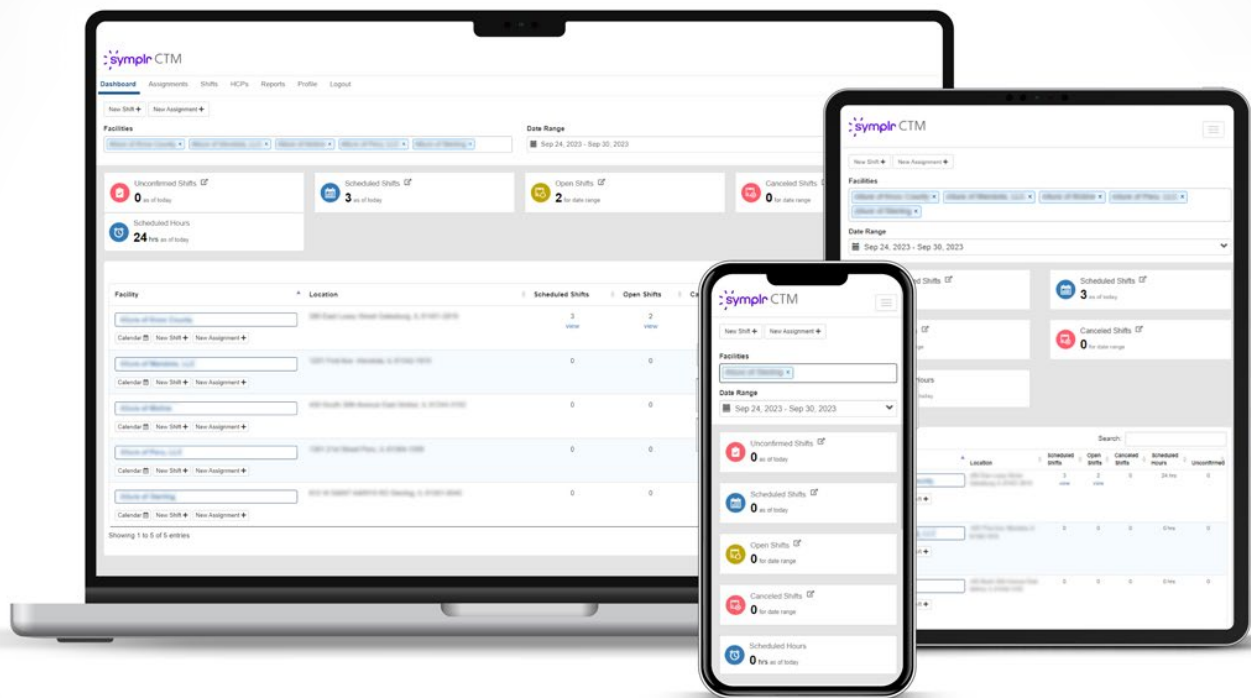


GRAPETREE

MEDICAL STAFFING



Facility Portal Manual

Facility Portal is your #1 tool, providing you and your team with full control and everything you need to efficiently manage your shifts. This easy-to-use, all-inclusive portal is where you will manage your facility shifts, credentials, GrapeTree Healthcare Professional documentation, and run reports.

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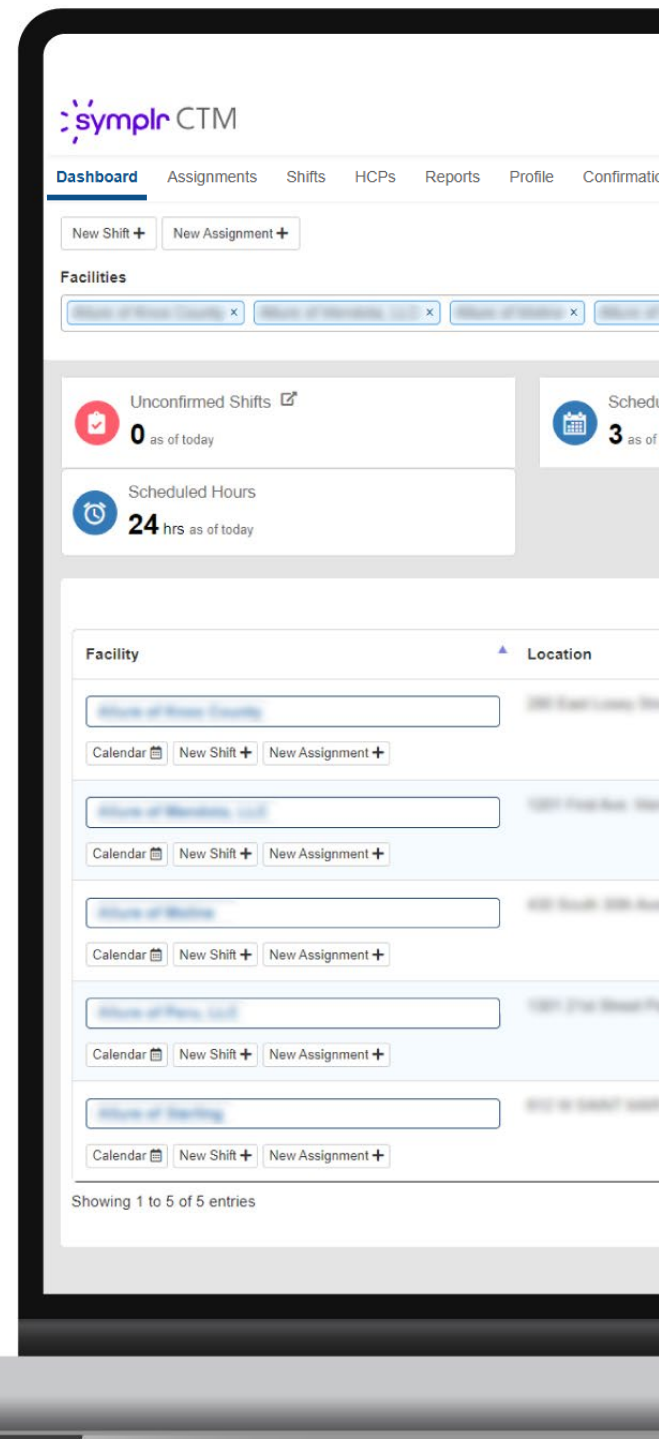
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Facility Portal Overview

Facility Portal makes scheduling work simple. Whether you manage one or multiple facility calendars, get the insights you need with ease. GrapeTree's Facility Portal, powered by Symplr, gives you the power to:

- Add per-diem shifts and assignment needs.
- View and manage all open, filled, and cancelled shifts.
- Search and filter shifts by status, specialty, facility, start date, or assignment.
- Search and filter healthcare professionals by certification, orientation status, work history, or name.
- Complete performance evaluations for GrapeTree healthcare professionals.
- View professional documents for healthcare professionals shared with your facility.
- Access and run reports – including your PBJ report.

[Click to Open Facility Portal](#)

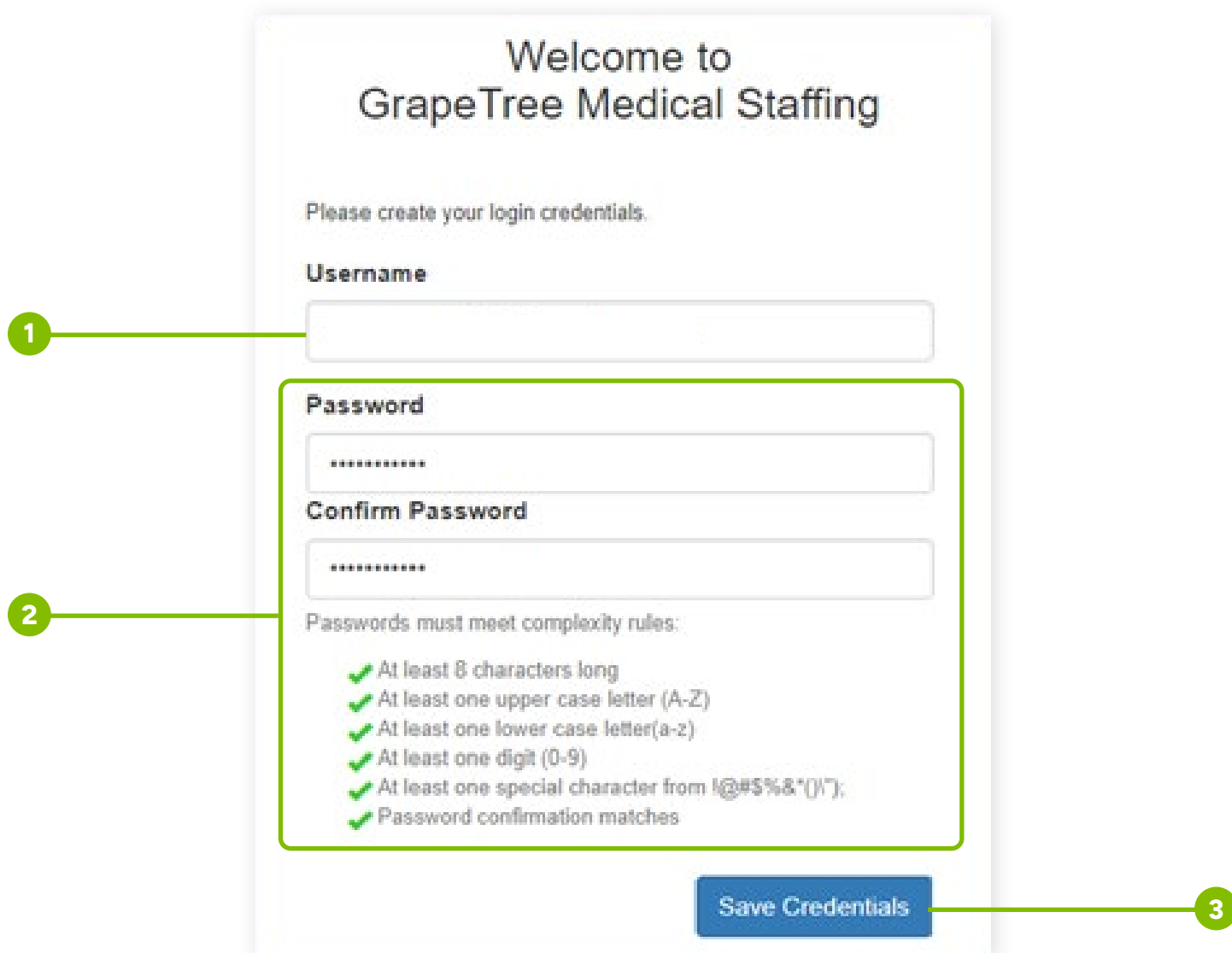


Getting Started

Account Set Up

GrapeTree will send an invitation to your primary email on file for you to create a Facility Portal account. Click the link in the email to set up your username and password. If you do not see the email invitation, please check your junk/spam folder.

1. Create a username. This can be your email address or a custom username.
2. Set your password. Your password **MUST** meet all of the complexity rules listed. Each rule will check off in green as you meet the criteria.
3. Click the "Save Credentials" button. This will take you to the Facility Portal home page.



The screenshot shows a web form titled "Welcome to GrapeTree Medical Staffing". Below the title is the instruction "Please create your login credentials." The form has three main sections: "Username", "Password", and "Confirm Password". A green line with a circle containing the number "1" points to the "Username" input field. The "Password" and "Confirm Password" sections are grouped together by a green box, with a green line and a circle containing the number "2" pointing to the "Password" input field. Below the "Confirm Password" field, there is a list of complexity rules, each preceded by a green checkmark. A green line with a circle containing the number "3" points to the "Save Credentials" button at the bottom right of the form.

Welcome to
GrapeTree Medical Staffing

Please create your login credentials.

Username

1

Password

2

Confirm Password

Passwords must meet complexity rules:

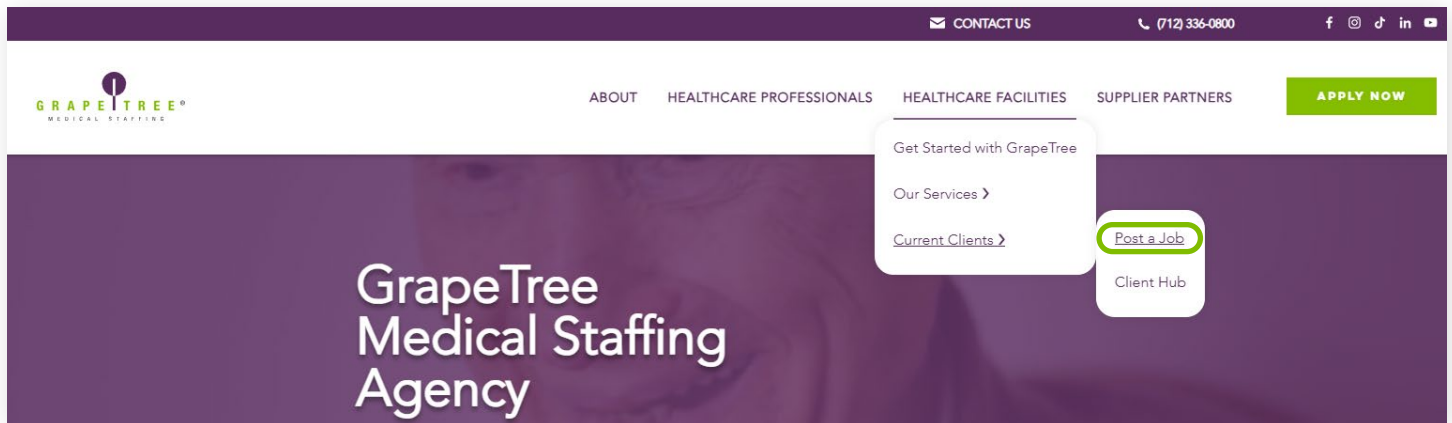
- ✓ At least 8 characters long
- ✓ At least one upper case letter (A-Z)
- ✓ At least one lower case letter(a-z)
- ✓ At least one digit (0-9)
- ✓ At least one special character from !@#\$%&*(~);
- ✓ Password confirmation matches

3

Save Credentials

Getting There

For your convenience, the [GrapeTree website](#) has a link to the Facility Portal login page. In the menu, hover over the Healthcare Facilities dropdown, the Current Clients dropdown, and then click on the Post a Job link.



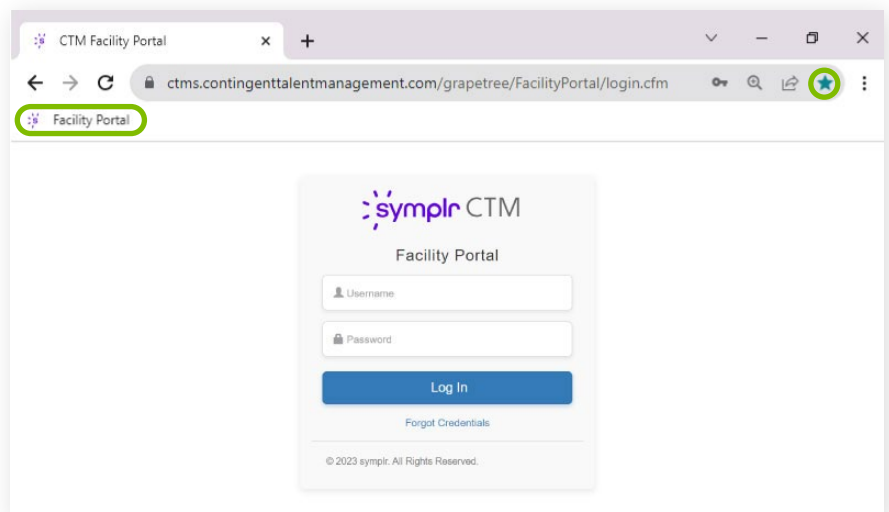
Bookmark Facility Portal

We recommend bookmarking the Facility Portal login page on your web browser so that you always have quick access to manage your shift orders. Use the links below for additional instructions on adding a site to your bookmark toolbar based on which web browser you use.

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

Logging In

Input the username and password that you specified when creating your account and click the "Log In" button. After successfully logging in, you will see your Dashboard.



The Dashboard Tab

The Dashboard tab will show you an overview of all scheduled (filled), open, and cancelled shifts your facility or facilities have posted with GrapeTree. Whether you are managing one facility or multiple, the Dashboard is a great spot to gain quick insights and take actions.

1. If you are managing schedules for multiple facility locations, you can select or remove locations in the Facilities section to view more custom overview data. If you don't see one of your facilities listed or there are facilities listed that you do not manage the schedules for in the dropdown, your Client Account Manager can add or remove locations from your list to help you better manage your work.
2. On login, your dashboard's date range will automatically display data for the current week. Expand the dropdown to customize the date range and view more specific data.
3. The boxes at the top of the page conveniently show numbers for all open, filled, and cancelled shifts for the facilities within the date range selected.
 - a. The shift boxes are interactive. On click, they will take you to a detailed list view of the shifts that meet the criteria.

The screenshot displays the symplr CTM Dashboard interface. At the top, the 'Dashboard' tab is selected in the navigation bar. Below the navigation bar, there are buttons for '+ New Shift' and '+ New Assignment'. The 'Facilities' section features a dropdown menu with three facility names: 'GrapeTree Medical Longwood', 'GrapeTree Medical Park Plaza', and 'GrapeTree Medical Park Ridge'. A green circle with the number '1' points to this dropdown. To the right of the facilities, the 'Date Range' is set to 'Current period (Sun, Oct 4, 2026 - Sat, Oct 10, 2026)', with a green circle with the number '2' pointing to the dropdown arrow. Below these, a summary row shows four boxes: 'Unconfirmed Shifts 0 as of today', 'Scheduled Shifts 62 as of today', 'Open Shifts 29 for date range', and 'Canceled Shifts 8 for date range'. A green circle with the number '3' points to the 'Unconfirmed Shifts' box. Below the summary row, a table lists facilities with columns for Facility, Location, Account Manager, Staffing Specialist, Scheduled Shifts, Open Shifts, Canceled Shifts, Scheduled Hours, and Unconfirmed. The table has three rows of data. Below the table, the 'Shifts' tab is selected in the navigation bar. The 'Shifts' section shows a 'Show Search Form' button and a 'Quick Filter' input. Below this, a table titled 'Dashboard > Scheduled Shifts for Selected Facilities' displays shift details. A green circle with the letter 'a' points to the first row of the shift table. The shift table has columns for Shift #, Status, Type, Client, Job Date, Shift Name, Cert, Specialty, Floor, Bill Rate, Requests, HCP, Assignment #, State, City, Zip Code, Created, and Modified. The first row shows a shift with ID # 5967709, status 'Filled', type 'Per Diem', client 'GrapeTree Medical Longwood', job date '09/28/2023', shift name '2P-10P (2)', cert 'CNA', specialty 'LTC', floor, bill rate, requests, HCP, assignment #, state, city, zip code, created '09/12/2023 2:02 pm', and modified '09/12/2023 2:02 pm'. The second row shows a shift with ID # 5967710, status 'Filled', type 'Per Diem', client 'GrapeTree Medical Longwood', job date '09/30/2023', shift name '2P-10P (2)', cert 'CNA', specialty 'LTC', floor, bill rate, requests, HCP, assignment #, state, city, zip code, created '09/12/2023 2:02 pm', and modified '09/12/2023 2:02 pm'. At the bottom of the shift table, it says 'Showing 1 to 2 of 2 Shifts' and has 'Previous', '1', and 'Next' buttons.

The Dashboard Tab Continued

4. Below the shift boxes, you will see a list of the facilities you have selected. The columns will show a breakdown of which locations your scheduled, open, and cancelled shifts are posted at, along with the total number of scheduled hours at each facility for the selected date range.
5. Click the dropdown arrow next to a facility name to access quick actions for that location.
 - a. The Calendar button will take you to that facility's specific calendar.
 - b. The New Shift button allows you to quickly add a shift at that specific facility.
 - c. The New Assignment button allows you to quickly add a local or travel assignment for that specific facility.

The screenshot shows the Dashboard tab with a navigation bar at the top. Below the navigation bar, there are buttons for '+ New Shift' and '+ New Assignment'. A 'Facilities' section contains a search bar and a 'Date Range' dropdown set to 'Current period (Sun, Oct 4, 2026 - Sat, Oct 10, 2026)'. Below this, there are four summary cards: 'Unconfirmed Shifts 0 as of today', 'Scheduled Shifts 62 as of today', 'Open Shifts 29 for date range', and 'Canceled Shifts 8 for date range'. A 'Scheduled Hours' card shows '605 hrs as of today'. The main section is a table with the following columns: Facility, Location, Account Manager, Staffing Specialist, Scheduled Shifts, Open Shifts, Canceled Shifts, Scheduled Hours, and Unconfirmed. The table lists five facilities, each with a dropdown arrow next to the Facility name. A green circle with the number '4' points to the first facility's dropdown arrow.

Facility	Location	Account Manager	Staffing Specialist	Scheduled Shifts	Open Shifts	Canceled Shifts	Scheduled Hours	Unconfirmed
North Health Longview	1010 Longview Rd, Longview, WA 98640-1001	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	5 view	10 view	0	44 hrs	0
North Health Puyallup	2001 S 304 St, Puyallup, WA 98449-1111	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	24 view	9 view	4 4 view	236 hrs	0
North Health Puyallup Ridge	400 Puyallup Rd, Puyallup, WA 98449-1000	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	Jessie Warburton jessie.warburton@grapetree.com 7125842814 (2814)	6 view	10 view	4 4 view	64 hrs	0
North Health Tacoma	1110 1st St, Tacoma, WA 98402-1400	Rachael Swearingen rachael.swearingen@grapetree.com 7123360800 (2872)	Rachael Swearingen rachael.swearingen@grapetree.com 7123360800 (2872)	17 view	0	0	136 hrs	0
North Health Tacoma	400 1st St, Tacoma, WA 98402-1400	Rachael Swearingen	Rachael Swearingen	10 view	0	0	125 hrs	0

This close-up screenshot shows a dropdown menu for a facility. The menu is open, revealing three options: 'Calendar' (with a calendar icon), 'New Shift' (with a plus icon), and 'New Assignment' (with a plus icon). A green circle with the number '5' points to the dropdown arrow. A green circle with the letter 'a' points to the 'Calendar' option, a green circle with the letter 'b' points to the 'New Shift' option, and a green circle with the letter 'c' points to the 'New Assignment' option.

Facility Calendars

Clicking on a facility's Calendar button on the Dashboard will bring you to a color coded calendar view of all shifts submitted to GrapeTree for that specific facility.

Quick Tip: For a printer friendly view of a facility's calendar with specific shift and healthcare professional details, check out the [Schedule Report](#).

Shifts are color coded on the calendar:

- Grey** = Shift has been completed.
- Blue** = Shift is filled. Click it to see the healthcare professional's name & shift details.
- Gold** = Shift is open, and we are working to fill it.
- Red** = Shift has been cancelled.
- Purple** = Shift has been cancel requested.

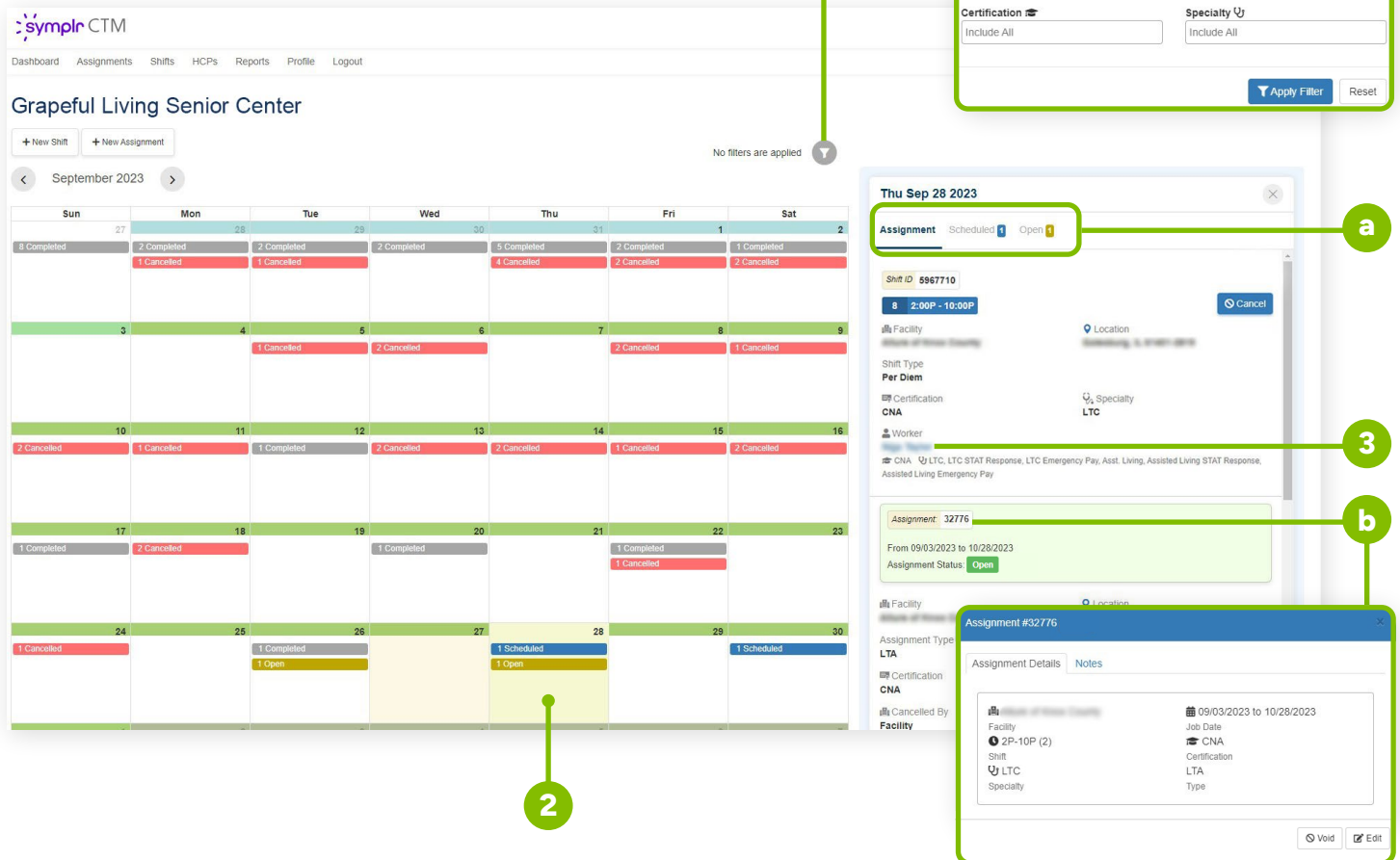
Assignments will show as a continuous colored bar across the top of each calendar day.

The screenshot displays the Symply CTM interface for the facility "Grapeful Living Senior Center". The calendar view for September 2023 shows shifts color-coded by status. A callout box on the right illustrates how to interact with the calendar.

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

Navigating the Calendar

1. Shifts can be filtered by shift type, assignment type, status, floor, certification, and specialty using the filter icon at the top right of the calendar.
2. Click in the white space on a day on the calendar to open a popup with tabs for all shift types and assignments for that day.
 - a. Click on the shift type tab headers to see breakdowns of the listed shifts or assignments.
 - b. Click on a shift or assignment ID number to see more details on that shift or assignment.
3. **Quick Tip:** Clicking on a healthcare professional's name within a shift on the calendar will allow you to view their credential documents quickly and easily without searching for them in the [HCPs Tab](#).



The screenshot displays the Symplr CTM Facility Portal interface for 'Grapeful Living Senior Center'. The main calendar view shows a grid for September 2023, with days of the week and dates. Shifts are represented by colored blocks: green for completed, red for cancelled, and yellow for open. A callout '1' points to the filter icon at the top right of the calendar. A callout '2' points to a specific day (Thursday, September 28th) on the calendar. A callout '3' points to a shift block on Thursday, September 28th. A callout '3a' points to the 'Assignment' tab in the shift popup. A callout '3b' points to a specific assignment ID (32776) in the assignment list.

Filter Calendar

Shifts | Assignments | Both

Shift Type: All

Assignment Type: All

Status: Include All

Floor: Include All

Certification: Include All

Specialty: Include All

Apply Filter | Reset

Thu Sep 28 2023

Assignment | Scheduled | Open

Shift ID: 5967710

Shift: 2:00P - 10:00P

Facility: Grapeful Living Senior Center

Location: Grapeful Living Senior Center

Shift Type: Per Diem

Certification: CNA

Specialty: LTC

Worker: [Name]

CNA: CNA, LTC, LTC STAT Response, LTC Emergency Pay, Asst. Living, Assisted Living STAT Response, Assisted Living Emergency Pay

Assignment: 32776

From 09/03/2023 to 10/28/2023

Assignment Status: Open

Assignment #32776

Assignment Details | Notes

Facility: Grapeful Living Senior Center

Job Date: 09/03/2023 to 10/28/2023

Shift: 2P-10P (2)

Certification: CNA

Specialty: LTC

Type: Type

Void | Edit

Adding Shifts

From the Dashboard, click the “New Shift” button under the facility that you would like to add shifts for. Alternatively, click the “New Shift” button in the top left side on any page and select which facility you would like to add the shift for in the Facility box.

Adding a Single Shift

1. In the dropdown menu for a location, click the “New Shift” button.
2. Select the certification(s) for the shift (multiple can be selected).
3. Select the job date.
4. Select the specialty of the facility you are adding the shift for. If you are entering a Crisis or STAT shift, select the corresponding specialty variation from this menu. **Do not select Emergency Pay.**
5. Select the shift time in the “Default Shifts” dropdown or enter a “Start Time” and “End Time”.
 - a. If you select one of the default shifts, the “Shift” dropdown and shift start and end times will auto populate based on your selection.
 - b. If you input your own start and end times, select the corresponding shift in the “Shift” dropdown: 8 hr Days (Shift 1), 8 hr Evening (Shift 2), 8 hr Nights (Shift 3), 12 hr Days (Shift 4), or 12 hr Nights (Shift 5).
6. If you want to request a certain healthcare professional to work the shift, type their name into the “Requested HCPs” field. The GrapeTree team will check with them to see if they are able to work the shift. Please note that once the shift is posted, any healthcare professional can fill it.
7. Do not adjust the “Type” or “On-Call” fields. They should show as Per Diem and No.
8. Leave “Floor” blank to allow partial shift adjustments (example: a professional books 8 hours of a 12 hour shift, and the remaining 4 hours are posted for another professional to fill), or select “Shift Adjustment Approval Needed” if you prefer to manually approve all partial shift adjustments.
9. Click the “Save Shift” button to post the need.

The screenshot shows the 'Create Shift' form in the Facility Portal. The form is divided into several sections with numbered callouts:

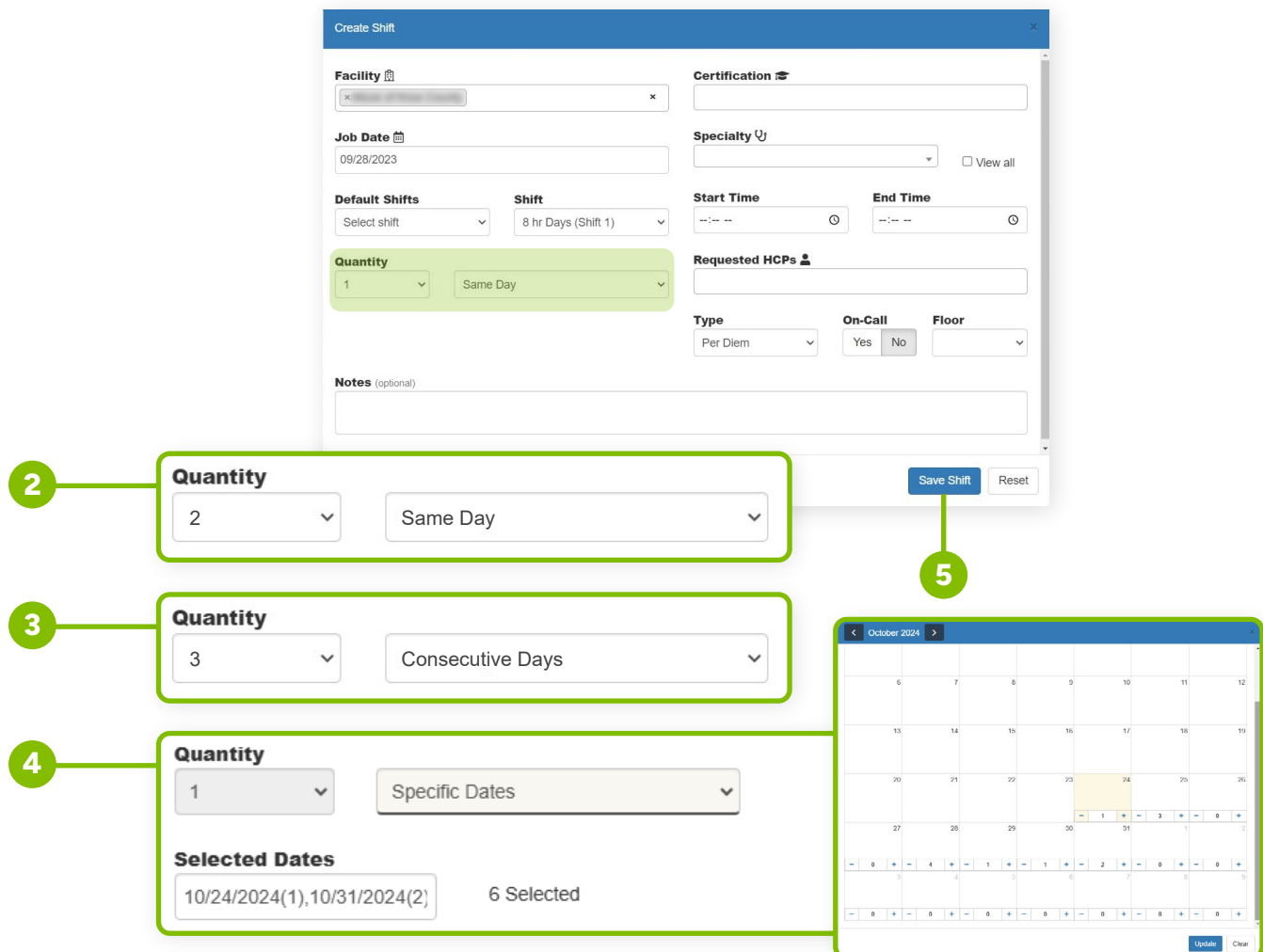
- 1**: Points to the 'New Shift' button in the left sidebar under a facility.
- 2**: Points to the 'Certification' dropdown field.
- 3**: Points to the 'Job Date' field.
- 4**: Points to the 'Specialty' dropdown field.
- 5**: Points to the 'Default Shifts' dropdown field.
- 6**: Points to the 'Requested HCPs' text field.
- 7**: Points to the 'Type' dropdown field.
- 8**: Points to the 'On-Call' field.
- 9**: Points to the 'Save Shift' button.

The form includes fields for Facility, Certification, Job Date, Specialty, Default Shifts, Start Time, End Time, Quantity, Requested HCPs, Type, On-Call, Floor, and Notes. The 'Save Shift' button is at the bottom right.

Adding Multiple Shifts

1. Complete steps 1-8 on the previous page for adding a shift and shift details.
2. To add multiple shifts with the same criteria for the same day, select the number of shifts from the first "Quantity" dropdown and "Same Day" in the second dropdown.
3. To add multiple of the same shift for consecutive days, select the number of days in the first "Quantity" dropdown and "Consecutive Days" in the second dropdown.
4. To add multiple of the same shift for specific days, select "Specific Dates" in the second "Quantity" dropdown and then click in the "View and Select Dates" box. In the calendar popup, use the + and - buttons to specify how many shifts you would like to post on each day. Once you have completed your selections, click "Update."
5. Click the "Save Shift" button to post the needs.

Immediately after shifts are added to the calendar, automated text message campaigns are triggered to send to all healthcare professionals in the area to notify them of the opportunity. Your GrapeTree Client Account Manager will also be notified so that they can work to fill the open need.



The image shows the 'Create Shift' form and a calendar popup. Callouts 2, 3, and 4 point to the 'Quantity' dropdowns in the form, which are highlighted with green boxes. Callout 5 points to the 'Save Shift' button. The calendar popup shows a grid for October 2024, with a yellow highlight on the 24th and 31st, indicating selected dates.

Callout 2: Quantity dropdown set to 2, Same Day dropdown.

Callout 3: Quantity dropdown set to 3, Consecutive Days dropdown.

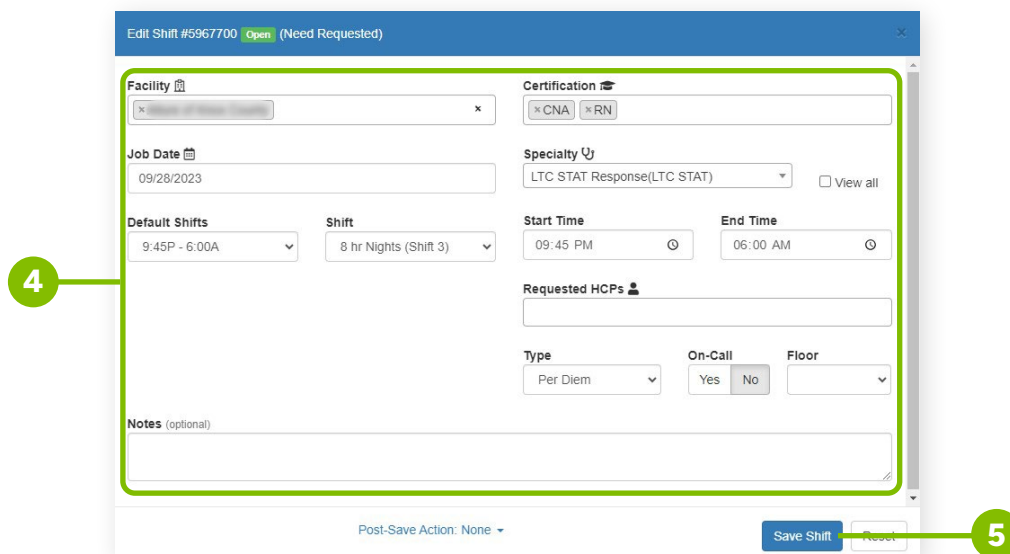
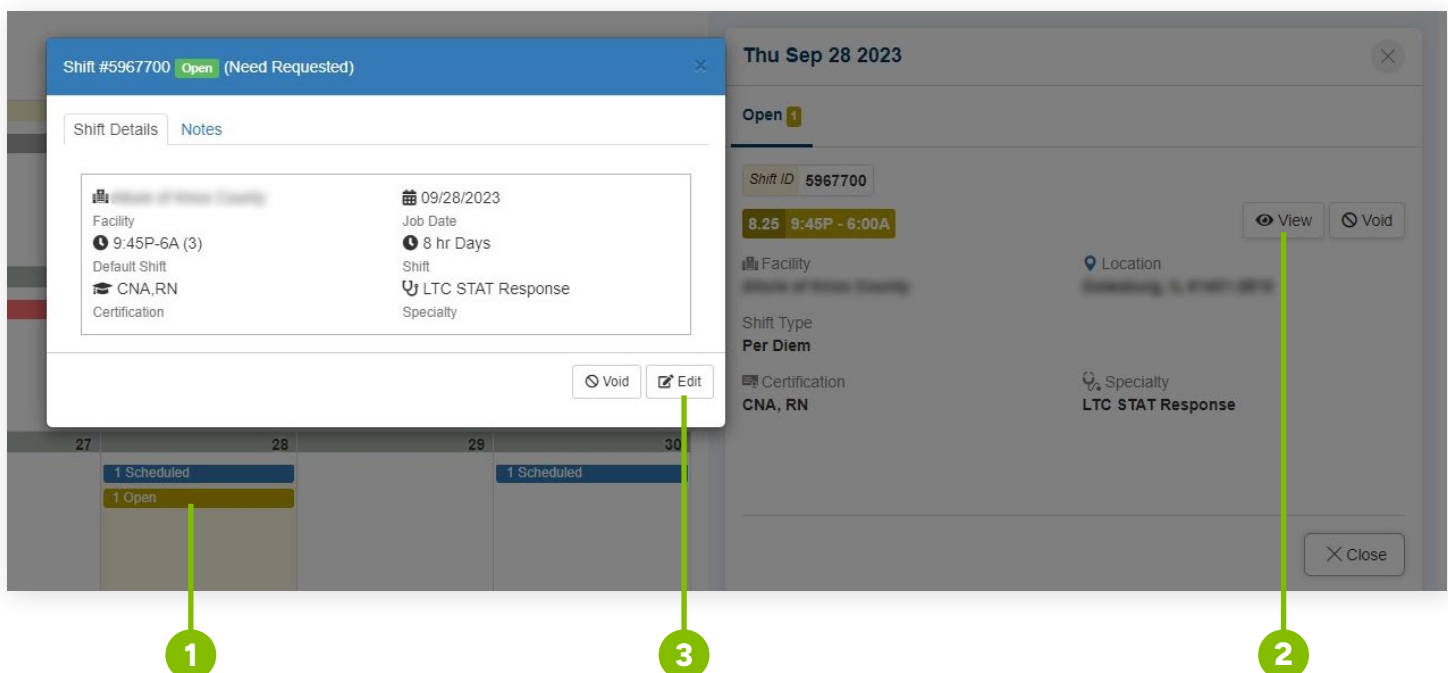
Callout 4: Quantity dropdown set to 1, Specific Dates dropdown. Below it, the 'Selected Dates' section shows '10/24/2024(1), 10/31/2024(2)' and '6 Selected'.

Callout 5: Save Shift button.

Editing Shifts

Shift and assignment details can be edited if the shift or assignment is open and has not been filled.

1. Select the shift on the calendar that you would like to edit.
2. Click "View."
3. Click "Edit" in the popup view of the shift.
4. Make any edits to the shift details or healthcare professional requests in the new popup.
5. Once all edits are made, click "Save Shift."



Cancelling Shifts

Cancelling an Open Shift

If an open shift or assignment is no longer needed, you have the option to cancel it.

1. Select the shift on the calendar that you would like to cancel.
2. Click "Void."
3. In the "Void Reason" dropdown, select "No longer needed or Census Dropped" option.
4. Click "Void Shift."
5. The shift is now cancelled and will show on your calendar in red. No further actions are needed.

The screenshot illustrates the steps to cancel an open shift in the Facility Portal. On the left, a calendar view shows a yellow shift on 9/28/2023 labeled '1 Open'. A green line connects this shift to step 1. A modal window titled 'Void Shift - #5967700' is open, showing details for Shift # 5967700, including the date 09/28/2023, certification CNA, RN, and specialty LTC STAT Response. The 'Void Reason' dropdown is set to 'No longer needed or Census Dropped', with a green line connecting it to step 3. A 'Void Shift' button is at the bottom of the modal, with a green line connecting it to step 4. A 'Void' button is also visible on the shift details card, with a green line connecting it to step 2.

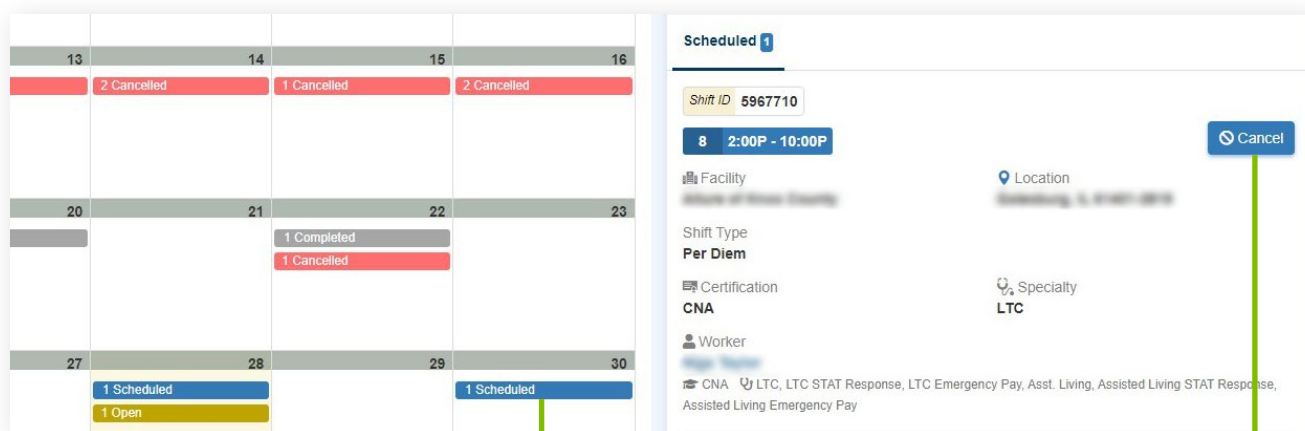
Cancel Request a Filled Shift

If you wish to cancel a shift that a healthcare professional has already filled, you will instead send a shift cancel request. Your GrapeTree Client Account Manager will review the request to approve and remove the shift.

1. Select the shift on the calendar that you would like to cancel.
2. Click "Cancel."
3. In the "Void Reason" dropdown, select "No longer needed or Census Dropped" option.
4. Click "Cancel Shift."
5. Click "Send Request."
6. The shift will show on your calendar in purple, meaning you have submitted a cancel request for the shift.

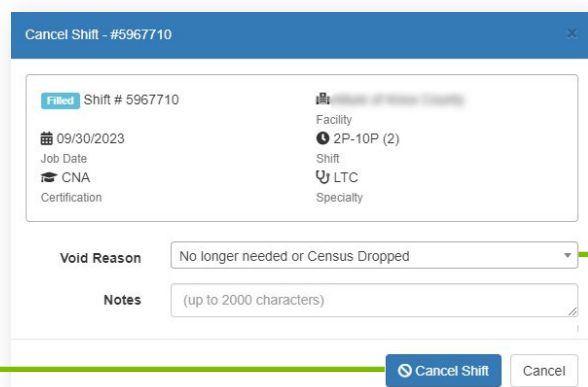
If you have requested to cancel a shift in error, you can remove the cancel request in the [Shifts Tab](#).

Keep in mind, our system will not allow any cancel requests to come through for shifts that have been filled with less than a 24-hour notice from the start time of the shift. This will require a call to be made to your Client Account Manager, or the 24/7 Staffing Department at 712-336-0800, select option 2.



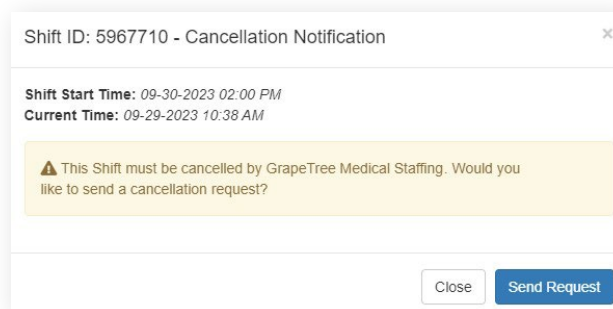
1

2



3

4



5

Adding an Assignment

From the dashboard, click the “New Assignment” button for the facility you would like to add a local or travel assignment for. Alternatively, click the “New Assignment” button in the top left side on any page and select which facility you would like to add the shift for in the Facility box.

1. In the dropdown menu for a location, click the “New Assignment” button.
2. Select the start and end date for the assignment.
3. Select the certification(s) for the assignment (multiple can be selected).
4. Select the specialty of the facility you are adding the shift for.
5. Select the shift time in the “Default Shifts” dropdown or input your own in the “Start Time” and “End Time” fields.
 - a. If you select one of the default shifts, the “Shift” dropdown and shift start and end times will auto populate based on your selection.
 - b. If you input your own start and end times, select the corresponding shift in the “Shift” dropdown: 8 hr Days (Shift 1), 8 hr Evening (Shift 2), 8 hr Nights (Shift 3), 12 hr Days (Shift 4), or 12 hr Nights (Shift 5).
6. Enter the number of days and hours per week for the assignment.
7. If you would like to request a certain healthcare professional to work the assignment, you can type their name into the “Worker” field. Our team will check with the healthcare professional to see if they are interested in picking up the assignment.
8. If you would like to post more than one assignment with the same details, adjust the “Assignment Quantity” dropdown.
9. Do not adjust the “Type” dropdown. Please leave it as the default option, “Local Travel LTA.” Additionally, leave the “Floor” dropdown blank.
10. Click the “Save Assignment” button to post the need.

The screenshot shows the 'Create Assignment' form with the following fields and callouts:

- 1**: Facility dropdown menu.
- 2**: Start Date and End Date fields.
- 3**: Certification field.
- 4**: Specialty dropdown menu.
- 5**: Default Shifts dropdown menu.
- 6**: Days Per Week dropdown menu.
- 7**: Worker field.
- 8**: Assignment Quantity dropdown menu.
- 9**: Type dropdown menu.
- 10**: Save Assignment button.

The form also includes fields for Shift, Start Time, End Time, Hours Per Week, and Floor. The 'Notes (optional)' field is at the bottom.

The Assignments Tab

The Assignments tab allows you to view and add your local and travel assignment needs. Clicking on the Assignments tab will open a search filter box for viewing your assignments.

Viewing Assignments

Leaving all fields blank on the search form and clicking the “Search” button will show a historical list of all assignments that have been added to all facilities tied to your account. This list can be sorted by any of the columns by clicking on the column header. To view a filtered list instead, click the “Show Search Form” button to open the search box back up.

- 1a. Leave the “Assignment #” field blank to search all assignments, or type in the assignment number to view a specific assignment. If typing in an assignment number, no other fields need to be filled out before clicking “Search.”
- 1b. Use the form fields to filter down your search results. Any field can be left blank, so you can get as detailed or as broad as you would like with your search.
2. Toggle the “Auto-Save/Load Last Search” button if you would like to view the same search criteria each time you visit the Assignments tab.
3. Click “Search” to view the assignments that meet your criteria.
4. Clicking on the column headers will sort the list of assignments as desired.

The screenshot displays the symplr CTM Assignments tab. A search filter box is open, showing various fields for filtering assignments. Callout 1a points to the 'Assignment #' field. Callout 1b points to the 'Facilities' field. Callout 2 points to the 'Auto-Save/Load Last Search' toggle. Callout 3 points to the 'Search' button. Callout 4 points to the 'Assignment #' column header in the resulting list.

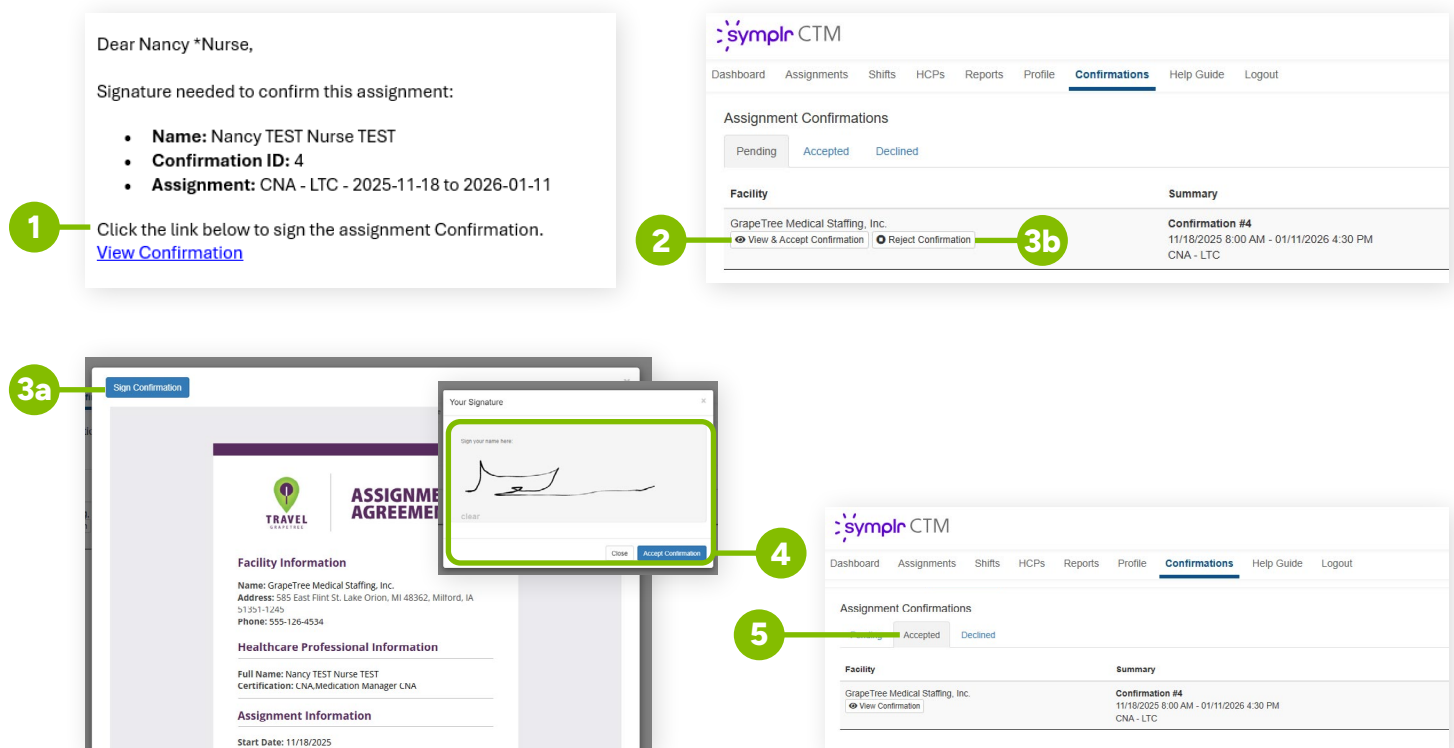
Assignment #	Facility	HCP	Type	Status	Start Date	End Date	Duration	Shift	Certification	Specialty	State	City	Zip Code
# 32785	Calendar		LTA	Open	10/02/2023	10/27/2023	26 days	6A-2P (1)	CNA	LTC	IL	Springfield	62761-2015
# 32773	Calendar		LTA	Voided	09/04/2023	10/07/2023	34 days	2P-10P (2)	CNA	LTC	IL	Springfield	62761-2015
# 32776	Calendar		LTA	Voided	09/03/2023	10/28/2023	56 days	2P-10P (2)	CNA	LTC	IL	Springfield	62761-2015
# 32777	Calendar		LTA	Open	09/03/2023	10/28/2023	56 days	2P-10P (2)	CNA	LTC	IL	Springfield	62761-2015

The Confirmations Tab

The Confirmations tab is where you will sign off on assignment agreements. From here, you can review, approve, or request changes to the assignment details.

How to Complete a Confirmation

1. When an assignment agreement is ready to be confirmed, you'll receive an email containing a direct link to the Confirmations tab. If you prefer, you can also log into the Facility Portal and select the Confirmations tab in the menu.
 - a. You'll land on the Pending tab by default. This is where any confirmations requiring your signature will appear. You can use the Accepted and Declined tabs to view previously completed or rejected agreements.
2. Locate the assignment you want to review and select "View & Accept Confirmation."
3. A window will open displaying the agreement details.
 - a. If everything looks accurate, select the "Sign Confirmation" button in the top-left corner.
 - b. If something needs to be updated, simply close the window and click the "Reject Confirmation" button on the main Pending screen to notify us that revisions are needed.
4. After clicking "Sign Confirmation," you'll be prompted to provide your signature. You can sign using your mouse, trackpad, or touchscreen device. Once signed, click "Accept Confirmation" to finalize.
5. After you sign, the agreement automatically moves to the Accepted tab. You can revisit this section anytime to reference your confirmed agreements.



Dear Nancy *Nurse,

Signature needed to confirm this assignment:

- **Name:** Nancy TEST Nurse TEST
- **Confirmation ID:** 4
- **Assignment:** CNA - LTC - 2025-11-18 to 2026-01-11

1 Click the link below to sign the assignment Confirmation.
[View Confirmation](#)

2

3b

3a

4

5

The Shifts Tab

The Shifts tab allows you to view and add your per-diem shift needs. Clicking on the Shifts tab will open a search filter box for viewing your shifts.

Viewing Shifts

Leaving all fields blank on the search form and clicking the "Search" button will show a historical list of open shifts that have been added to all facilities tied to your account. This list can be sorted by any of the columns by clicking on the column header. To view a filtered list instead, click the "Show Search Form" button to open the search box back up.

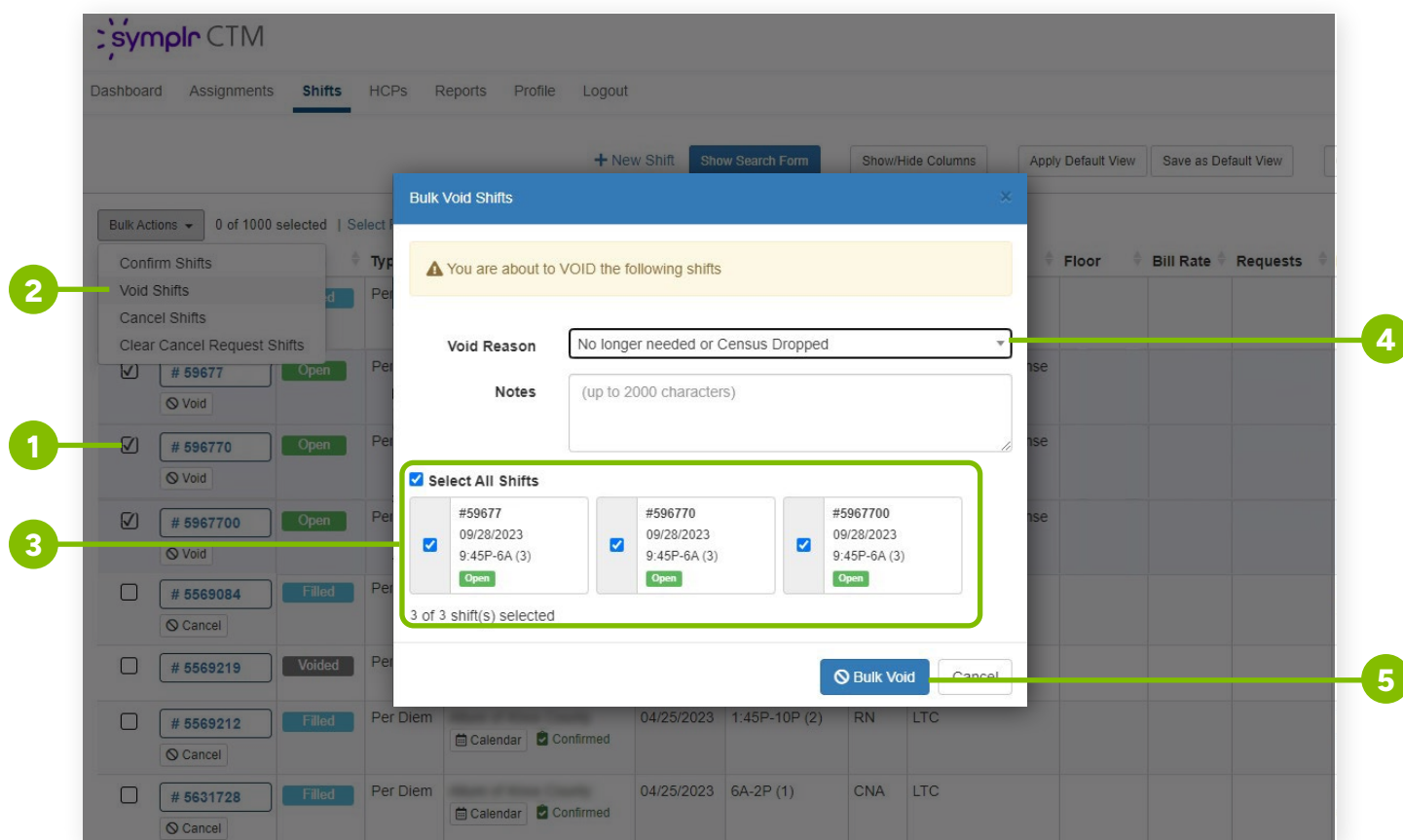
1. Click the blue "Requests" dropdown at the top of the pop-up to minimize it.
- 2a. Leave the "Shift #" field blank to search all shifts, or type in the shift number to view a specific shift. If typing in a shift number, no other fields need to be filled out before clicking "Search."
- 2b. Use the fields to filter down your search results. Any field can be left blank, so you can get as detailed or as broad as you would like with your search. We recommend removing "Open" from the Shift Type field to view all shifts.
3. Toggle the "Auto-Save/Load Last Search" button if you would like to view the same search criteria each time you visit the Shifts tab.
4. Click "Search" to view the shifts that meet your criteria.
5. Clicking on the column headers will sort the list of shifts as desired.

Bulk Cancelling Shifts

From the Shifts tab, you can bulk cancel **open** shifts that are no longer needed.

*Please note, **filled** shifts must be cancel requested one by one.*

1. Check the box next to each open shift you would like to cancel.
2. Click the "Bulk Actions" dropdown, and then select "Void Shifts."
3. Confirm that the details listed for the shifts selected for cancellation are correct.
4. In the "Void Reason" dropdown, select "No longer needed or Census Dropped" option.
5. Click the "Bulk Void" button.
6. A bulk void notification will display showing that you have successfully voided the shifts. If you receive a failed notification and still need to void the shift(s), please call your Client Account Manager for further assistance, or call our 24/7 Staffing Department at 712-336-0800 and select option 2.



The screenshot shows the Symplr CTM interface with the 'Bulk Void Shifts' modal open. The modal contains the following elements:

- Warning:** "You are about to VOID the following shifts"
- Void Reason:** A dropdown menu with the selected option "No longer needed or Census Dropped".
- Notes:** A text area labeled "(up to 2000 characters)".
- Select All Shifts:** A checkbox that is checked.
- Shifts List:** A table showing 3 selected shifts:

Shift ID	Date	Time	Count	Action
#59677	09/28/2023	9:45P-6A	(3)	Open
#596770	09/28/2023	9:45P-6A	(3)	Open
#5967700	09/28/2023	9:45P-6A	(3)	Open
- Count:** "3 of 3 shift(s) selected"
- Buttons:** "Bulk Void" and "Cancel".

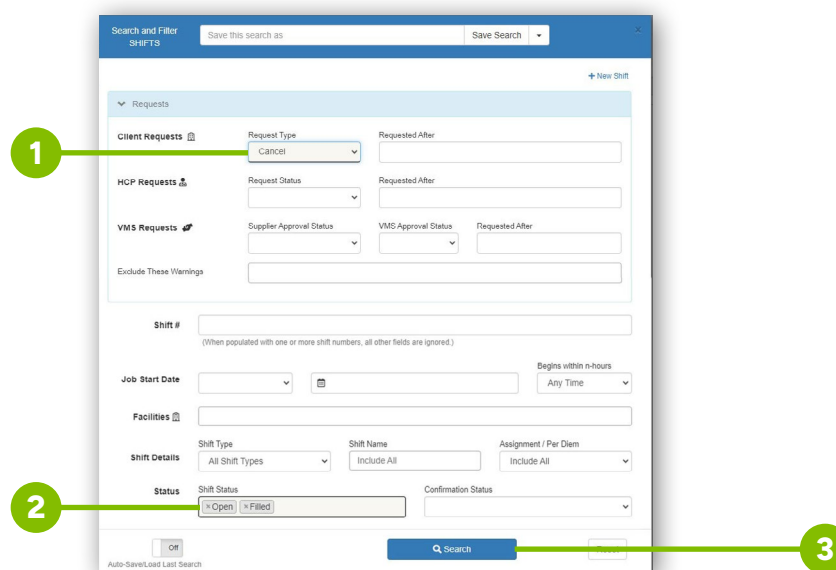
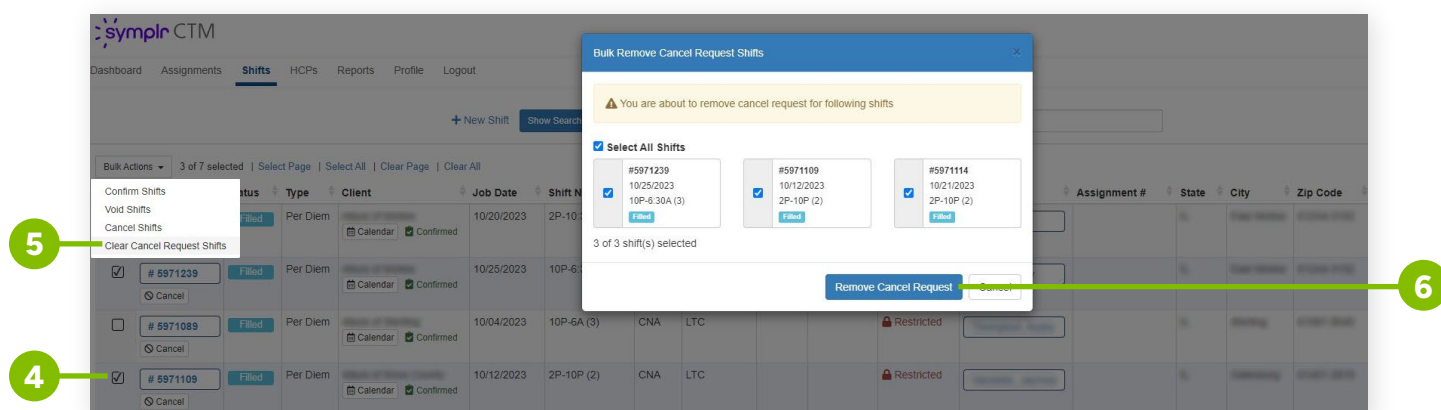
Numbered callouts indicate the steps:

1. Selecting shifts in the main table.
2. Clicking "Void Shifts" in the Bulk Actions dropdown.
3. Confirming shift details in the modal.
4. Selecting the void reason.
5. Clicking the "Bulk Void" button.

Removing Cancel Requests

From the Shifts tab, you can bulk remove cancel requests that you have sent. This will keep the shift on your calendar, and the healthcare professional that has filled the shift will still have the shift on their calendar.

1. In the search box, select "Cancel" in the "Request Type" dropdown.
2. Scroll down to the "Status" field and select both "Open" and "Filled" status types.
3. Click the "Search" button.
4. Check the box next to each shift you would like to remove your cancel request from, meaning it will remain on your calendar and the GrapeTree healthcare professional who has filled it will show up for the shift.
5. In the "Bulk Actions" dropdown, click "Clear Cancel Requests Shifts."
6. In the popup, review the cancel requests that you are going to clear, and then click "Remove Cancel Request" to restore the shift on your calendar.

The HCPs Tab

The HCPs tab allows you to view healthcare professionals (HCPs) who have been shared with your facilities. Clicking on the HCPs tab will open a search filter box.

Viewing Healthcare Professionals

Leaving all fields blank on the search form and clicking the "Search" button will show a historical list of all healthcare professionals who have been shared to any facilities tied to your account. This list can be sorted by any of the columns by clicking on the column header.

1. Use the form fields to filter down your search results. Any field can be left blank, so you can get as detailed or as broad as you would like with your search.
2. We recommend selecting the "Oriented" option in the Facility Status field.
3. Toggle the "Auto-Save/Load Last Search" button if you would like to view the same search criteria each time you visit the HCPs tab.
4. Click "Search" to view the healthcare professionals who meet your criteria.
5. Clicking on the column headers will sort the list of healthcare professionals as desired.

Search and Filter HCPs

Save this search as [] Save Search []

Wildcard Searchable Fields (for example: %@gmail.com)

Work History []

Facility Status [x] Oriented [x]

Name % First Name [] Last Name []

Accreditation Certification [] Specialty []

Auto-Save/Load Last Search [Off]

Search [] Reset []

symplr CTM

Dashboard Assignments Shifts **HCPs** Reports Profile Logout

Show Search Form Show/Hide Columns Apply Default View Save as Default View Quick Filter []

Name	Certifications	Specialties	Facility Status	Last Scheduled	Next Scheduled	Shifts Worked	Evaluations
[]	LPN	LTC LTC STAT Response LTC Emergency Pay	Preferred Oriented Work History	09/02/2023 12:00 am	None	28	1 View
[]	CNA	LTC LTC STAT Response LTC Emergency Pay	Preferred Oriented Work History	09/01/2023 12:00 am	None	47	0 Add
[]	CNA	Home Health	Preferred	09/01/2023	None	19	0

View a Healthcare Professionals Credential Documents

Leaving all fields blank on the search form and clicking the “Search” button will show a historical list of all healthcare professionals who have been shared to any facilities tied to your account. This list can be sorted by any of the columns by clicking on the column header.

1. Click on a healthcare professional’s name from the list.
2. Click the “Credentials” tab.
3. Click “View Documents” on the credential you would like to view.
4. Click the document version you would like to see from the dropdown.

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Dashboard Assignments Shifts **HCPs** Reports Profile Logout

Show Search Form Show/Hide Columns Apply Default View Save as Default View Quick Filter

Name	Certifications	Specialties	Facility Status	Last Scheduled	Next Scheduled	Shifts Worked	Evaluations
1 Nancy, Stephanie	LPN	LTC LTC STAT Response LTC Emergency Pay	Preferred Oriented Work History	09/02/2023 12:00 am	None	28	1 View
Stephanie, Nancy	CNA	LTC LTC STAT Response LTC Emergency Pay	Preferred Oriented Work History	09/01/2023 12:00 am	None	47	0 Add

symplr CTM

Dashboard Assignments Shifts **HCPs** Reports Profile Logout

Nancy Nurse

Profile **Credentials** Work History Evaluations

Professional Licenses

License Number [Redacted]

Certificate & State or Country
LPN - FL

Expiration Date: 2023-07-31 View Documents

License Number [Redacted]

Certificate & State or Country
LPN - IA

Expiration Date: 2024-05-15 View Documents

License Number
043108808

Certificate & State or Country
LPN - IL

Expiration Date: 2025-01-31 View Documents

Documents

BON 221216.pdf

221216.pdf

Expiration Date: 2023-05-31 View Documents

Background Checks

Name
Background IA

Requirements Completed
04/26/2022

Expiration Date: Not Available View Documents

Name
Background IL

Requirements Completed
12/09/2021

Expiration Date: Not Available View Documents

Medical/Vaccinations

Name
Tuberculosis

Requirements Completed

Name
Health Examination

Requirements Completed

Performance Evaluations

When You'll Receive an Evaluation Request

Your feedback helps us monitor performance, address concerns quickly, and keep sending qualified healthcare professionals to your facility. After a GrapeTree healthcare professional works a per diem orientation shift at your facility, the person who requested the shift will receive an evaluation email from RefAssured at 8 am the following morning. If the evaluation isn't completed, RefAssured will send follow-up reminders.

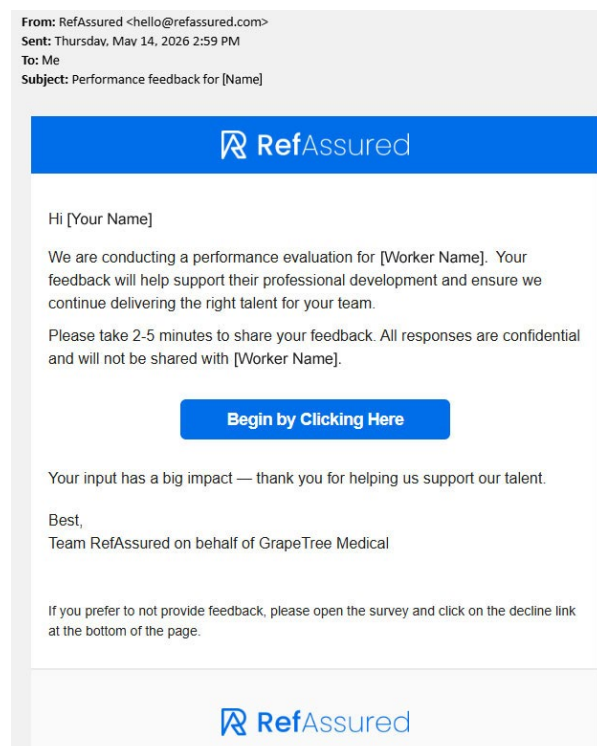
Performance evaluations are completed through the RefAssured platform, not the Facility Portal. No login is required.

Email Details

- **From:** RefAssured (hello@refassured.com)
- **Subject Line:** Performance feedback for [Name]

How to Complete the Evaluation

1. Open the email from RefAssured.
2. Click the button in the email.
3. Fill out the evaluation form (2–5 minutes).
4. Submit the form.



Not the right person to fill out the evaluation?

Forward the email to the team member who worked most closely with the healthcare professional.

Don't see the email?

Check your spam or junk folder, and add hello@refassured.com to your safe senders list.

Have other feedback to share?

For feedback outside of orientation shift evaluations, whether a worker exceeded expectations or didn't meet your standards, contact your dedicated Client Account Manager.

The Reports Tab

The Reports tab allows you to pull custom reports for the facilities you manage. Available reports include Sign-In Sheet Reports, Schedule Reports, and Payroll Based Journal (PBJ) Reports.

Sign-In Sheet Reports

The Sign-In Sheet Report allows you to see what time healthcare professionals have clocked in and out for their shifts and meal breaks.

1. Select "Sign-In Sheet Report" from the Report Type dropdown.
2. Add the facilities that you would like to include in the report.
3. Select the date range that you would like to see data for.
4. Click "Download CSV."

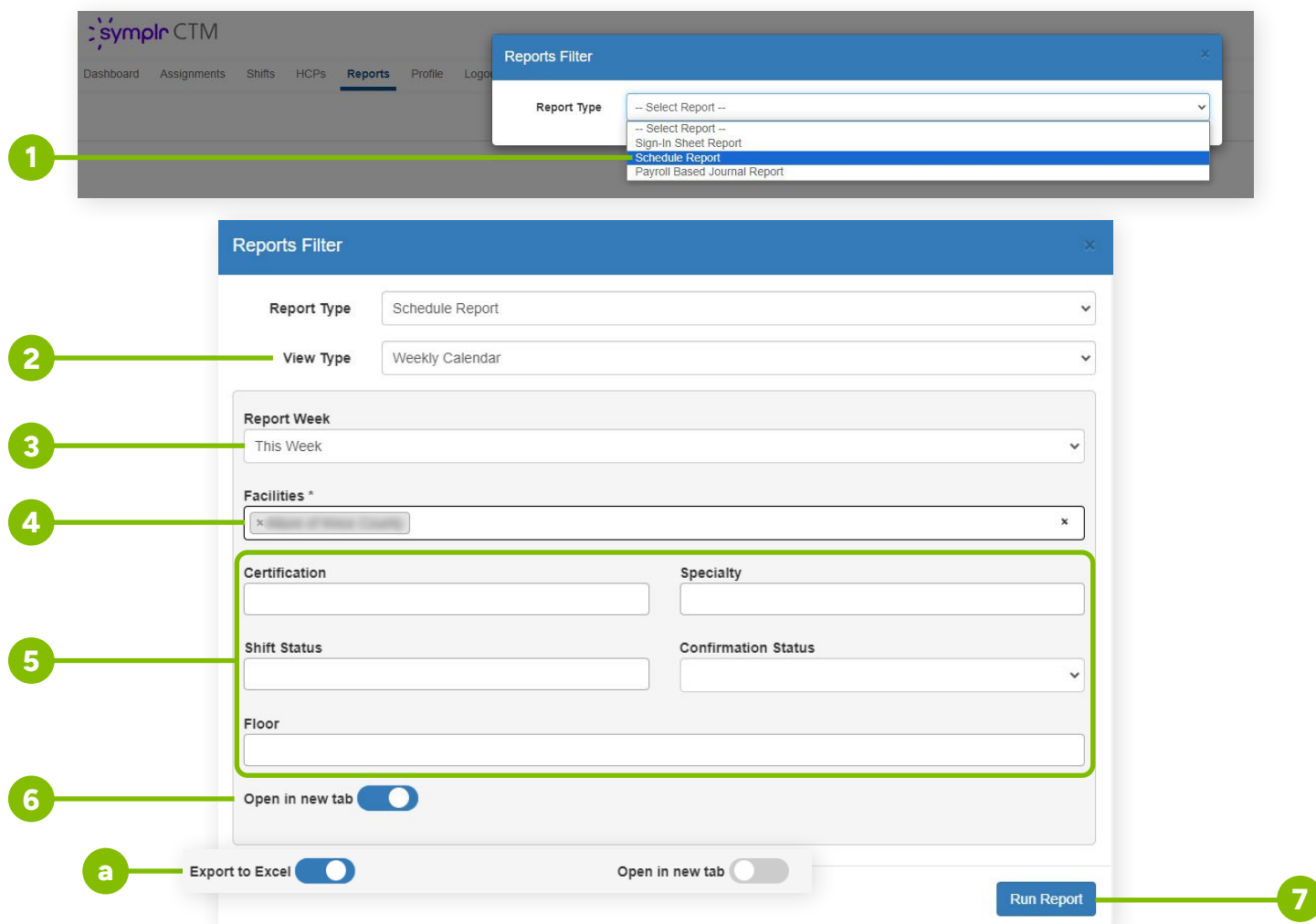
The first screenshot shows the Symplr CTM interface with the 'Reports' tab selected. A 'Reports Filter' modal is open, displaying a 'Report Type' dropdown menu. A green line with a '1' in a circle points to the 'Sign-In Sheet Report' option in the dropdown list.

The second screenshot shows the same 'Reports Filter' modal with 'Sign-In Sheet Report' selected. A green line with a '2' in a circle points to the 'Facilities' field, which contains several facility names. Another green line with a '3' in a circle points to the 'Shift Date' field, which shows a date range of 'October 1, 2023 - October 7, 2023'. A green line with a '4' in a circle points to the 'Download CSV' button at the bottom right of the modal.

Schedule Reports

The Schedule Report allows you to pull a list of shifts that are open, filled, and/or cancelled on a facility's calendar. These reports are especially helpful for printing out a facility's schedule for the week or month in a calendar or list view.

1. Select "Schedule Report" from the Report Type dropdown.
2. Select the view type: List View, Monthly Calendar, or Weekly Calendar.
3. Select the report month or week from the dropdown.
4. Add one or multiple facilities that you would like to run a report for.
5. Fill out the remaining fields as needed to filter your view. We recommend selecting "Open" and "Filled" shifts in the Shift Status field if you plan to print out a facility schedule to remove cancelled shifts.
6. Toggle the "Open in New Tab" option to on.
 - a. If running the report in list view, you have the option to export your report to an Excel file instead by toggling the "Export to Excel" option to on.
7. Click "Run Report."



The screenshot shows the Symplr CTM Reports Filter interface. The interface includes a navigation bar with links to Dashboard, Assignments, Shifts, HCPs, Reports, Profile, and Logout. The Reports Filter modal is open, showing the following fields and options:

- Report Type:** A dropdown menu with options: -- Select Report --, -- Select Report --, Sign-In Sheet Report, **Schedule Report** (highlighted), and Payroll Based Journal Report.
- View Type:** A dropdown menu with options: List View, Monthly Calendar, and Weekly Calendar.
- Report Week:** A dropdown menu with options: This Week, Last Week, and Next Week.
- Facilities *:** A text input field with a search icon and a list of facilities.
- Certification:** A text input field.
- Specialty:** A text input field.
- Shift Status:** A text input field.
- Confirmation Status:** A dropdown menu.
- Floor:** A text input field.
- Open in new tab:** A toggle switch.
- Export to Excel:** A toggle switch.
- Run Report:** A button.

Numbered callouts (1-7) and 'a' point to the following elements:

- 1. Report Type dropdown menu.
- 2. View Type dropdown menu.
- 3. Report Week dropdown menu.
- 4. Facilities * text input field.
- 5. Certification, Specialty, Shift Status, Confirmation Status, and Floor text input fields.
- 6. Open in new tab toggle switch.
- a. Export to Excel toggle switch.
- 7. Run Report button.

Schedule Reports Continued

See examples of each Schedule Report type below.

Monthly Calendar

Monthly Facility Schedule Report [Print](#)

Grapeful Living Senior Center **October 2023**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	2 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)	3 6:00A-2:00P (RN,LPN LTC)	4 2:00P-10:00P (RN,LPN LTC)	5 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	6 6:00A-2:00P (RN,LPN LTC) 2:00P-10:00P (RN,LPN LTC)	7 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)
8 6:00A-2:00P (RN,LPN LTC)	9 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	10 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	11 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)	12 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	13 2:00P-10:00P (RN,LPN LTC)	14 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)
15 6:00A-2:00P (RN,LPN LTC)	16 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	17 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)	18 6:00A-2:00P (CNA LTC)	19 6:00A-2:00P (CNA LTC)	20 6:00A-2:00P (CNA LTC)	21 6:00A-2:00P (CNA LTC)
22 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	23 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	24 2:00P-10:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	25 6:00A-2:00P (RN,LPN LTC)	26 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	27 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)	28 6:00A-2:00P (RN,LPN LTC)
29 6:00A-2:00P (RN,LPN LTC)	30 6:00A-2:00P (RN,LPN LTC) 6:00A-2:00P (CNA LTC)	31 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LTC)	1 6:00A-2:00P (RN,LPN LTC)	2 6:00A-2:00P (RN,LPN LTC)	3 6:00A-2:00P (RN,LPN LTC)	4 6:00A-2:00P (RN,LPN LTC)
5 6:00A-2:00P (RN,LPN LTC)	6 6:00A-2:00P (RN,LPN LTC)	7 6:00A-2:00P (RN,LPN LTC)	8 6:00A-2:00P (RN,LPN LTC)	9 6:00A-2:00P (RN,LPN LTC)	10 6:00A-2:00P (RN,LPN LTC)	11 6:00A-2:00P (RN,LPN LTC)

Shift Status: ● Filled (Unconfirmed) ● Filled (Confirmed) ● Open ● Canceled (Confirmed)

Weekly Calendar

Weekly Facility Schedule Report [Print](#)

Grapeful Living Senior Center **10/01/2023 - 10/07/2023**

Sun 01	Mon 02	Tue 03	Wed 04	Thu 05	Fri 06	Sat 07
6:00A-2:00P (RN,LPN LT C) 6:00A-2:00P (CNA LTC)	6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LT C)	6:00A-2:00P (RN,LPN LT C)		2:00P-10:00P (RN,LPN LT C) 6:00A-2:00P (RN,LPN LT C)	6:00A-2:00P (RN,LPN LT C) 6:00A-2:00P (CNA LTC)	2:00P-10:00P (RN,LPN LT C) 2:00P-10:00P (RN,LPN LT C) 6:00A-2:00P (CNA LTC) 6:00A-2:00P (RN,LPN LT C)

Shift Status:
● Filled (Unconfirmed)
● Filled (Confirmed)
● Open
● Canceled (Confirmed)

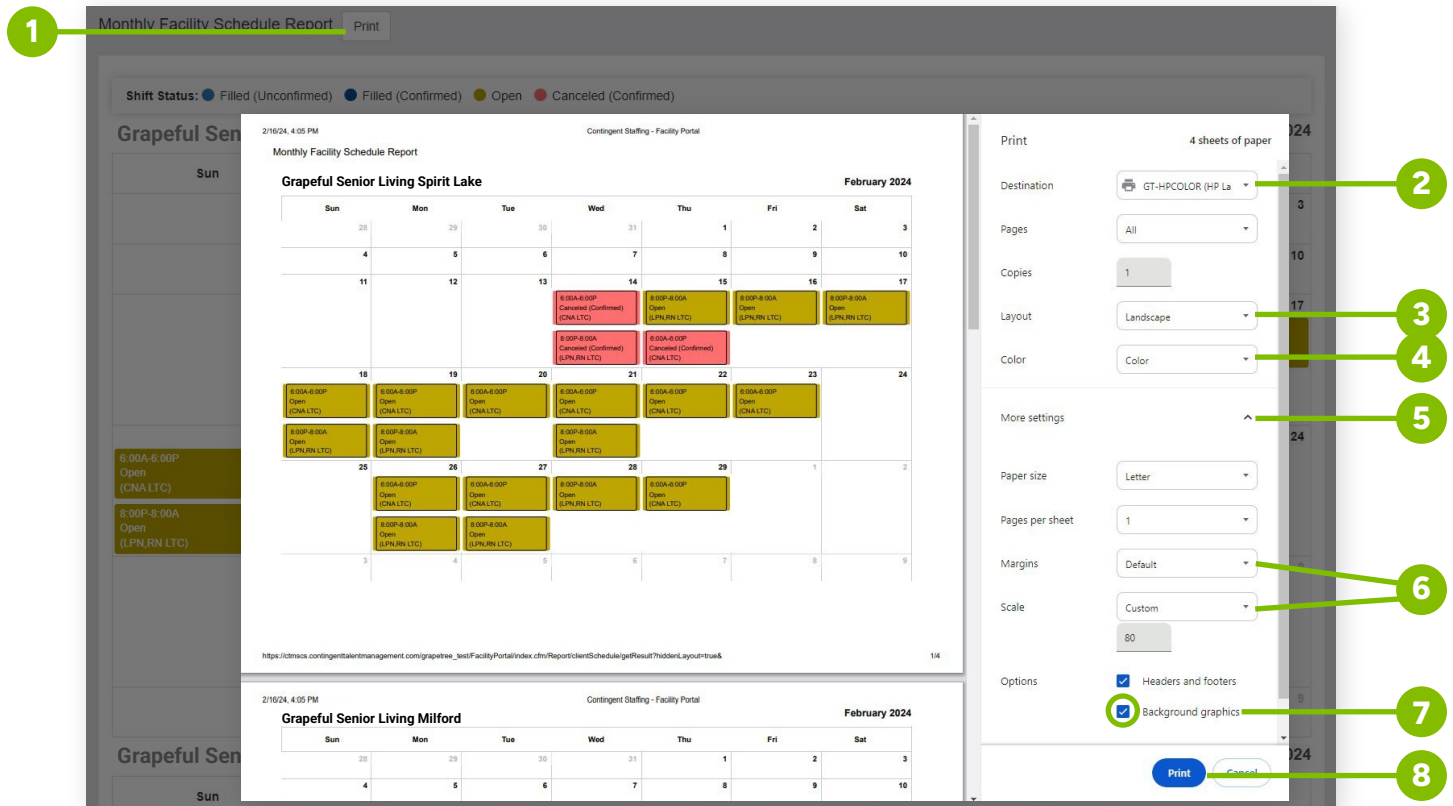
List View

FACILITYNAME	FACILITYID	FACILITYADDRESS	TEMP	STATUS	JOBSTARTDATE	ORDERID	SHIFT	DEPT	SHIFTHOURS	NOTE	CONFIRM	SALESREP	STAFFINGSPECIALIST
				Canceled (Confirmed)	10/01/2023	5969938	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Canceled (Confirmed)	10/01/2023	5969971	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/02/2023	5969939	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/02/2023	5969972	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/03/2023	5969940	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/05/2023	5969941	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/05/2023	5969958	2:00P - 10:00P (2)	RN,LPN - LTC	8				
				Open	10/06/2023	5969942	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/06/2023	5969973	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/07/2023	5969943	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/07/2023	5969959	2:00P - 10:00P (2)	RN,LPN - LTC	8				
				Open	10/07/2023	5969960	2:00P - 10:00P (2)	RN,LPN - LTC	8				
				Open	10/07/2023	5969974	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/08/2023	5969944	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/10/2023	5969945	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/10/2023	5969961	2:00P - 10:00P (2)	RN,LPN - LTC	8				
				Open	10/10/2023	5969975	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/11/2023	5969962	2:00P - 10:00P (2)	RN,LPN - LTC	8				
				Open	10/11/2023	5969976	6:00A - 2:00P (1)	CNA - LTC	8				
				Open	10/12/2023	5969946	6:00A - 2:00P (1)	RN,LPN - LTC	8				
				Open	10/12/2023	5969963	2:00P - 10:00P (2)	RN,LPN - LTC	8				

Schedule Reports Continued

Schedule reports can be printed in full-color so you can easily identify whether a shift on the calendar is open, filled, or canceled. Follow the steps below for the best experience printing your schedule reports.

1. Click the "Print" button at the top of the page.
2. Make sure your preferred printer is selected, or select to save as an Adobe PDF.
3. Select if you would like to print in portrait or landscape layout.
4. Select to print in color.
5. Expand the "More Settings" dropdown
6. Adjust the "Margins" and "Scale" dropdowns if needed to make your view fit best on the page.
7. IMPORTANT: If printing in color, you must check to enable "Background graphics."
8. Click "Print."



The screenshot shows a web interface for printing a schedule report. The main content area displays a calendar for February 2024 for 'Grapeful Senior Living Spirit Lake'. The calendar shows various shifts with status indicators (filled, open, canceled). On the right side, there is a 'Print' settings panel. The panel includes options for destination, pages, copies, layout, color, and more settings. The 'More settings' section is expanded, showing options for paper size, pages per sheet, margins, scale, and options. The 'Background graphics' option is checked. The 'Print' button is at the bottom of the panel.

1. Click the "Print" button at the top of the page.

2. Make sure your preferred printer is selected, or select to save as an Adobe PDF.

3. Select if you would like to print in portrait or landscape layout.

4. Select to print in color.

5. Expand the "More Settings" dropdown

6. Adjust the "Margins" and "Scale" dropdowns if needed to make your view fit best on the page.

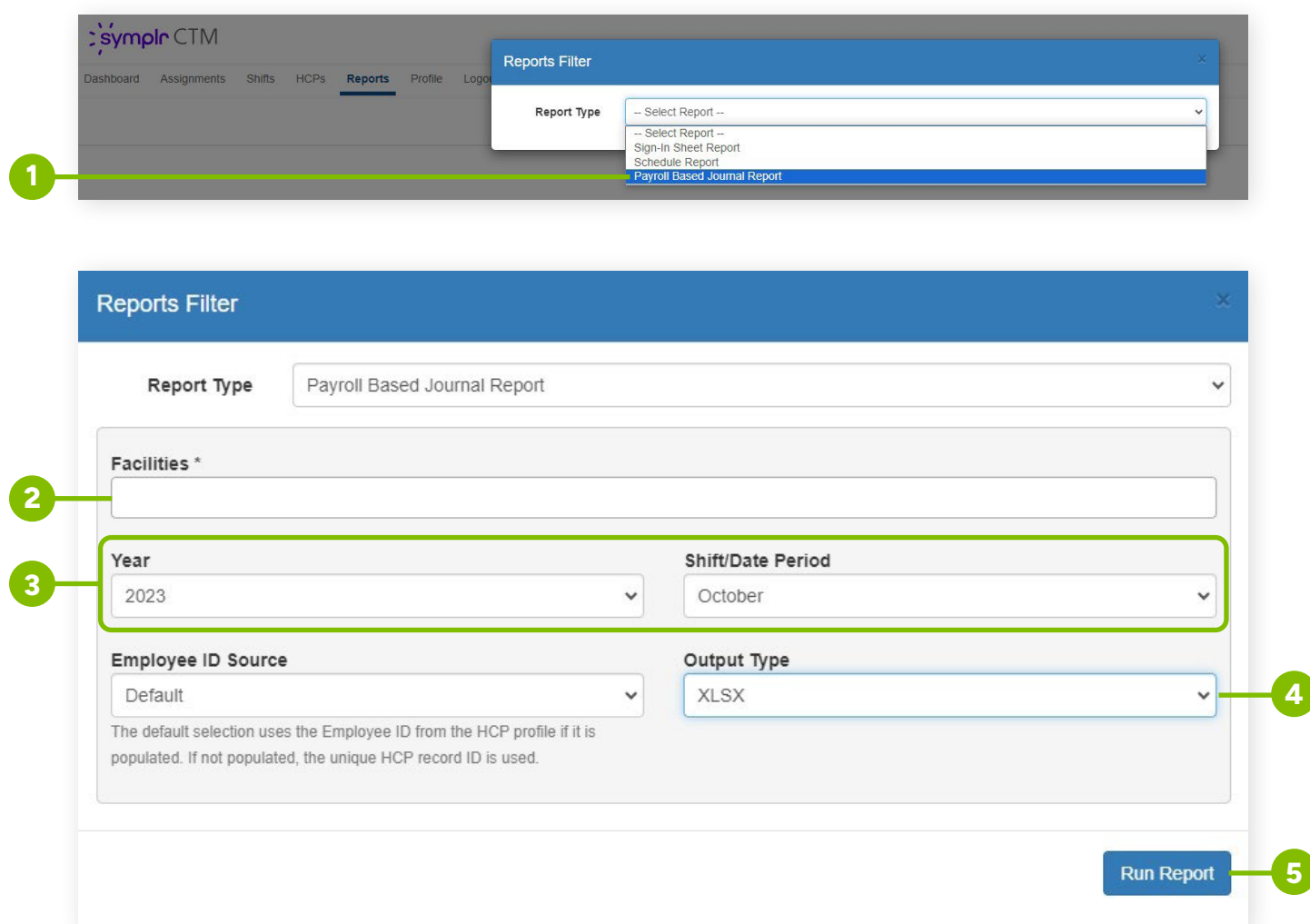
7. IMPORTANT: If printing in color, you must check to enable "Background graphics."

8. Click "Print."

Payroll Based Journal (PBJ) Report

The Payroll Based Journal Report assists you in running payroll hours. Please only run this report after your invoice from GrapeTree has been received for the timeframe you are selecting to ensure the data reflected is correct.

1. Select "Payroll Based Journal Report" from the Report Type dropdown.
2. Select the facility you would like to pull a report for.
3. Select the year and shift date period.
4. Select the Output Type "XLSX" to export as an Excel file.
5. Click "Run Report."



The screenshot shows the 'Reports Filter' modal in the symplr CTM system. The 'Report Type' dropdown is open, showing 'Payroll Based Journal Report' as the selected option. The 'Facilities' field is empty. The 'Year' dropdown is set to '2023' and the 'Shift/Date Period' dropdown is set to 'October'. The 'Employee ID Source' dropdown is set to 'Default'. The 'Output Type' dropdown is set to 'XLSX'. The 'Run Report' button is at the bottom right.

1 Select "Payroll Based Journal Report" from the Report Type dropdown.

2 Select the facility you would like to pull a report for.

3 Select the year and shift date period.

4 Select the Output Type "XLSX" to export as an Excel file.

5 Click "Run Report."

The Profile Tab

The Profile tab allows you to change your username and password.

Change Username

1. Expand the "Change Username" dropdown.
2. Enter the new username you would like to use and your current password.
3. Click "Save Username."

The screenshot shows the Symplr CTM interface with the 'Profile' tab selected. A green box highlights the 'Change Username' section, which includes a 'NewUsername' input field and a password field. A 'Save Username' button is located to the right of the password field. Numbered callouts 1, 2, and 3 point to the dropdown arrow, the input fields, and the 'Save Username' button respectively.

Change Password

Your new password must meet all the complexity rules listed on the page. You cannot reuse your previous 10 passwords when changing your password.

1. Expand the "Change Password" dropdown.
2. Enter your current password.
3. Enter your new password.
4. Confirm your new password.
5. Click "Save Password."

The screenshot shows the Symplr CTM interface with the 'Profile' tab selected. A green box highlights the 'Change Password' section, which includes 'Current Password', 'New Password', and 'Confirm Password' input fields. Below the fields are password complexity rules and a 'Save Password' button. Numbered callouts 1 through 5 point to the dropdown arrow, the 'Current Password' field, the 'New Password' field, the 'Confirm Password' field, and the 'Save Password' button respectively.