GRAPE TREE

MEDICAL STAFFING

Supplier Portal Manual

The Supplier Portal is where you will manage your healthcare professionals, review their requested shifts, and run reports.

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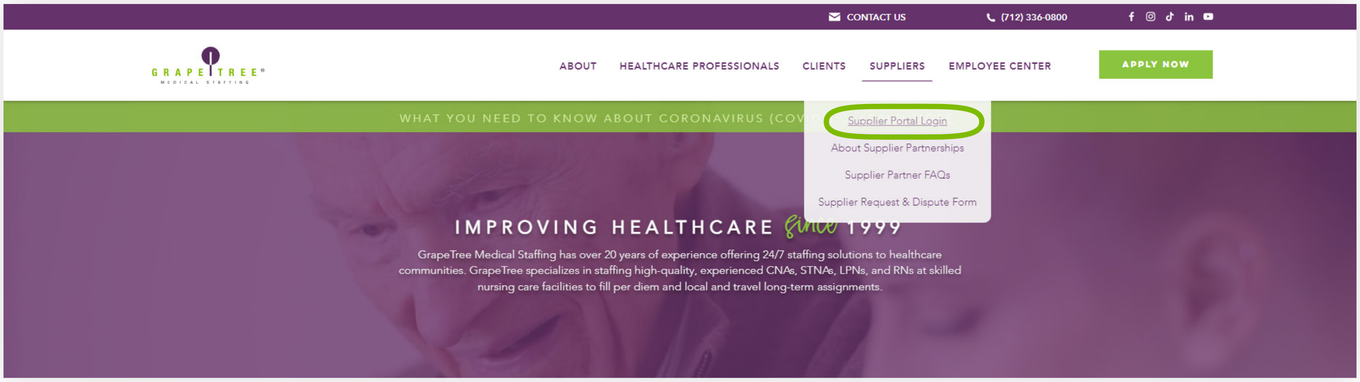
Table of Contents

Logging In

Already have an account?

1. Head to [grapetree.com]() for a quick login link. Hover over the Supplier tab and click on Supplier Portal Login in the dropdown menu. Once you have entered your username and password, you will be directed to the portal homepage. If you do not know your login, click "Forgot Credentials" under the login button.



First-time logging in?

1. Click on the link in your email sent to you by GrapeTree to create your account. If you cannot find the link, reach out to your Supplier Account Manager. After your account has been created, enter your login credentials to be directed to the portal homepage.

Bookmark the Supplier Portal Login Page on Your Web Browser

We recommend bookmarking the Supplier Portal login page on your web browser so that you always have quick access to manage your healthcare professionals. Click the links below to learn how to add a site to your bookmark toolbar based on the web browser you use.

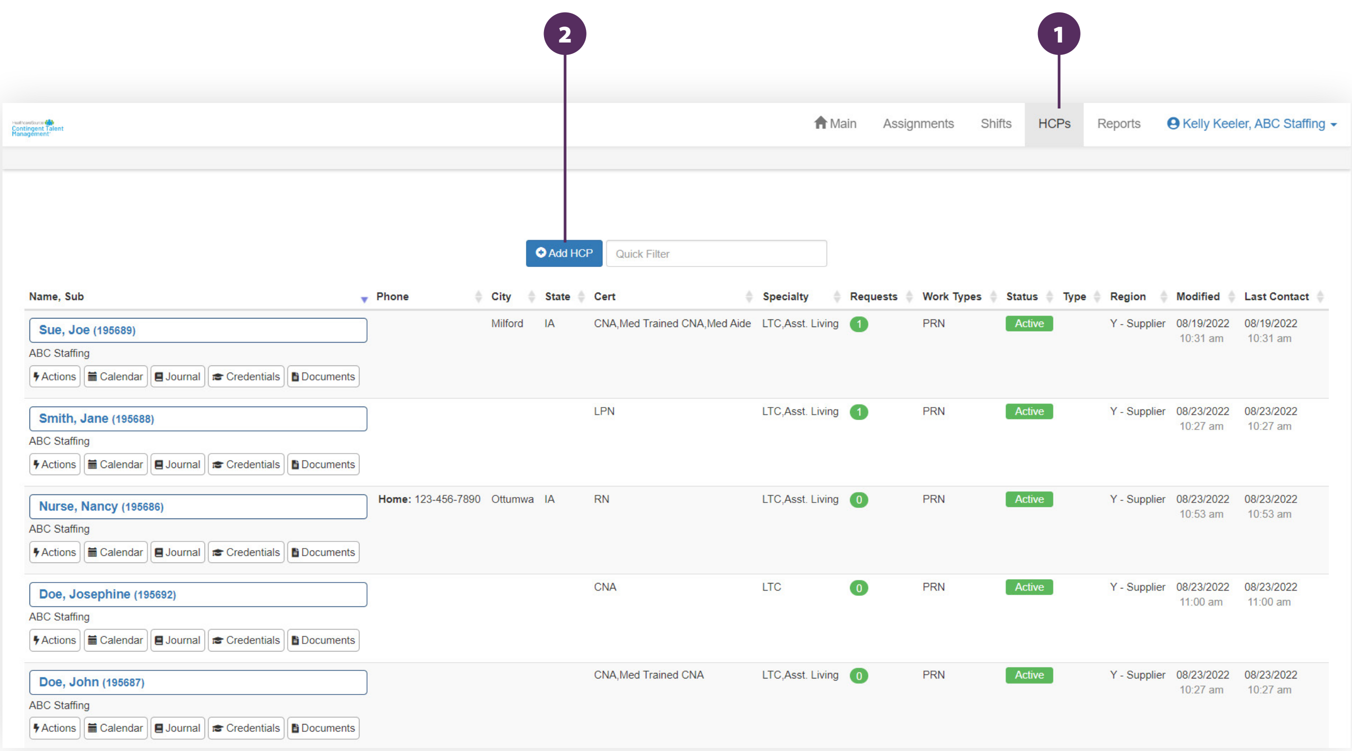
- Google Chrome
- Mozilla Firefox
- Safari
- Microsoft Edge
- Internet Explorer

Managing Healthcare Professional Profiles

The HCP Tab is where you will add and manage your healthcare professionals. Quick Tip: The acronym "HCP" stands for healthcare professional, an all-encompassing term that is used for nursing assistants and nurses. Within the HCP Tab, you will see all your healthcare professionals listed in a table, along with key information about them from their profile. You can filter this table by column, or use the search bar at the top of the page to quickly find a certain profile.

Adding a Healthcare Professional

1. Click on the HCPs Tab.
2. Click on the blue "Add HCP" button at the top of the page.



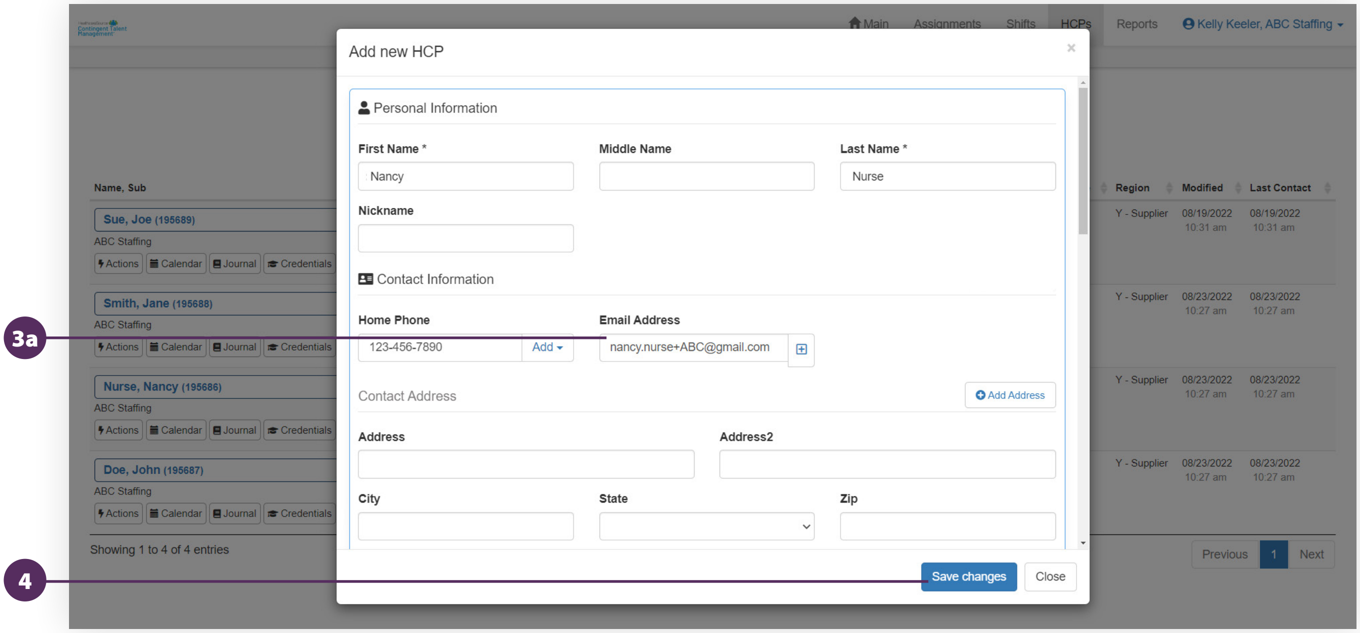
Adding a Healthcare Professional Continued...

3. Add the healthcare professional's name, email address, and ZIP Code. No other information is needed, as GrapeTree will always connect with your agency and will not reach out to your healthcare professionals.
   a. **IMPORTANT:** When adding their email address, you will need to add your agency name in the email. Entering the healthcare professional's email in this format is key for them to be able to view shifts within their area. Add their email address in the format **email+agency@domain.com**.
   b. Keep the "agency" portion of the email consistent through all your healthcare professionals' accounts. You can choose an acronym or a shortened version of your agency name, as long as it remains the same for all healthcare professionals.

Example Agency: ABC Staffing Services, Inc.
HCP Email: nancy.nurse@gmail.com + Shortened Agency Name: ABC
Example Email Address: nancy.nurse+ABC@gmail.com

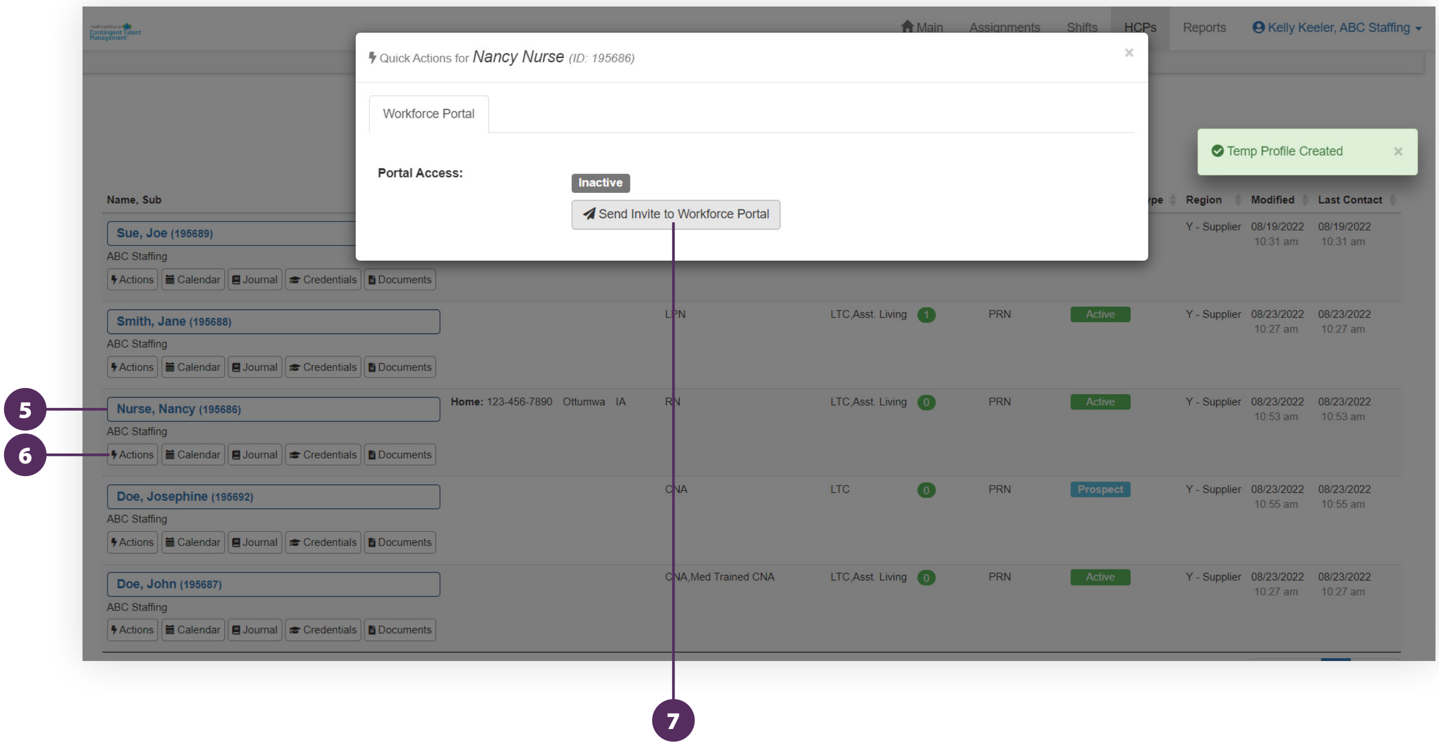
   c. This is the username they will use to log in to their account.

4. Click the "Save changes" button to create the healthcare professional's profile.



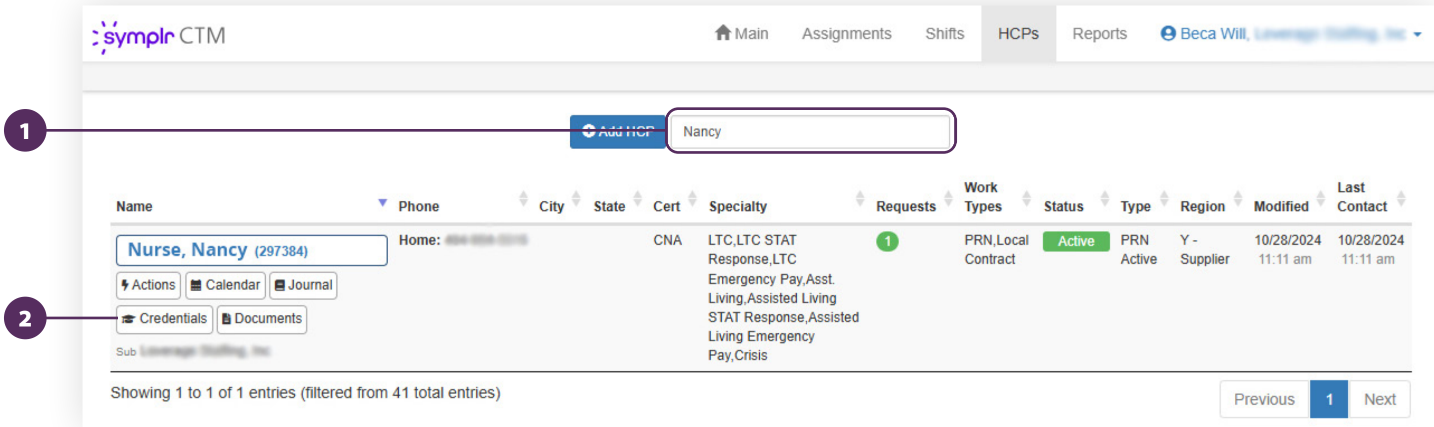
Adding a Healthcare Professional Continued...

5. Find the profile you just created in the list, but do not click on their name.
6. Click the "Actions" button beneath their name.
7. Click the "Send Invite to Workforce Portal" button.
8. The healthcare professional will receive an email with a link to set up their Workforce Portal where they can view and request shifts.

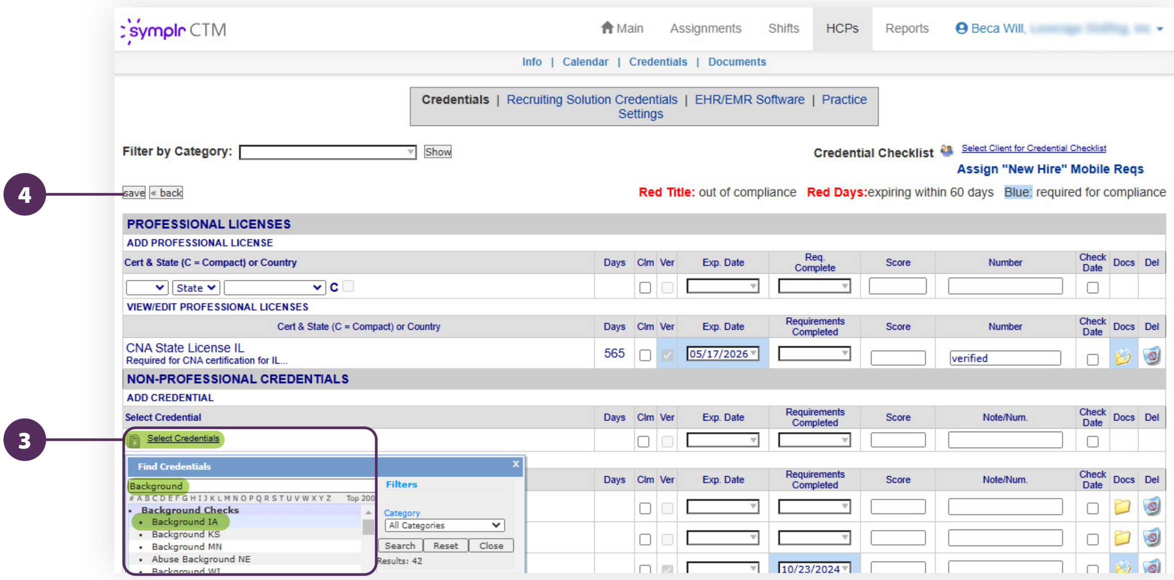


Adding Compliance Documents

1. In the HCPs Tab, find the name of the healthcare professional you would like to add documents for in the list by either scrolling or typing their name into the Quick Filter search bar.
2. Click the "Credentials" button under the healthcare professional's name.

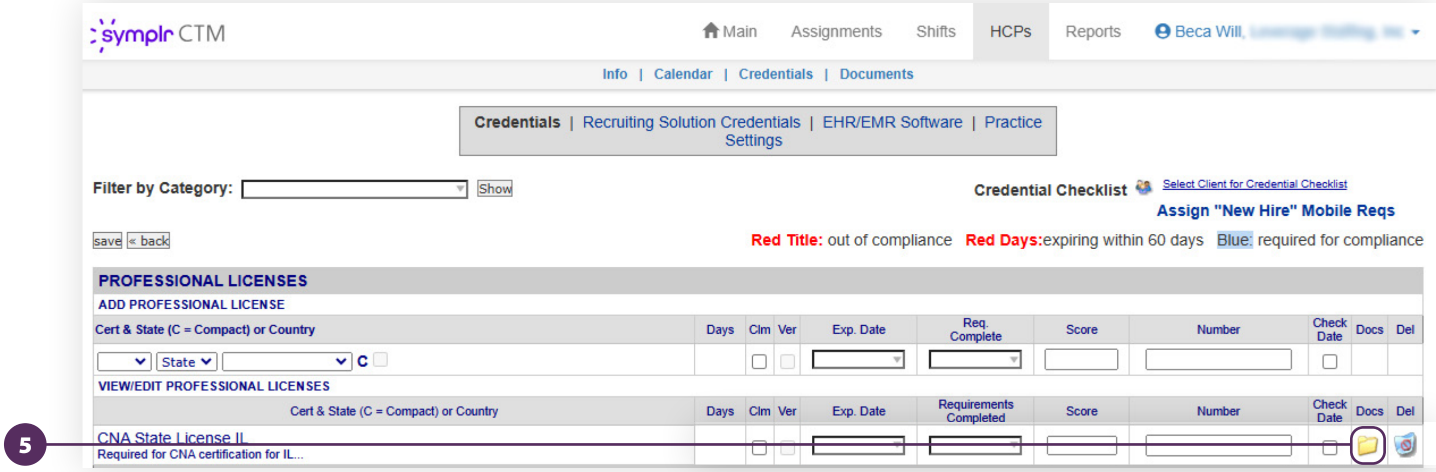


3. Manually add any missing compliance items. Credential lines that will need to be manually added include state licenses, state backgrounds, and state testing and forms. Click the "Select Credentials" link and type in the name of the credential that needs to be added, then click it.
4. Click the "save" button in the top left of the page. Repeat steps 3 & 4 for each missing credential.



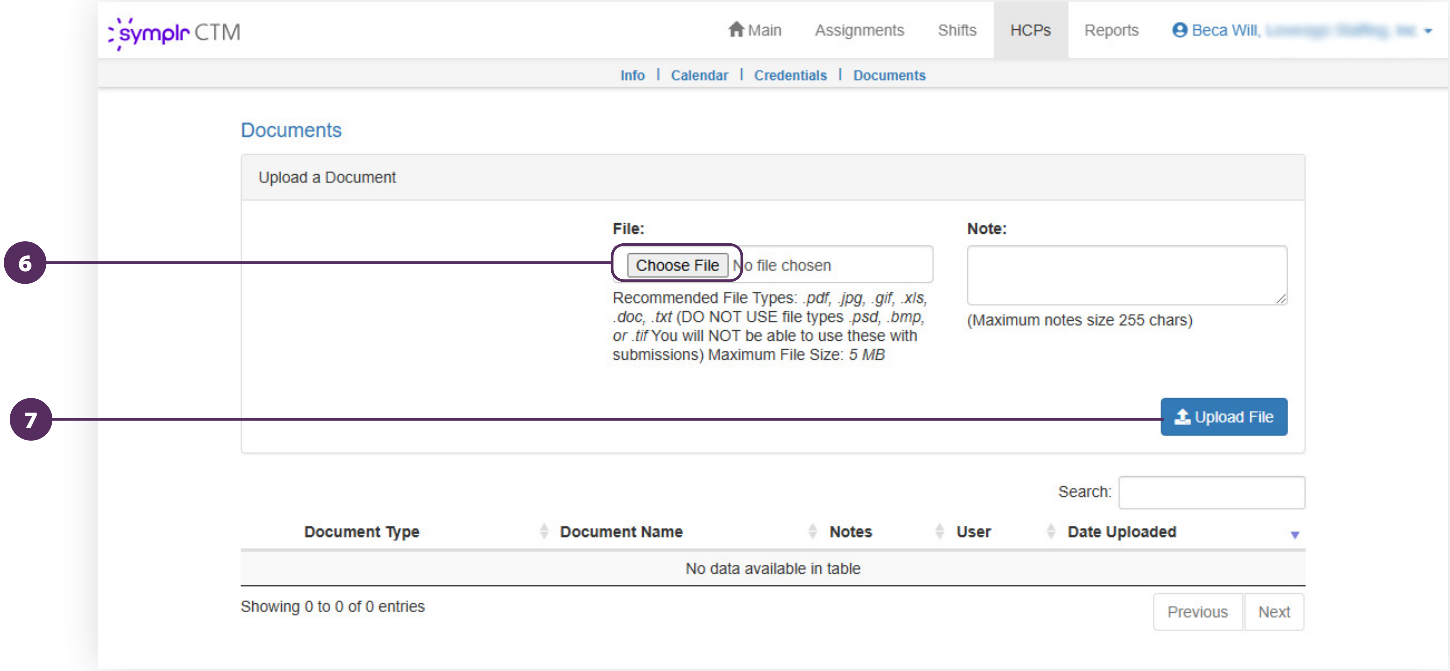
Adding Compliance Documents Continued...

5. Click the button in the "Docs" column for one of the compliance documents.



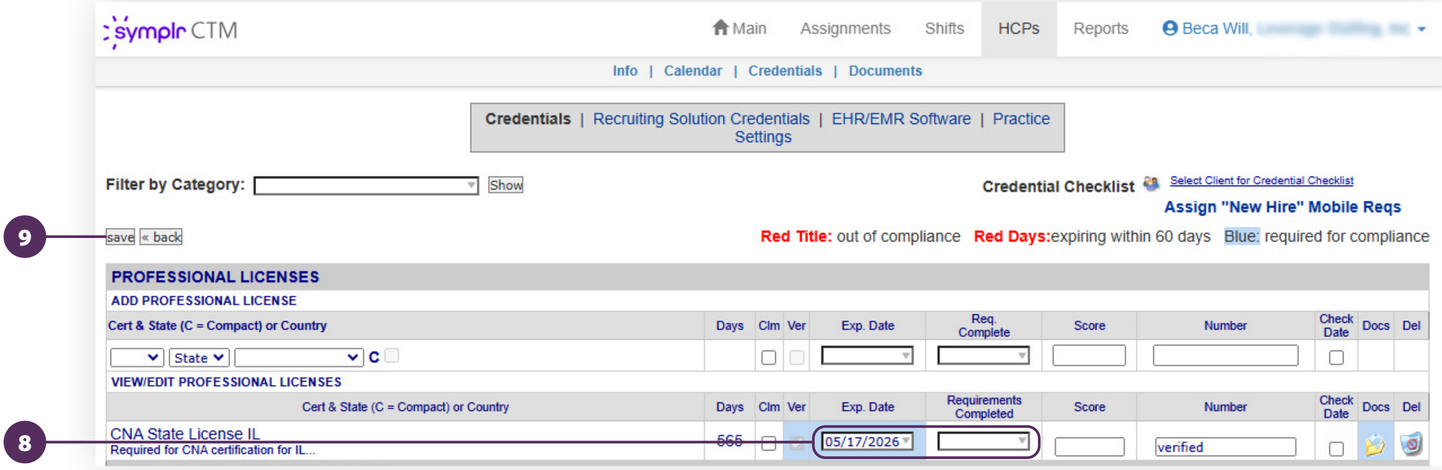
6. Click the "Choose File" button to open up your computer's File Explorer. Find the compliance document that corresponds with the correct credential line that you are uploading for, and select it.

7. Click the "Upload File" button.



Adding Compliance Documents Continued...

8. Enter the date the requirement was completed and/or the expiration date for the compliance item.
9. Click "save."
10. Repeat steps 5-9 for each credential line.



11. Send an email to GMSCompliance@grapetree.com to let us know that the healthcare professional's file is ready for review.

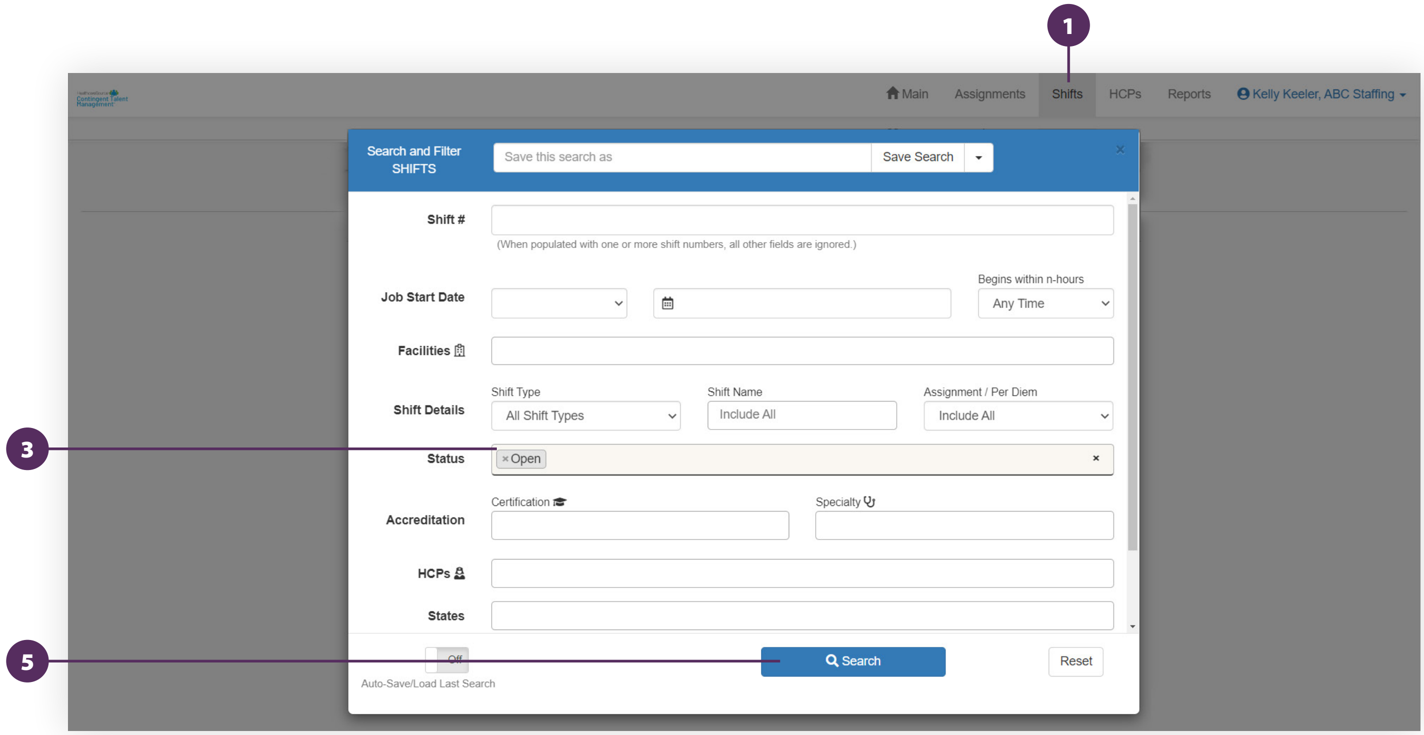
Please include the following information on the healthcare professional:

- First & Last Name
- Certification
- Years of Experience
- Zip Code
- Targeted First Shift Date

Viewing Open Shifts

The Shifts Tab is where you can view all available open shifts, suggest your healthcare professionals for a shift, and approve shift requests.

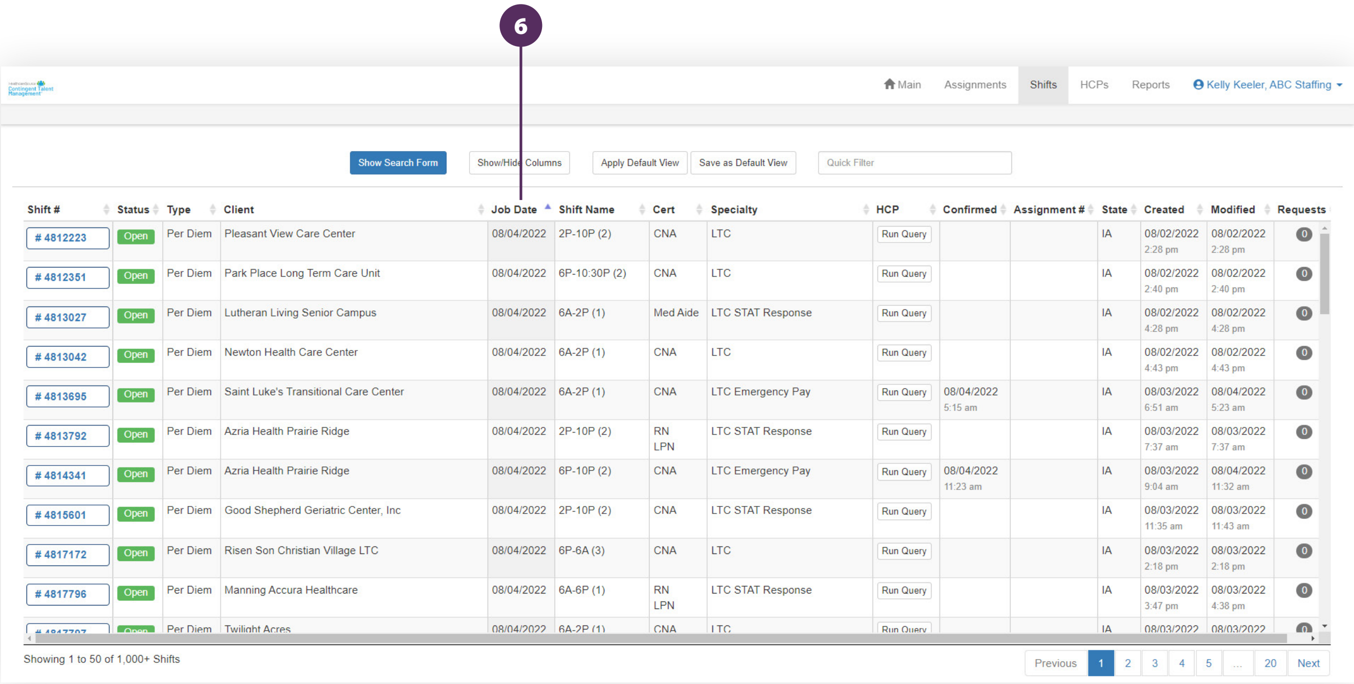
1. Select the Shifts Tab in the menu.
2. A popup box will appear on your screen to search and filter the shifts. If the box does not appear, click on the blue "Show Search Form" button.
3. In the "Status" row, select the "Open" status.
    a. To see shifts that are filled or voided, change the status filter to "include all," or select the specific status you would like to view.
4. Adjust the filters to show certain dates, certifications (CNA, LPN, RN), specialties (Assisted Living, Long-Term Care), or facilities as needed.
5. Click the blue search button to view the open shifts that meet your criteria.



Viewing Open Shifts Continued...

6. On the results page, click on the "Job Date" column to filter the table so that the shifts with the closest start date display at the top of the page.

Utilize other column filters as desired to find the type of shift you are looking for.



Shift #	Status	Type	Client	Job Date	Shift Name	Cert	Specialty	HCP	Confirmed	Assignment #	State	Created	Modified	Requests
# 4812223	Open	Per Diem	Pleasant View Care Center	08/04/2022	2P-10P (2)	CNA	LTC	Run Query			IA	08/02/2022 2:28 pm	08/02/2022 2:28 pm	0
# 4812351	Open	Per Diem	Park Place Long Term Care Unit	08/04/2022	6P-10:30P (2)	CNA	LTC	Run Query			IA	08/02/2022 2:40 pm	08/02/2022 2:40 pm	0
# 4813027	Open	Per Diem	Lutheran Living Senior Campus	08/04/2022	6A-2P (1)	Med Aide	LTC STAT Response	Run Query			IA	08/02/2022 4:28 pm	08/02/2022 4:28 pm	0
# 4813042	Open	Per Diem	Newton Health Care Center	08/04/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/02/2022 4:43 pm	08/02/2022 4:43 pm	0
# 4813695	Open	Per Diem	Saint Luke's Transitional Care Center	08/04/2022	6A-2P (1)	CNA	LTC Emergency Pay	Run Query	08/04/2022 5:15 am		IA	08/03/2022 6:51 am	08/04/2022 5:23 am	0
# 4813792	Open	Per Diem	Azria Health Prairie Ridge	08/04/2022	2P-10P (2)	RN LPN	LTC STAT Response	Run Query			IA	08/03/2022 7:37 am	08/03/2022 7:37 am	0
# 4814341	Open	Per Diem	Azria Health Prairie Ridge	08/04/2022	6P-10P (2)	CNA	LTC Emergency Pay	Run Query	08/04/2022 11:23 am		IA	08/03/2022 9:04 am	08/04/2022 11:32 am	0
# 4815601	Open	Per Diem	Good Shepherd Geriatric Center, Inc	08/04/2022	2P-10P (2)	CNA	LTC STAT Response	Run Query			IA	08/03/2022 11:35 am	08/03/2022 11:43 am	0
# 4817172	Open	Per Diem	Risen Son Christian Village LTC	08/04/2022	6P-6A (3)	CNA	LTC	Run Query			IA	08/03/2022 2:18 pm	08/03/2022 2:18 pm	0
# 4817796	Open	Per Diem	Manning Accura Healthcare	08/04/2022	6A-6P (1)	RN LPN	LTC STAT Response	Run Query			IA	08/03/2022 3:47 pm	08/03/2022 4:38 pm	0
[illegible]	Open	Per Diem	Twilight Acres	08/04/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/03/2022	08/03/2022	0

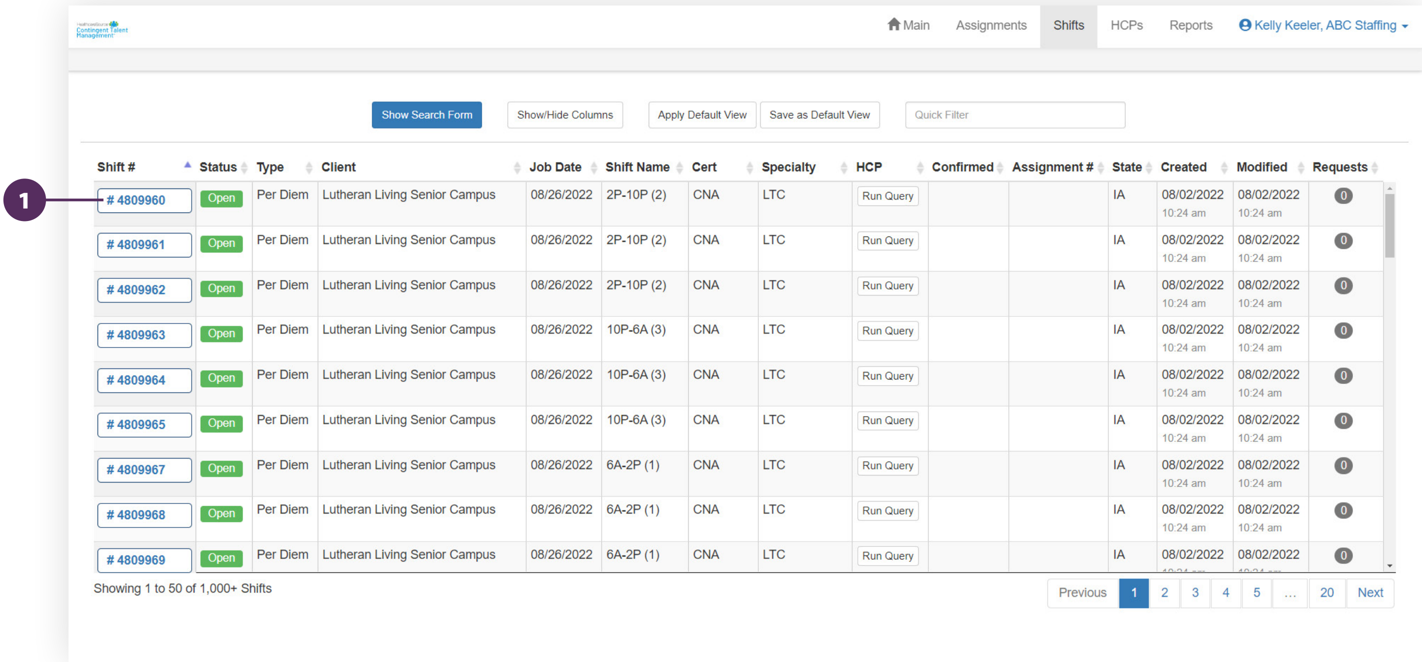
Showing 1 to 50 of 1,000+ Shifts

Previous 1 2 3 4 5 ... 20 Next

Suggesting a Healthcare Professional for a Shift

After searching for open shifts, you can suggest one of your healthcare professionals to work any of the open shifts. You can always click the blue "Show Search Form" button to change the search parameters and find more open shifts.

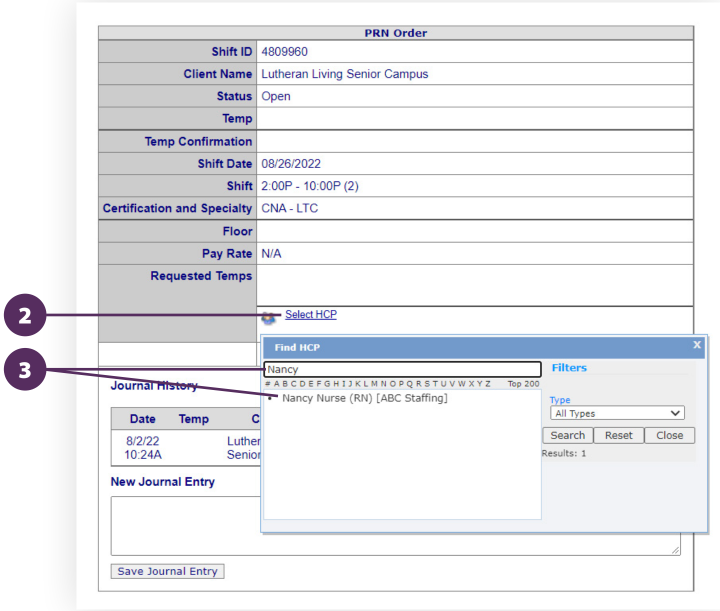
1. Click the blue shift number from the Shift # column on the left-hand side of the screen to view details about the shift and suggest one of your healthcare professionals to work that shift.



Shift #	Status	Type	Client	Job Date	Shift Name	Cert	Specialty	HCP	Confirmed	Assignment #	State	Created	Modified	Requests
# 4809960	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	2P-10P (2)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809961	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	2P-10P (2)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809962	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	2P-10P (2)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809963	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	10P-6A (3)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809964	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	10P-6A (3)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809965	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	10P-6A (3)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809967	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809968	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/02/2022 10:24 am	08/02/2022 10:24 am	0
# 4809969	Open	Per Diem	Lutheran Living Senior Campus	08/26/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/02/2022	08/02/2022	0

Suggesting a Healthcare Professional for a Shift Continued...

2. On the next screen, click on the "Select HCP" link in the "Requested Temps" row.
3. Type in the healthcare professional's name in the search box that appears, and select their name from the list.
4. Click on the "Request Shift" button below their name.
5. The request will then be sent to GrapeTree Managed Solutions to book them into the shift.
   a. **IMPORTANT:** If the shift start time is within 12 hours, reach out to your Supplier Account Manager to let them know you have requested the shift so that they can be sure to book the healthcare professional in. To get GrapeTree's approval for a last-minute shift with a start time over the weekend, reach out to our 24/7 After-Hours Staffing Department at (712) 336-0800 ext. 2704.



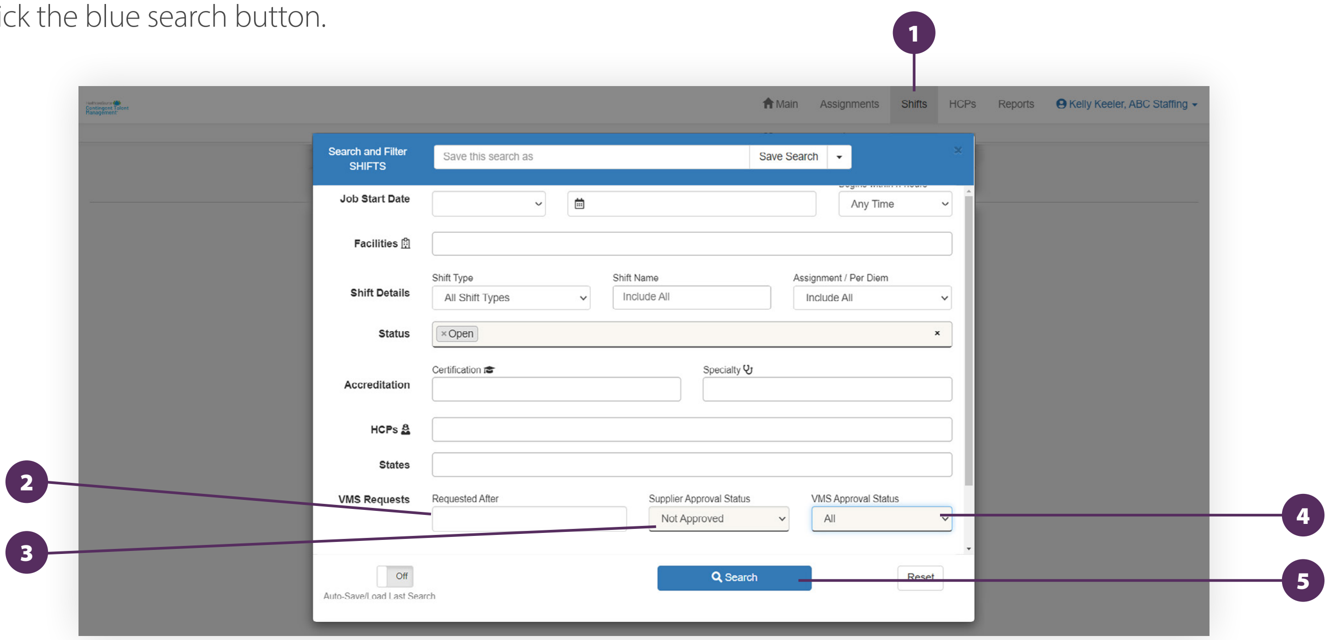
Reviewing Requested Shifts

There are two ways to review shifts that your healthcare professionals have requested to work, the Shifts Tab and the HCP Tab. We will explain both ways so that you can decide which will work best for your agency.

Method 1 - The Shifts Tab

First, we will go over using the Shifts Tab to view requested shifts. This method may be helpful for agencies with many healthcare professionals to manage.

1. Select the Shifts Tab in the menu, and a popup box will appear on your screen to search and filter the shifts. If the box does not appear, click on the blue "Show Search Form" button.
2. In the VMS Requests row (you may need to scroll down to see this row), you can select a date in the "Requested After" box to show shifts requested after a certain date, or leave it blank to view all requests.
3. In the Supplier Approval Status box, select "Not Approved" from the dropdown menu to view unapproved requests. You can review the shift requests you have already approved by selecting "Approved," or select "All" to view all approved and unapproved shifts.
4. In the VMS Approval Status box, select the appropriate option from the dropdown menu to see either open suggestions GrapeTree has not approved or rejected shifts that GrapeTree was unable to book. You can also leave this option blank to view open or rejected VMS approvals.
5. Click the blue search button.



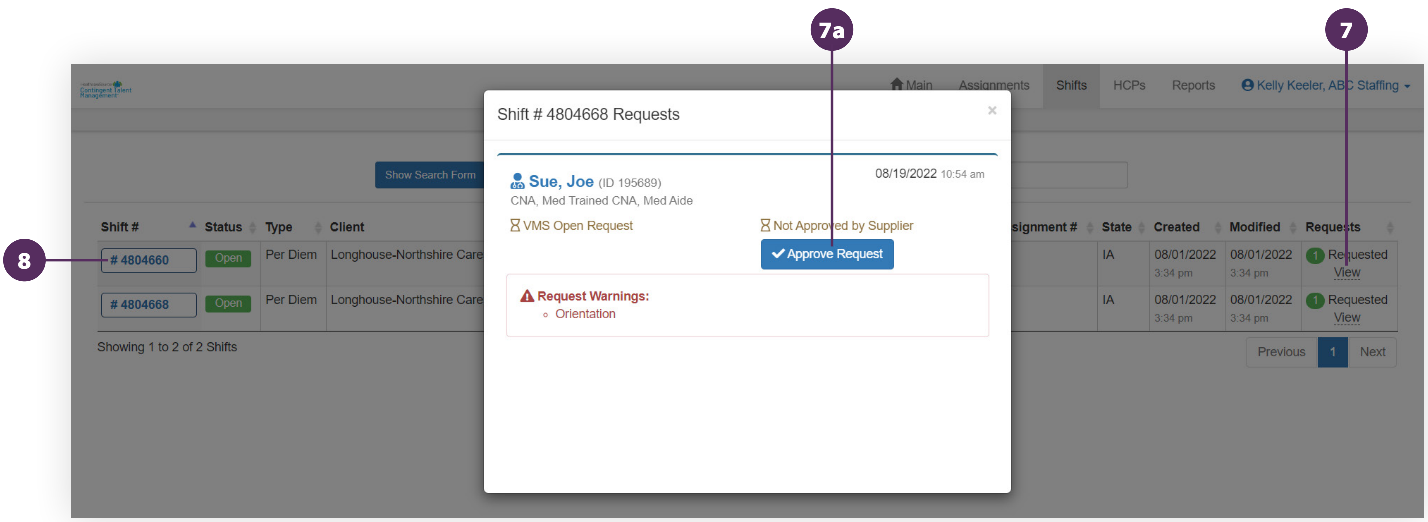
Method 1 - The Shifts Tab Continued

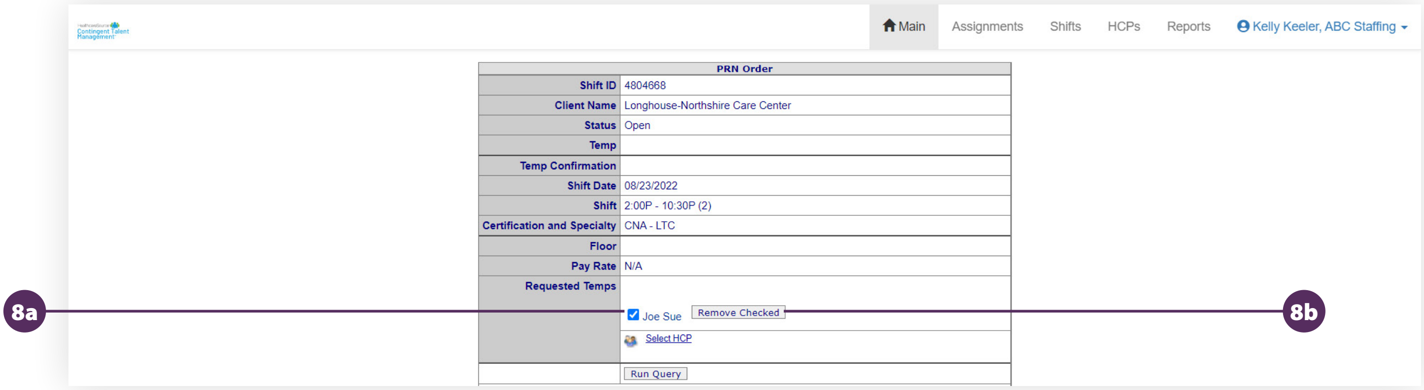
7. To approve a request, click the "View" link under the Requests column on the far right-hand side of the screen.

- **a.** Click the blue "Approve Request" button in the popup screen. This will notify GrapeTree that you have approved your healthcare professional's request for the shift, and GrapeTree will book them in to the shift if it is still available and the healthcare professional's file is compliant.

8. To reject a request from the Shifts Tab, click on the blue shift number under the Shift # column on the left-hand side.

- **a.** The healthcare professionals who have requested the shift will be listed in the "Requested Temps" row.
- **b.** To reject the request, click on the box next to the healthcare professional's name to check it and then click the "Remove Checked" button.

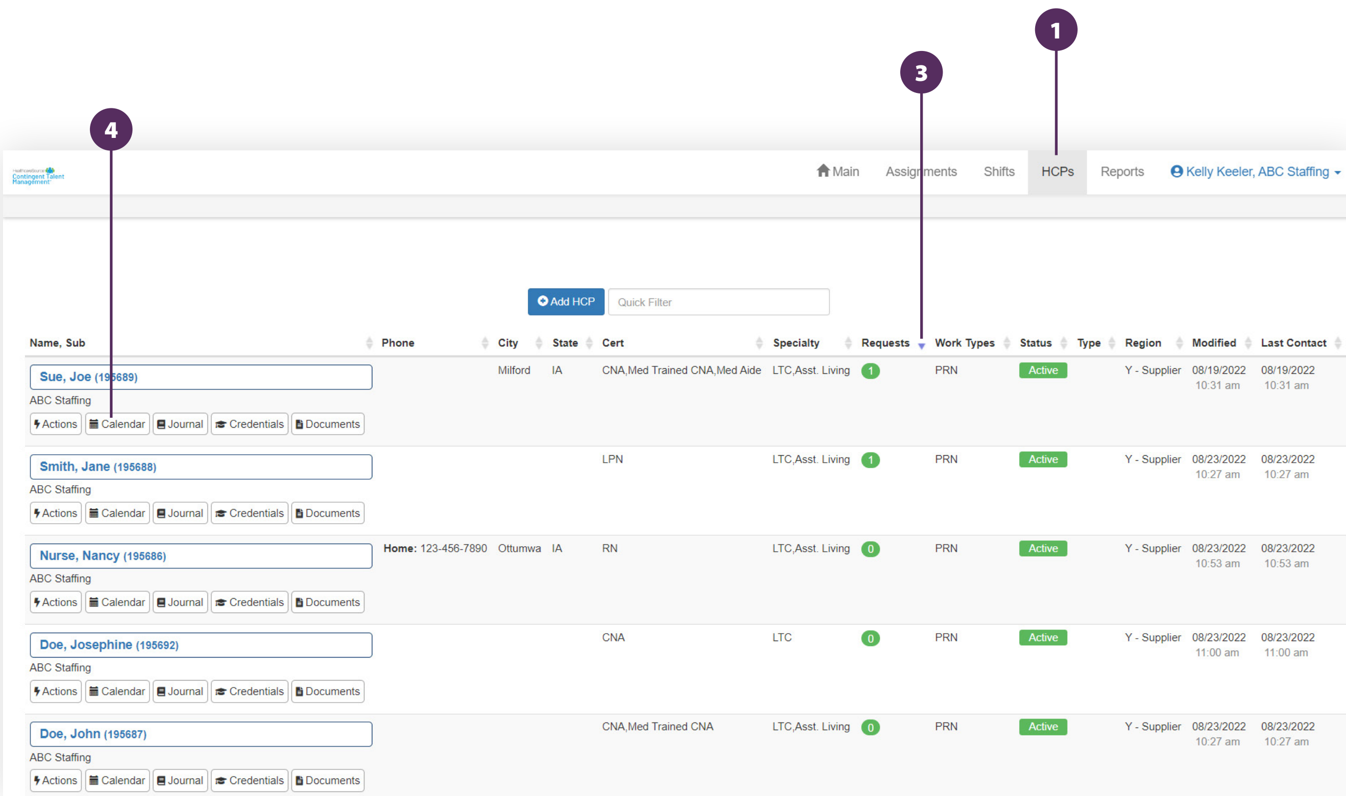




Method 2 - The HCP Tab

The second way to review shift requests is by using the HCP Tab. Keep in mind that both methods will allow to you approve or reject shift requests, so please use the option that works best for you.

1. Click on the HCP Tab in the menu.
2. The next screen will have all of your healthcare professionals listed in a table view.
3. Filter the table to show healthcare professionals who have requested shifts at the top by clicking on the filter button in the Requests column.
4. Click on the Calendar button underneath the healthcare professional's name.



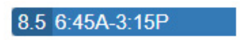
Method 2 - The HCP Tab Continued

4. **a.** After clicking on the calendar button, it will take you to their calendar where you can see shifts they have completed, booked, and requested.

b. Shifts that have been completed are color-coded in gray.

c. If the healthcare professional has completed a shift, but has not submitted their timesheet, there will be a red clock icon indicating that the timesheet needs to be submitted.

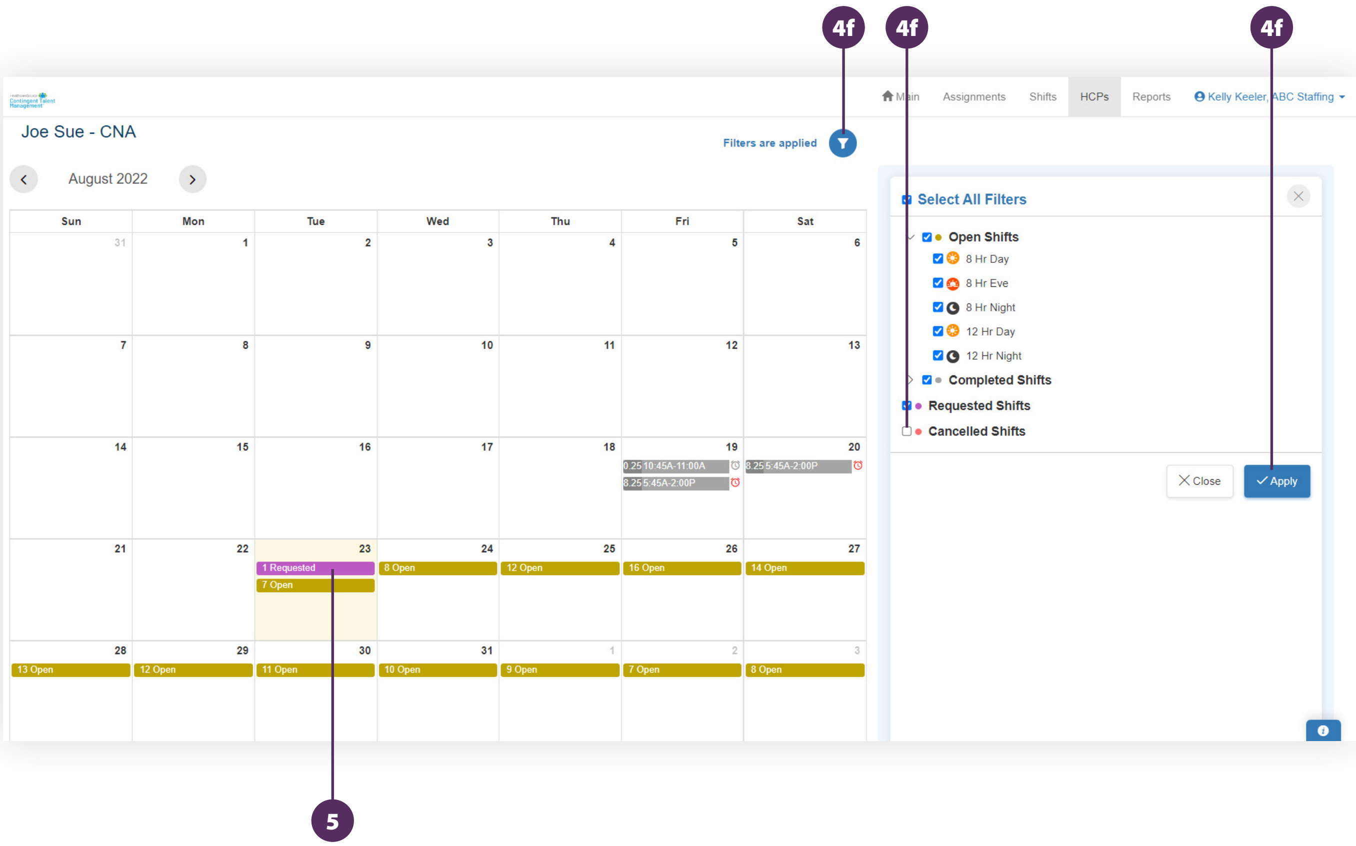
d. Shifts that the healthcare professional has been booked in to work are show in blue.



e. Shifts that the healthcare professional has requested to work are colored purple.

f. If you would also like to see shifts that have been cancelled by the healthcare professional or the facility, tap on the filter icon in the top right, check the Cancelled Shifts option, and then click "Apply."

5. Click on a purple shift bar on the calendar to review the request.



Method 2 - The HCP Tab Continued

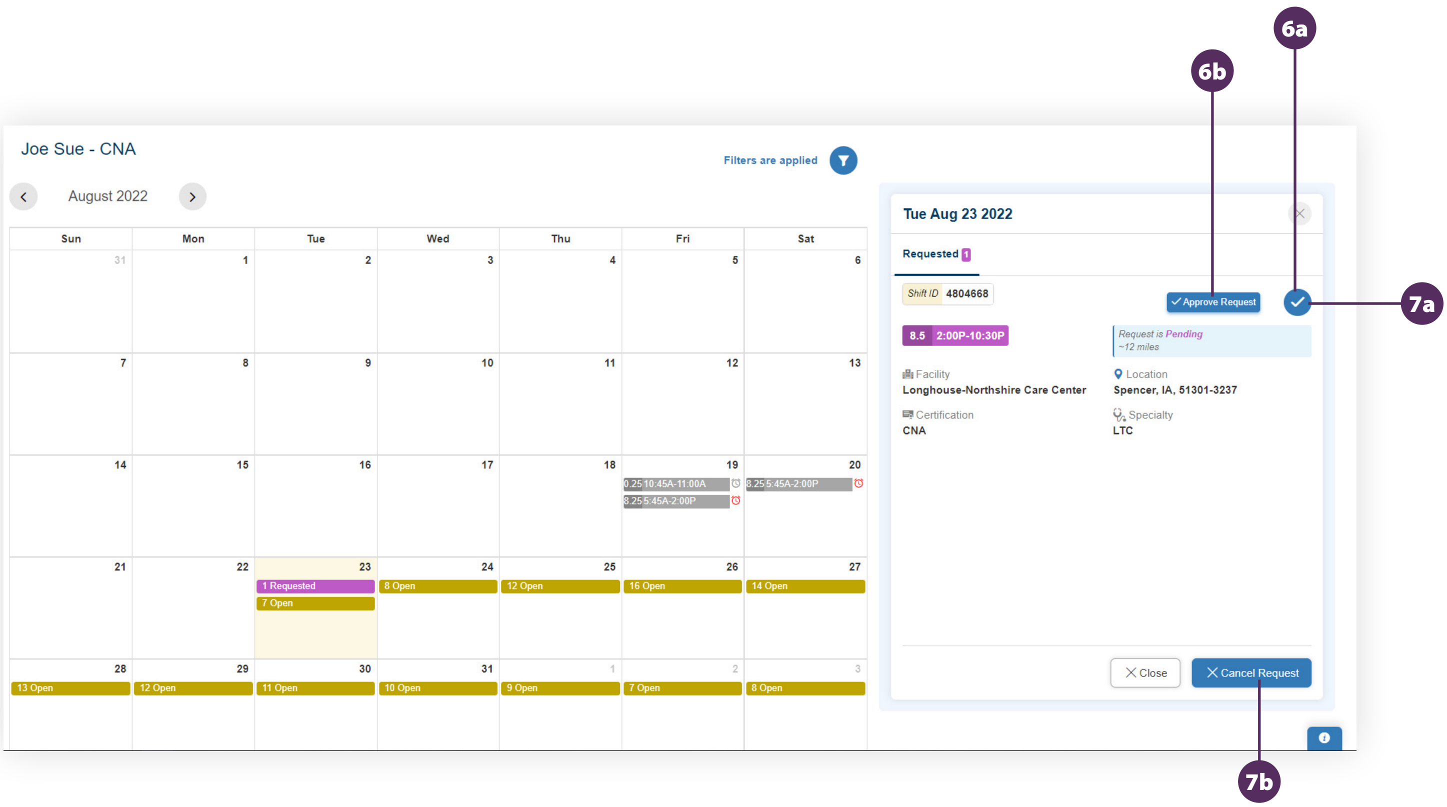
6. To approve the request:

- **a.** Click the circle button next to the approve request button to check it
- **b.** Click the Approve Request button. The button will then fade once the request has been approved.

7. To deny the request:

- **a.** Click the circle button to check it.
- **b.** Click the Cancel Request button at the bottom of the screen.

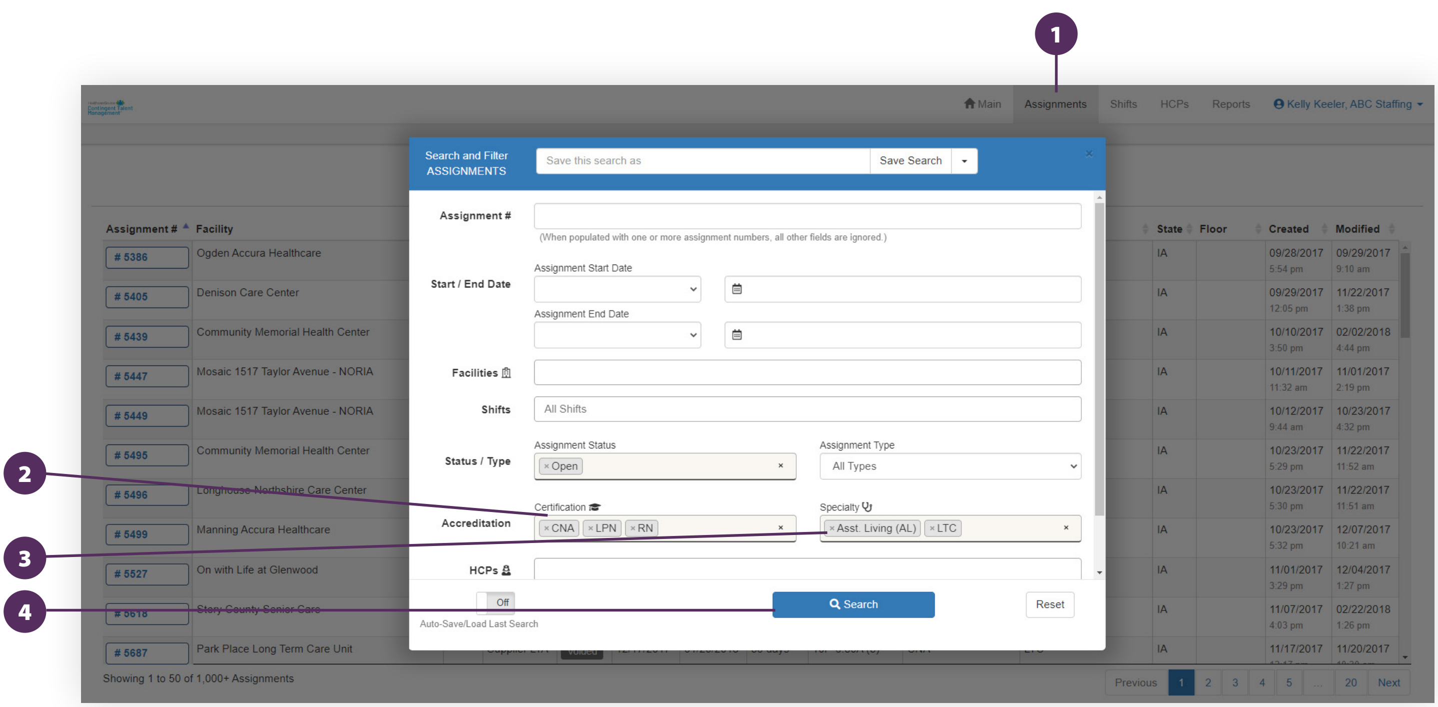
Once you approve a shift request, the healthcare professional will be suggested to GrapeTree to fill the shift. When GrapeTree books the healthcare professional into the shift, the shift bar will turn blue on the calendar. If you need to review the details of a booked shift, click on the blue shift bar for more information.



Viewing Open Long-Term Assignments

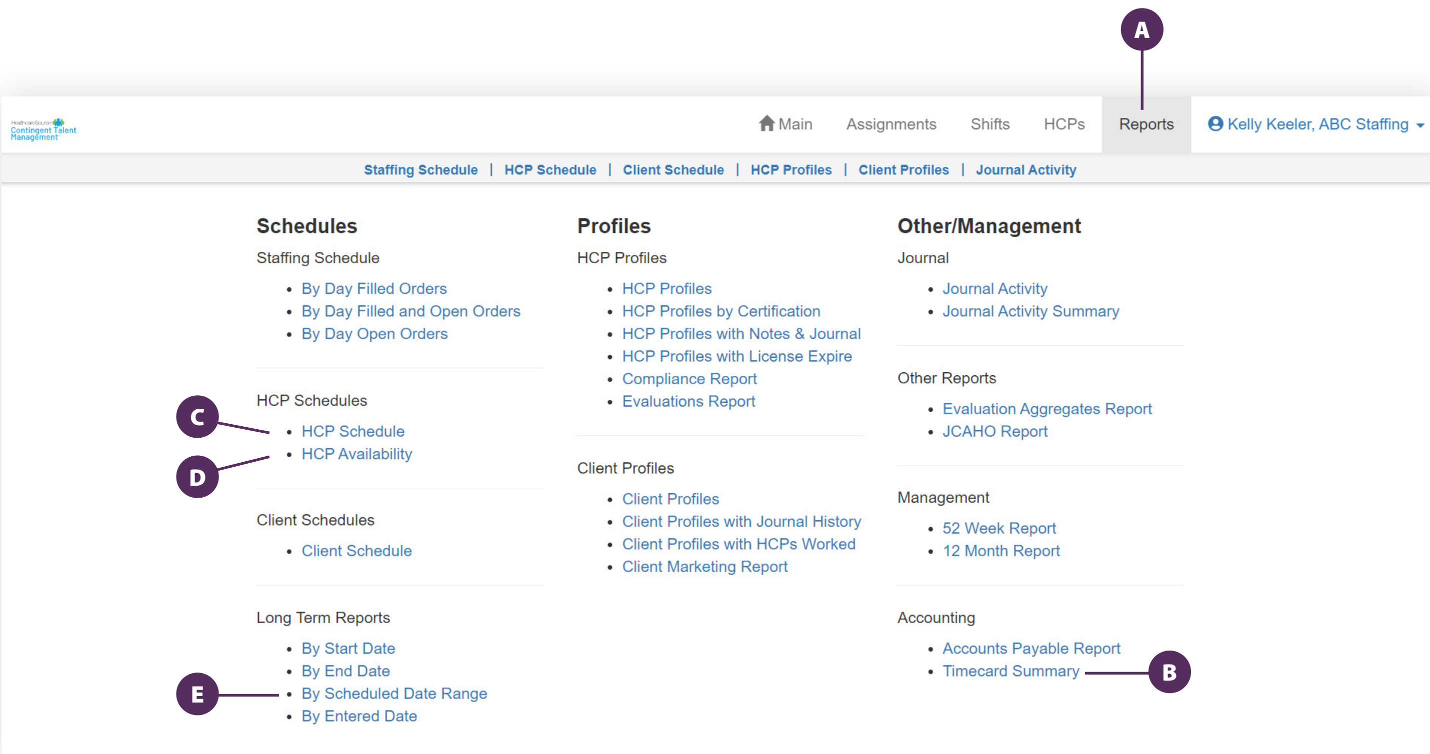
The Assignments Tab is where you can view all available long-term assignments. You can apply filters to view only the long-term assignments that fit your criteria, or leave the search form blank to view all open, filled, and voided assignments.

1. Select the Assignments Tab in the menu, and a popup box will appear on your screen to search and filter the long-term assignments. If the box does not appear, click on the blue "Show Search Form" button.
2. In the Status / Type row, select "Open" from the dropdown to view available long-term assignments.
3. In the Accreditation row, you can select certain certifications (CNA, LPN, RN) or specialties (Assisted Living, Long-Term Care).
4. Click the blue search button to see all long-term assignments that fit your criteria.
5. If you have a healthcare professional interested in one of the long-term assignments, call your Supplier Account Manager to discuss the details of the assignment or to book your healthcare professional in.



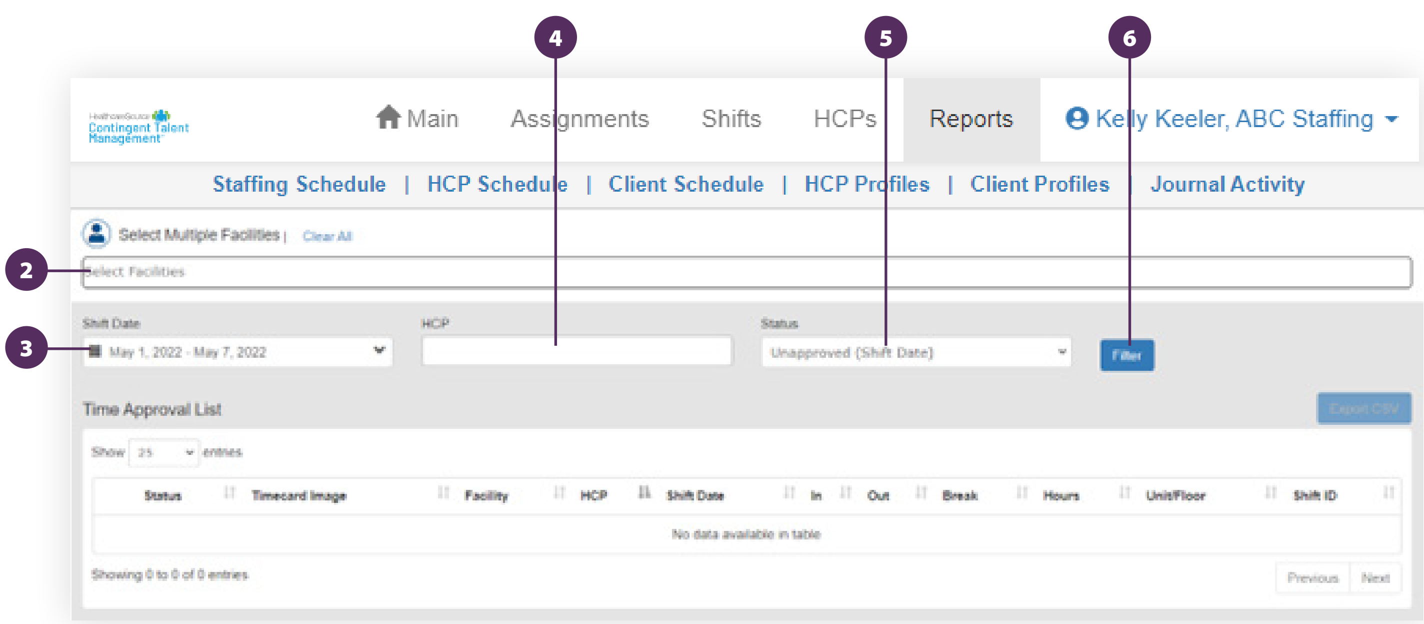
Running Reports

Another function of the Supplier Portal is running reports for your records. To run a report, click on the Reports Tab (A) in the menu bar. Here you will see all of the different types of reports the system can run. In this manual, we will review the steps to run the most popular reports - timesheet reports (B), schedule reports (C), availability reports (D), and long-term assignment reports (E).



Timesheet Reports

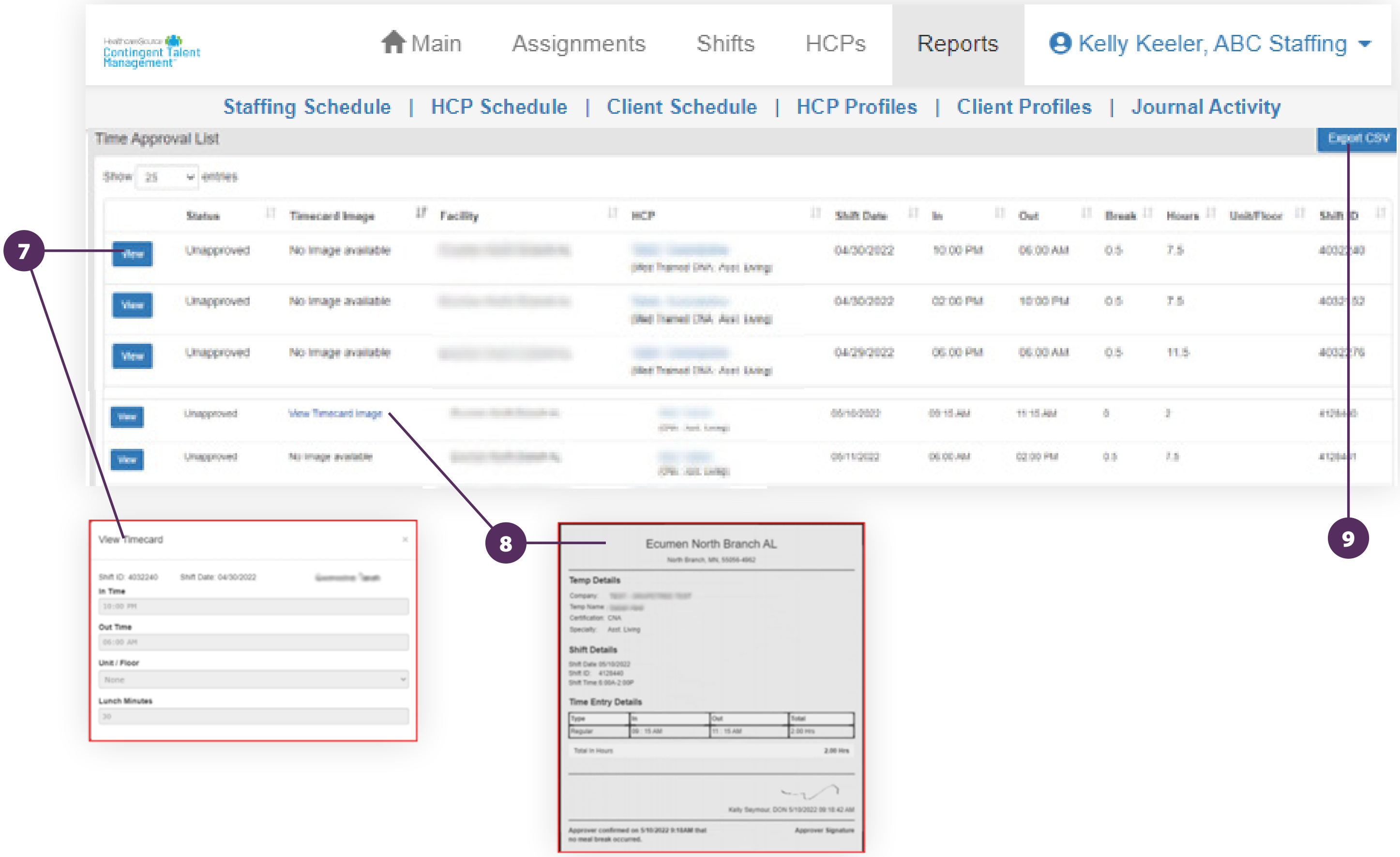
1. In the Reports Tab under the Accounting column in the Other/Management section, click on the "Timecard Summary" link. Refer to page 15 (B) for a visual. You will be taken to a screen where you will select your filter parameters for the report.
2. Select the specific facilities you would like to view data for.
   a. You cannot leave the facilities box blank, you must select the facilities you would like to see data for in order to run the report.
3. Under Shift Date, you can select the Last Period, This Period, or set a Custom Range of dates.
4. Under HCP, you can select a specific healthcare professional to view data for, or leave the box blank to view all.
5. Under Status, select either Unapproved or Approved.
   a. The Unapproved option will show any timesheets that have been submitted, but have not been processed yet.
   b. Selecting Approved will show any timesheets that have already been processed.
6. After selecting your parameters, click the blue Filter button to apply the filters to the table.



Timesheet Reports Continued

7. Click the blue View button on the far-left side of the table to view a quick summary of a timecard. This will show the shift date, the clock-in and clock-out times, and the meal break length.
8. To view the full timecard, click on the View Timecard Image link. This will show all details of the shift including the client facility, the healthcare professional's details, shift details, time entry details, and the approver's signature.
9. To view the table in a spreadsheet format, select the blue Export CSV button to download a file that can be opened in Excel.

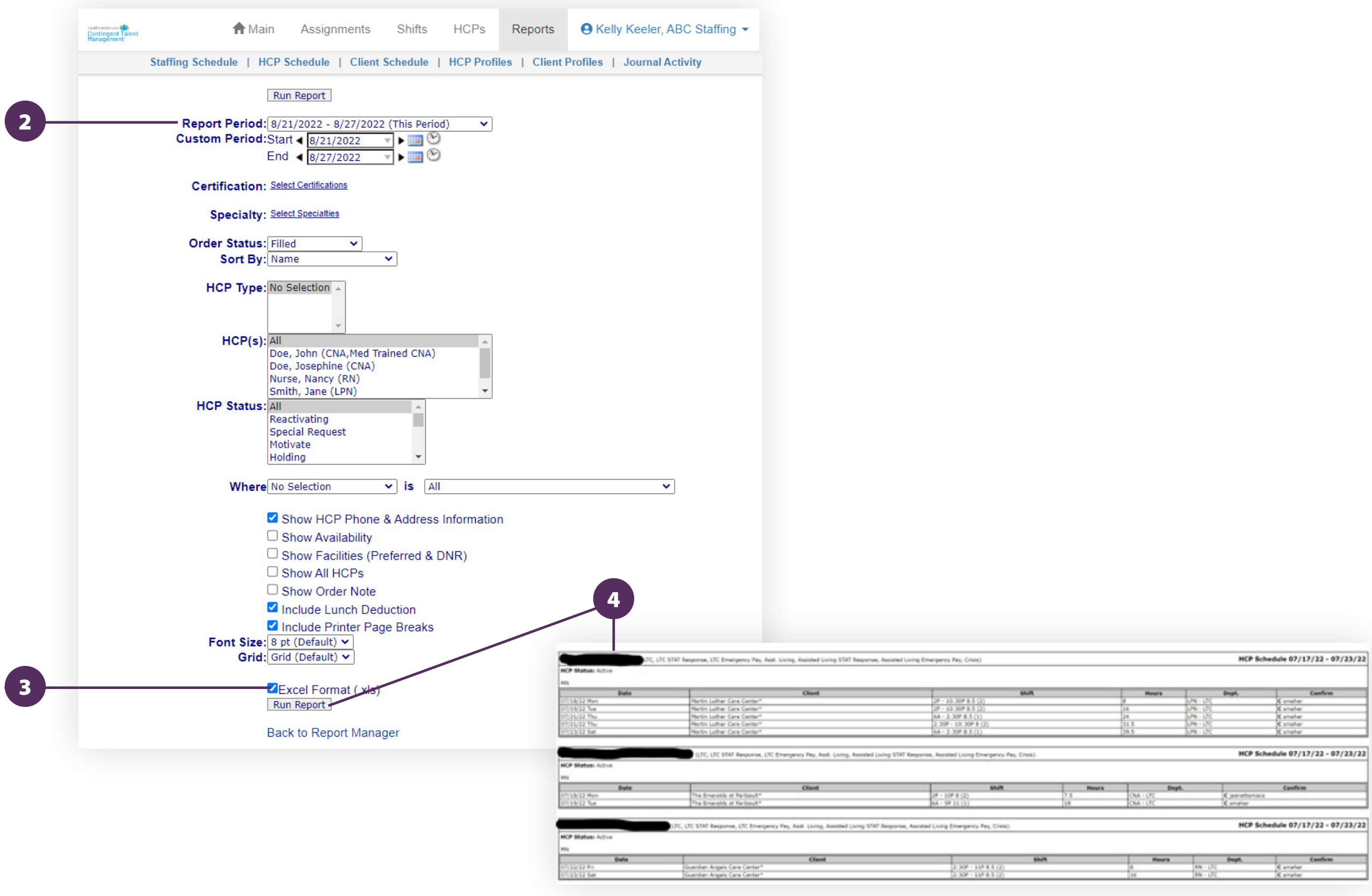
If you feel like there is a timecard with an error after reviewing the data, please fill out our dispute form at bit.ly/supplierdispute.



Schedule Reports

If you are interested in seeing which of your employees are working within a time frame and what facilities they are working at, you can run an HCP Schedule Report.

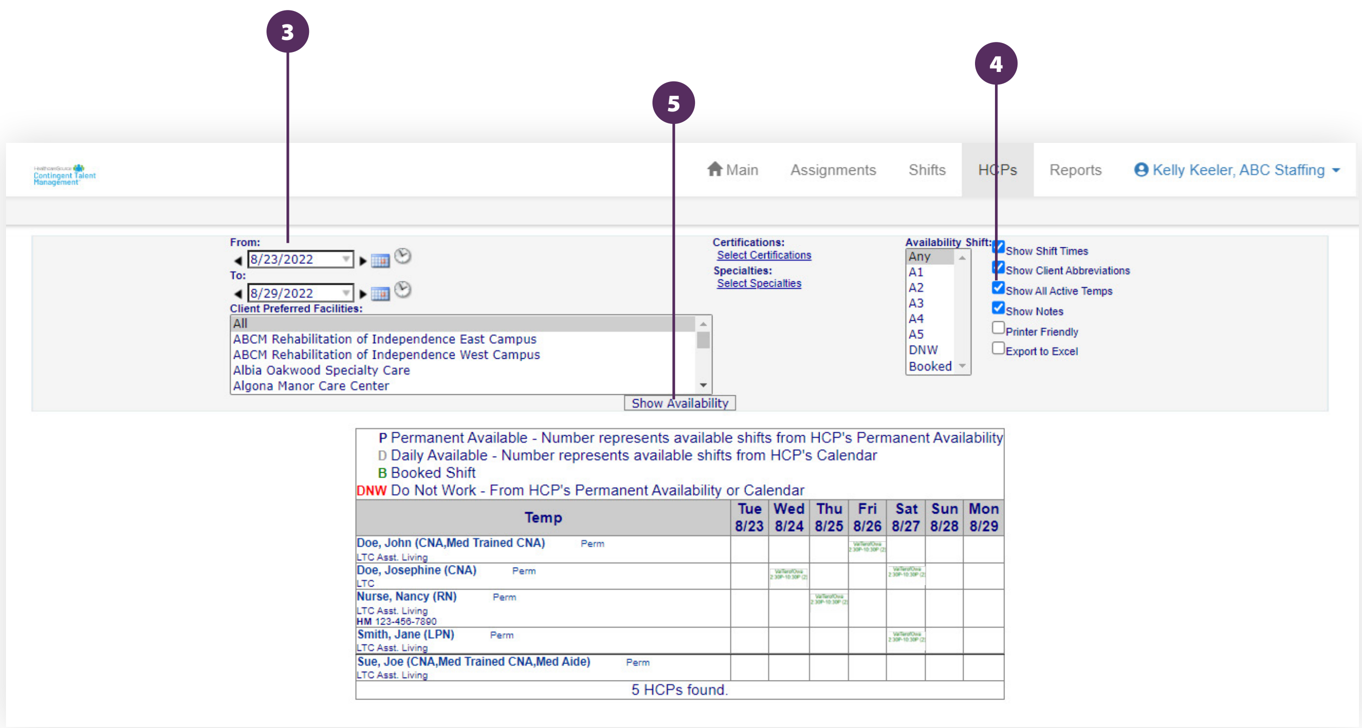
1. In the Reports Tab under the Schedules column in the HCP Schedules section, click on the "HCP Schedule" link. Refer to page 15 (C) for a visual. You will be taken to a screen where you will select your filter parameters for the report.
2. Select a date range from the "Report Period" dropdown menu.
3. If you would like to view this data as an Excel spreadsheet, be sure to check the box next to "Excel Format" to download the file.
4. Click "Run Report." A list of your healthcare professionals that work within the date range you selected will appear along with the shifts they are scheduled for and which facilities those shifts are at.



Availability Reports

If you are interested in booking your healthcare professionals into more shifts through GrapeTree, you can run an HCP Availability Report to view your healthcare professionals' availability.

1. In the Reports Tab under the Schedules column in the HCP Schedules section, click on the HCP Availability link. Refer to page 15 (D) for a visual.
2. The next screen will have a table that shows you where each employee is working and what days they are available within the selected date range.
3. Use the filters at the top of the page to customize the date range you would like to view.
4. To see healthcare professionals who are not scheduled to work during the allotted timeframe, you can check the "Show All Active Temps" box in the top right.
5. Click the "Show Availability" button and a list of your healthcare professionals will populate along with the dates and times they are scheduled to work within your selected timeframe.



If you have any additional questions about the Supplier Portal, please reach out to your Supplier Account Manager.