



# Supplier Portal Manual

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

## CALL US

PHONE: (712) 336-0800  
FAX: (888) 678-4077

## FIND US

2501 BOJI BEND DRIVE, SUITE 100  
MILFORD, IOWA 51351

## FOLLOW US



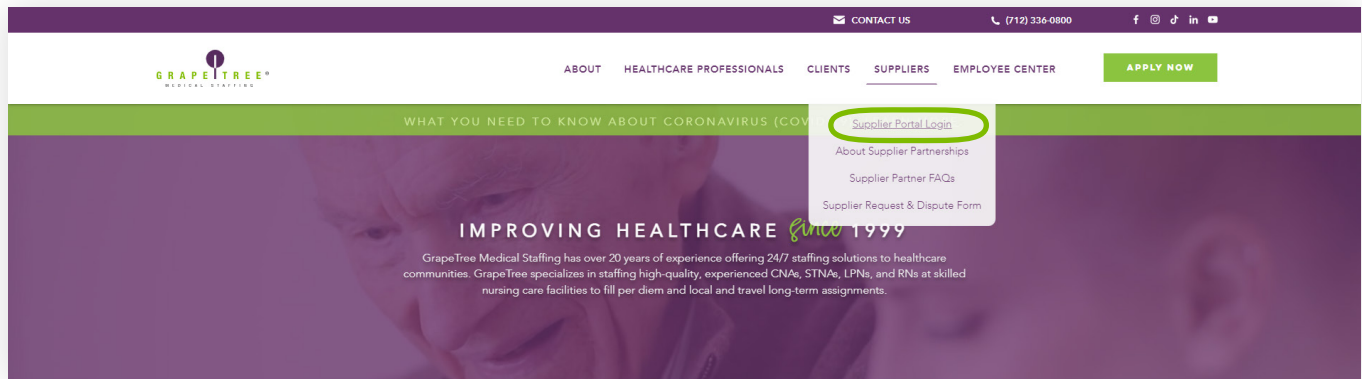
## Table of Contents

Logging In .....	<b>3</b>
Managing Healthcare Professional Profiles.....	<b>4</b>
Adding Healthcare Professionals.....	<b>4</b>
Adding Compliance Documents .....	<b>7</b>
Viewing Open Shifts.....	<b>10</b>
Suggesting a Shift.....	<b>12</b>
Reviewing Shift Requests.....	<b>14</b>
Method 1 - Shifts Tab.....	<b>14</b>
Method 2 - HCP Tab.....	<b>16</b>
Viewing Open Long-Term Assignments .....	<b>19</b>
Running Reports.....	<b>20</b>
Timesheet Reports.....	<b>21</b>
Schedule Reports.....	<b>23</b>
Availability Reports.....	<b>24</b>

# Logging In

## Already have an account?

1. Head to [grapetree.com](http://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.

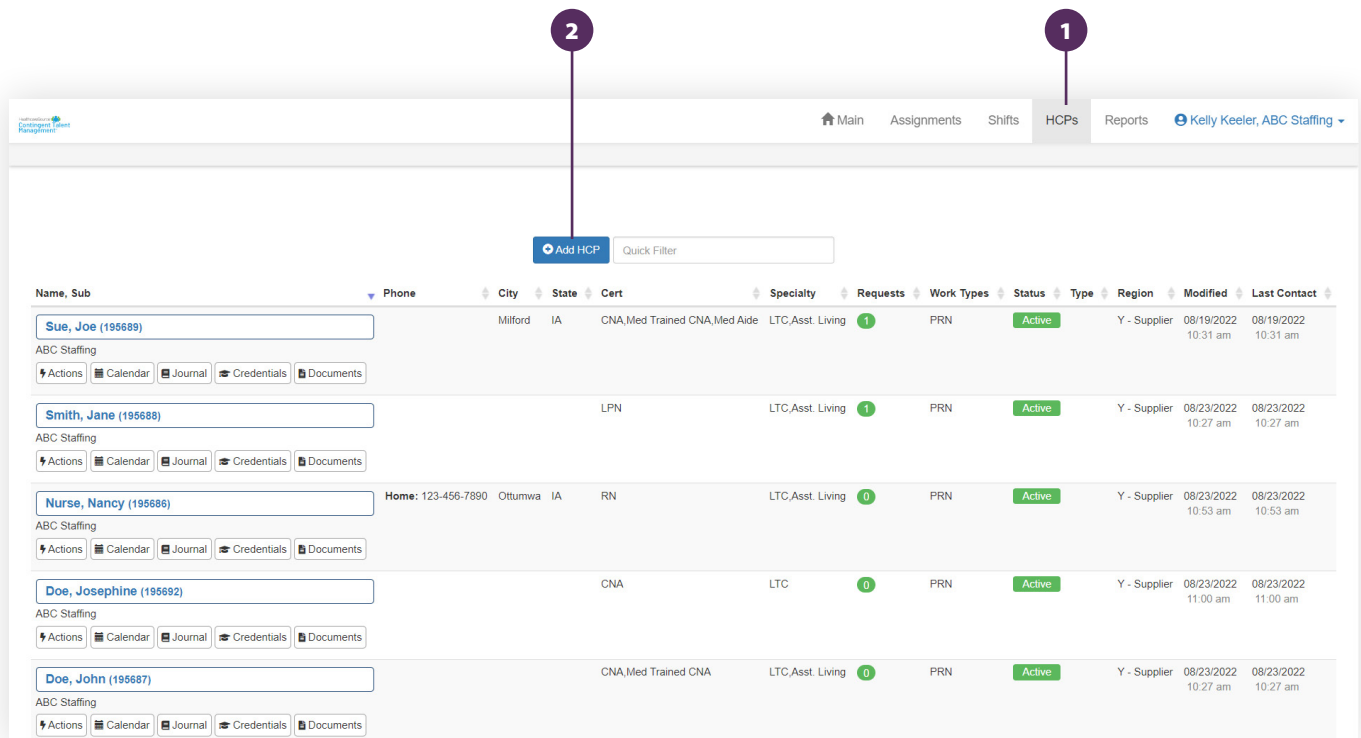
- [Google Chrome](#)
- [Mozilla Firefox](#)
- [Safari](#)
- [Microsoft Edge](#)
- [Internet Explorer](#)

# 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.



The screenshot shows the 'HCPs' tab selected in the navigation bar. Below the navigation bar, there is a search bar and an 'Add HCP' button. The main content area displays a table of healthcare professionals with the following columns: Name, Sub, Phone, City, State, Cert, Specialty, Requests, Work Types, Status, Type, Region, Modified, and Last Contact. The table lists five professionals: Sue, Joe; Smith, Jane; Nurse, Nancy; Doe, Josephine; and Doe, John. Each row includes a set of action buttons: Actions, Calendar, Journal, Credentials, and Documents.

Name, Sub	Phone	City	State	Cert	Specialty	Requests	Work Types	Status	Type	Region	Modified	Last Contact
Sue, Joe (195689) ABC Staffing		Milford	IA	CNA, Med Trained CNA, Med Aide	LTC, Asst. Living	1	PRN	Active		Y - Supplier	08/19/2022 10:31 am	08/19/2022 10:31 am
Smith, Jane (195688) ABC Staffing				LPN	LTC, Asst. Living	1	PRN	Active		Y - Supplier	08/23/2022 10:27 am	08/23/2022 10:27 am
Nurse, Nancy (195686) ABC Staffing	Home: 123-456-7890	Ottumwa	IA	RN	LTC, Asst. Living	0	PRN	Active		Y - Supplier	08/23/2022 10:53 am	08/23/2022 10:53 am
Doe, Josephine (195692) ABC Staffing				CNA	LTC	0	PRN	Active		Y - Supplier	08/23/2022 11:00 am	08/23/2022 11:00 am
Doe, John (195687) ABC Staffing				CNA, Med Trained CNA	LTC, Asst. Living	0	PRN	Active		Y - Supplier	08/23/2022 10:27 am	08/23/2022 10:27 am

## Adding a Healthcare Professional Continued...

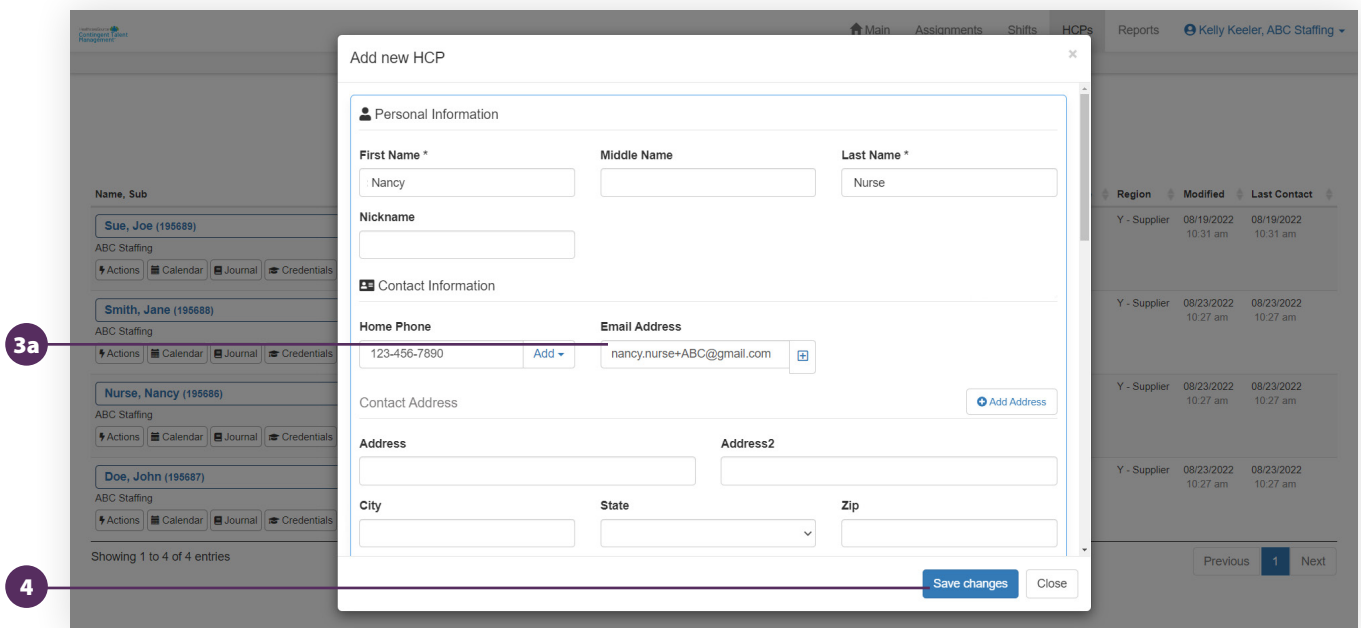
3. Add the healthcare professional's name, email address, and ZIP Code. No other information is needed, as GrapeTree will always connect with your agency and will not reach out to your healthcare professionals.
  - a. **IMPORTANT:** When adding their email address, you will need to add your agency name 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

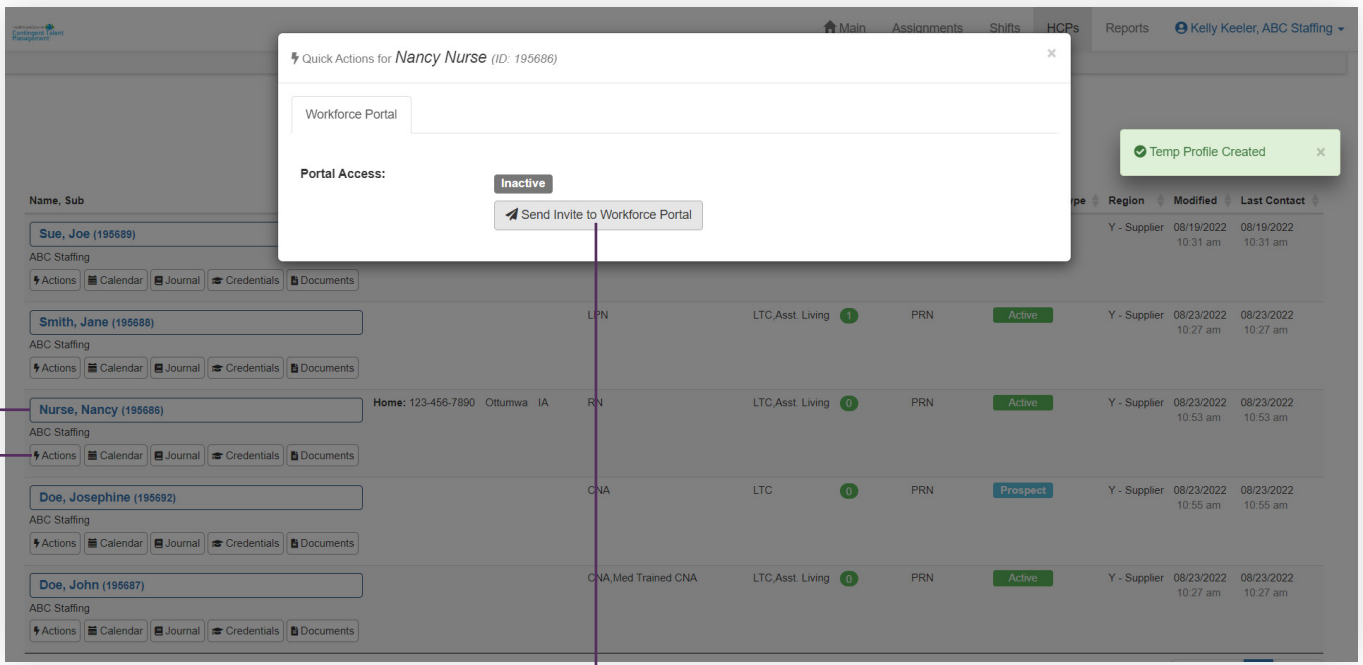
**Example Email Address:** nancy.nurse+ABC@gmail.com

- 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.



The screenshot shows a web application interface for managing healthcare professionals. A modal window titled "Quick Actions for Nancy Nurse (ID: 195686)" is open, displaying a "Workforce Portal" section with "Portal Access:" set to "Inactive" and a "Send Invite to Workforce Portal" button. A green notification "Temp Profile Created" is visible in the top right. The background shows a list of healthcare professionals with columns for Name, Sub, Home, Location, Role, Status, and Contact Info. Numbered callouts 5, 6, and 7 point to the "Nurse, Nancy" profile, its "Actions" button, and the "Send Invite to Workforce Portal" button respectively.

Name, Sub	Home	Location	Role	Status	Contact Info
Sue, Joe (195689)					
Smith, Jane (195688)			LPN	Active	
Nurse, Nancy (195686)	123-456-7890	Ottumwa IA	RN	Active	
Doe, Josephine (195692)			CNA	Prospect	
Doe, John (195687)			CNA, Med Trained CNA	Active	

## 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.

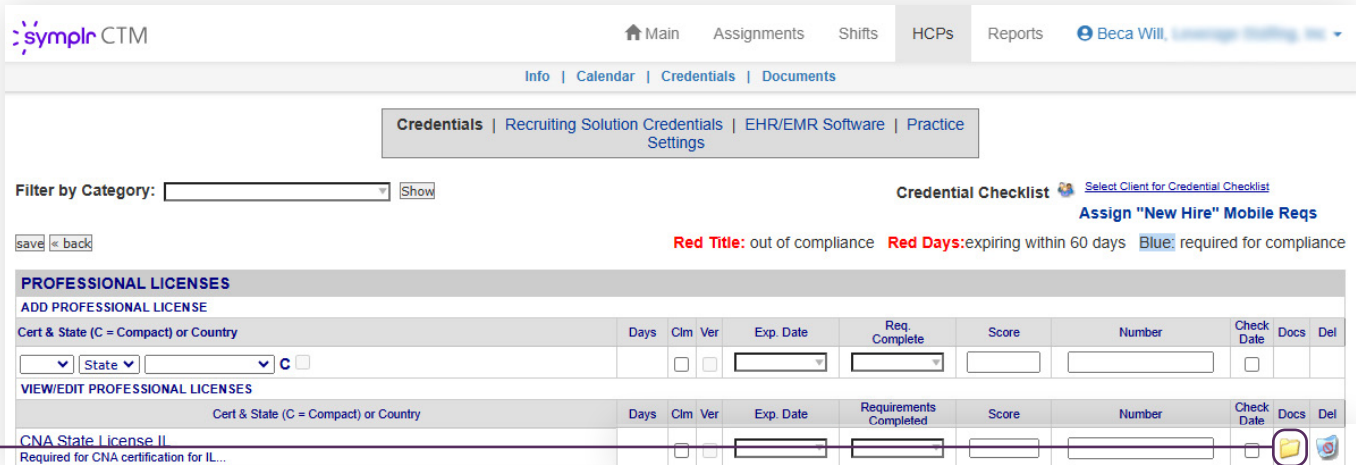
The screenshot shows the symplr CTM interface. At the top, there are navigation tabs: Main, Assignments, Shifts, HCPs, Reports, and a user profile for Beca Will. Below the navigation is a search bar with the text 'Add HCP' and 'Nancy'. A table lists healthcare professionals with columns for Name, Phone, City, State, Cert, Specialty, Requests, Work Types, Status, Type, Region, Modified, and Last Contact. The first entry is 'Nurse, Nancy (297384)' with a '1' in the Requests column. Below the table, there are buttons for 'Actions', 'Calendar', 'Journal', 'Credentials', and 'Documents'. A red circle '1' points to the search bar, and a red circle '2' points to the 'Credentials' button.

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.

The screenshot shows the symplr CTM Credentials page. At the top, there are navigation tabs: Main, Assignments, Shifts, HCPs, Reports, and a user profile for Beca Will. Below the navigation is a breadcrumb trail: Info | Calendar | Credentials | Documents. The main content area is titled 'Credentials | Recruiting Solution Credentials | EHR/EMR Software | Practice Settings'. There is a 'Filter by Category' dropdown and a 'Show' button. A 'Credential Checklist' section is visible with a 'Select Client for Credential Checklist' link and an 'Assign "New Hire" Mobile Reqs' button. A red title indicates 'out of compliance' and 'Red Days: expiring within 60 days'. Below this, there are sections for 'PROFESSIONAL LICENSES' and 'NON-PROFESSIONAL CREDENTIALS'. A table lists various credentials with columns for Days, Cim, Ver, Exp. Date, Requirements Completed, Score, Note/Num, Check Date, Docs, and Del. A red circle '3' points to the 'Select Credentials' button, and a red circle '4' points to the 'save' button.

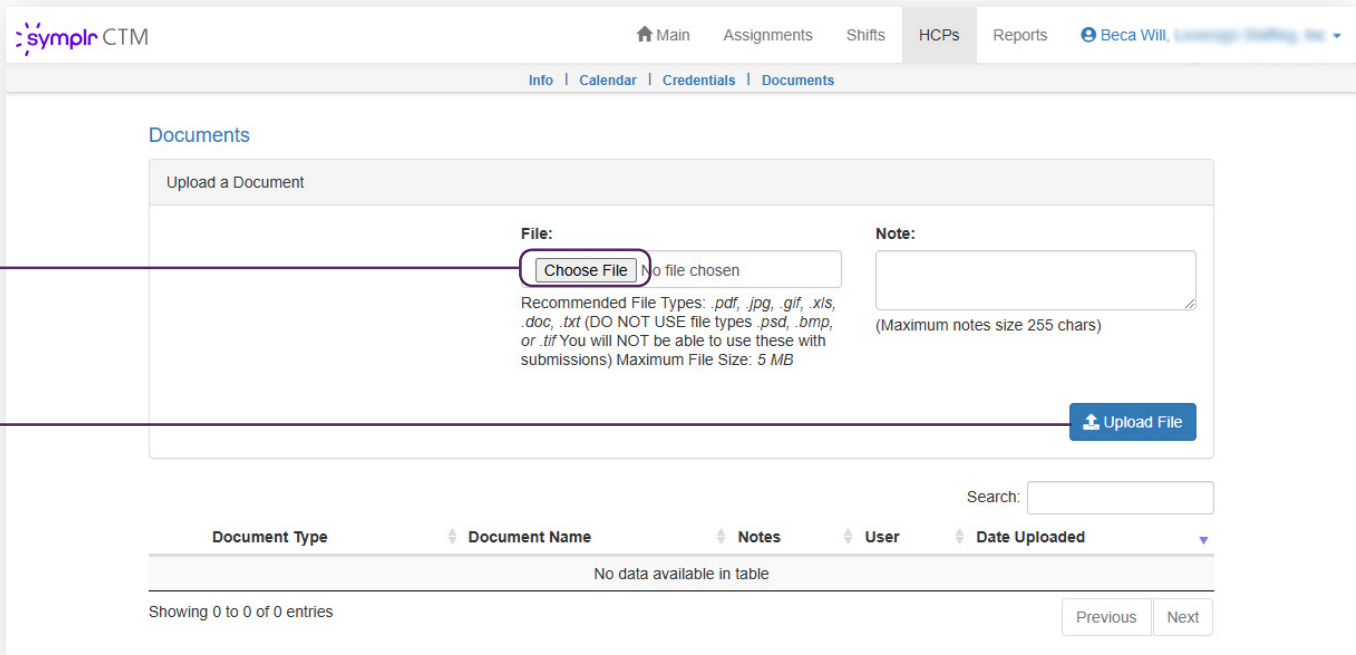
## Adding Compliance Documents Continued...

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



The screenshot shows the Symplr CTM interface. At the top, there are navigation tabs: Main, Assignments, Shifts, HCPs, Reports, and a user profile for Beca Will. Below this, there are sub-tabs: Info, Calendar, Credentials, and Documents. The 'Documents' sub-tab is active. A breadcrumb trail shows: Credentials | Recruiting Solution Credentials | EHR/EMR Software | Practice Settings. There is a 'Filter by Category' dropdown and a 'Show' button. A 'Credential Checklist' section includes a 'Select Client for Credential Checklist' link and an 'Assign "New Hire" Mobile Reqs' button. A legend indicates: Red Title: out of compliance, Red Days: expiring within 60 days, Blue: required for compliance. Below this is a table for 'PROFESSIONAL LICENSES'. The table has columns: Cert & State (C = Compact) or Country, Days, Cim, Ver, Exp. Date, Req. Complete, Score, Number, Check Date, Docs, and Del. The 'CNA State License II' row is highlighted, and a yellow folder icon in the 'Docs' column is circled with a purple circle containing the number 5.

- 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.
- Click the "Upload File" button.

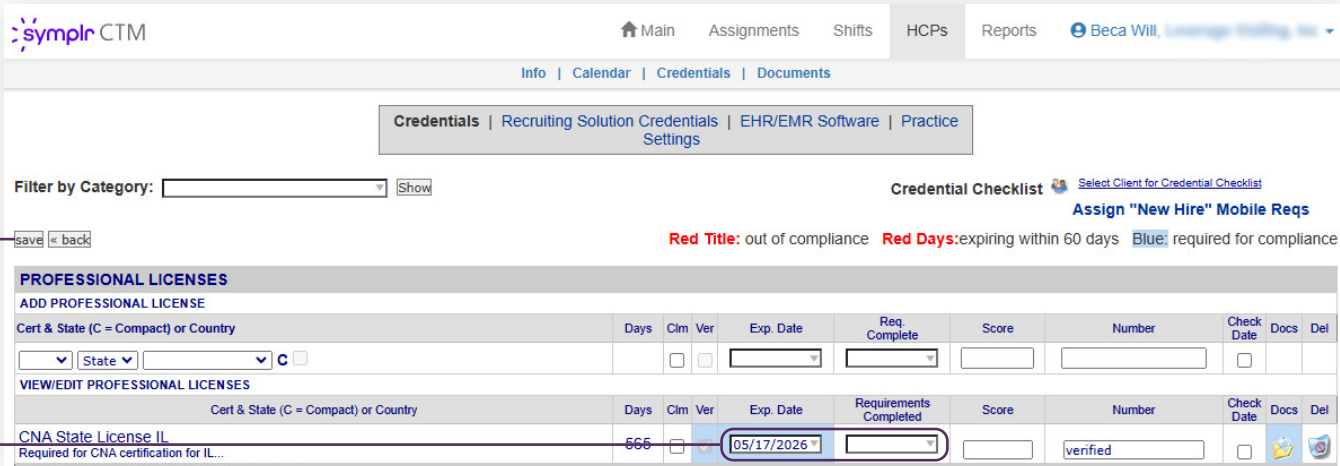


The screenshot shows the Symplr CTM interface with the 'Documents' section. The 'Upload a Document' form is displayed. It has a 'File:' section with a 'Choose File' button circled with a purple circle containing the number 6. Below the button, it says 'No file chosen'. There is also a 'Note:' section with a text area and a '(Maximum notes size 255 chars)' label. At the bottom right of the form is an 'Upload File' button circled with a purple circle containing the number 7. Below the form is a search bar and a table with columns: Document Type, Document Name, Notes, User, and Date Uploaded. The table is currently empty, showing 'No data available in table'. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.



## 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.



symplr CTM

Home | Main | Assignments | Shifts | HCPS | Reports | Beca Will, [dropdown]

Info | Calendar | Credententials | Documents

Credententials | Recruiting Solution | Credentials | EHR/EMR Software | Practice Settings

Filter by Category: [dropdown] Show

Credential Checklist [Select Client for Credential Checklist](#)  
Assign "New Hire" Mobile Reqs

Red Title: out of compliance Red Days: expiring within 60 days Blue: required for compliance

save back

**PROFESSIONAL LICENSES**

ADD PROFESSIONAL LICENSE

Cert & State (C = Compact) or Country	Days	Cm	Ver	Exp. Date	Req. Complete	Score	Number	Check Date	Docs	Del
[dropdown] State [dropdown] C <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	[dropdown]	[dropdown]	[input]	[input]	<input type="checkbox"/>		

VIEW/EDIT PROFESSIONAL LICENSES

Cert & State (C = Compact) or Country	Days	Cm	Ver	Exp. Date	Requirements Completed	Score	Number	Check Date	Docs	Del
CNA State License IL Required for CNA certification for IL...	565	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05/17/2026	[dropdown]	[input]	verified	<input type="checkbox"/>		

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

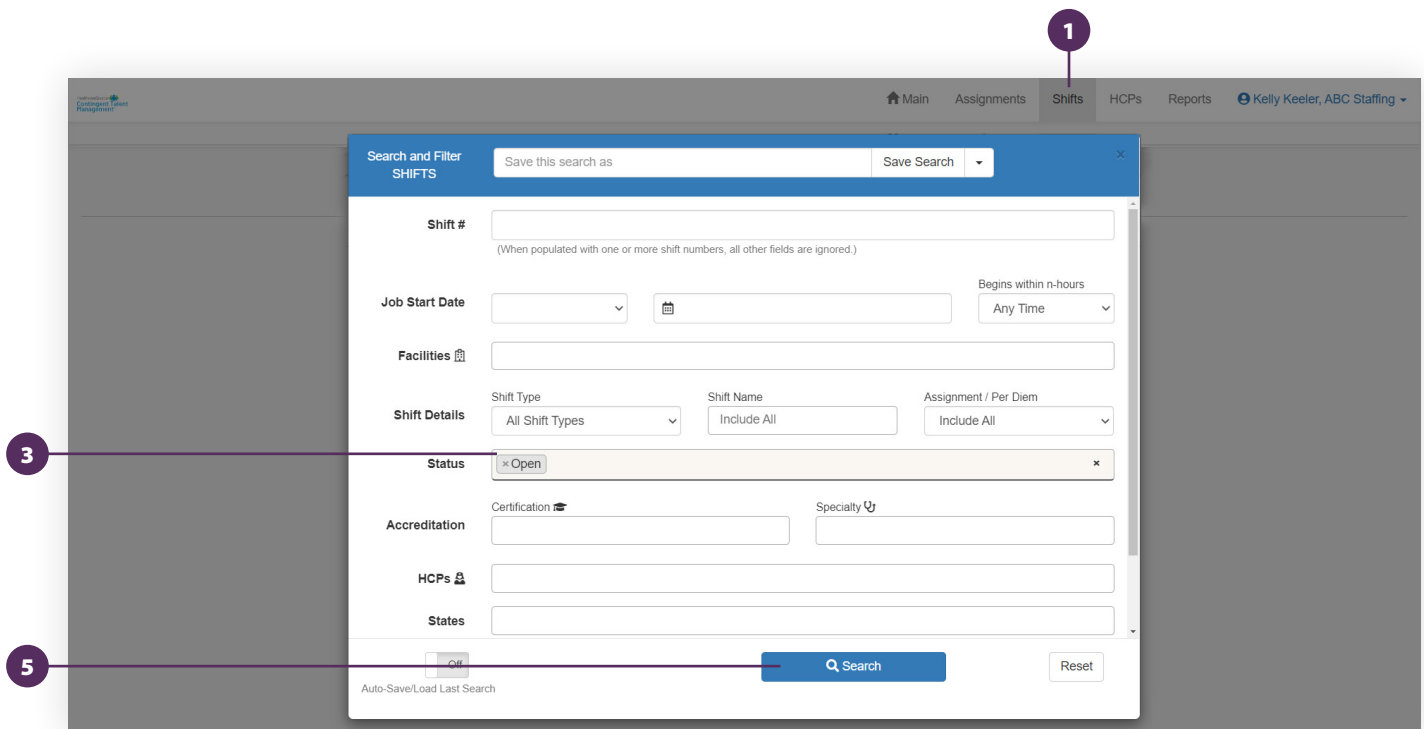
### Please include the following information on the healthcare professional:

- 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.

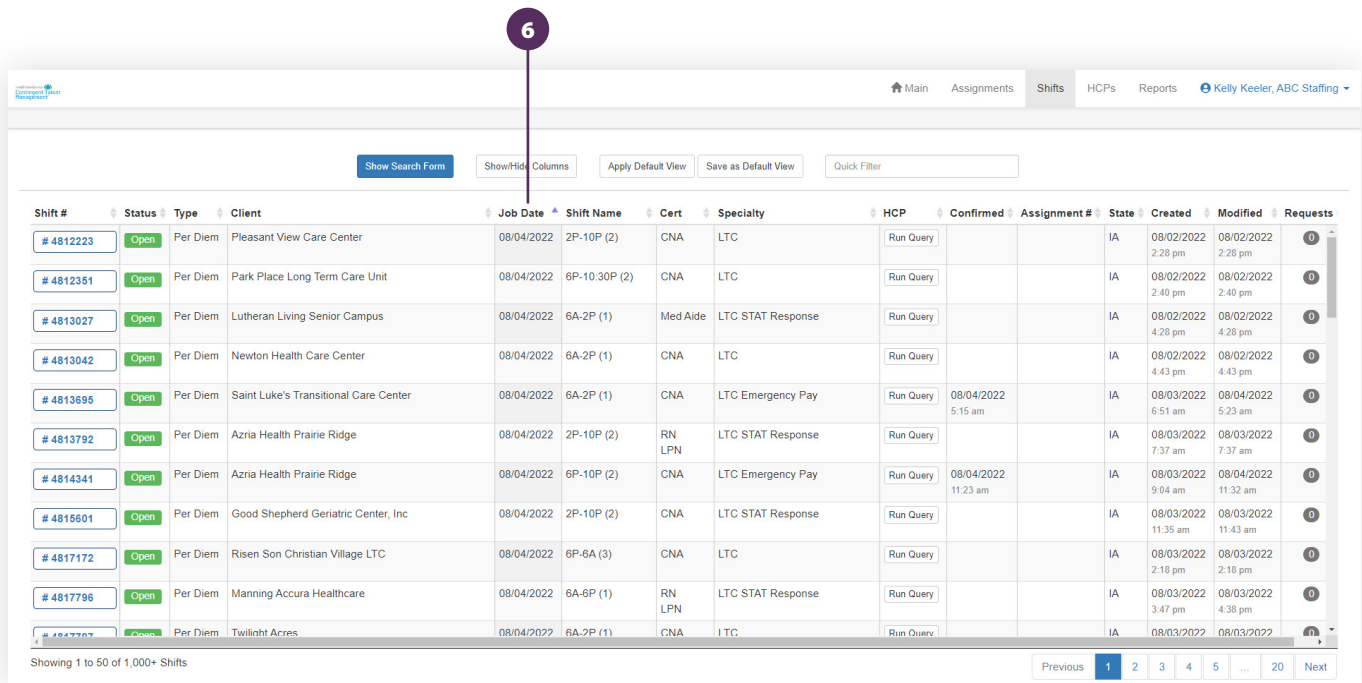
1. Select the Shifts Tab in the menu.
2. A popup box will appear on your screen to search and filter the shifts. If the box does not appear, click on the blue "Show Search Form" button.
3. In the "Status" row, select the "Open" status.
  - a. To see shifts that are filled or voided, change the status 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...

- 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.



The screenshot shows a web interface for viewing open shifts. A callout bubble with the number '6' points to the 'Job Date' column header in the table. The table lists various shifts with columns for Shift #, Status, Type, Client, Job Date, Shift Name, Cert, Specialty, HCP, Confirmed, Assignment #, State, Created, Modified, and Requests. The 'Job Date' column is currently sorted by date, showing shifts for 08/04/2022.

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 4:36 pm	0
# 4847767	Open	Per Diem	Twilight Acres	08/04/2022	6A-2P (1)	CNA	LTC	Run Query			IA	08/03/2022	08/03/2022	0

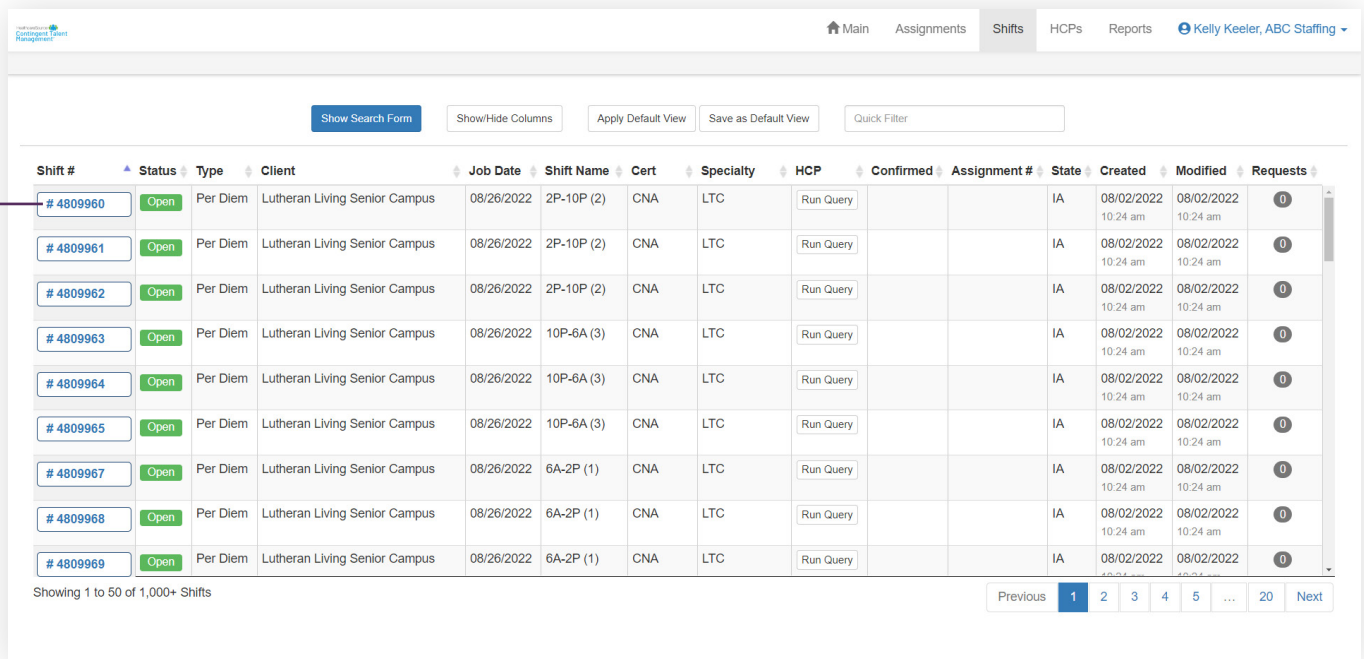
Showing 1 to 50 of 1,000+ Shifts

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.



The screenshot shows a web application interface for managing shifts. At the top, there are navigation tabs: Main, Assignments, Shifts (selected), HCPs, Reports, and a user profile for Kelly Keeler, ABC Staffing. Below the navigation is a toolbar with buttons for 'Show Search Form', 'Show/Hide Columns', 'Apply Default View', 'Save as Default View', and a 'Quick Filter' input field. The main content is a table with the following columns: Shift #, Status, Type, Client, Job Date, Shift Name, Cert, Specialty, HCP, Confirmed, Assignment #, State, Created, Modified, and Requests. The first row is highlighted, and a red circle with the number 1 points to the shift number '#4809960'. The table shows several open shifts for 'Lutheran Living Senior Campus' on '08/26/2022' with various shift names and times. At the bottom, there is a pagination bar showing 'Showing 1 to 50 of 1,000+ Shifts' and a set of page numbers from 1 to 20, with '1' being the active page.

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 10:24 am	08/02/2022 10:24 am	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.

**PRN Order**

Shift ID	4809960
Client Name	Lutheran Living Senior Campus
Status	Open
Temp	
Temp Confirmation	
Shift Date	08/26/2022
Shift	2:00P - 10:00P (2)
Certification and Specialty	CNA - LTC
Floor	
Pay Rate	N/A
Requested Temps	<a href="#">Select HCP</a>

**Find HCP**

Nancy

ABCDEF... Top 200

- Nancy Nurse (RN) [ABC Staffing]

Results: 1

**Journal History**

Date	Temp	C
8/2/22	10:24A	Luther Senior

**New Journal Entry**

**PRN Order**

Shift ID	4809960
Client Name	Lutheran Living Senior Campus
Status	Open
Temp	
Temp Confirmation	
Shift Date	08/26/2022
Shift	2:00P - 10:00P (2)
Certification and Specialty	CNA - LTC
Floor	
Pay Rate	N/A
Requested Temps	Nancy Nurse (RN) [ABC Staffing] - 195686

**Journal History**

Date	Temp	Client	Type	Note	User
8/2/22	10:24A	Lutheran Living Senior Campus	Order Created (Client Access)	Order Source: Facility Portal	Kelsey *Bohm

**New Journal Entry**

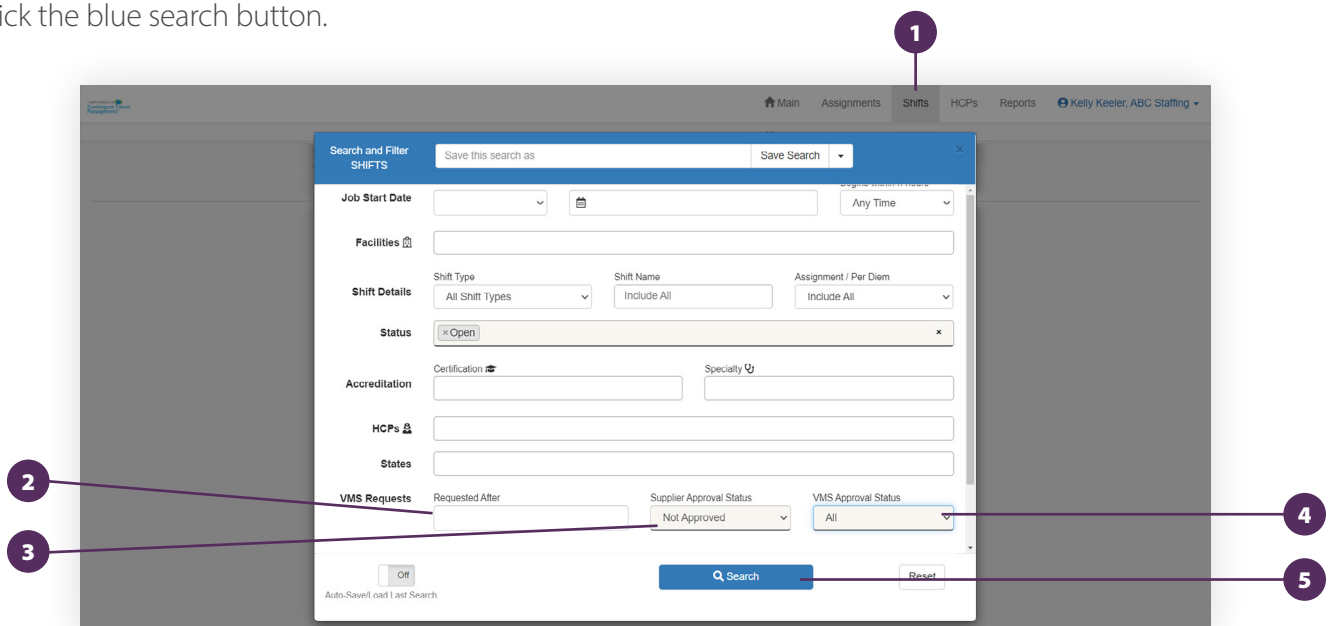
# Reviewing Requested Shifts

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

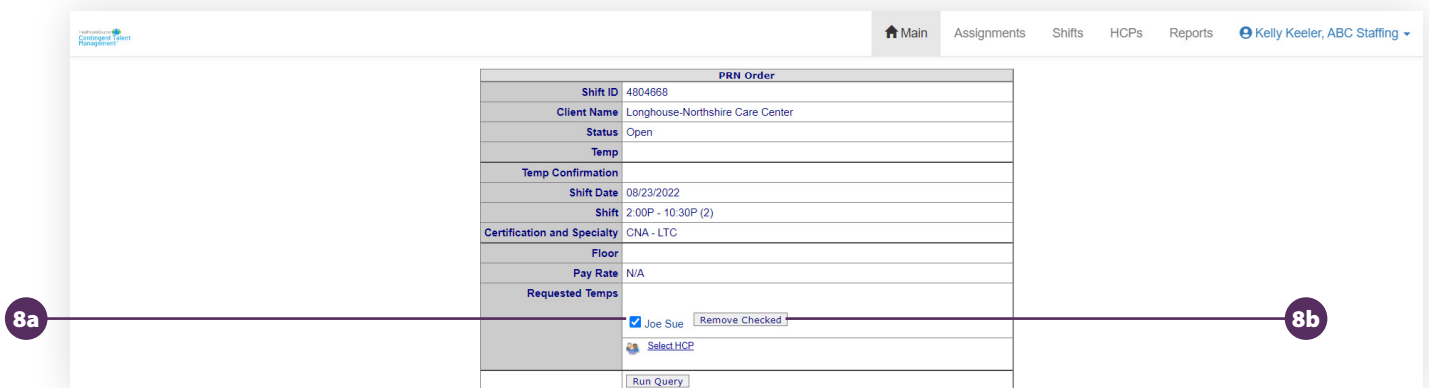
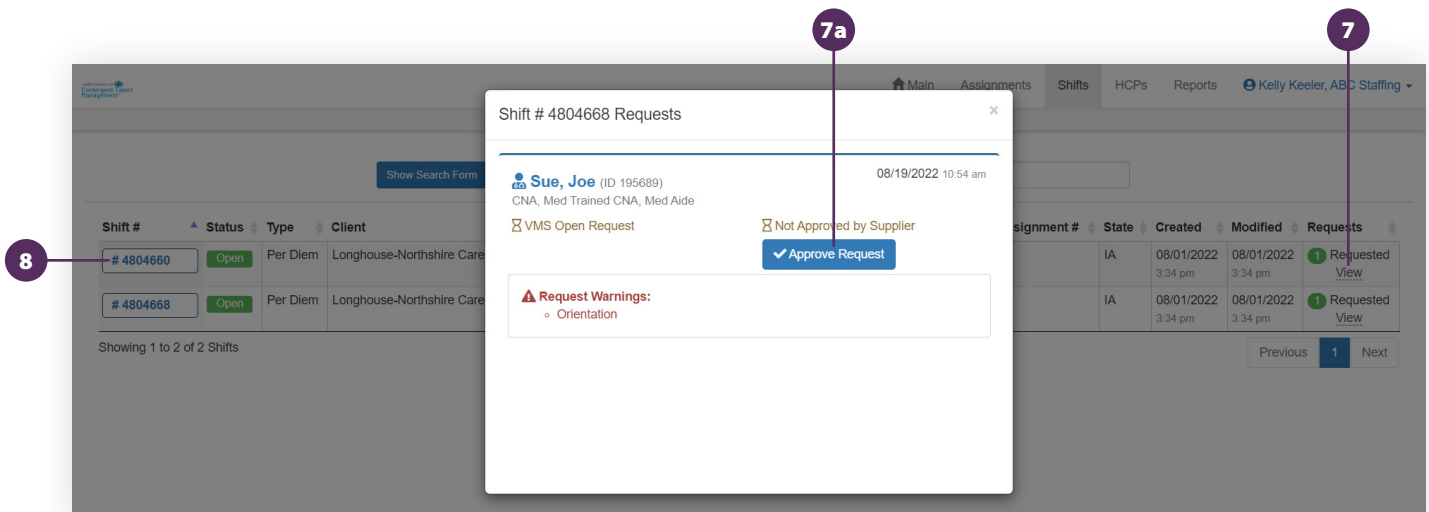
First, we will go over using the Shifts Tab to view requested shifts. This method may be helpful for agencies with many healthcare professionals to manage.

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

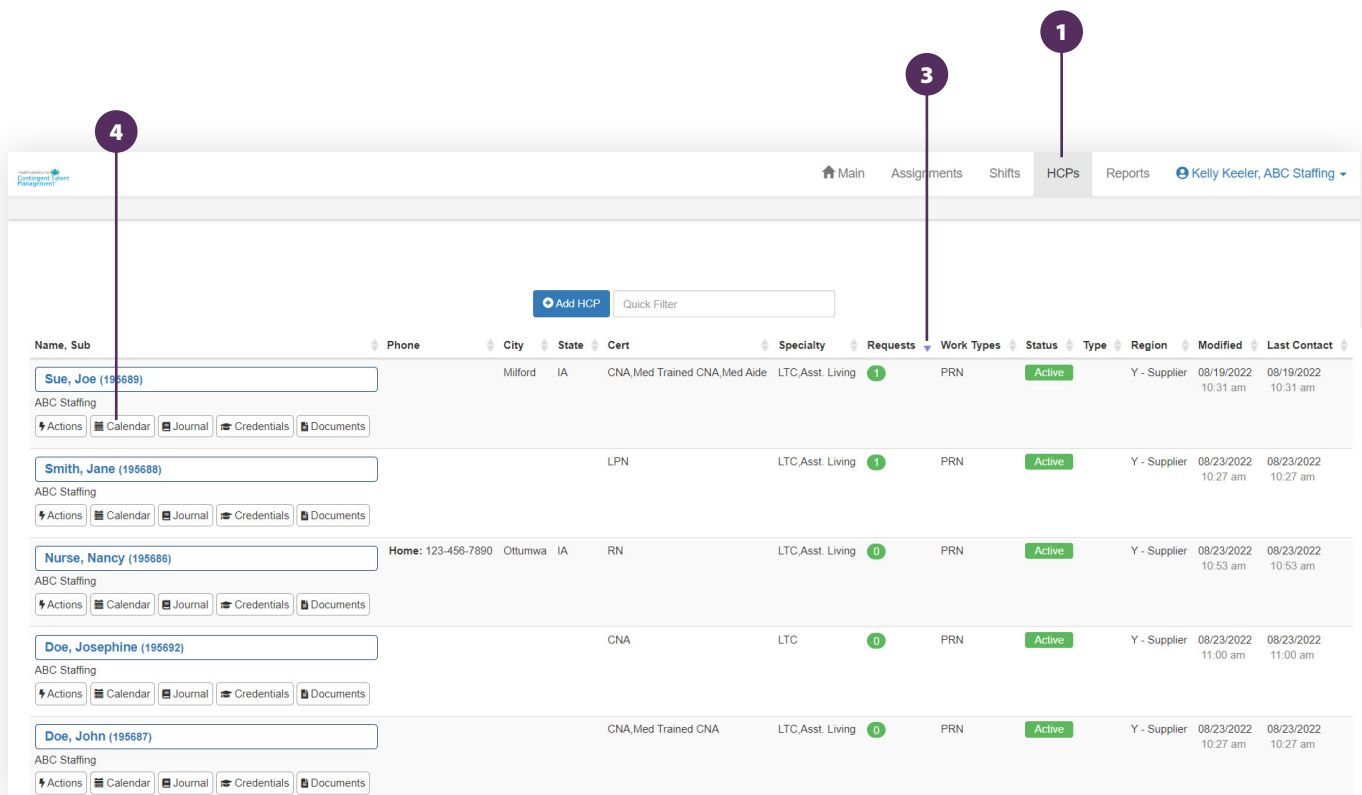
- 7.** To approve a request, click the “View” link under the Requests column on the far right-hand side of the screen.
  - a.** Click the blue “Approve Request” button in the popup screen. This will notify GrapeTree that you have approved your healthcare professional’s request for the shift, and GrapeTree 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 you to 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.

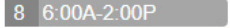
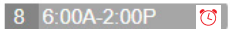
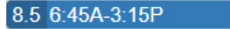
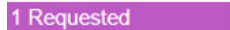


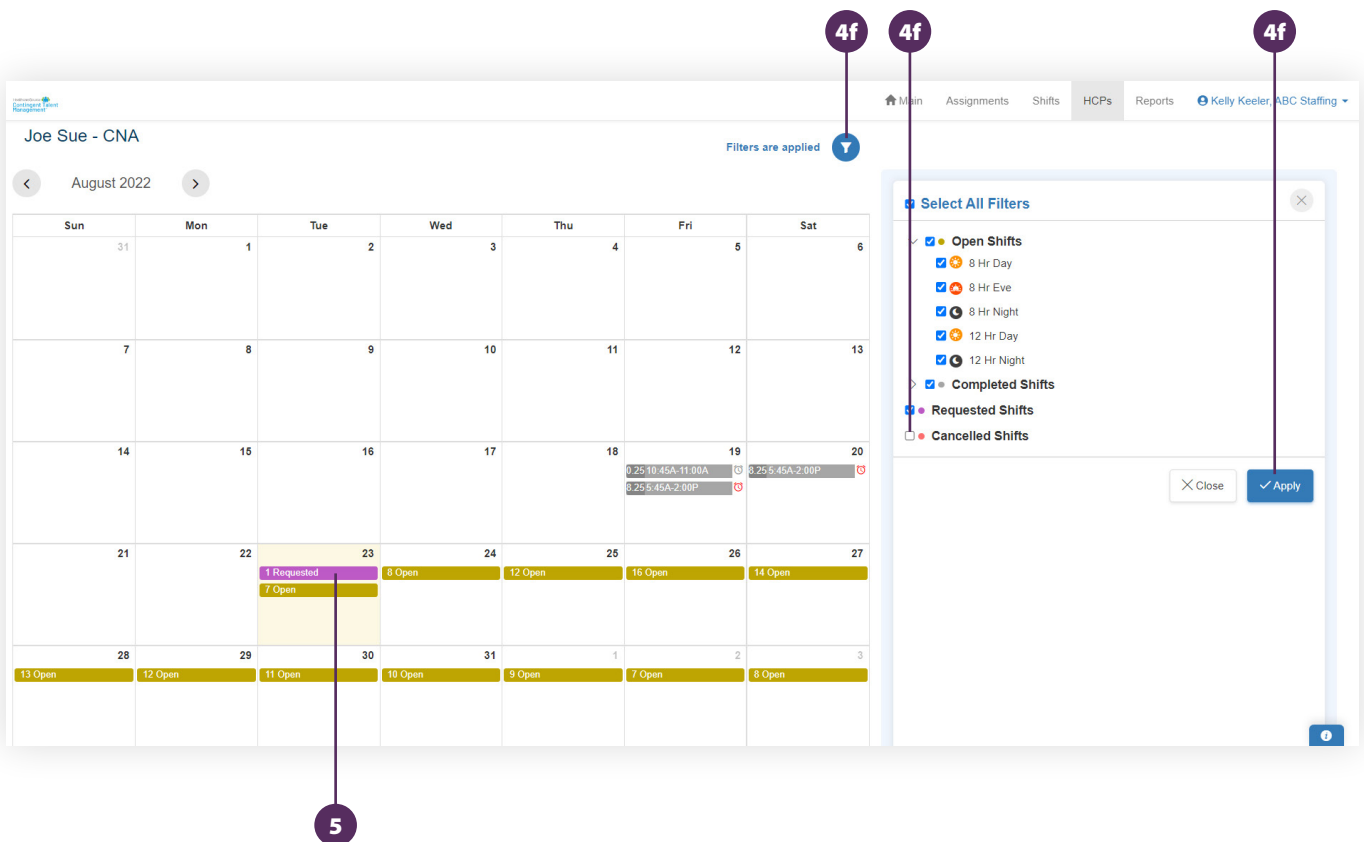
The screenshot shows the 'HCPs' tab in a web application. The top navigation bar includes 'Main', 'Assignments', 'Shifts', 'HCPs', and 'Reports'. Below the navigation is a search bar with 'Add HCP' and 'Quick Filter' buttons. The main content area is a table of healthcare professionals with columns for Name, Sub, Phone, City, State, Cert, Specialty, Requests, Work Types, Status, Type, Region, Modified, and Last Contact. The 'Requests' column has a filter dropdown set to '1'. Below the table, each row has a set of buttons: 'Actions', 'Calendar', 'Journal', 'Credentials', and 'Documents'. Numbered callouts indicate the steps: 1 points to the 'HCPs' menu item, 2 points to the 'Requests' filter dropdown, 3 points to the 'Calendar' button under 'Sue, Joe', and 4 points to the 'Calendar' button under 'Smith, Jane'.

Name, Sub	Phone	City	State	Cert	Specialty	Requests	Work Types	Status	Type	Region	Modified	Last Contact
Sue, Joe (195689) ABC Staffing		Milford	IA	CNA, Med Trained CNA, Med Aide	LTC, Asst. Living	1	PRN	Active	Y - Supplier		08/19/2022 10:31 am	08/19/2022 10:31 am
Smith, Jane (195688) ABC Staffing				LPN	LTC, Asst. Living	1	PRN	Active	Y - Supplier		08/23/2022 10:27 am	08/23/2022 10:27 am
Nurse, Nancy (195686) ABC Staffing	Home: 123-456-7890	Ottumwa	IA	RN	LTC, Asst. Living	0	PRN	Active	Y - Supplier		08/23/2022 10:53 am	08/23/2022 10:53 am
Doe, Josephine (195692) ABC Staffing				CNA	LTC	0	PRN	Active	Y - Supplier		08/23/2022 11:00 am	08/23/2022 11:00 am
Doe, John (195687) ABC Staffing				CNA, Med Trained CNA	LTC, Asst. Living	0	PRN	Active	Y - Supplier		08/23/2022 10:27 am	08/23/2022 10:27 am



## 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.

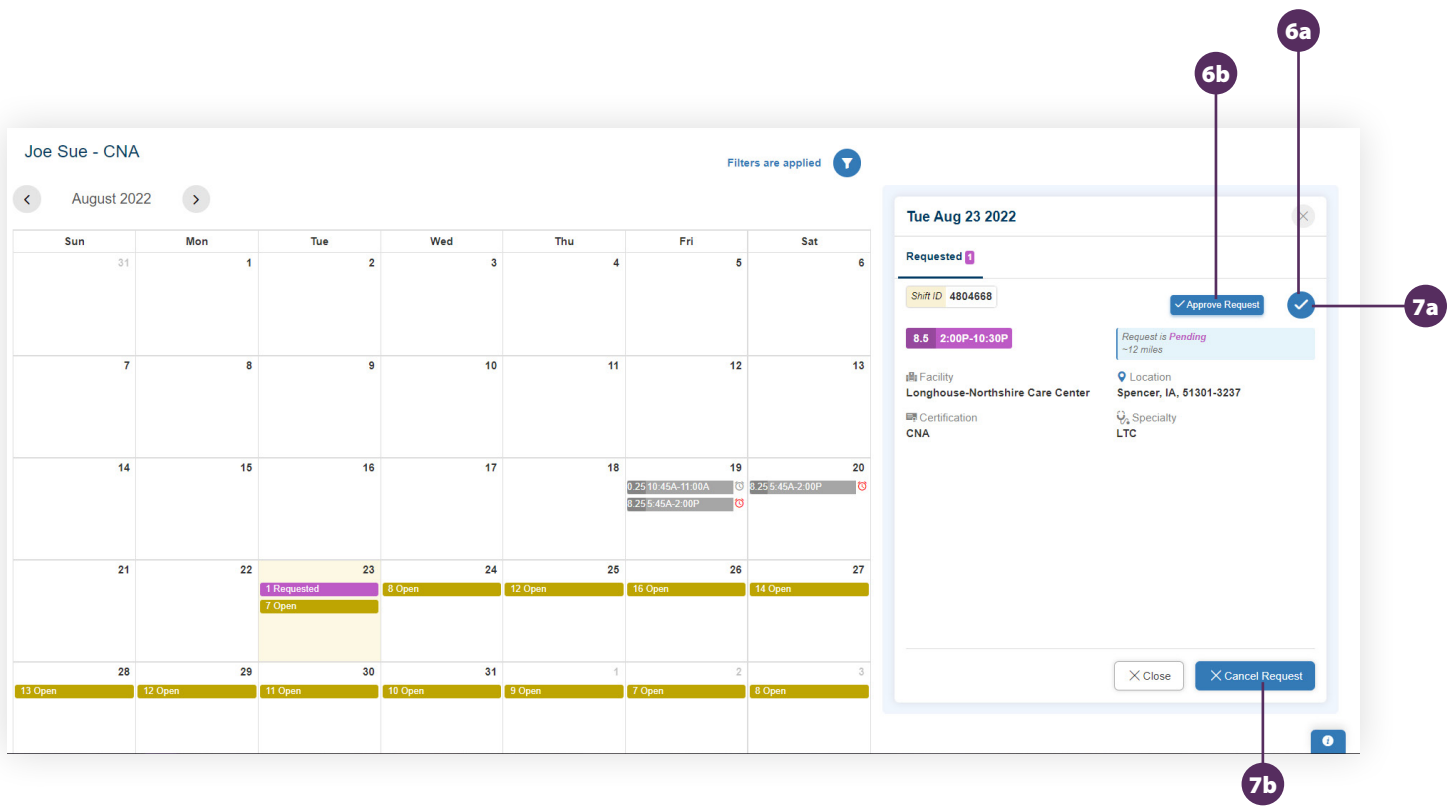


The screenshot displays the 'Joe Sue - CNA' calendar for August 2022. The calendar grid shows shifts for each day. On Tuesday, August 23rd, there is a purple bar labeled '1 Requested' and a yellow bar labeled '7 Open'. On Friday, August 19th, there are two gray bars: one for '8:25 10:45A-11:00A' and another for '8:25 5:45A-2:00P' with a red clock icon. A filter menu is open on the right side, titled 'Select All Filters', with options for 'Open Shifts', 'Completed Shifts', 'Requested Shifts', and 'Cancelled Shifts'. The 'Requested Shifts' option is selected. The 'Apply' button is highlighted. Callout boxes labeled '4f' point to the filter icon and the 'Apply' button. Callout box '5' points to the purple '1 Requested' shift bar.

## 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.



The screenshot displays a calendar for 'Joe Sue - CNA' for August 2022. A modal window is open for 'Tue Aug 23 2022', showing a requested shift with ID 4804668 from 2:00P to 10:30P. The modal includes fields for Facility (Longhouse-Northshire Care Center), Location (Spencer, IA, 51301-3237), and Certification (CNA). A 'Request is Pending ~12 miles' status is shown. Callouts 6a and 6b point to a checkmark icon and the 'Approve Request' button, respectively. Callouts 7a and 7b point to a checkmark icon and the 'Cancel Request' button, respectively.

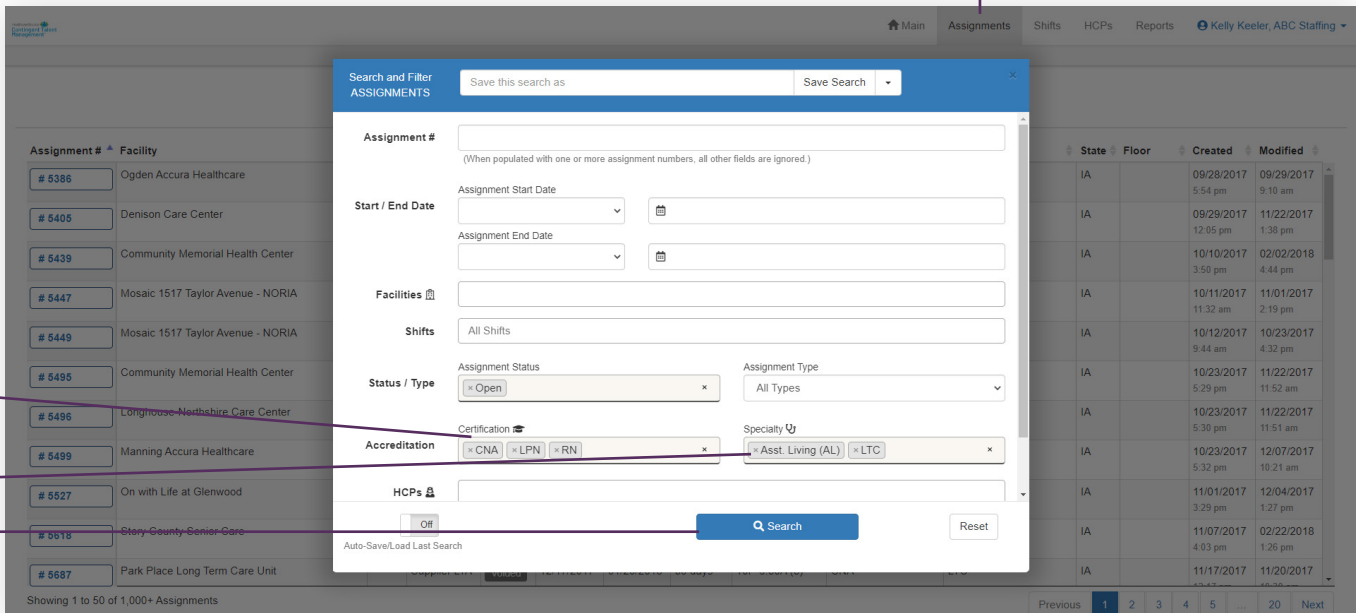
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

# 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.

1



The screenshot shows the 'Search and Filter ASSIGNMENTS' popup box. Callout 1 points to the 'Assignments' tab in the top navigation bar. Callout 2 points to the 'Status / Type' dropdown menu where 'Open' is selected. Callout 3 points to the 'Accreditation' section where 'CNA', 'LPN', and 'RN' are selected. Callout 4 points to the blue 'Search' button. The background shows a list of assignments with columns for Assignment #, Facility, State, Floor, Created, and Modified.

# 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).

The screenshot shows the 'Reports' tab selected in the top navigation bar, indicated by callout 'A'. The page content is organized into three main columns: Schedules, Profiles, and Other/Management.

- Schedules:**
  - Staffing Schedule
    - By Day Filled Orders
    - By Day Filled and Open Orders
    - By Day Open Orders
  - HCP Schedules (Callout C)
    - HCP Schedule
    - HCP Availability (Callout D)
  - Client Schedules
    - Client Schedule
  - Long Term Reports (Callout E)
    - By Start Date
    - By End Date
    - By Scheduled Date Range
    - By Entered Date
- Profiles:**
  - HCP Profiles
    - HCP Profiles
    - HCP Profiles by Certification
    - HCP Profiles with Notes & Journal
    - HCP Profiles with License Expire
    - Compliance Report
    - Evaluations Report
  - Client Profiles
    - Client Profiles
    - Client Profiles with Journal History
    - Client Profiles with HCPs Worked
    - Client Marketing Report
- Other/Management:**
  - Journal
    - Journal Activity
    - Journal Activity Summary
  - Other Reports
    - Evaluation Aggregates Report
    - JCAHO Report
  - Management
    - 52 Week Report
    - 12 Month Report
  - Accounting
    - Accounts Payable Report
    - Timecard Summary (Callout B)

## Timesheet Reports

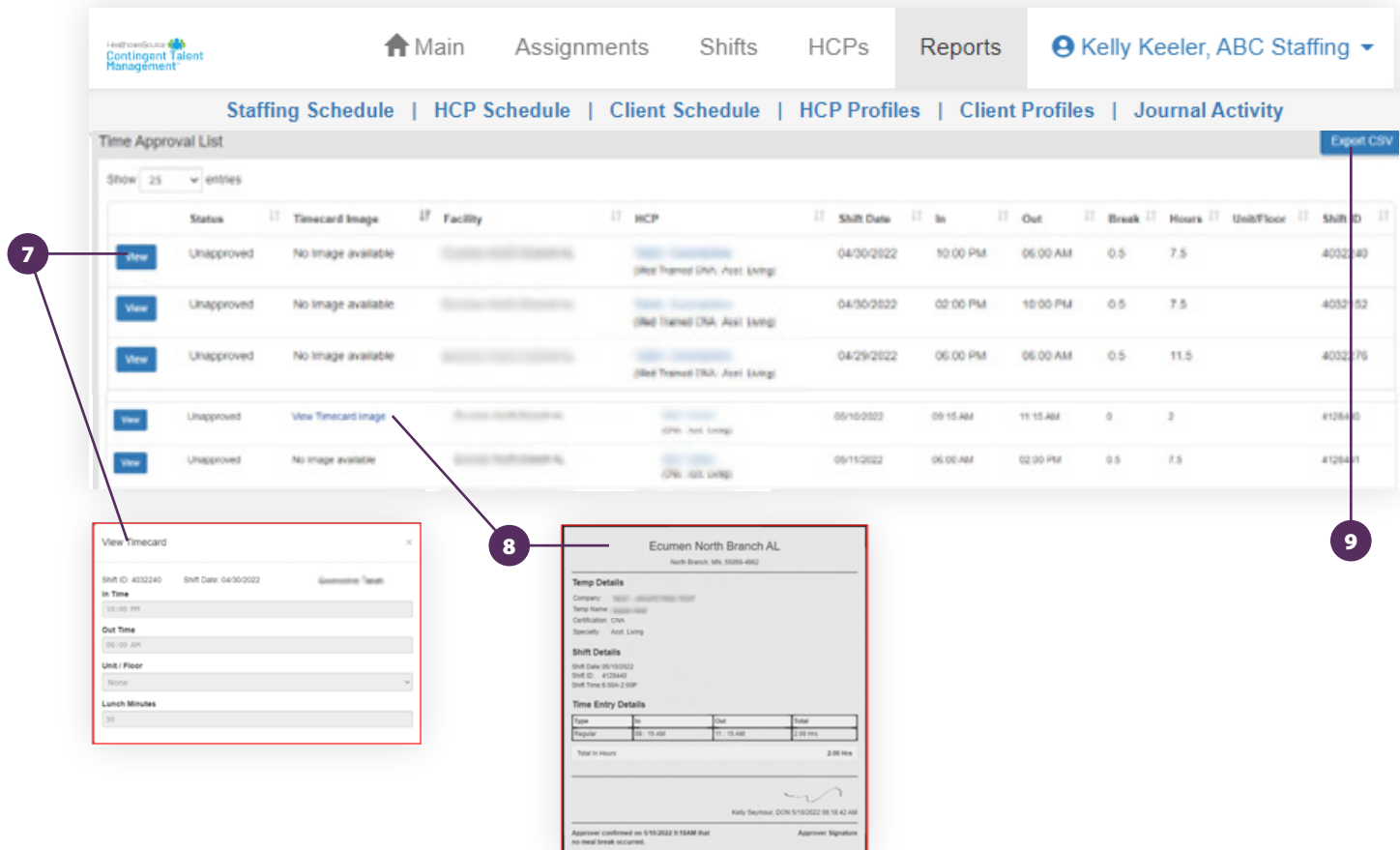
1. In the Reports Tab under the Accounting column in the Other/Management section, click on the “Timecard Summary” link. Refer to page 15 (B) for a visual. You will be taken to a screen where you will select your filter parameters for the report.
2. Select the specific facilities you would like to view 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.

The screenshot shows the 'Reports' section of the software interface. At the top, there are navigation tabs: Main, Assignments, Shifts, HCPs, Reports, and a user profile for Kelly Keeler. Below the navigation is a sub-menu with options: Staffing Schedule, HCP Schedule, Client Schedule, HCP Profiles, Client Profiles, and Journal Activity. The main content area has a 'Select Multiple Facilities' section with a 'Clear All' link and a 'Select Facilities' input field (callout 2). Below this is a 'Shift Date' dropdown menu showing 'May 1, 2022 - May 7, 2022' (callout 3). To the right of the shift date is an 'HCP' input field (callout 4). Further right is a 'Status' dropdown menu showing 'Unapproved (Shift Date)' (callout 5). A blue 'Filter' button is located to the right of the status dropdown (callout 6). Below the filter section is a 'Time Approval List' table with columns: Status, Timecard Image, Facility, HCP, Shift Date, In, Out, Break, Hours, Unit/Floor, and Shift ID. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'. There are 'Previous' and 'Next' buttons at the bottom right of 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](http://bit.ly/supplierdispute).



The screenshot displays the 'Staffing Schedule' interface. At the top, there are navigation tabs: Main, Assignments, Shifts, HCPs, Reports, and a user dropdown for Kelly Keeler, ABC Staffing. Below the tabs is a sub-menu with links: Staffing Schedule, HCP Schedule, Client Schedule, HCP Profiles, Client Profiles, and Journal Activity. The main content area is titled 'Time Approval List' and features a table with columns: Status, Timecard Image, Facility, HCP, Shift Date, In, Out, Break, Hours, Unit/Floor, and Shift ID. A 'Show 25 entries' dropdown is present. A blue 'Export CSV' button is located at the top right of the table. Three callouts are present: Callout 7 points to a 'View' button in the first row of the table. Callout 8 points to a 'View Timecard Image' link in the 'Timecard Image' column of the fourth row. Callout 9 points to the 'Export CSV' button.

**Callout 7: View Timecard Summary**

View Timecard

Shift ID: 4032240 Shift Date: 04/30/2022 Geocode: Team

**In Time**  
10:00 PM

**Out Time**  
06:00 AM

**Unit / Floor**  
None

**Lunch Minutes**  
30

**Callout 8: View Timecard Image Full Report**

Ecumen North Branch AL  
North Branch, MN, 55954-4952

**Temp Details**  
Company: 10331 - (2020)10331  
Temp Name: (2020)10331  
Certification: CNA  
Security: Asst. Living

**Shift Details**  
Shift Date: 05/10/2022  
Shift ID: 4128440  
Shift Time: 8:00A-2:00P

**Time Entry Details**

Type	In	Out	Break
Regular	09:15 AM	11:15 AM	2:00 Hrs

Total in Hours: 2.00 Hrs

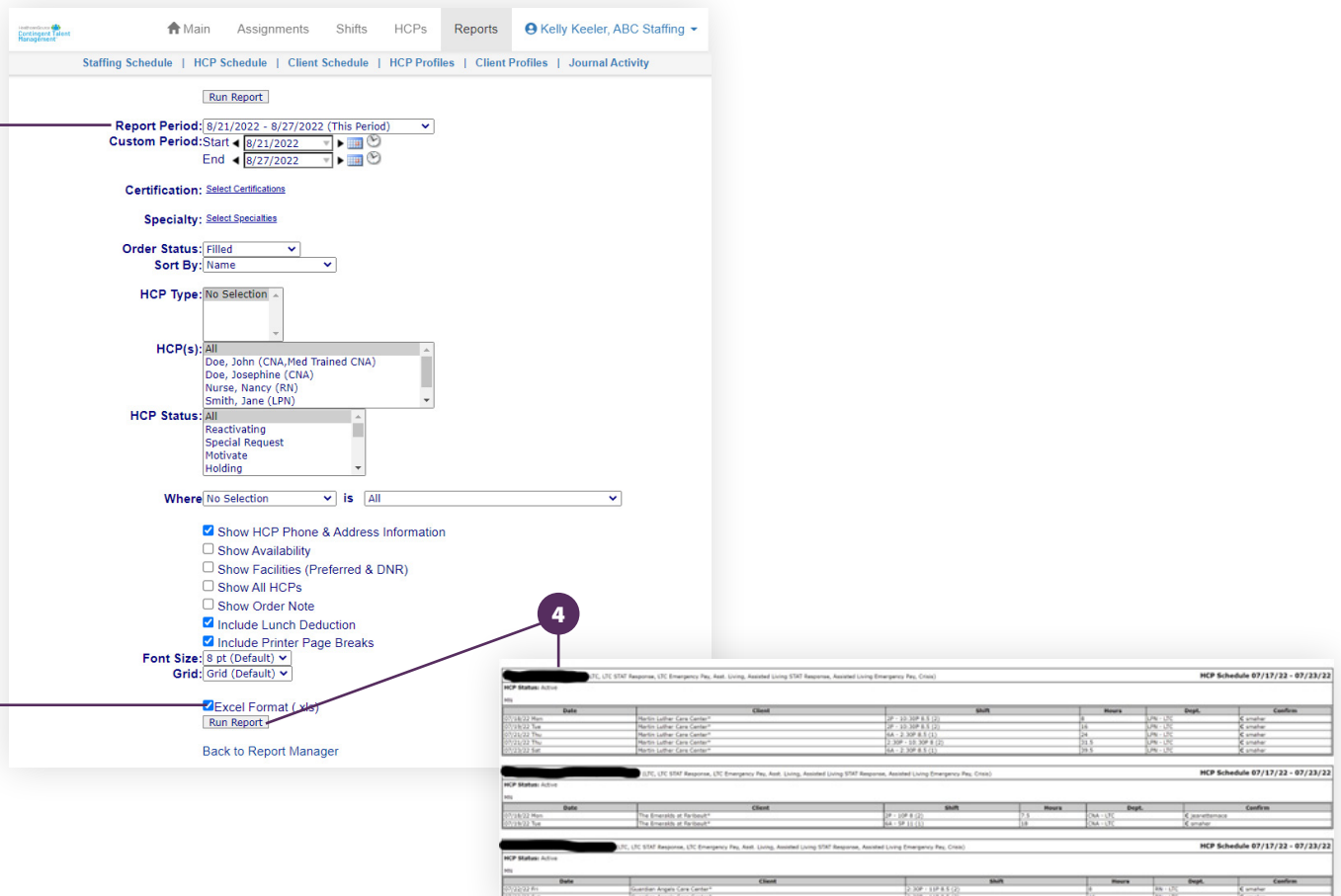
Kelly Keeler, DCM 5/10/2022 08:18:42 AM

Approver confirmed on 5/10/2022 9:15AM that no meal break occurred. Approver Signature

## 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.



The screenshot shows the 'Reports' section of the software interface. The 'Run Report' button is highlighted with a '2'. The 'Report Period' is set to '8/21/2022 - 8/27/2022 (This Period)'. The 'Custom Period' start and end dates are also set to 8/21/2022 and 8/27/2022. The 'Where' filter is set to 'No Selection is All'. The 'Excel Format (.xls)' checkbox is checked, highlighted with a '3'. The 'Run Report' button is highlighted with a '4'. Below the form, three tables of HCP schedule data are shown, each with columns for Date, Shift, Client, Hours, Dept., and Confirm.

Date	Shift	Client	Hours	Dept.	Confirm
07/18/22 Mon	12P - 10P B.S (2)	HealthLuther Care Center	10	12P - 10P	OK Employee
07/18/22 Tue	12P - 10P B.S (2)	HealthLuther Care Center	10	12P - 10P	OK Employee
07/19/22 Wed	12P - 10P B.S (1)	HealthLuther Care Center	10	12P - 10P	OK Employee
07/20/22 Thu	12P - 10P B.S (2)	HealthLuther Care Center	10.5	12P - 10P	OK Employee
07/21/22 Fri	12P - 10P B.S (2)	HealthLuther Care Center	10.5	12P - 10P	OK Employee
07/22/22 Sat	12P - 10P B.S (1)	HealthLuther Care Center	10.5	12P - 10P	OK Employee

## 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.

The screenshot shows the HCP Availability Report interface. Callout 3 points to the date range filters (From: 8/23/2022, To: 8/29/2022). Callout 4 points to the 'Show All Active Temps' checkbox in the 'Availability Shifts' section. Callout 5 points to the 'Show Availability' button.

**Client Preferred Facilities:**  
 All  
 ABCM Rehabilitation of Independence East Campus  
 ABCM Rehabilitation of Independence West Campus  
 Albia Oakwood Specialty Care  
 Algona Manor Care Center

**Availability Shifts:**  
 Any  
 A1  
 A2  
 A3  
 A4  
 A5  
 DNW  
 Booked

**Legend:**  
 P Permanent Available - Number represents available shifts from HCP's Permanent Availability  
 D Daily Available - Number represents available shifts from HCP's Calendar  
 B Booked Shift  
 DNW Do Not Work - From HCP's Permanent Availability or Calendar

Temp	Tue 8/23	Wed 8/24	Thu 8/25	Fri 8/26	Sat 8/27	Sun 8/28	Mon 8/29
Doe, John (CNA, Med Trained CNA) Perm LTC Asst. Living					1 Substitution 2 3PM-10:30P (2)		
Doe, Josephine (CNA) Perm LTC		1 Substitution 2 3PM-10:30P (2)				1 Substitution 2 3PM-10:30P (2)	
Nurse, Nancy (RN) Perm LTC Asst. Living HM 123-456-7890			1 Substitution 2 3PM-10:30P (2)				
Smith, Jane (LPN) Perm LTC Asst. Living						1 Substitution 2 3PM-10:30P (2)	
Sue, Joe (CNA, Med Trained CNA, Med Aide) Perm LTC Asst. Living							

5 HCPs found.

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