Getting Started

VRS Vendor Guide

Contents

Information

As a Vendor working in the VRS program, utilize this guide to manage and take actions within dotStaff Forms. If you have any questions, please reach out to your MSP for assistance.

VRS Service Opportunities Form

Anytime you are invited to a service opportunity, you will receive an email letting you know. Utilize the VRS Service Opportunity Form to review the referral/service opportunity.

1. **Login** to dotStaff Forms
2. Locate the form titled **VRS Service Opportunities**. Click the **3 dots** to the right on the form.

3. Select to **View Submissions**
4. Locate the Service Opportunity you wish to provide services. Click to open
5. Review the Form and **select the blue button** at the bottom titled *"I would like to provide services for this client"*
6. You are re-directed to another form. Follow instructions for Vendor Willing To Provide Service Form.

Vendor Willing To Provide Service Form

Once you select to provide services using the VRS Service Opportunities form, you are directed to the Vendor Willing To Provide Service Form to indicate you are available and willing to provide services.

1. Complete the field for **Company Name**
2. Complete the field for **Contact Email Address**
3. Click **Submit**

Service Summary Form

Once you receive the clearance email from the MSP and ready to submit the monthly reporting packet for processing, complete the Service Summary Form. Ensure you reference the Purchase Order # attached in the email sent by the MSP.

Submit

Do not submit a Service Summary Form until you have received the clearance email from the MSP.

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **hyperlink in blue** to open.
3. Complete the **Service Summary** section
4. Complete the **Authorization Information** section
5. Complete the **Service Reporting** Information section by attaching the packet
    a. **PDF** format only
6. Complete the **Service Summary Submitter Information** section
7. Click Submit

Resubmit

When the status of a submission reads Awaiting Submitter, the Vendor needs to make all corrections or updates before resubmitting.

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **3 dots** to the right on the form
3. Click **View Submissions**
4. Locate the **submission**. **Click** to open.
5. Click **Actions** in the upper right-hand corner

6. Select **Edit**
7. Make **edits** and corrections as needed
    a. If you are uploading a new packet, **rename** it in sequence of uploads (Example: If this is the 2nd time you are attaching a packet, put the #2 at the end of the file name)
8. When you are finished, click **Update**

View Submissions

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **3 dots** to the right on the form
3. Click **View Submissions**

Configure Views

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **3 dots** to the right on the form
3. Click **View Submissions**
4. *If this is your first-time viewing submissions, an option to **Configure View** is available and will work the same as selecting Configure Views (5b)*
5. Click **Actions** in the upper right-hand corner
    a. Select **Filter Data** to apply filters
    b. Select **Configure Views** to either select a view already created or create your own

View Milestones

View individual Milestone

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **3 dots** to the right on the form
3. Click **View Submissions**
4. Locate the **submission** you wish to view the Milestone. Click to **open**
5. Click the **blue hyperlink** titled *"Show Additional Data"* in the upper right-hand corner
6. A box Appears showing the Milestone details

View multiple Milestones

1. **Login** to dotStaff Forms
2. Locate the form titled **Service Summary**. Click the **3 dots** to the right on the form
3. Click **View Submissions**
4. Click **Actions** in the upper right-hand corner
5. Select **Configure View**
6. Select **Accounts Receivables** from the dropdown for *Choose your view*
7. Click **View**
8. All Milestones for your company appear
9. To export the information, click **Actions** in the upper right-hand corner

    a. Select **Download without status history** to exclude the history of status changes
    b. Select **Download with status history** to include the history of status changes

Reach out to your MSP for further assistance

Add Users

Add a User to dotStaff

Only the **Vendor Administrator** has the ability to add a new Vendor User to a company account. Please reach out to your MSP for assistance if you are unsure who the Vendor Administrator is for your company.

1. Log in to dotStaff
2. Navigate to **Records Management**
3. Select **View Users**
4. Click the **Add** button
5. Select the correct Account Type of **User**
6. Complete the **Account Information** fields
    a. All fields are required except Username
    b. The **Account Notification Email** is where the account activation email containing the User's activation code will be sent
7. Click the **right orange arrow** to move to the next page
8. Click the **Send Activation Notification** box if desired
    a. If selected, the user will receive an email notification requesting activation of their account in dotStaff
    b. If left unselected, the user will not receive an activation email
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on resending the activation notification email
9. Click **Complete**
    a. A pop-up message will appear asking if you want to save
10. Click **OK**

An automated email is generated and sent to the user in order to activate their account

Add a User to a Form

The Vendor Administrator must <u>Add the User to dotStaff</u> first

1. Reach out to the **MSP** to have them add a user to a Form

Add a User as Submission Viewer and/or Editor

Grant other people within your company permission to view or edit any submission. The user must have a dotStaff account to be assigned.

1. **Login** to dotStaff Forms

2. Locate the **form** you wish to assign. Click to **View Submissions**.
3. Locate the Submission you wish to assign. **Open** the submission.
4. Select **Actions** in the top right-hand corner
5. Select **Manage Access** from the dropdown
6. Click **Generate Link**
    a. Click **View Link** to generate a link to view the submission
    b. Click **Edit Link** to generate a link to edit the submission
7. Click **Copy**
8. **Paste** the link to the user you wish to view and/or edit the submission