



CLIENT ACCESS MANUAL

Client Access 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.

[WATCH OUR CLIENT ACCESS VIDEO TUTORIAL](#)

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Account Set Up

GrapeTree will send an invite to your primary email on file for you to set up your username and password. Click the link in the email to set up your username and password. Check your junk/spam folder if you do not see the email invitation.

Use your primary email address as your username.

Your Password **MUST** meet all of the complexity rules listed.

- At least 8 characters long
- At least one upper case letter
- At least one lower case letter
- At least one digit
- At least one special character

Select Save Credentials and this will take you to the Home page.

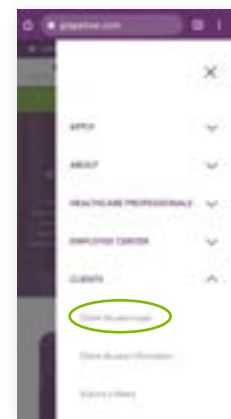
Once you select Save Credentials, you will be taken to a Facility Portal log in page. **Do not utilize this page at this time.** Please navigate to www.grapetree.com after your account has been set up.

, and Password confirmation matches. A 'Save Credentials' button is at the bottom right." data-bbox="584 148 945 495"/>

Getting There

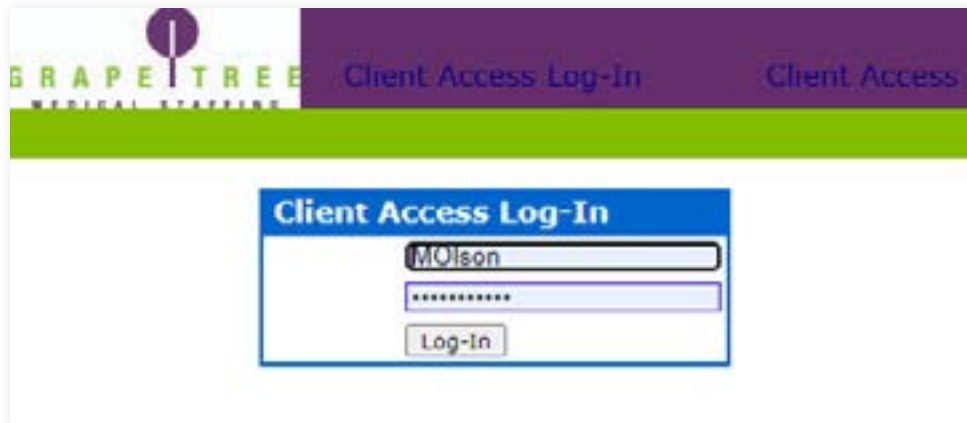
For your convenience, the [GrapeTree website](http://www.grapetree.com) has a link to the Client Access Login. On a desktop computer, hover your mouse over the Client tab in the menu and click on the [Client Access Login](#) link in the menu.

On a mobile device, tap the three horizontal lines ☰ to open a the menu options. Tap the Client dropdown arrow in the menu and then tap on the [Client Access Login](#) option.



Log In to Your Account

Input your username and password and select the Log-In button.



Once logged in, you will see your facility name and dedicated Staffing Representative's contact information in the gray bar.



Bookmark Client Access on Your Web Browser

We recommend bookmarking the [Client Access login page](#) on your web browser so that you always have quick access to manage your shift orders. Click the links below to learn how to add a site to your bookmark toolbar based on which web browser you use.

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

Calendar

To view and make changes on your calendar, select the calendar option in the blue bar or the first option listed under the gray bar.



You can select your filter preferences at the top of the calendar. We recommend using the following:

- Status → All Statuses
- Order Type → All Order Types

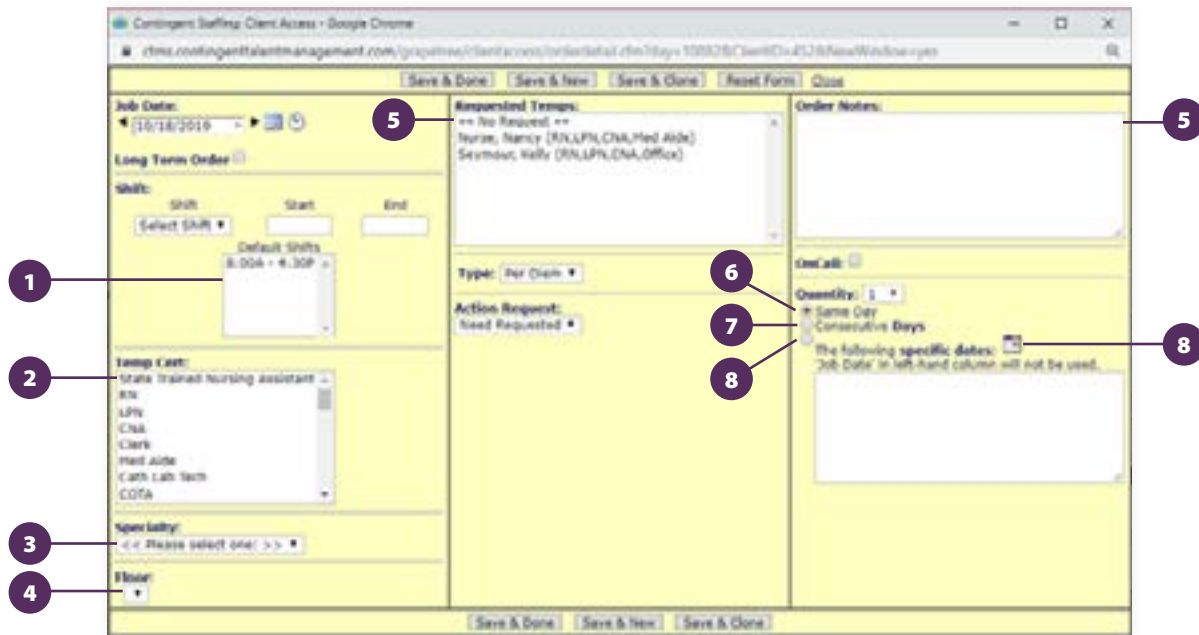
Shifts will be color coded on the calendar. Shift color meanings:

- **Blue** → The shift is open and we are working to fill it.
- **Green** → The shift is filled. You will see the GrapeTree healthcare professional's last name and first name.
- **Red** → The shift has been cancelled.



Adding Shifts

Select the New option next to the date you would like to add a shift. This will open a new window for you to input your new shift details.



1. Select your shift time in Default Shifts or input your own in the Start and End fields. If you input your own, select the corresponding shift time.
 - a. First Shift b. Second Shift c. Third Shift d. 12-Hour Day Shift e. 12-Hour Night Shift
2. Select the certification you are looking for. To select multiple certifications, hold control while clicking.
3. Select the specialty of your facility from the dropdown menu. If you are entering a Crisis or STAT shift, be sure to select the corresponding specialty variation from this menu.
4. Floor is for GrapeTree Internal use only.
5. We do not recommend putting information into the Requested Temps and Order Notes fields. If you are looking for someone/something specific, contact your Staffing Specialist.
6. To input multiples of the same shift for the same day, select the quantity and the Same Day check box.
7. To input multiples of the same shift for consecutive days, select the quantity and the Consecutive Days check box. This will post one shift for the amount of days you selected.
8. To input multiples of the same shift for multiple days, select the third check box and select the calendar. This will open another window and show a four month calendar as shown on the next page.

Adding Shifts Continued

- 8a. Select the check box next to the dates you would like added.
- 8b. Select the pound symbol underneath to post multiple shifts on the same date. If you accidentally select one too many, uncheck the date and re-check it to bring it back to 1.
- 8c. When you have all your dates selected, press Save and Return to Order. This will take you back to the yellow screen where you can select Save and Done again to post the shifts to the calendar.



Immediately after shifts are added to your calendar, an automated text campaign is sent out to healthcare professionals in your area to notify them of the opportunity, as well as your GrapeTree Staffing Specialist to work on filling your need.

Cancelling Shifts

If you find you are not needing an open or filled shift, you can request that shift be cancelled by following these steps:

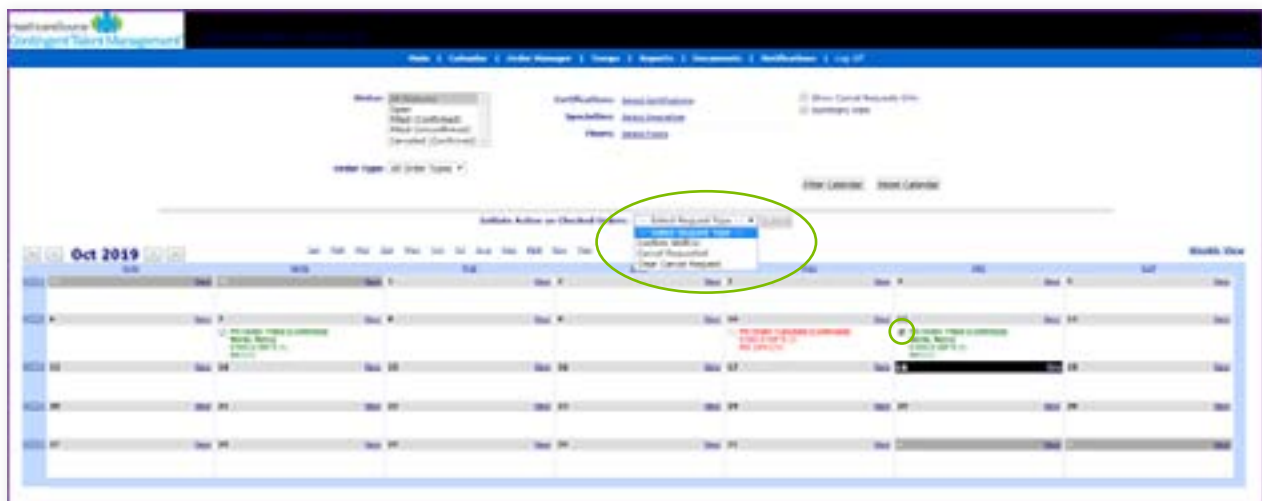
1. Select the box next to the shift you wish to cancel
2. Select the drop-down box that states, "Select Request Type"
3. Choose Cancel Requested and select Submit. You will see "Cancel Requested" appears next to the shift you are no longer wanting.
4. Your Staffing Specialist will receive an email notifying them you wish to cancel the shift and they will take it off.



If you have requested to cancel a shift in error, you can clear that cancel request as long as the shift still states "Cancel Requested".

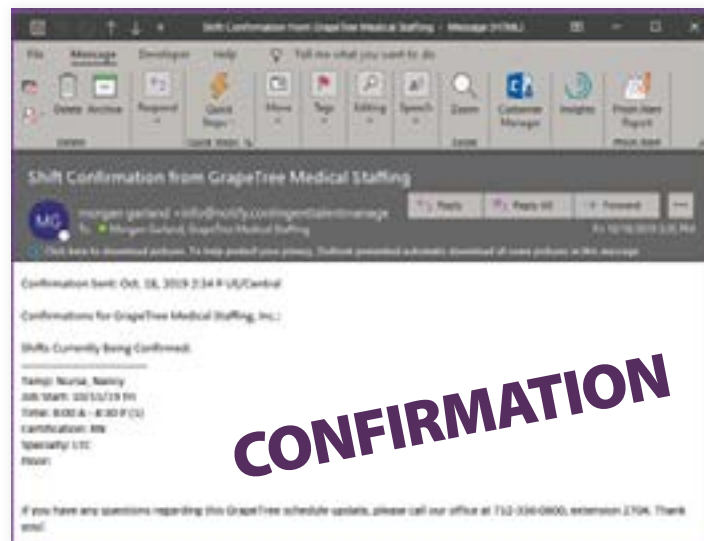
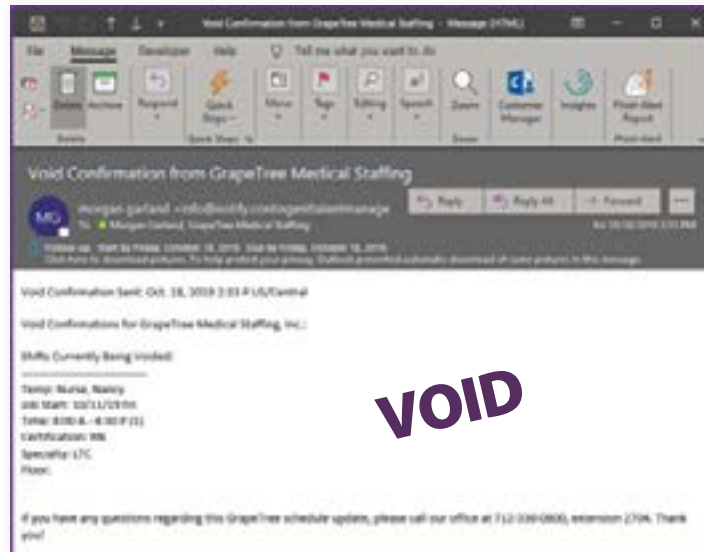
1. Select the box next to the shift you wish to cancel
2. Select the drop-down box that states, "Select Request Type"
3. Choose "Clear Cancel Request" then Submit
4. The "Cancel Requested" label will then be removed from that shift.

Keep in mind, our system will not allow any cancel requests to come through for shifts that have been filled with less than 24 hours' notice from the start time of the shift. This will require a call to be made to your Staffing Specialist, or the Staffing Department at 712-336-0800 extension 2704.



Email Notifications

When a GrapeTree Healthcare Professional picks up a shift or if a shift gets cancelled, you will receive an email notification from your Staffing Specialist. See the examples of each shown below.



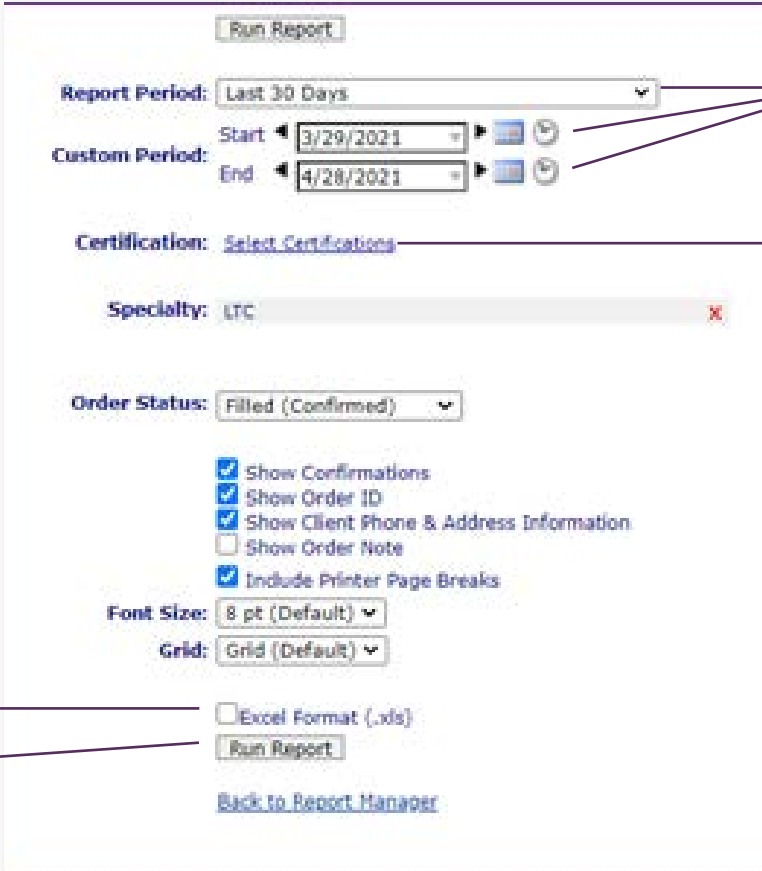
In the event of a GrapeTree Healthcare Professional needing to cancel a shift for any reason, GrapeTree will call in addition to sending the email to ensure proper notice is given.

GrapeTree will work on finding a replacement for any Healthcare Professional that cancels by offering an incentive for that shift to be picked up at no cost to you.

Client Schedule Report

The Client Schedule Report allows you to pull a report of shifts that have been open/filled/cancelled on your calendar.

1. Select the date range you wish to report on. You can select options from the dropdown or enter a custom period.
2. For a more specific report, you can select to filter based on certification.
3. Choose the Order Status you want included in the report.
4. Select Excel Format to export the report.
5. Click the "Run Report" button.



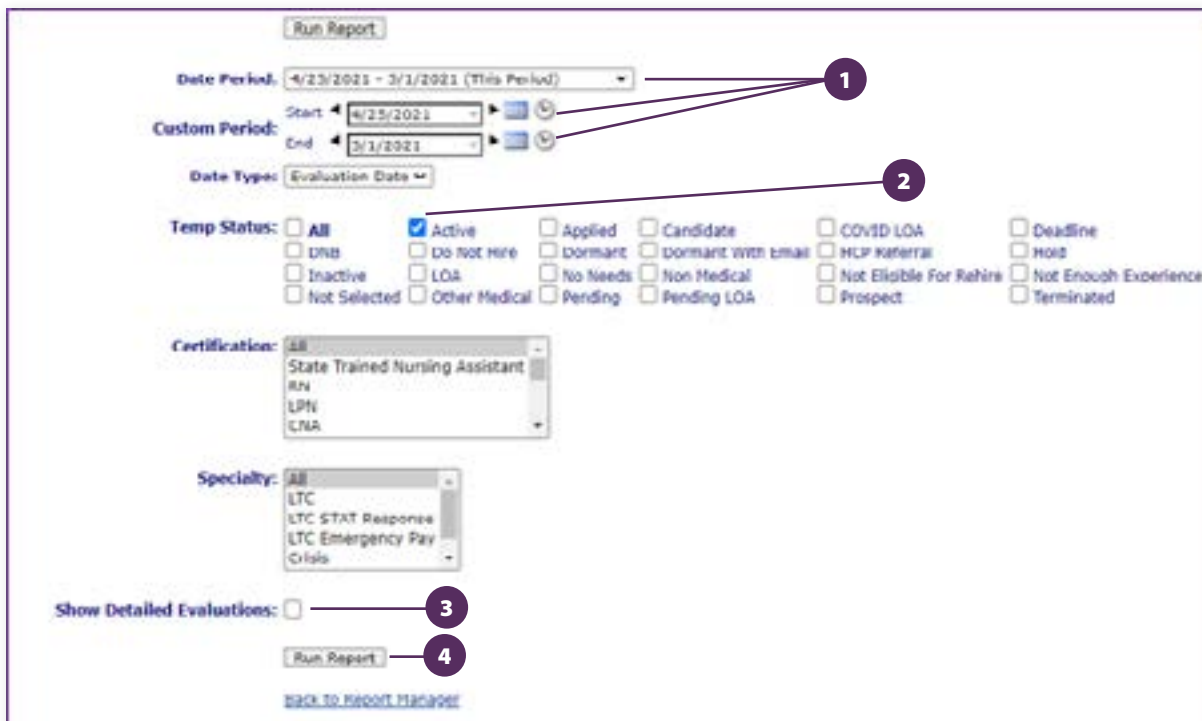
The screenshot shows the 'Run Report' form with the following fields and options:

- Report Period:** Last 30 Days (dropdown menu) — callout 1
- Custom Period:** Start: 3/29/2021, End: 4/28/2021 (date pickers) — callout 1
- Certification:** Select Certifications (text input) — callout 2
- Specialty:** LTC (text input with clear button) — callout 2
- Order Status:** Filled (Confirmed) (dropdown menu) — callout 3
- Checkboxes:**
 - Show Confirmations
 - Show Order ID
 - Show Client Phone & Address Information
 - Show Order Note
 - Include Printer Page Breaks
- Font Size:** 8 pt (Default) (dropdown menu) — callout 3
- Grid:** Grid (Default) (dropdown menu) — callout 3
- Excel Format (.xls) — callout 4
- Run Report** (button) — callout 4
- [Back to Report Manager](#) (link)

Evaluation Report

The Evaluation Report shows the online performance evaluations you have completed for our healthcare professionals.

1. Select the date range you wish to report on. You can select options from the dropdown or enter a custom period.
2. Check the “Active” status
3. For a more specific report, you can select to filter based on certification.
4. Check “Show Detailed Evaluations” to see the details of the evaluation you completed.
5. Click the “Run Report” button.



The screenshot shows the 'Run Report' form with the following elements and callouts:

- 1**: Points to the 'Date Period' dropdown menu and the 'Start' and 'End' date input fields under 'Custom Period'.
- 2**: Points to the 'Active' checkbox under the 'Temp Status' section.
- 3**: Points to the 'Show Detailed Evaluations' checkbox.
- 4**: Points to the 'Run Report' button.

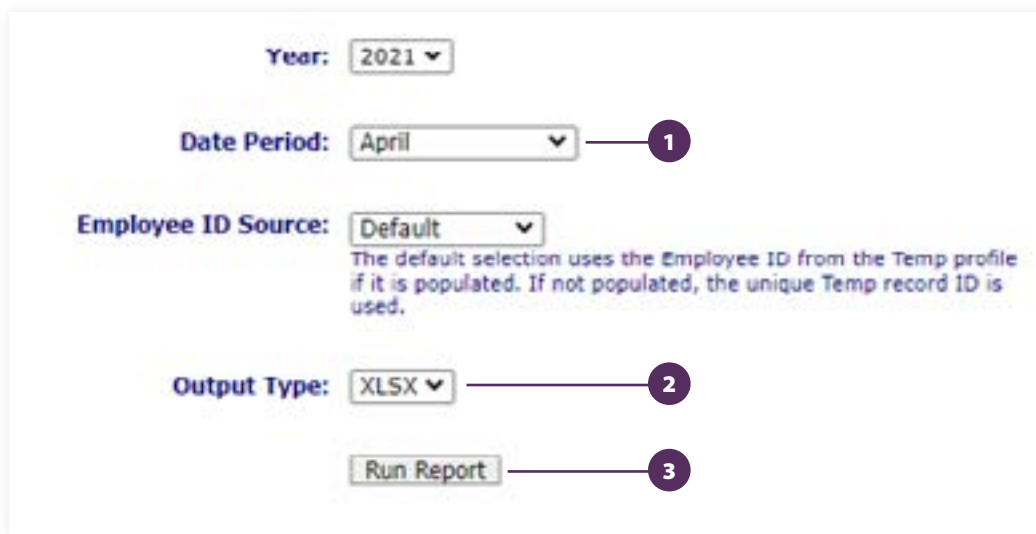
Other visible form elements include:

- Date Period:** 4/23/2021 - 3/1/2021 (This Period)
- Custom Period:** Start: 4/23/2021, End: 3/1/2021
- Date Type:** Evaluation Date
- Temp Status:** All, Active (checked), Applied, Candidate, COVID LOA, Deadline, DNB, Do Not Hire, Dormant, Dormant With Email, HCP Referral, Hold, Inactive, LOA, No Needs, Non Medical, Not Eligible For Rethink, Not Enough Experience, Not Selected, Other Medical, Pending, Pending LOA, Prospect, Terminated
- Certification:** All, State Trained Nursing Assistant, RN, LPN, CNA
- Specialty:** All, LTC, LTC STAT Response, LTC Emergency Pay, Crisis
- Show Detailed Evaluations:** (checkbox)
- Run Report** button
- [BACK TO REPORT MANAGER](#) link

Payroll Based Journal Report

The Payroll Based Journal Report will assist you in running payroll hours. Please only run this report after you have received an invoice from GrapeTree for the timeframe you are selecting to ensure correct data.

1. Select the time frame you wish to run a report for.
2. Select the Output Type XLSX
3. Click the "Run Report" button.



The screenshot shows a web form for generating a Payroll Based Journal Report. It includes the following fields and controls:

- Year:** A dropdown menu set to "2021".
- Date Period:** A dropdown menu set to "April", with a callout "1" pointing to it.
- Employee ID Source:** A dropdown menu set to "Default". Below it is a note: "The default selection uses the Employee ID from the Temp profile if it is populated. If not populated, the unique Temp record ID is used."
- Output Type:** A dropdown menu set to "XLSX", with a callout "2" pointing to it.
- Run Report:** A button with a callout "3" pointing to it.