterly
8. Inviting your boss
9. Putting it on your phone
10. Your account
11. Keep patient details out

1 Getting started

Rosterly Assistant keeps your whole work life in one place: your shifts at every job, your home visits, your to-do list, your license renewals and your notes. It is free.

- 1 Go to Jobs and add each place you work: a hospital, an agency, a private client. Each one gets its own color.
- 2 Press "Add to my schedule" on Today or Calendar, and add your shifts, visits and appointments.
- 3 Go to Credentials and add your license, BLS, CPR and anything else that runs out.
- 4 If your employer uses Rosterly, connect it on the Rosterly page. If not, you can invite your boss from that same page.

2 Today

Today is your day on one screen: what is on your schedule today and tomorrow, your tasks due today or late, and any license running out in the next 30 days.

If your employer uses Rosterly and is asking you to cover a shift, it shows at the very top in red. Press "Answer in Rosterly" to accept or decline it there.

You can add a task right from Today with the box under "Your list".

3 Adding shifts, visits and appointments

- 1** Press "Add to my schedule" (or "Add" on any day in the Calendar).
- 2** Choose what it is: a shift, a home visit, an appointment, or something else.
- 3** Choose which job it is for. Leave it on "Not for a job" for personal things like the dentist.
- 4** Pick the day, the start time and the end time. An end time earlier than the start means it ends the next morning, like a night shift from 7 PM to 7 AM.
- 5** Choose a reminder, or leave it on your usual one.
- 6** A new shift can repeat every week, for up to 12 weeks. Choose that under "Repeat".

To change or remove something, tap it on Today or the Calendar.

For a home visit, enter the client's initials only, like R.A. Never a name, an address, or health details.

4 The Calendar

Week shows Monday to Sunday with everything on each day and your hours for the week. Month shows the whole month with a colored dot for each item; tap a day to see that week.

The arrows move back and forward. "Today" brings you back to this week. Each color is one of your jobs, and Rosterly shifts are green.

5

Reminders

Reminders come by email to the address you signed up with.

In Profile, under Reminders, set your time zone and how early you usually want to be reminded: 15 minutes, an hour, the day before, or never. Each shift or visit can also have its own reminder.

You also get an email an hour before a task is due, and 30 days and 7 days before a credential runs out.

To stop reminder emails, untick "Email me reminders" in Profile. If reminders do not arrive, check your spam folder.

6

Tasks, Credentials and Notes

Tasks: your to-do list. Give a task a due day and time if it has one. Tap the box to tick it off. Late tasks show in red.

Credentials: your licenses and certificates with their expiry dates. Each shows Good, Expires soon, or Expired.

Credentials you keep in Rosterly also show here when you are connected.

Jobs: the places you work, with your hours there this week. Removing a job keeps its shifts on your calendar.

Notes: anything you want to remember, like parking, the building door code, or questions for your manager. Pin a note to keep it at the top.

7 Connecting to Rosterly

If your employer schedules with Rosterly, connect once and your Rosterly shifts, the requests to cover a shift sent to you, and your Rosterly credentials show up in your assistant on their own.

- 1 Sign in to Rosterly and open your Profile.
- 2 Press "Get a connect code". The code looks like K7QM-3XPA and lasts 30 minutes.
- 3 In your assistant, open the Rosterly page, type the code, and press Connect.

Your employer never sees what you keep in your assistant. Only your own Rosterly shifts, requests and credentials come over, and nothing in Rosterly is changed by your assistant. You can disconnect from either side at any time.

8 Inviting your boss

Work somewhere that does not use Rosterly yet? On the Rosterly page, under "Invite my boss", enter your boss or scheduler's name, email and workplace, and press Send.

They get one email in your name, with a page showing what Rosterly does for an employer and a free trial. If they reply, it comes straight to your email. Under "Invites you sent" you can see when it was opened.

9 Putting it on your phone

iPhone: open the app in Safari, tap the Share button, then "Add to Home Screen".

Android: open the app in Chrome, tap the three-dot menu, then "Add to Home screen" or "Install app".

It then opens like an app from your home screen, and you stay signed in for 30 days.

10 Your account

In Profile you can change your name, what you do, your phone, your sign-in email and your password.

Forgot your password? On the sign-in page press "Forgot password?" and a link comes to your email. It works once, for 2 hours.

You can delete your account in Profile. That removes everything in it and cannot be undone.

11 Keep patient details out

Rosterly Assistant is your personal organizer, not a medical record. Never enter a patient's or client's name, address, phone number or health details anywhere in it, including notes and tasks. Use initials and the part of town instead.

Questions? Write to stevenlawrencellc@gmail.com.