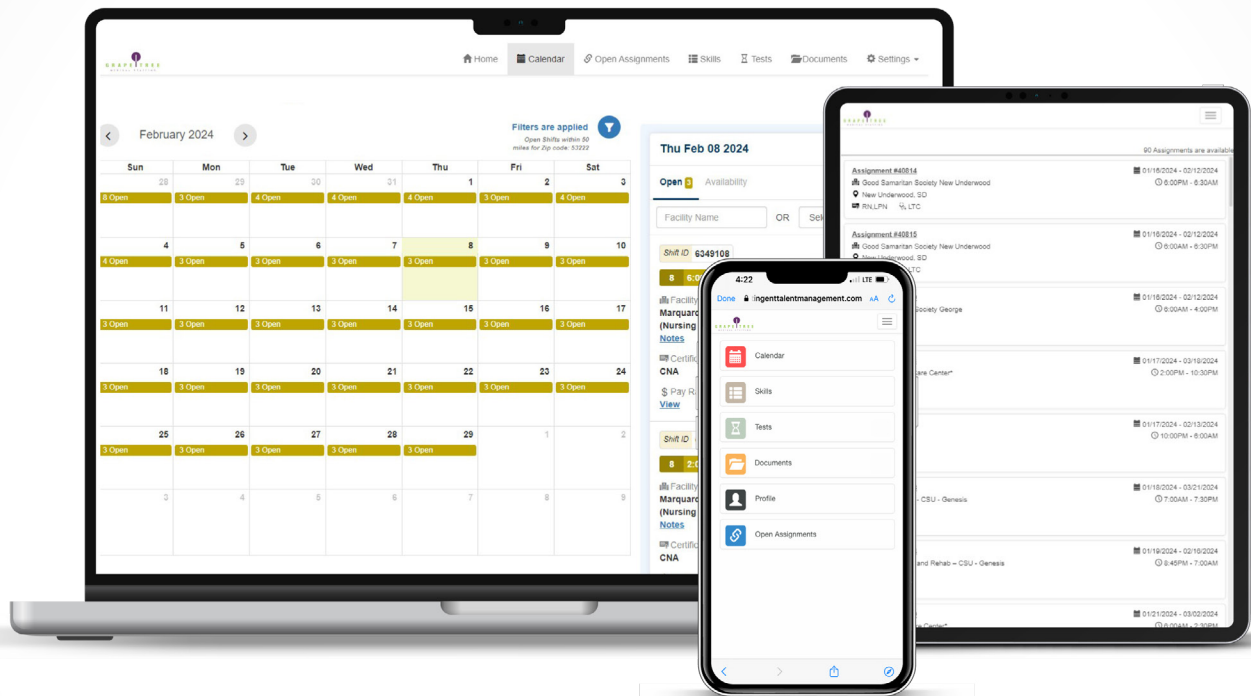




**GRAPE TREE**  
MEDICAL STAFFING



# Workforce Portal Manual

GrapeTree's Workforce Portal is where you can seamlessly manage your calendar, book shifts and assignments, and utilize electronic timesheets. Build a schedule that fits your lifestyle. From per-diem shifts to local and travel assignments, your opportunities are endless.

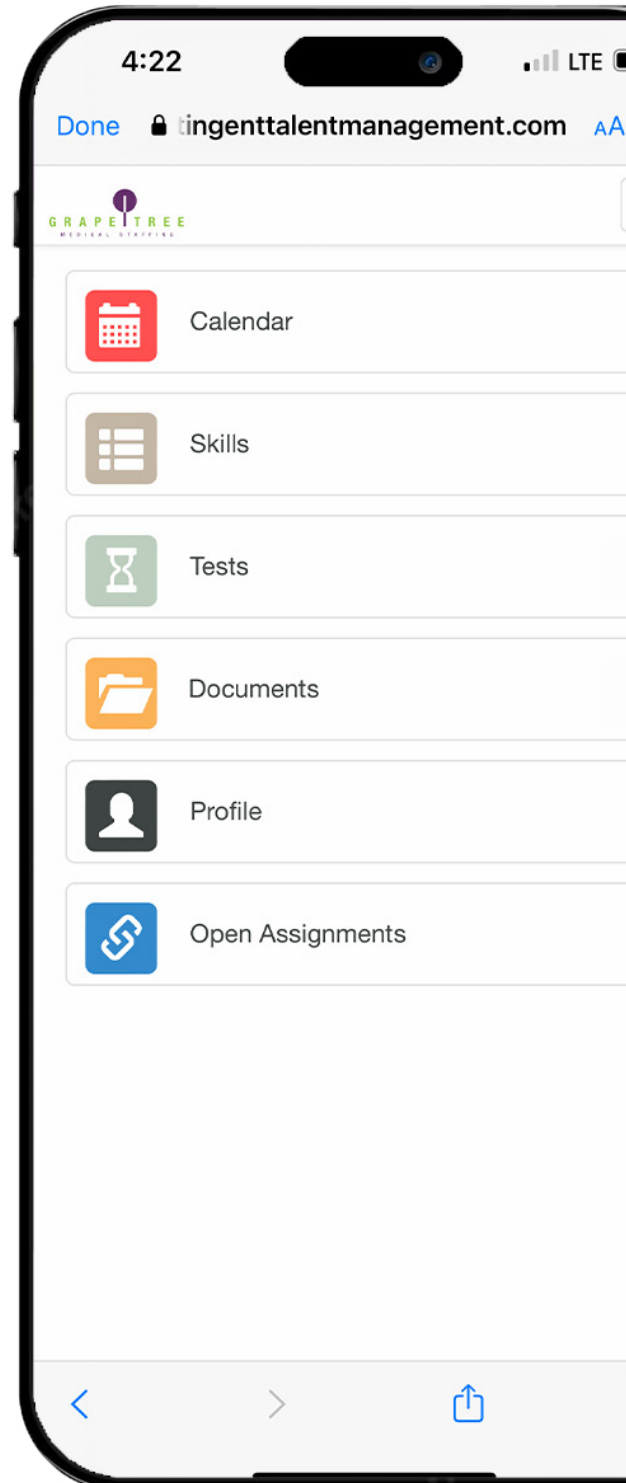
# Table of Contents

<b>Workforce Portal Overview</b> .....	<b>3</b>	<b>Electronic Timesheets</b> .....	<b>13</b>
<b>Getting There</b> .....	<b>4</b>	Clock In For a Shift.....	<b>13</b>
GrapeTree App.....	<b>4</b>	Enter Your Meal Break.....	<b>14</b>
Web Browser.....	<b>4</b>	Clock Out of a Shift.....	<b>15</b>
<b>Profile Set Up</b> .....	<b>5</b>	Edit Your Timesheet.....	<b>16</b>
Preferred Home View.....	<b>5</b>	Get Facility Approval.....	<b>18</b>
Personal Information.....	<b>5</b>	Request Priority Pay.....	<b>19</b>
Preferences.....	<b>6</b>	Submit Your Timesheet.....	<b>20</b>
Update Your Availability.....	<b>7</b>	Priority Pay Requested Shifts.....	<b>21</b>
<b>Per Diem Shifts</b> .....	<b>9</b>	<b>Staying Compliant</b> .....	<b>22</b>
Browse Per Diem Shifts.....	<b>9</b>	Tests.....	<b>22</b>
Self-Book and Request Shifts.....	<b>10</b>	Documents.....	<b>22</b>
Cancel a Shift.....	<b>11</b>		
<b>Local and Travel Assignments</b> .....	<b>12</b>		
Browse and Request.....	<b>12</b>		
Adjust Assignment Details.....	<b>12</b>		

# Workforce Portal Overview

The Workforce Portal makes managing your work simple. Whether GrapeTree is your full-time job or you pick up extra shifts where you can, GrapeTree's Workforce Portal gives you the power to:

- Self-book and request per diem shifts.
- View and request open local and travel assignments.
- Set up your profile preferences so we only notify you of the best matches.
- Search and filter shifts by the criteria you select.
- Complete tests to help you stay compliant.
- Upload credential documents.

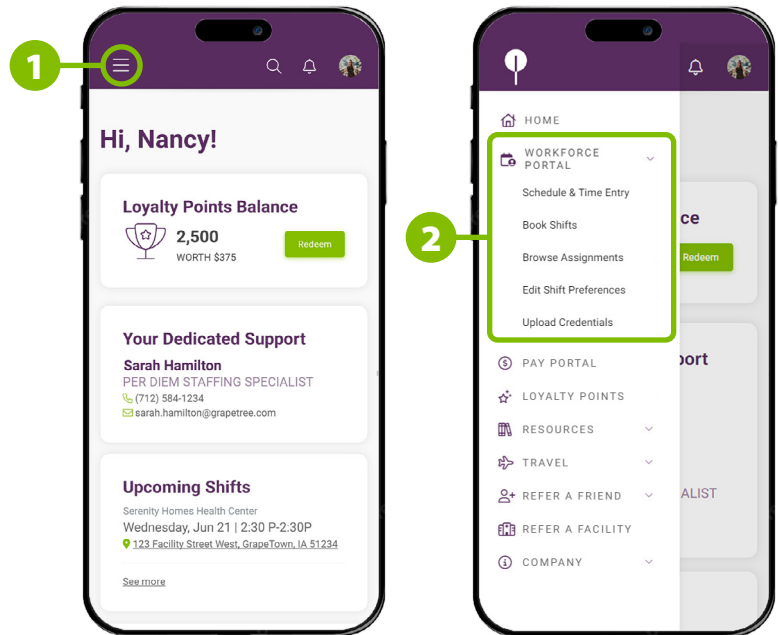


# Getting Started

## GrapeTree App

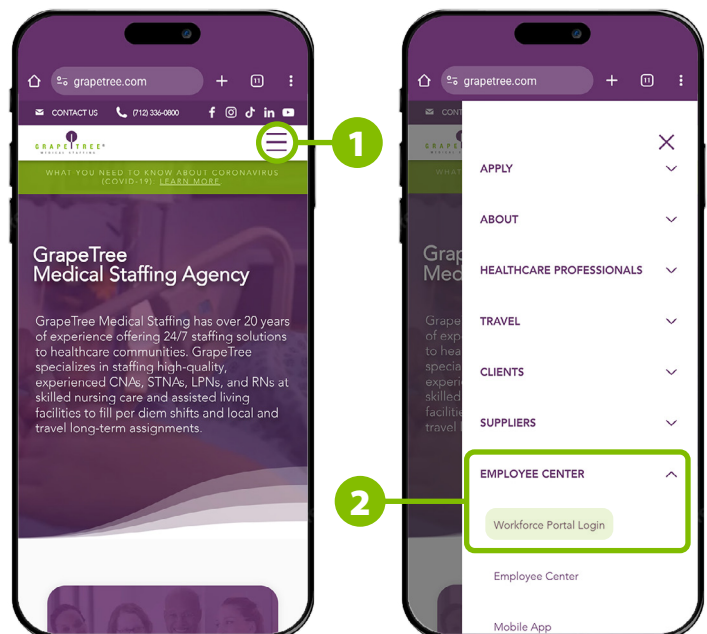
You can access the Workforce Portal through the [GrapeTree mobile app](#), which is available for download on the App Store and Google Play. After downloading, you will need to create an account for the app if you have not already. This account is separate from your Workforce Portal account, but you may use the same credentials if desired.

1. Log in to the GrapeTree app and open the menu.
2. Utilize the Workforce Portal dropdown options in the app menu for quick links to the most frequently visited pages in the Workforce Portal.



## Web Browser

1. Head to the [GrapeTree website](#) for a quick login link and open the menu.
2. In the menu, navigate to the Employee Center dropdown and click on the Workforce Portal Login link.
3. If you prefer to access the Workforce Portal through your browser on your mobile device, we recommend adding a tile to your home screen or app list with a shortcut to open the website. [Click here to learn how to add a tile for the Workforce Portal to your home screen.](#)
4. If you also access the Workforce Portal on a computer, we recommend adding the website as a bookmark. If you are not sure how to do this, click the link below for the browser you use to learn how to add a bookmark.



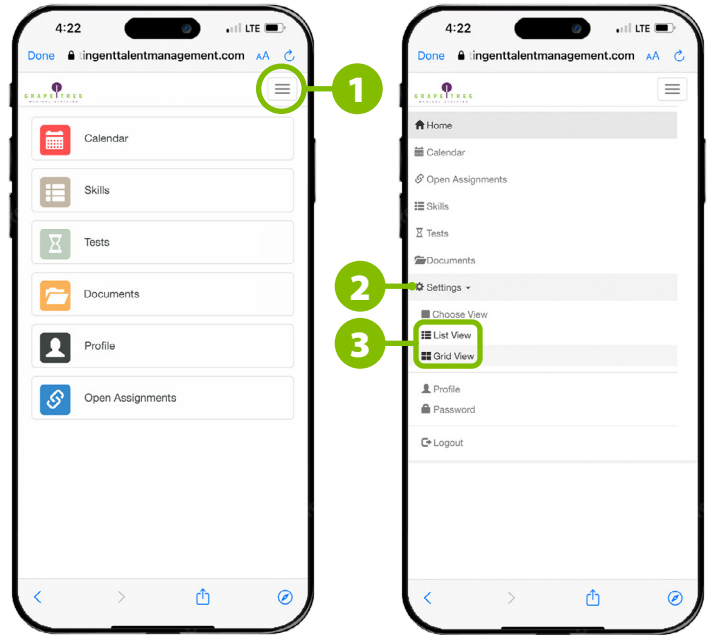
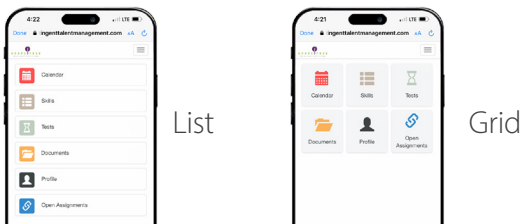
- [Google Chrome](#)
- [Mozilla Firefox](#)
- [Safari](#)
- [Microsoft Edge](#)

# Profile Set Up

## Preferred Home View


Once you log in, you will be directed to the home screen. You can customize this screen to display the tiles in a list or grid view. Follow the steps below to switch to your preferred view style.

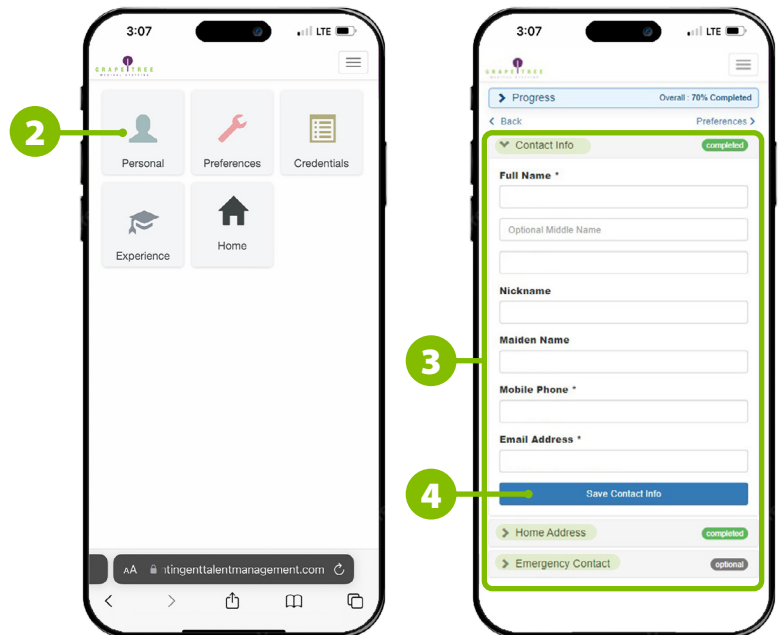
1. Tap the menu icon.
2. Expand the Settings dropdown.
3. Select your view type preference.



## Personal Information

Your personal information, including contact information, home address, and emergency contact information, will be listed in your profile. If any of your personal information changes due to a move, change in emergency contact, etc., please update this information in your Workforce Portal account to keep GrapeTree updated.


1. Tap on the "Profile" tile  on the home screen.
2. Select "Personal."
3. Open the dropdown(s) for the section(s) of your information you need to update.
4. Tap the "Save" button for each dropdown that you edit information in.

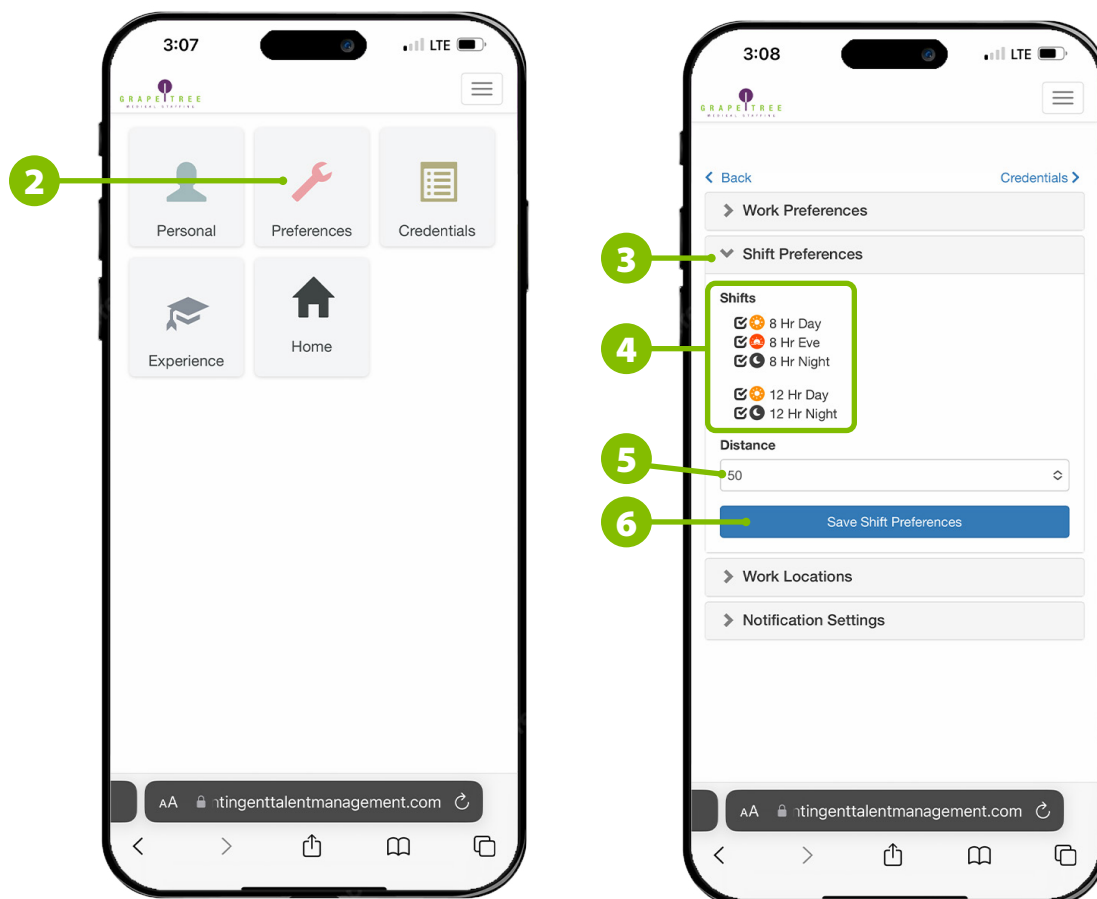


# Profile Set Up

## Profile Preferences

Setting your profile preferences will help our system know what kinds of shifts you would like to see. Please keep in mind that the selections you make on this screen will impact the visibility of shifts on your calendar.

1. Tap on the “Profile” tile  on the home screen.
2. Select “Preferences.”
3. Tap the “Shift Preferences” dropdown.
4. Select the shift times that you are interested in. We highly recommend selecting all shift times to maximize your shift opportunities with GrapeTree, as this setting will affect shifts options shown to you.
5. Enter the farthest distance, in miles, you are willing to travel for a shift. We highly recommend setting your default distance to 50 miles to maximize your shift opportunities with GrapeTree, as this setting will affect shifts options shown to you.
6. Once you are happy with your selections, tap “Save Shift Preferences.”




# Profile Set Up

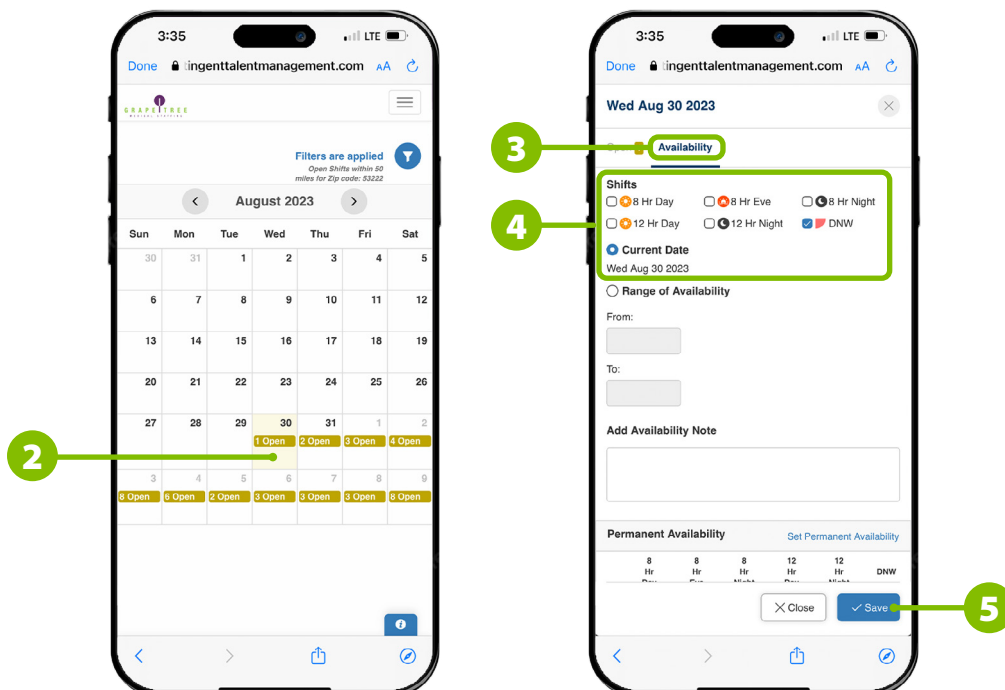
## Update Your Availability

Adding your availability helps GrapeTree know which days and shifts you want to work. This way, we can notify you only about the best shift matches. Please keep in mind that your availability selections will also impact the visibility of shifts on your calendar. If you do not set up your availability, your calendar will show shift openings according to the over-arching profile preferences you have set up for your account.

On your calendar, the availability icon displays in the top left corner on days your availability has been set. Green represents available, and red represents do not work, or not available. You can resource the info icon at the bottom right of the screen to view a full color-coding guide for shifts, availability, and timesheets.

### Update Availability For 1 Day


1. Tap on the “Calendar” tile  on the home screen.
2. Tap in the white space on today’s date or a future date on your calendar that you would like to update your availability for.
3. Tap the “Availability” tab.
4. Update your availability for the date you tapped on.
  - a. Select the shift options you are available for. If you would like to view as many shift options as possible, select all shift options.
  - b. If you are not available on the date you tapped on, select “DNW,” which stands for do not work.
5. Tap “Save.”

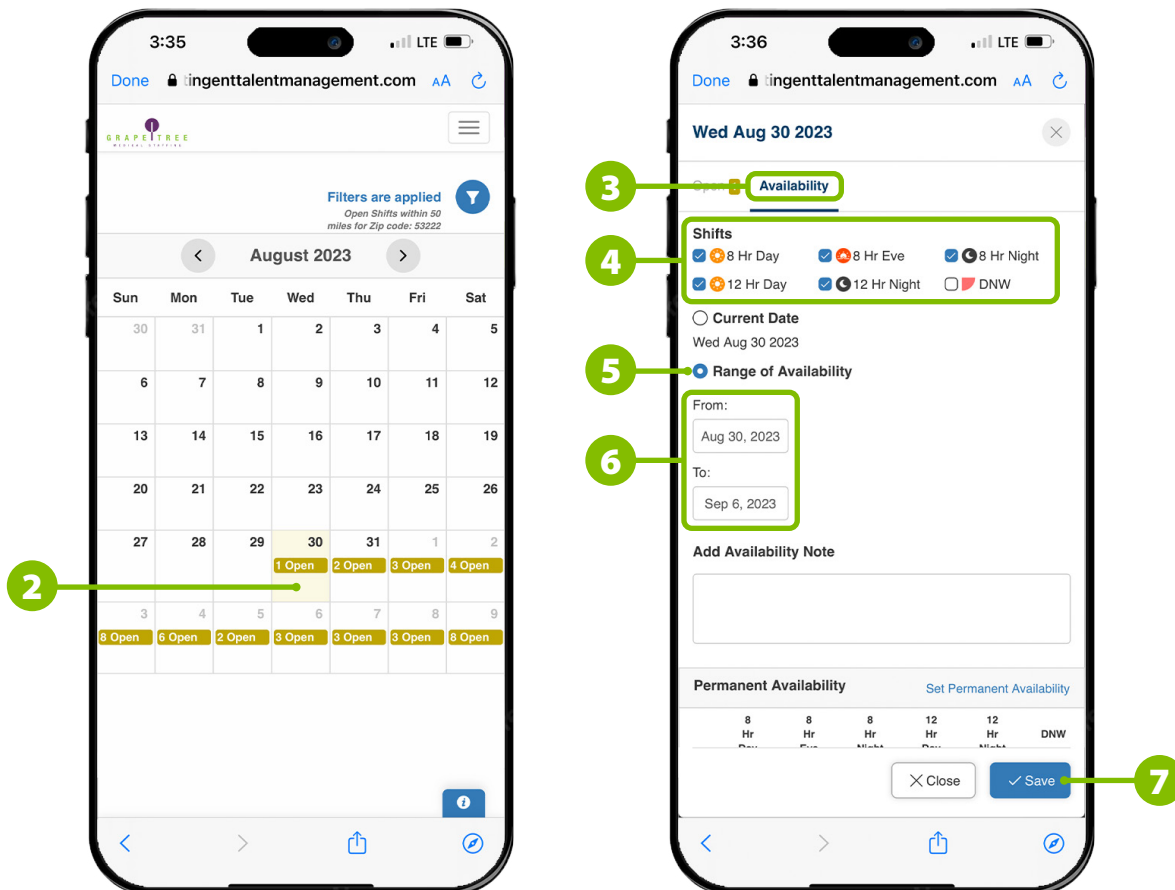


# Profile Set Up

## Update Your Availability

### Update Availability For Multiple Days

1. Tap on the “Calendar” tile  on the home screen.
2. Tap in the white space on today’s date or a future date on your calendar.
3. Tap the “Availability” tab.
4. Update your availability for shifts for the date range.
  - a. Select the shift options you are available for. If you would like to view as many shift options as possible, select all shift options.
  - b. If you are not available during this date range, select “DNW,” which stands for do not work.
5. Toggle the “Range of Availability” option.
6. Set a “From Date” and a “To Date” to apply your availability selections for a date range.
7. Tap “Save.”




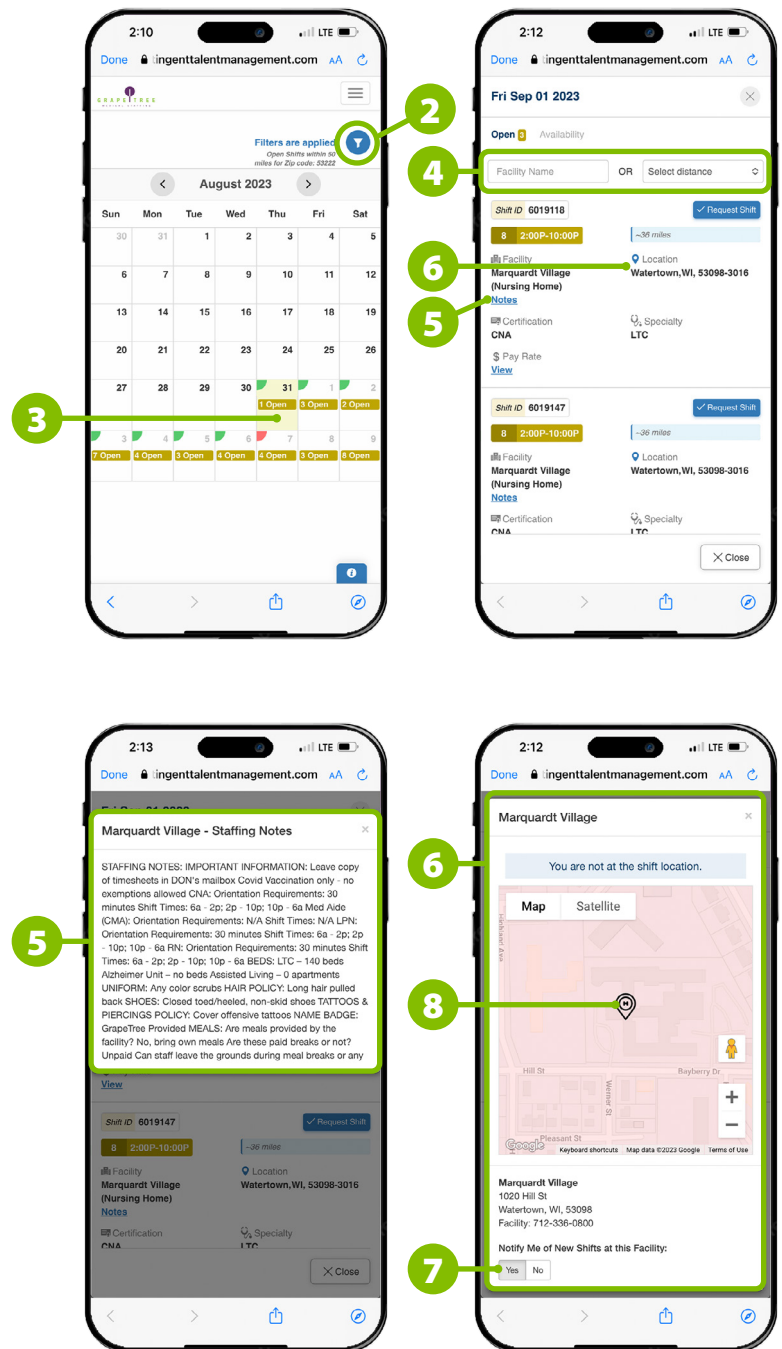


# Per Diem Shifts

## Browse Per Diem Shifts

You can browse per diem, or day-to-day, shift opportunities on your calendar. The open shifts are filtered based on the criteria you set in your profile preferences.

1. Tap the “Calendar” tile  on the home screen.
2. Press the filter icon if you would like to filter the open shifts shown on your calendar by shift type.
3. Days with available shifts for you to pick up are color-coded gold. Tap on a specific day to view all shifts that are open on that date.
4. You can use the search bar to look for a specific healthcare facility or adjust the distance you are willing to travel.
5. Tap the “Notes” link within a shift to open a popup with important information about the facility, such as orientation requirements, parking guidelines, cancellation policies, paid holidays, and more. *We highly encourage you to review these notes for each facility before scheduling yourself for shifts.*
6. Tap the location within a shift to open a popup map view of the facility.
7. On this screen, you can toggle on or off text notifications for shift opportunities at that facility.
8. Tap the location icon on the map to get driving directions to the facility.

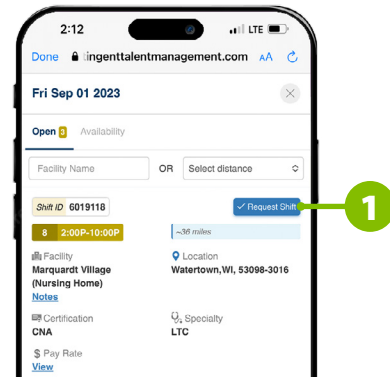


# Per Diem Shifts

## Self-Book or Request a Shift

Once you find a shift you are interested in working, you can instantly book yourself for that shift as long as you meet all the criteria. If you do not meet the criteria, you can instead request to work the shift and your Staffing Specialist will review your request for approval.

1. Tap the “Request Shift” button and review the shift details shown on the next screen to verify that this is a shift you would like to work.
- 2a. If you meet all criteria, you can tap the “Schedule” button to add it to your schedule. Self-booking a shift is a 100% commitment to work the shift.
- 3a. The next screen will show a green notification confirming the shift has been added to your schedule.



- 2b. If you do not meet all criteria, there will be a yellow section indicating what criteria is not being met. Some common examples of why this could happen include: the shift would put you into overtime, the shift would put you in back-to-back shifts, or you are not compliant due to expired or incomplete credentials.

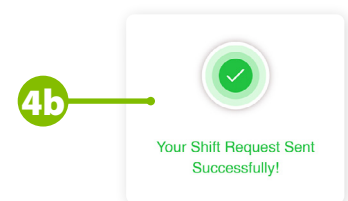
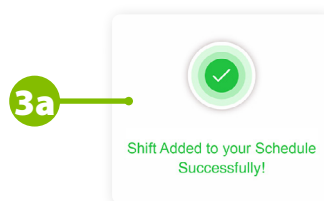
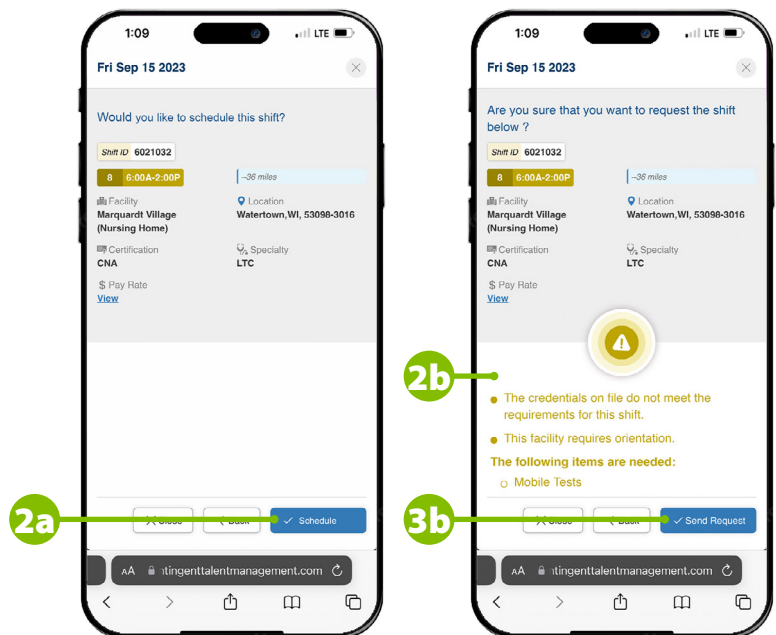
Note: this does not necessarily mean that you cannot work this shift. You can still request to work this shift, and your Staffing Specialist will need to review the criteria and approve or deny your request.

- 3b. If you are still interested in working the shift, tap the “Send Request” button. Keep in mind that while your request for the shift may not be approved, requesting a shift is a 100% commitment to work the shift if you are approved.

- 4b. The next screen will show a confirmation message. Your Staffing Specialist will review the criteria for the shift and approve or deny your request.

a. Self-Book

b. Request



# Per Diem Shifts


## Cancel a Per Diem Shift

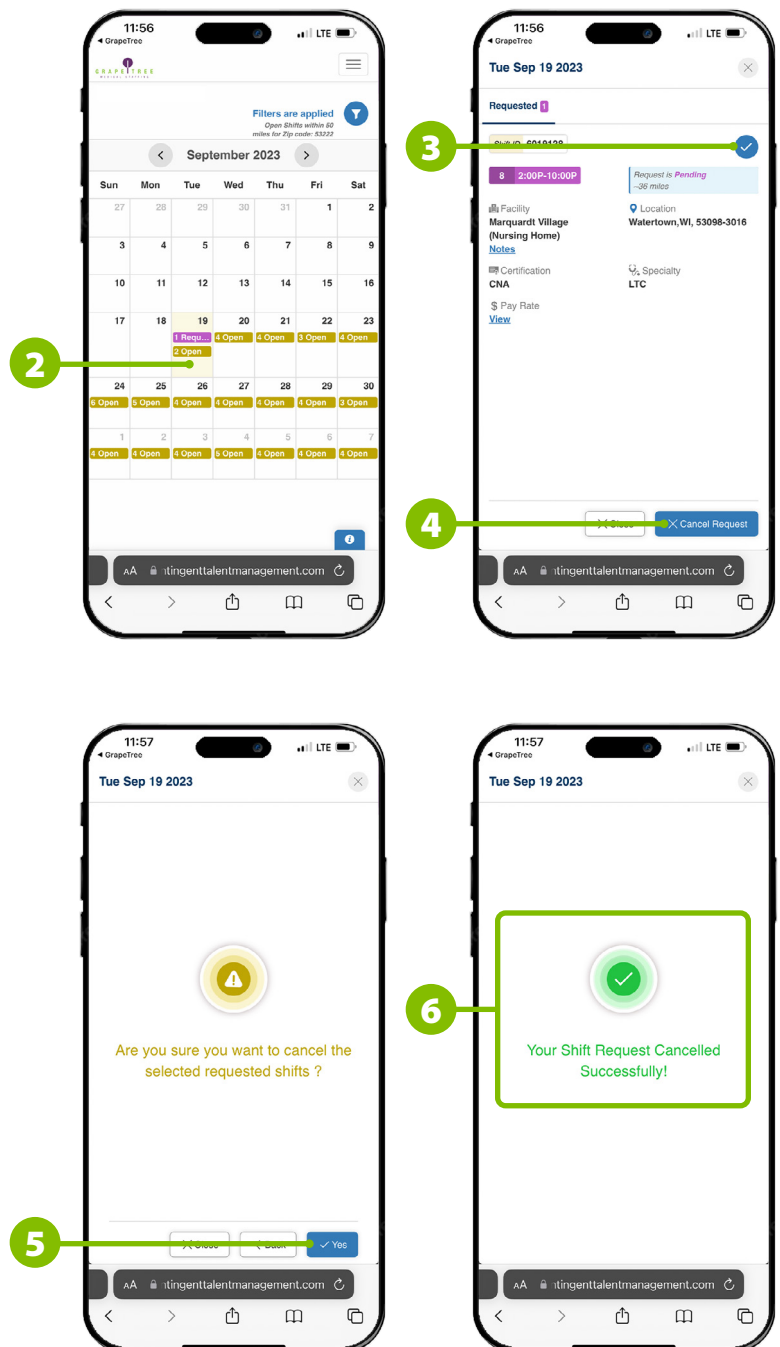
### Cancel a Booked Shift

If you need to cancel a shift you are booked into, you are required to call your GrapeTree Staffing Specialist or our 24/7 Staffing Department as soon as possible at (712) 336-0800 and select option 2.

### Cancel a Requested Shift

If you need to cancel a request for a shift that you are not officially booked into yet, you can do so within the Workforce Portal and do not need to call GrapeTree. Shift requests will be shown as purple on your calendar. If the shift has changed to blue, that means you have already been approved for the shift and will need to instead call GrapeTree to cancel.


1. Tap the "Calendar" tile  on the home screen.
2. Tap on the day with the requested shift.
3. Tap the empty circle in the top right corner. It will turn blue with a check mark.
4. Press the "Cancel Request" button.
5. You will see a notification asking if you are sure you want to cancel the selected shift request. Tap "Yes" to confirm your cancellation.
6. You will receive a green confirmation message and then see that the shift is no longer purple on your calendar as a requested shift.



# Local & Travel Assignments

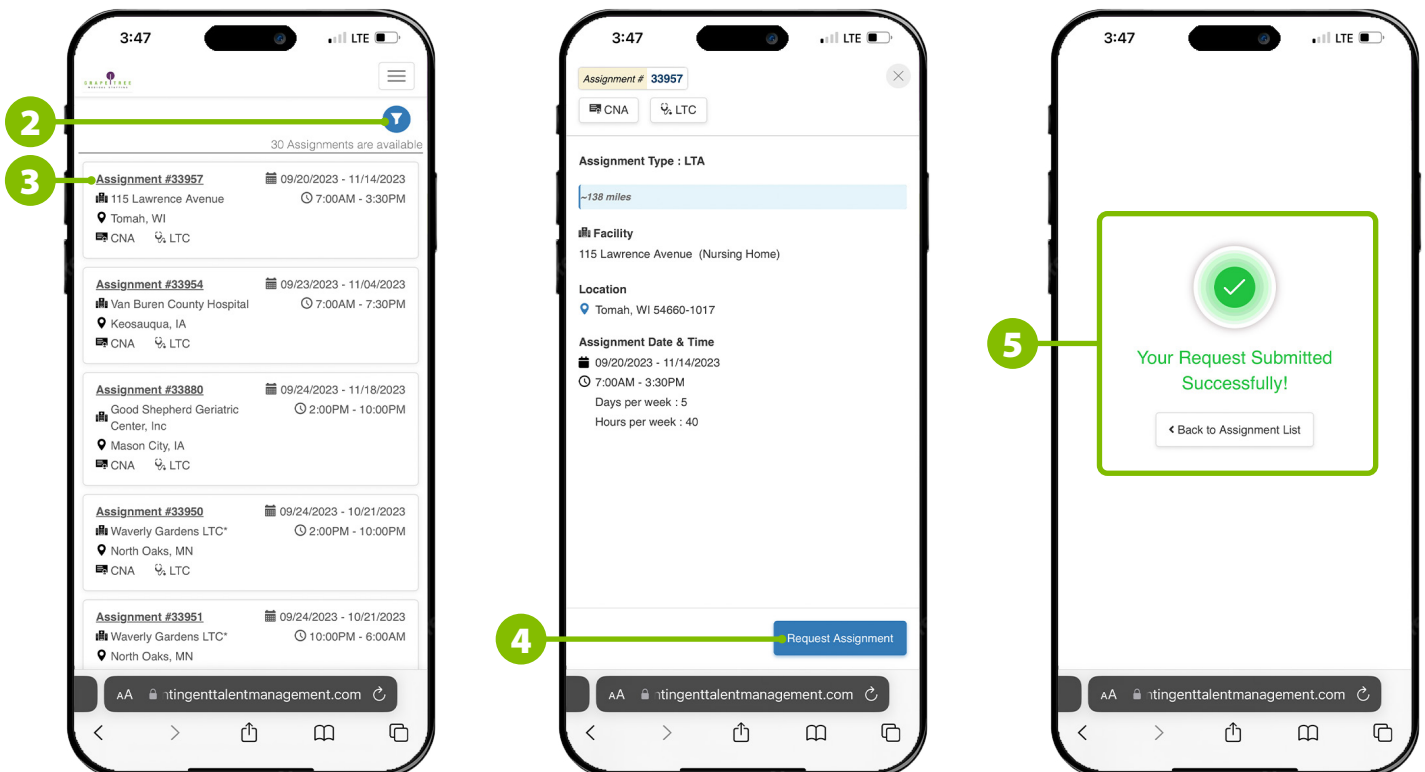
## Browse and Request Assignments

You can browse available local and travel assignments on the Open Assignments page. The assignments shown on this page can be filtered to show assignments that meet your unique interests.

1. Tap the “Open Assignments” tile  on the home screen.
2. Press the filter icon if you would like to search open assignments by start date, city, state, zip code, shift options, or search for a specific assignment number. After making your selections, tap the search button.
3. Tap on any assignment to view the details and request the assignment.
4. If you are committed to the assignment details and wish to be considered for the assignment, tap the “Request Assignment” button.
5. The next screen will show a message confirming that you have requested the assignment. Your Staffing Specialist or Nurse Recruiter will see your request, work with the facility to gather all the details for that assignment, and will connect with you to align schedules and book you in.

## Adjust Assignment Details


If for any reason you need to adjust the terms of an assignment you have already been booked into, you must call your GrapeTree Staffing Specialist or Nurse Recruiter.

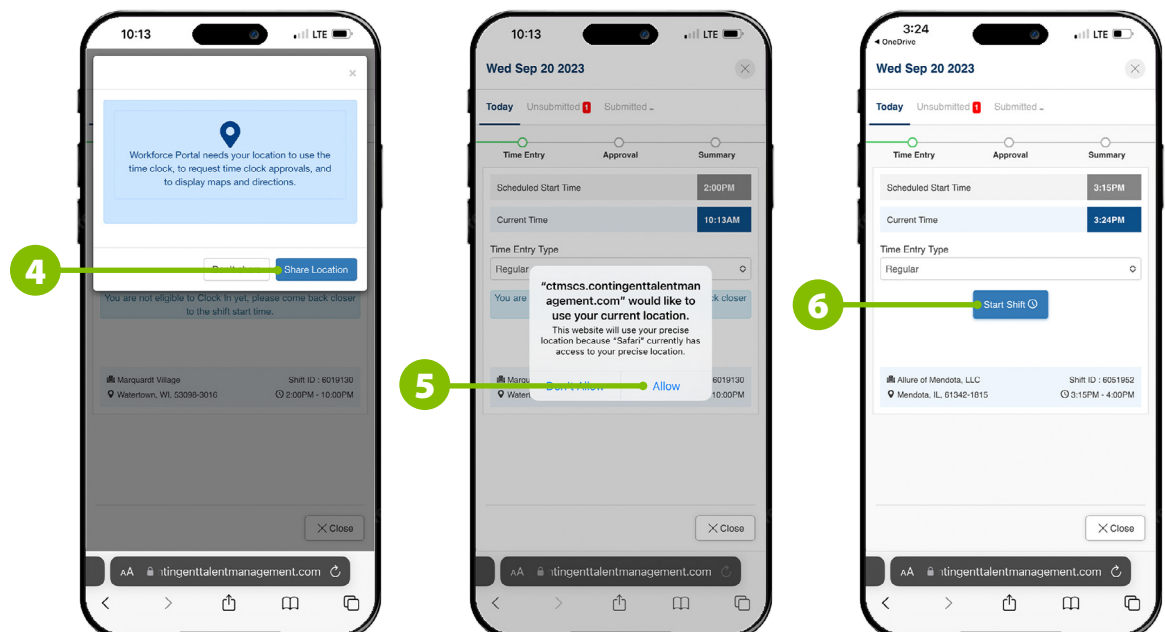
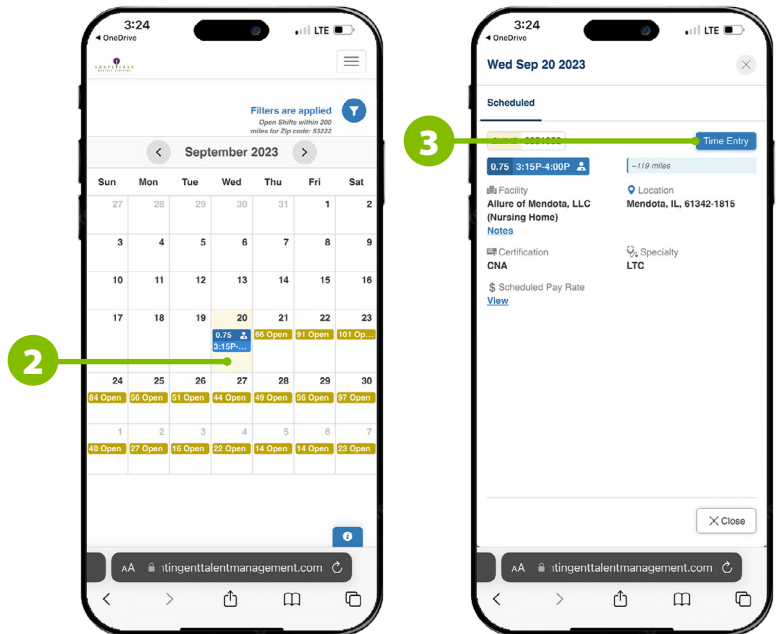


# Electronic Timesheets

## Clock In For a Shift

GrapeTree uses electronic timesheets within the Workforce Portal to track your work hours and verify that you are at the facility location when making clocking actions. You can clock in up to 7 minutes before your shift's start time. If you try to clock in more than 7 minutes early, you will receive a blue notification stating you are not eligible to clock in yet and will need to come back closer to your shift start time.

1. Tap the "Calendar" tile  on the home screen.
2. Select the shift on the calendar that you are ready to clock in for. Remember you cannot clock in for a shift if the shift start time is more than 7 minutes away.
3. Tap the "Time Entry" button.
4. You may receive a notification stating you need to share your location. Your GPS location must be enabled to make clocking actions. Tap the "Share Location" button.
5. If your phone asks for permission to share your location, tap "Allow."
6. Tap the "Start Shift" button. You will see your clock timer start.

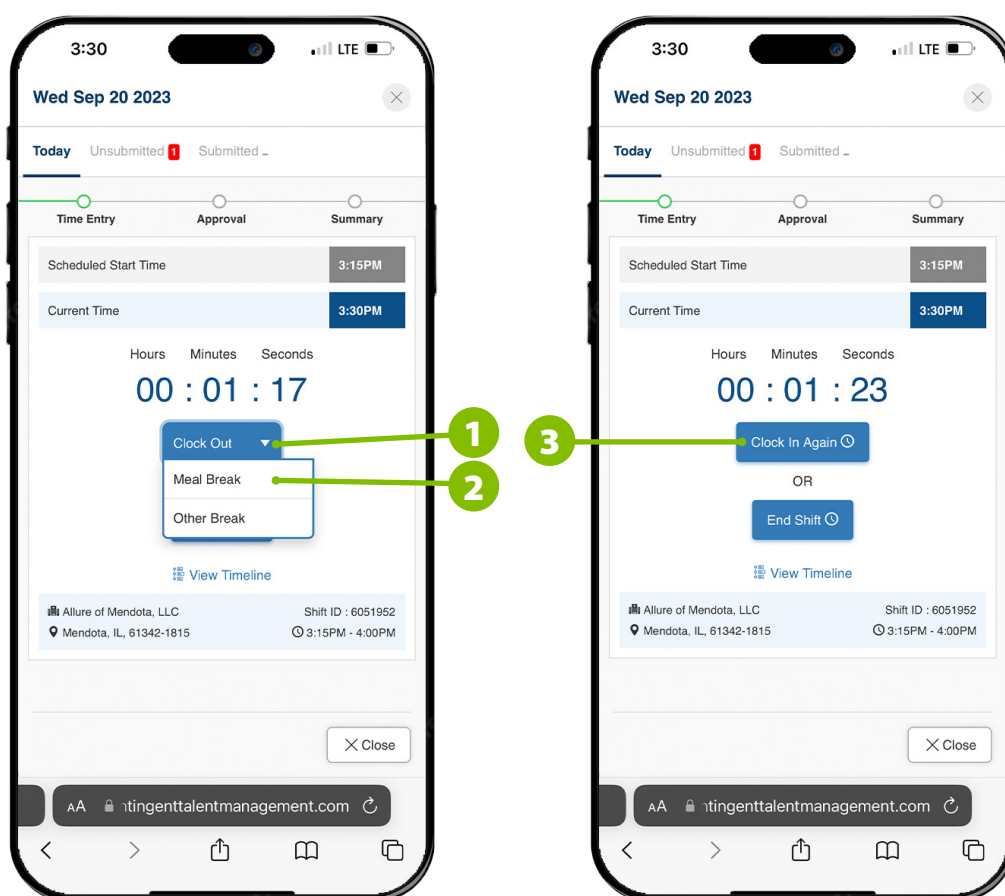


# Electronic Timesheets

## Enter Your Meal Break

Your normal, 15-minute breaks are paid and do not require you to clock out. However, 30-minute meal breaks do require you to clock out. Head to the time entry screen for the shift you are working.

1. On the time entry screen, press the drop-down arrow next to the "Clock Out" button.
2. Select "Meal Break" and you will be clocked out for your break.
3. When you are ready to clock back in from your break, tap the "Clock In Again" button.

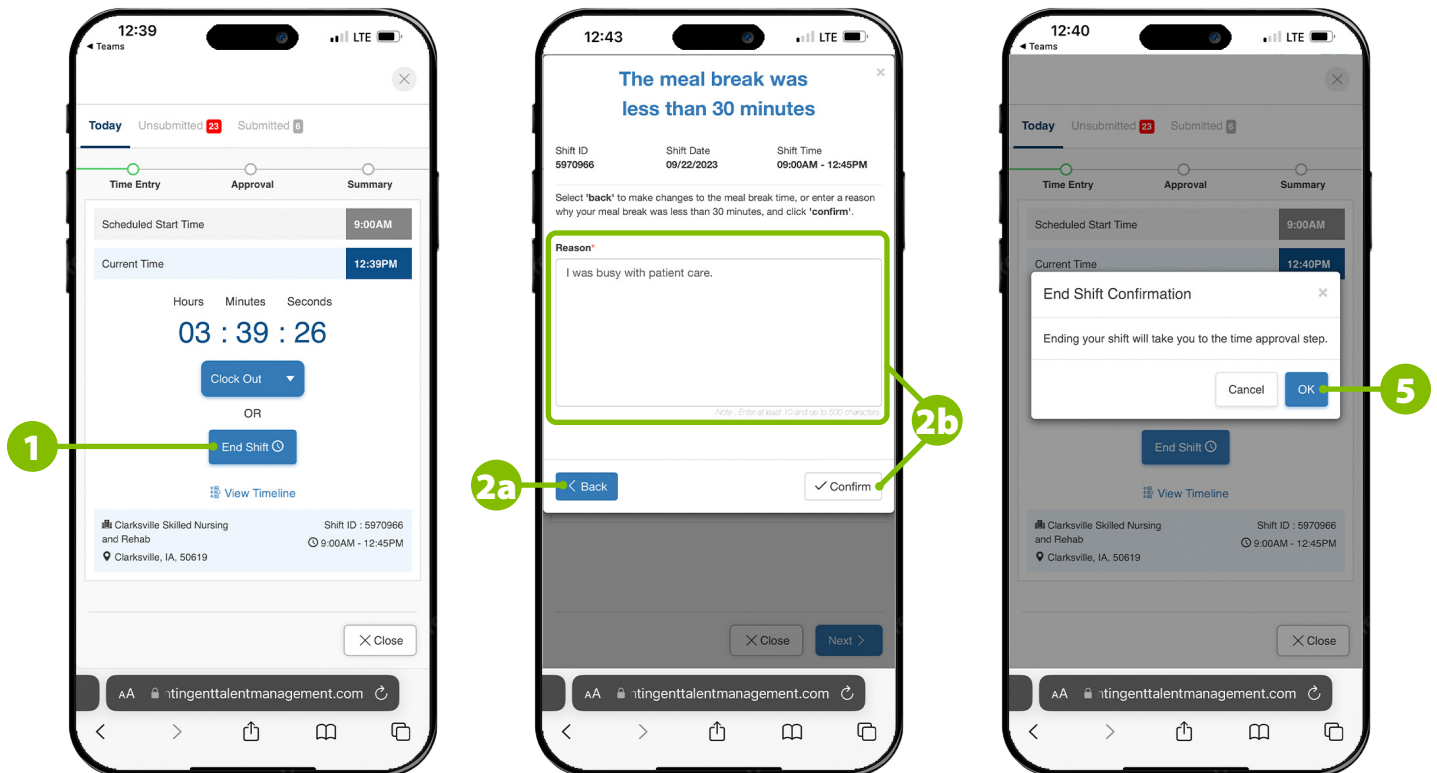


# Electronic Timesheets

## Clock Out of a Shift

When you're ready to clock out, open the time entry screen for the shift you are working.

1. On the time entry screen, tap the "End Shift" button to clock out.
2. If you did not take a meal break, took a shortened meal break, or forgot to punch out for your meal break, you will receive a prompt that requires you to provide a reason for the missed or shortened meal break.
  - a. If you did take a meal break, but forgot to punch out, you will need to go back and [edit your time](#) to add in your missed punches. Tap the "Back" button.
  - b. Enter your reason for missing the meal break, and then tap "Confirm."
3. Tap "OK" on the popup to confirm you are ending your shift, which will prevent further clocking actions.
4. You will then be taken to the [facility approval step](#).

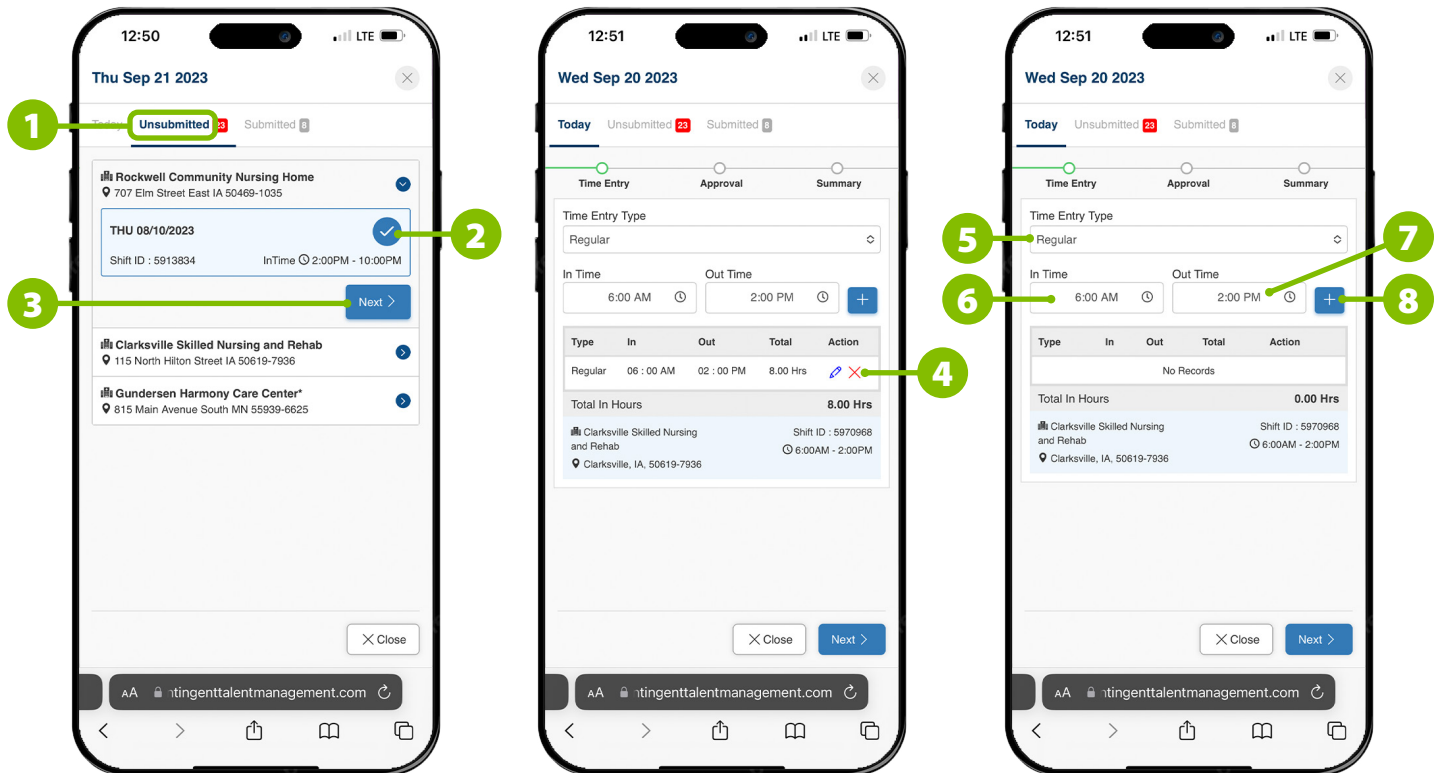


# Electronic Timesheets

## Edit Your Timesheet

If you forgot to clock in for your shift, missed clocking a meal break, or simply need to correct something on your timesheet, you can utilize the unsubmitted tab to make corrections as long as you are still at the facility.

1. On the time entry screen, tap the “Unsubmitted” tab at the top of the screen.
2. Select the shift you want to edit.
3. Press the “Next” button.
4. If there are any entries below the in time and out time sections that have a red X by them, you will need to tap the red X’s until all entries are cleared and the section says “No Records.”
5. Make sure the “Time Entry Type” is set to “Regular.”
6. Add your “In Time,” which should reflect the start time of your shift.
7. Add your “Out Time,” which should reflect the end time of your shift.
8. Press the blue + button.

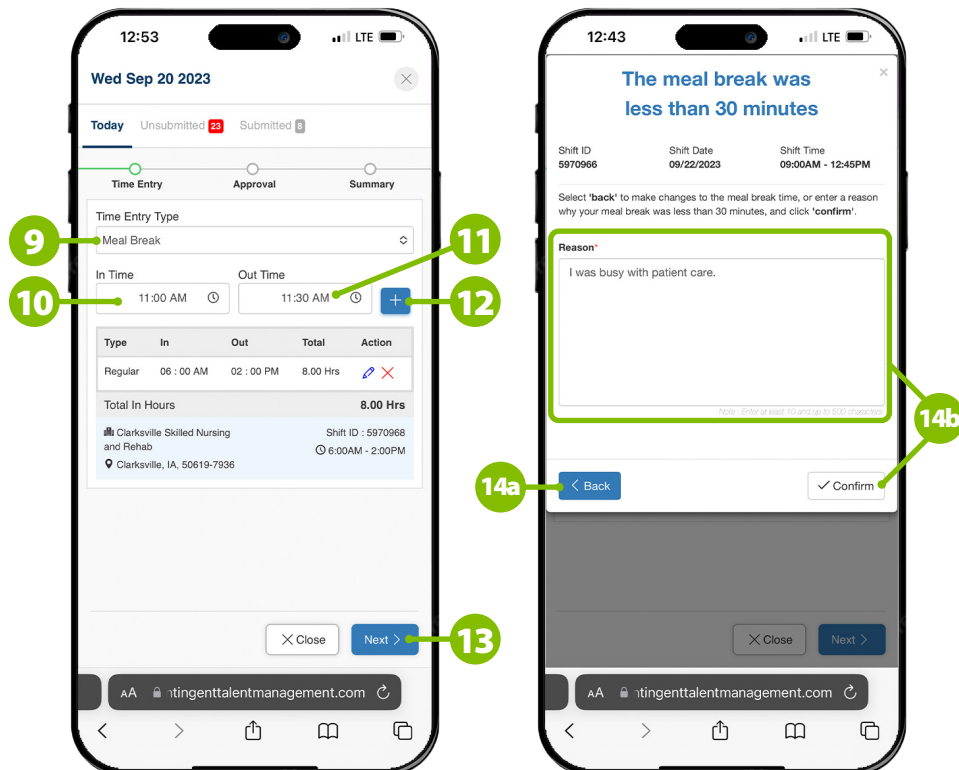




# Electronic Timesheets

## Edit Your Timesheet Continued

9. Switch the entry to "Meal Break."
10. Add your meal break "In Time," which should reflect when you went on break.
11. Add your meal break "Out Time," which should reflect when you went back to work.
12. Press the blue + button.
13. Tap "Next."
14. If you did not take a meal break or took a shortened meal break, you will receive a prompt that requires you to provide a reason for the missed or shortened meal break.
  - a. If you did take a meal break, but forgot to add those punches before moving on, tap the "Back" button to go back and add those punches according to steps 9-12.
  - b. If you did not take a meal break, enter your reason for missing the meal break, and then tap "Confirm."
15. You will then be taken to the [facility approval step](#).

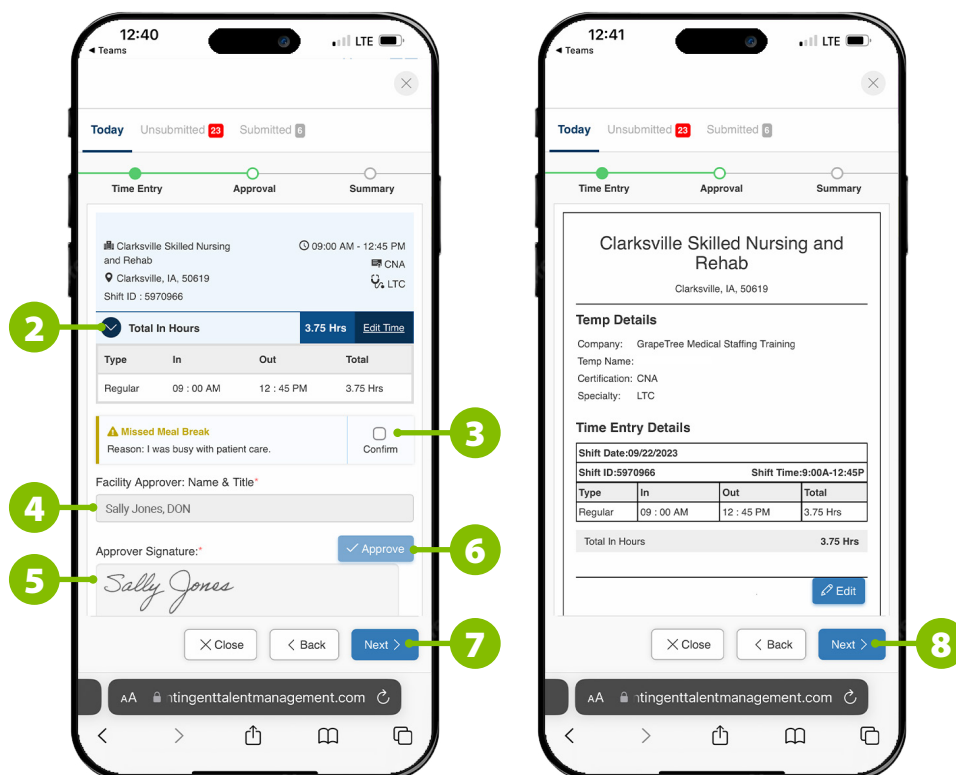


# Electronic Timesheets

## Get Facility Approval

After you have finished clocking out or editing your time, the healthcare facility will need to approve and sign off on your timecard. Find the facility's designated approver to complete this final step and submit your timecard.

1. After completing all clocking actions for your timecard, find the facility's approved person to sign off on your time.
2. If desired, the facility approver can tap the blue arrow to view more specific details on your shift.
3. If applicable, the approver will need to check the box next to the missed meal break notification to confirm that they approve of your missed or shortened break.
4. The approver will type in their name and job title.
5. The approver will sign their name with their finger.
6. The approver will tap the "Approve" button to submit their signature.
7. The approver will tap the "Next" button.
8. Then, the approver will tap "Next" on the next screen. The approver can then hand the device back to you to complete the final steps.



# Electronic Timesheets

## Request Priority Pay (Per Diem Only)

Our workweek begins on Sunday and ends on Saturday, with regular paychecks deposited into your bank account on the following Friday. If you would like to be paid sooner than the following Friday, you can request priority pay for a \$25 fee. Priority pay requests submitted by 8 am CT each business day, Monday through Friday, will be deposited into your bank account the next business day. Priority pay cannot be processed or deposited on Saturdays, Sundays, or bank holidays.

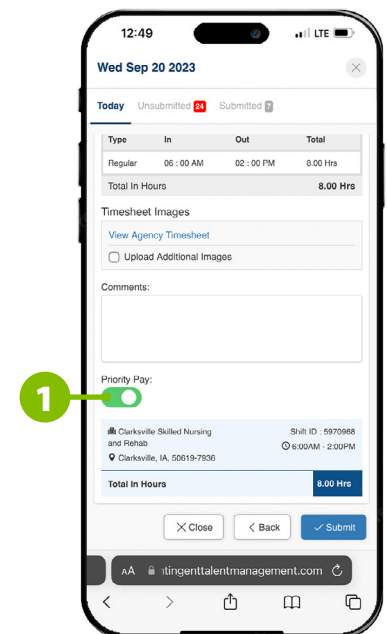
Please note that only per diem and local assignment shifts are eligible for priority pay. Travel assignments, which receive weekly reimbursements to cover housing and meals, are not eligible for priority pay. Per diem shifts worked while on a travel assignment are also not eligible for priority pay.

If you have a free priority pay on file, it will automatically be applied to your next eligible request, and the \$25 fee will be waived.

You can view your free priority pay balance at any time by logging into Paylocity, tapping the menu icon, and selecting “Pay.” Your balance is listed under the earnings section, coded as “PP BAL.”

### Request Priority Pay for a Single Shift

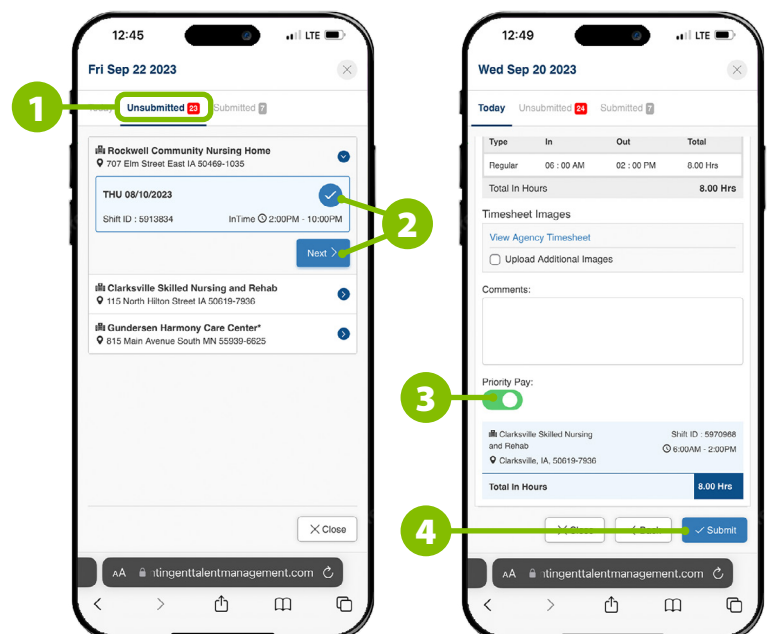
1. After receiving facility approval on your timecard, toggle the “Priority Pay” slider to green before [submitting your timecard](#).



### Request Priority Pay for Multiple Shifts

If you want to request priority pay for multiple shifts, you can avoid multiple fees by waiting until the end of the week to submit your timesheets. You will need to submit all of the week's shifts at the same time. If shifts are submitted individually with priority pay selected throughout the week, multiple fees will be applied. Please note that even though you won't press the “Submit” button when completing your shift, your timecard will be saved in the unsubmitted tab for you to submit later.

1. On the time entry screen, tap the “Unsubmitted” tab.
2. Open each shift by selecting it and tap “Next.”
3. Toggle all “Priority Pay” sliders to green.
4. [Submit](#) each timecard and priority pay will be applied to them all for one \$25 fee.

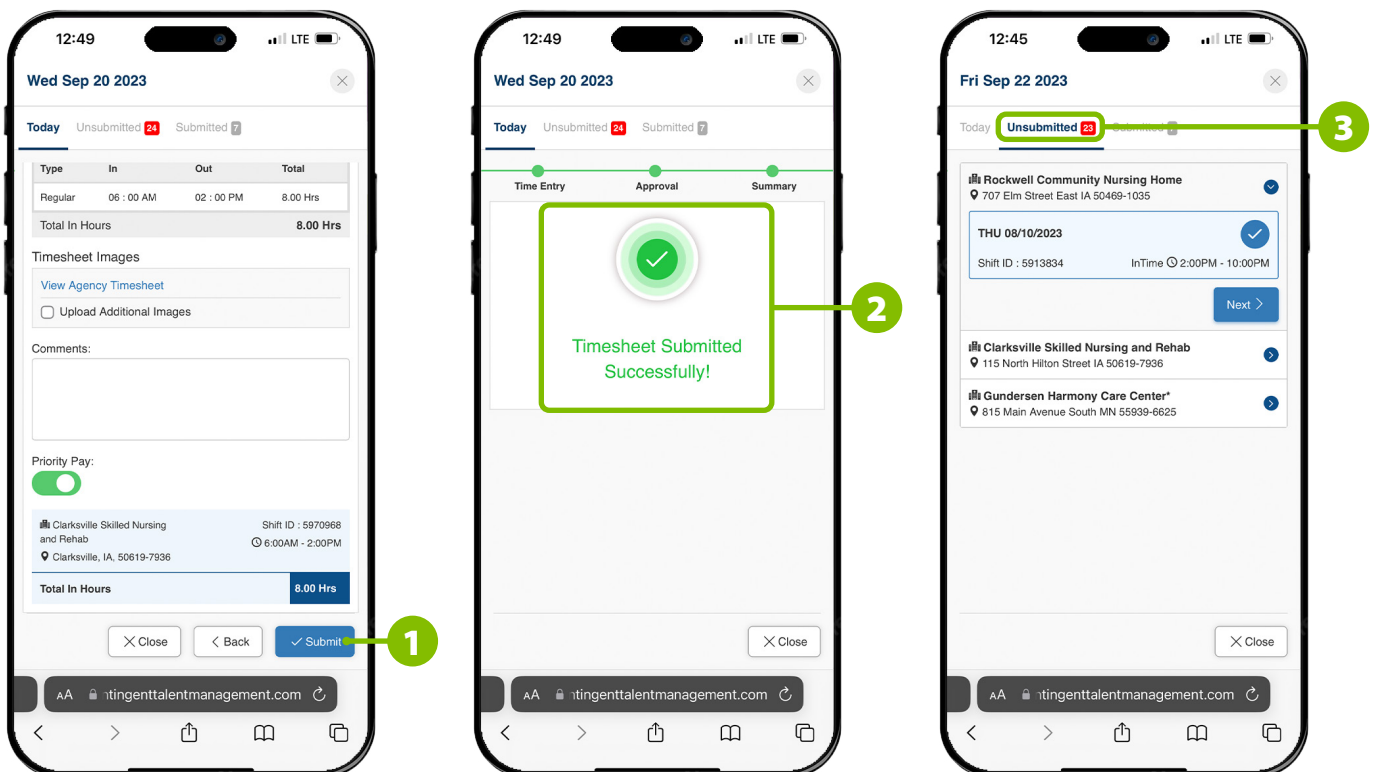


# Electronic Timesheets

## Submit Your Timesheet

Once you have finalized your timecard, received facility approval, and applied any desired priority pay, you are ready to submit your timecard. Please note that all timecards must be submitted by 8 am on Sundays in order to receive a regular Friday payout.

1. On the timecard summary screen, tap the "Submit" button.
2. The next screen will show a success message in green letting you know that your timecard has been submitted.
3. If you have any outstanding timesheets in the "Unsubmitted" tab, be sure to submit them before the weekly 8 am deadline on Sundays in order to receive your payment on time.

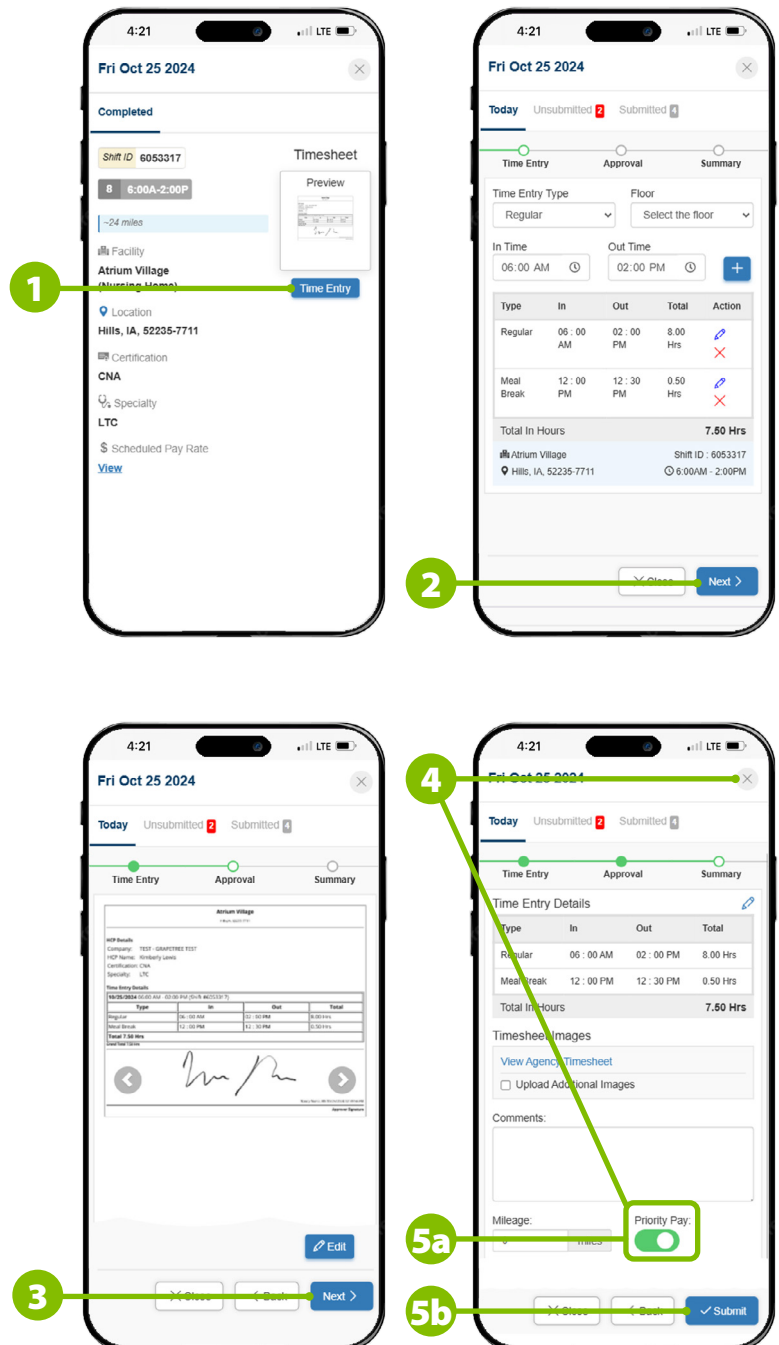


# Electronic Timesheets

## See Priority Pay Requested Shifts

If you would like to verify which shifts you have requested priority pay for after submitting them, you are able to do so by reviewing the timesheet details. Each of the timesheets you have submitted that have not yet been paid out will be visible in the “Submitted” tab of the time entry screen.

1. On the calendar, tap on the shift you would like to review the timesheet for and tap the “Time Entry” button.
2. Tap “Next” on the time entry screen
3. Tap “Next” again on the timesheet preview screen.
4. If you requested priority pay for the shift, the “Priority Pay” slider will be toggled to green. Tap the X in the top right corner to go back to the calendar.
5. If you didn’t toggle the slider for priority pay when you initially submitted your timesheet, but you would like to do so now\*, follow these steps:
  - a. Toggle the “Priority Pay” slider green.
  - b. Tap the “Submit” button.



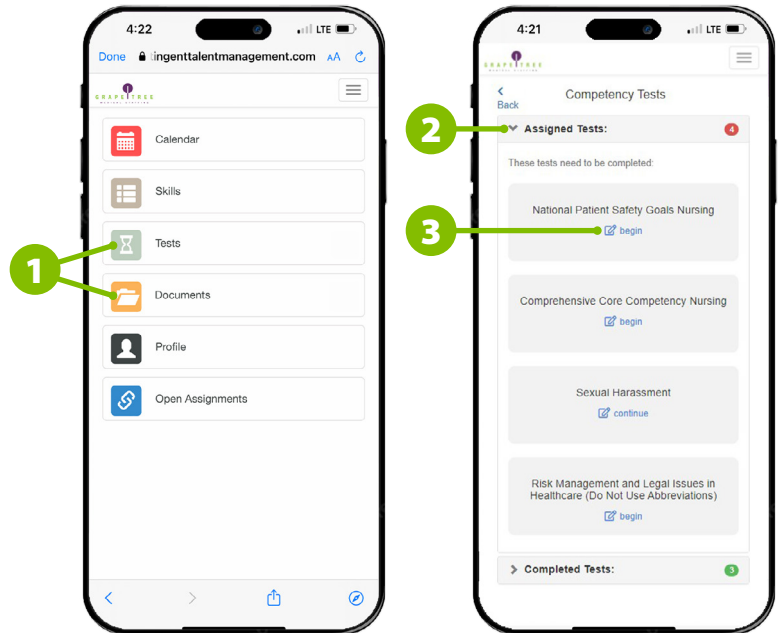
**\* Important:** Priority pay requests must be submitted by 8 am (Monday - Friday) to be deposited into your account the next business day. If you’ve already submitted timesheets in bulk and the deadline for the initial request has passed, an additional \$25 fee will be applied for a separate request. If the deadline hasn’t passed, only one \$25 fee will be charged.

# Staying Compliant

You will use the Tests and Documents sections of the Workforce Portal to complete any annual tests or update your credentials needed to stay compliant so that you can continue working. If you have a test to complete or document to update, there will be an icon with the number of tasks that need to be completed on the corresponding tile.

## Tests

1. Tap the “Tests” tile on the home screen.
2. Tests you need to complete will display in the “Assigned Tests” dropdown.
3. Tap “Begin” to start your test. Keep in mind that tests are timed. Always allow adequate time in your schedule to complete the test before beginning.



## Documents

1. Tap the “Documents” tile on the home screen.
2. Documents you need to update will display on the “Assigned” tab.
3. Tap on a document in the list.
4. Follow the instructions that popup to update that document.

