



## 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.

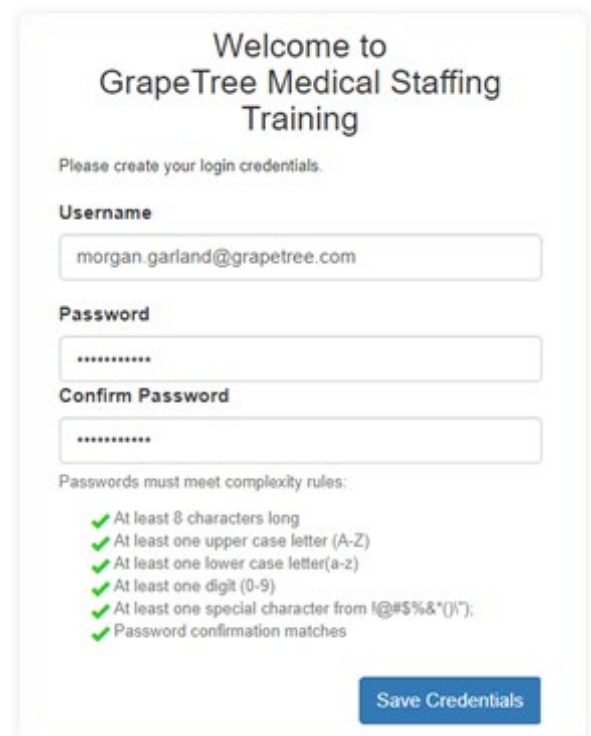
Use your primary email address as your username.

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.

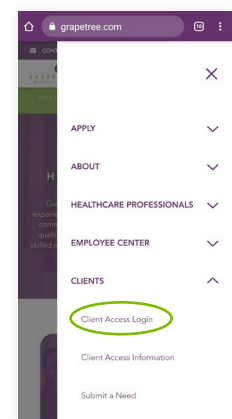
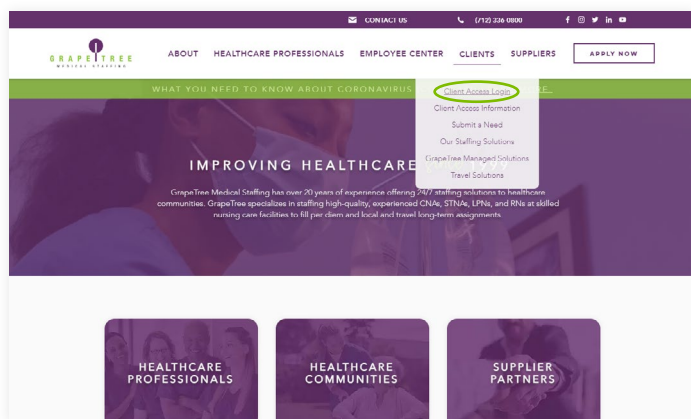
Once you select Save Credentials, you will be taken to a Facility Portal log in page. **Do not utilize this page at this time.** Please navigate to [www.grapetree.com](http://www.grapetree.com) after your account has been set up.



## Getting There

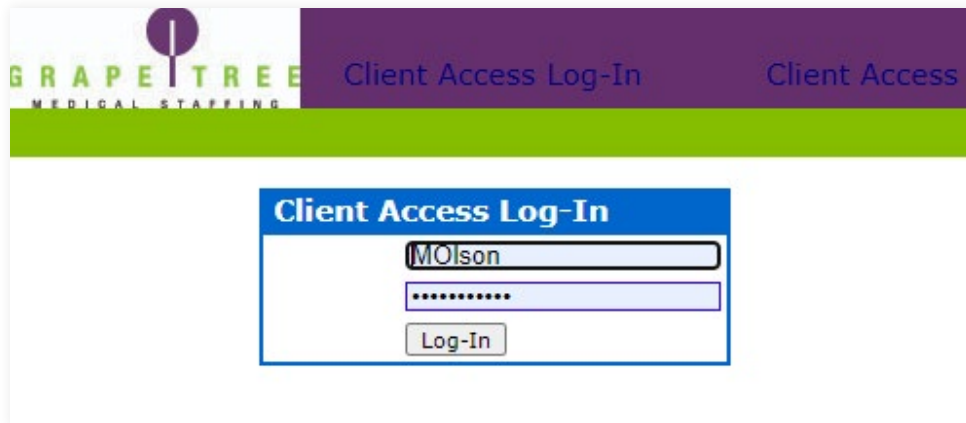
For your convenience, the [GrapeTree website](http://www.grapetree.com) has a link to the Client Access Login. On a desktop computer, hover your mouse over the Client tab in the menu and click on the [Client Access Login](#) link in the menu.

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.

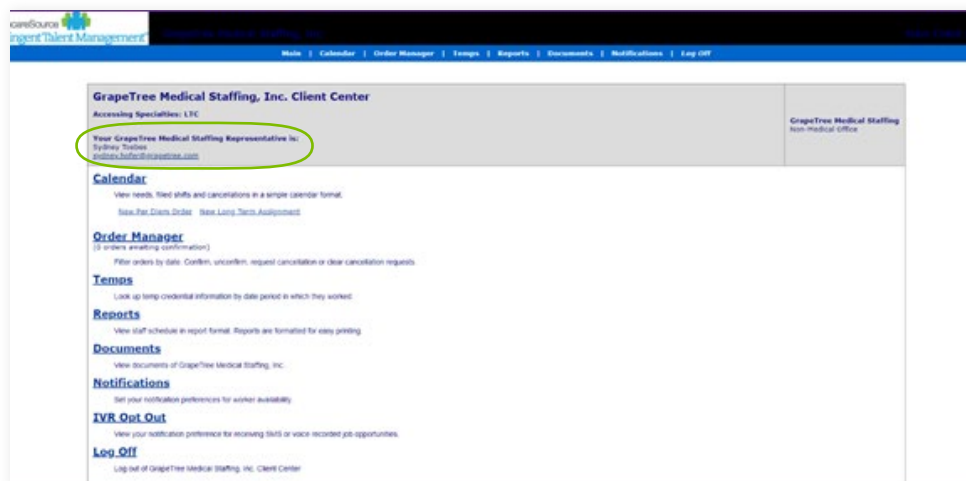


## Log In to Your Account

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.



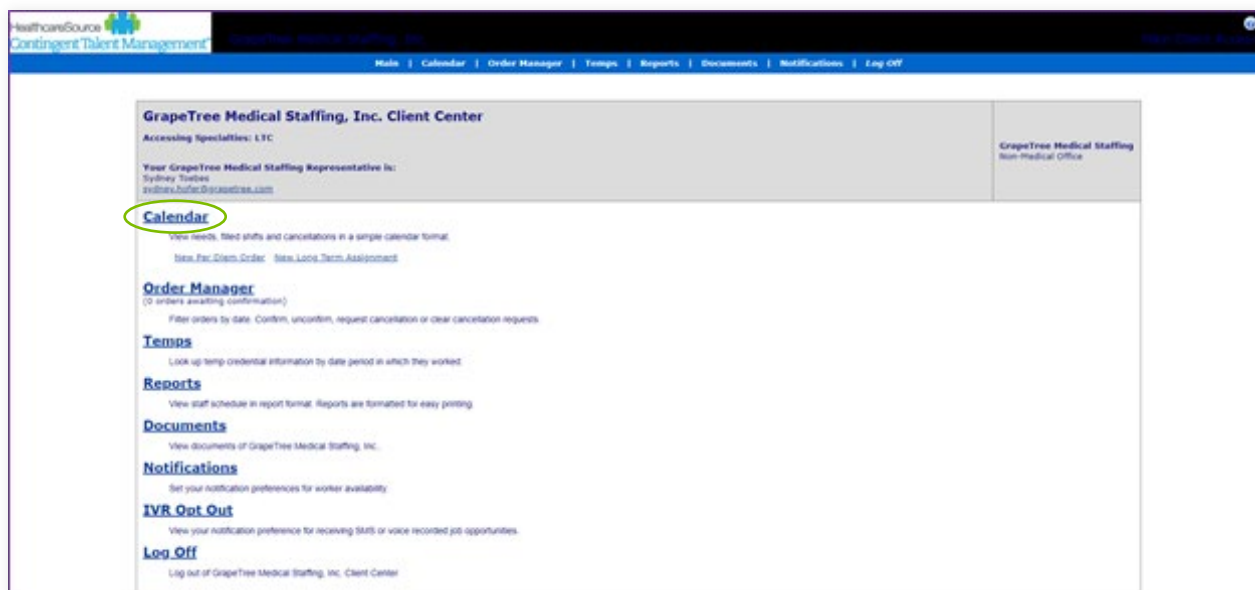
## Bookmark Client Access on Your Web Browser

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.

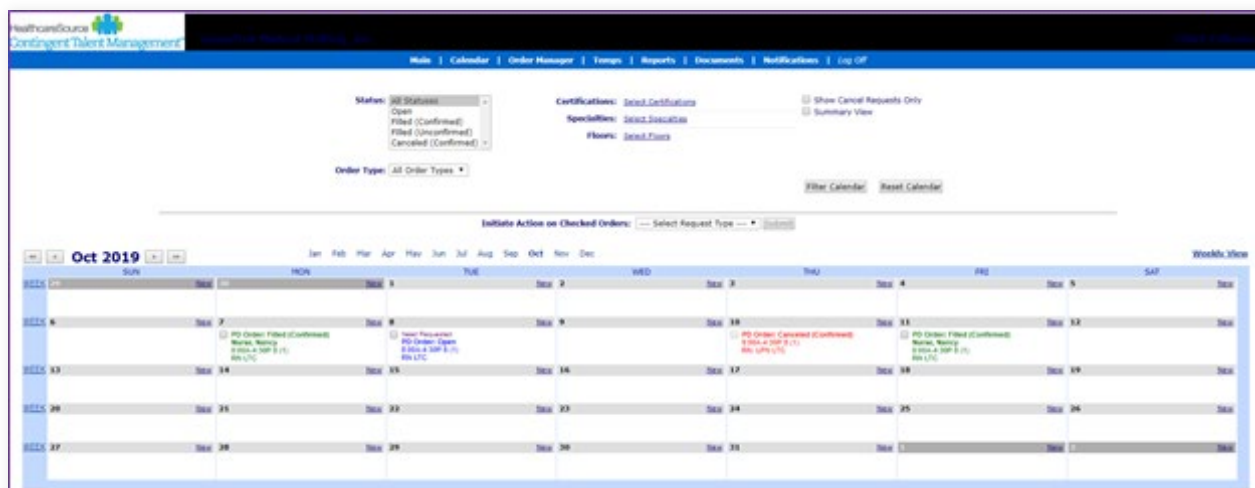


You can select your filter preferences at the top of the calendar. We recommend using the following:

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

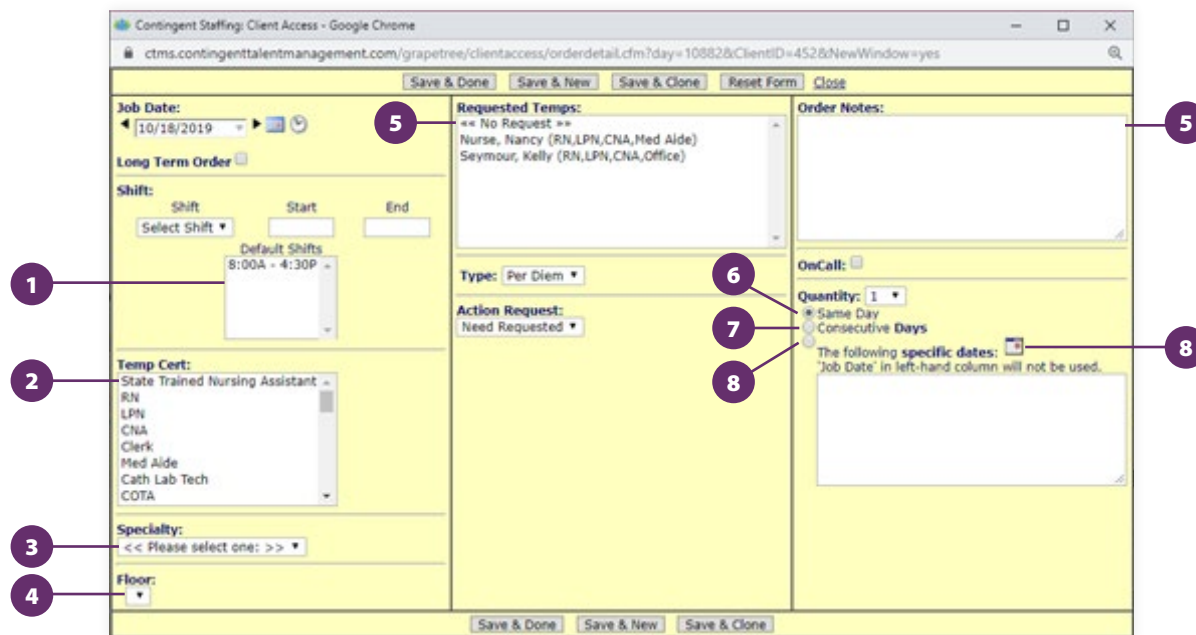
Shifts will be color coded on the calendar. Shift color meanings:

- **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.



The screenshot shows a web form titled 'Contingent Staffing: Client Access' in a Google Chrome browser. The form is divided into several sections. Callout 1 points to the 'Shift' section, which includes a 'Select Shift' dropdown and a 'Default Shifts' list showing '8:00A - 4:30P'. Callout 2 points to the 'Temp Cert:' section, which has a list of certifications including 'State Trained Nursing Assistant', 'RN', 'LPN', 'CNA', 'Clerk', 'Med Aide', 'Cath Lab Tech', and 'COTA'. Callout 3 points to the 'Specialty:' section, which has a dropdown menu with the text '<< Please select one: >>'. Callout 4 points to the 'Floor:' section, which has a dropdown menu. Callout 5 points to the 'Job Date:' section, which shows a date picker for '10/18/2019'. Callout 6 points to the 'Requested Temps:' section, which lists 'Nurse, Nancy (RN, LPN, CNA, Med Aide)' and 'Seymour, Kelly (RN, LPN, CNA, Office)'. Callout 7 points to the 'Type:' section, which has a dropdown menu set to 'Per Diem'. Callout 8 points to the 'OnCall:' section, which includes a 'Quantity' dropdown set to '1', a 'Same Day' checkbox, a 'Consecutive Days' checkbox, and a 'Specific dates' section with a calendar icon and a note: 'The following specific dates: "Job Date" in left-hand column will not be used.'

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 speciality of your facility.
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.

The screenshot shows a web browser window titled 'Contingent Staffing: Client Access - Google Chrome'. The URL is 'ctms.contingenttalentmanagement.com/grapetree/clientaccess/ordercalendar.cfm?multidates='. The interface features a calendar for the 'Next 4 Months' (October 2019, November 2019, December 2019, and January 2020). At the top, there are buttons for 'Save and Return to Order' and 'Reset'. Below the calendar, there are buttons for 'Previous 4 Months' and 'Next 4 Months'. The calendar displays dates from Sunday to Saturday. Callout boxes 8a, 8b, and 8c are overlaid on the image. Callout 8a points to a date (10/10) in the October 2019 calendar. Callout 8b points to a pound symbol (10/10) in the October 2019 calendar. Callout 8c points to the 'Save and Return to Order' button at the bottom of 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:

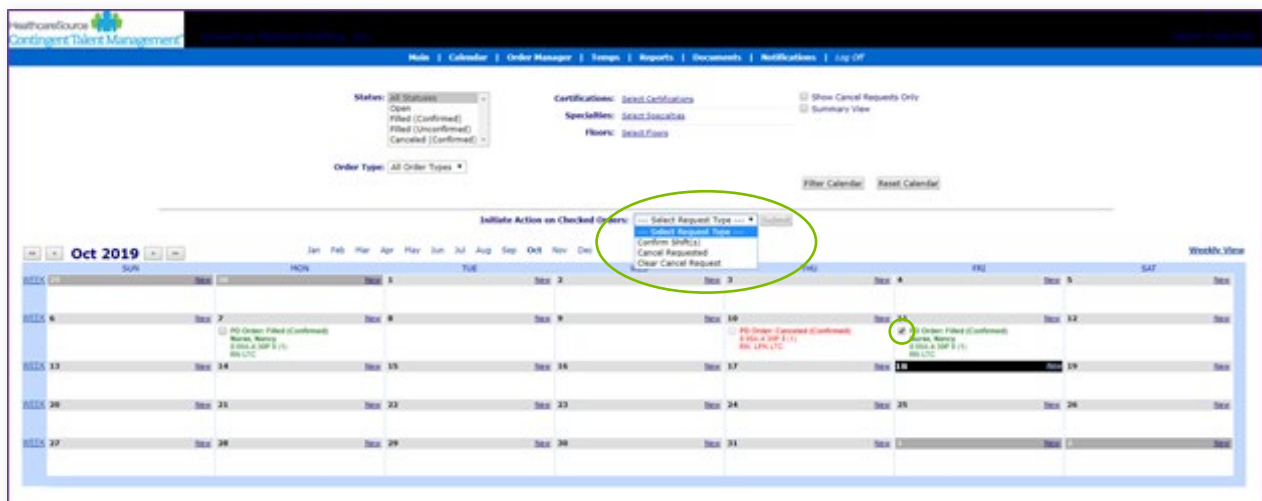
1. Select the box next to the shift you wish to cancel
2. Select the drop-down box that states, "Select Request Type"
3. Choose Cancel Requested and select Submit. You will see "Cancel Requested" appears next to the shift you are no longer wanting.
4. Your Staffing Specialist will receive an email notifying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

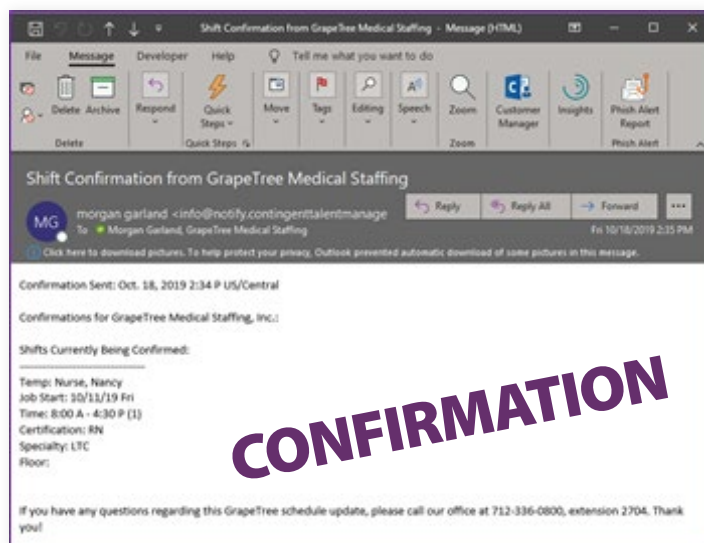
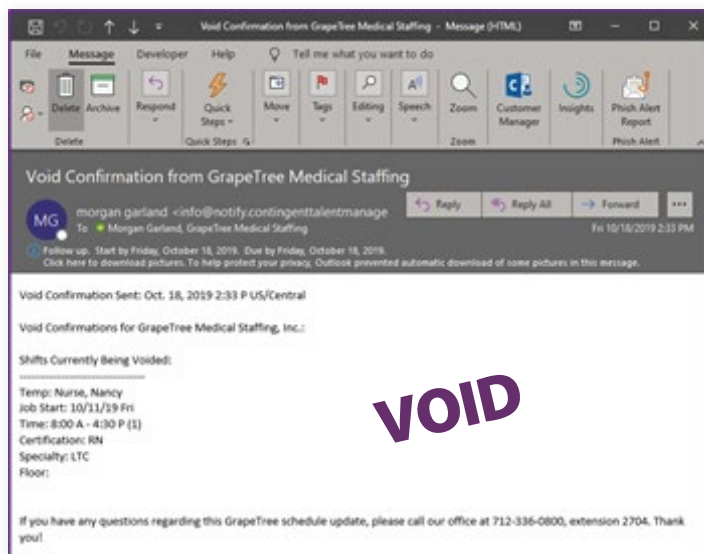
Keep in mind, our system will not allow any cancel requests to come through for shifts that have been filled with less than 24 hours' notice from the start time of the shift. This will require a call to be made to your Staffing Specialist, or the Staffing Department at 712-336-0800 extension 2704.





## 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.

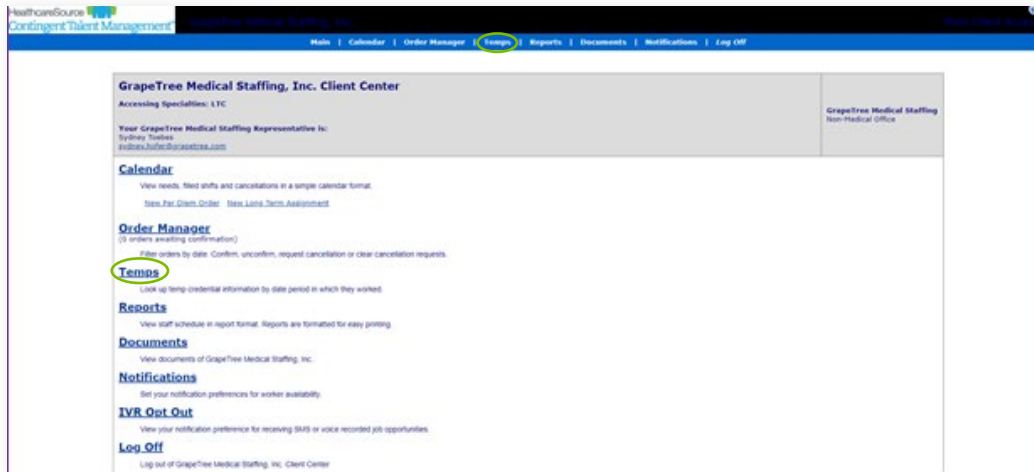


In the event of a GrapeTree Healthcare Professional needing to cancel a shift for any reason, GrapeTree will call in addition to sending the email to ensure proper notice is given.

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.

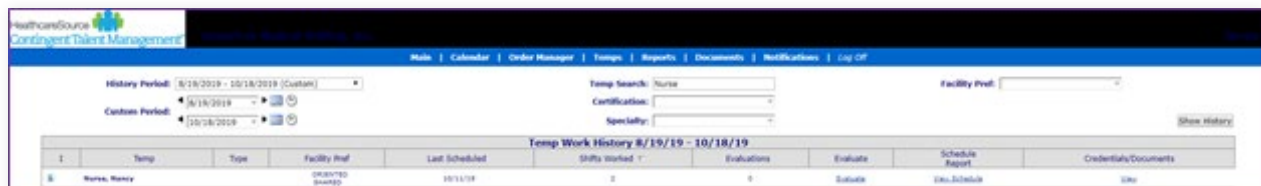
## Temp Documents

If at any time you need to view our healthcare professional's documents, you can do that within Client Access. Select the Temps option in the blue bar or Temps under the gray bar.



To find a specific Healthcare Professional, type their name into the Temp Search bar. You will then be able to select View on the right side to view their credentials. Each credential can be viewed individually by selecting the link on the right.

If you are unable to find a Healthcare Professional, please notify your Staffing Specialist.

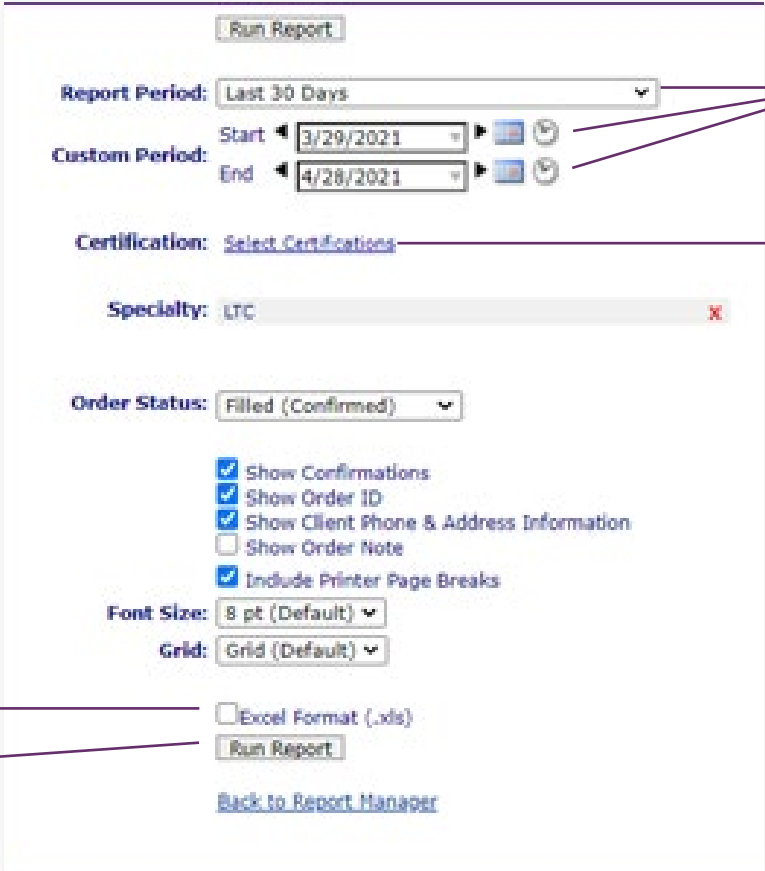


Professional Licenses						
	Cert & State	Exp. Date	Number		Documents	
IA	AN	11/15/2019	123456-verified		Nurse_Nancy_IA_License_Verification_171218.pdf	
IL	AN	10/26/2019	123456789-verified		Nurse_Nancy_IL_License_Verification_180612.pdf	
IN	AN	10/31/2019	123456789-verified		Nurse_Nancy_IN_License_Verification_171218.pdf	
KS	AN	04/30/2020	12-12345-123-verified		Nurse_Nancy_KS_License_Verification_171218.pdf	
MI	AN	03/23/2020	8123456-7-verified		Nurse_Nancy_MI_License_Verification_171218.pdf	
Licenses, Certifications, Test & Dates						
	On Boarding/Phase 1	Exp. Date	Requirements Completed	Score	Note/Name	Documents
	Resume	03/06/2008				Nurse_Nancy_GST_171218.pdf
	Employment References	06/17/2008			Attestat	Nurse_Nancy_Employment_References_081113.pdf
	Background Checks	Exp. Date	Requirements Completed	Score	Note/Name	Documents
	OSG	12/06/2017			Attestat	Nurse_Nancy_OSG_171218.pdf
	EPUS	12/06/2017			Attestat	Nurse_Nancy_EPUS_171218.pdf
	Background IA	01/04/2008				Nurse_Nancy_IA_Background_200206.pdf
	Background IL	07/07/2016				Nurse_Nancy_IL_Background.pdf
	Background Kansas	12/14/2017				Nurse_Nancy_KS_Background_171218.pdf
	Background MD	01/29/2018				Nurse_Nancy_MD_Background_171218.pdf
	Background MI	10/17/2022	10/17/2017			Nurse_Nancy_MI_Background_171218.pdf
	Background NE	06/23/2016				Nurse_Nancy_NE_Background_171218.pdf
	Background NY	03/22/2021	03/22/2017			Nurse_Nancy_NY_Background_171218.pdf
	Background National	12/01/2019				Nurse_Nancy_National_Background.pdf
	EDA MD	08/01/2017				Nurse_Nancy_MD_EDA_171218.pdf
	KS Abuse Registry	12/01/2017				Nurse_Nancy_KS_Abuse_Registry_171218.pdf
	National Sex Offender Reg	12/01/2017				Nurse_Nancy_National_Sex_Offender_171218.pdf
	Background IN	12/01/2017				Nurse_Nancy_IN_Background_171218.pdf
	IN State Sex Offender Reg	12/01/2017				Nurse_Nancy_IN_State_Sex_Offender_Registry_171218.pdf
	NE Sex Offender Registry	12/01/2017				
	Background MD STATE FAC					
	Background National ONLY					

## 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:** A dropdown menu currently set to 'Last 30 Days'. Callout 1 points to this dropdown.
- Custom Period:** Two date input fields. The 'Start' field is set to '3/29/2021' and the 'End' field is set to '4/28/2021'. Callout 1 also points to these date fields.
- Certification:** A text input field with the value 'Select Certifications'. Callout 2 points to this field.
- Specialty:** A text input field with the value 'LTC' and a red 'X' icon to its right.
- Order Status:** A dropdown menu currently set to 'Filled (Confirmed)'.
- Checkboxes:** A list of checkboxes for report options:
  - ☒ Show Confirmations
  - ☒ Show Order ID
  - ☒ Show Client Phone & Address Information
  - ☐ Show Order Note
  - ☒ Include Printer Page Breaks
- Font Size:** A dropdown menu currently set to '8 pt (Default)'.
- Grid:** A dropdown menu currently set to 'Grid (Default)'.
- Excel Format:** A checkbox labeled 'Excel Format (.xls)' which is currently unchecked. Callout 3 points to this checkbox.
- Run Report:** A button labeled 'Run Report'. Callout 4 points to this button.
- Back to Report Manager:** A link labeled 'Back to Report Manager'.

## 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 numbered callouts:

- 1** points to the **Date Period** dropdown menu, which is currently set to '4/25/2021 - 5/1/2021 (This Period)'.
- 2** points to the **Temp Status** section, where the **Active** checkbox is selected.
- 3** points to the **Show Detailed Evaluations** checkbox, which is currently unchecked.
- 4** points to the **Run Report** button.

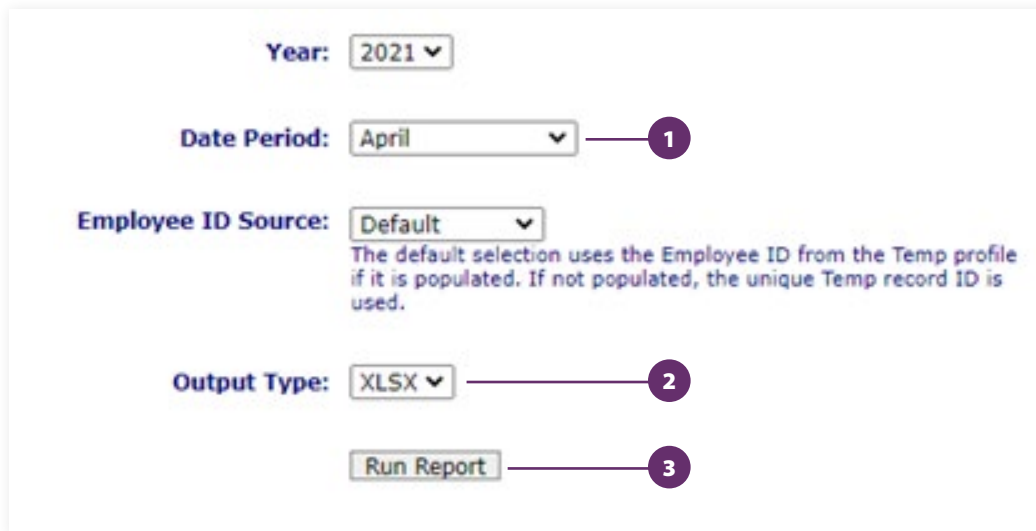
Other visible elements include:

- Custom Period:** Start (4/25/2021) and End (5/1/2021) date pickers.
- Date Type:** Evaluation Date dropdown.
- Certification:** A dropdown menu with options: All, State Trained Nursing Assistant, RN, LPN, CNA.
- Specialty:** A dropdown menu with options: All, LTC, LTC STAT Response, LTC Emergency Pay, Crisis.
- Temp Status:** A grid of checkboxes including All, DNB, Inactive, Not Selected, Active (checked), Do Not Hire, LOA, Other Medical, Applied, Dormant, No Needs, Pending, Candidate, Dormant With Email, Non Medical, Pending LOA, COVID LOA, HCP Referral, Not Eligible For Rehire, Prospect, Deadline, Hold, Not Enough Experience, and Terminated.
- Back to Report Manager** link at the bottom.

## 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 elements:

- Year:** A dropdown menu currently set to "2021".
- Date Period:** A dropdown menu currently set to "April". A purple line with a circle containing the number "1" points to this dropdown.
- Employee ID Source:** A dropdown menu currently set to "Default". Below this dropdown is a text explanation: "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 currently set to "XLSX". A purple line with a circle containing the number "2" points to this dropdown.
- Run Report:** A button labeled "Run Report". A purple line with a circle containing the number "3" points to this button.