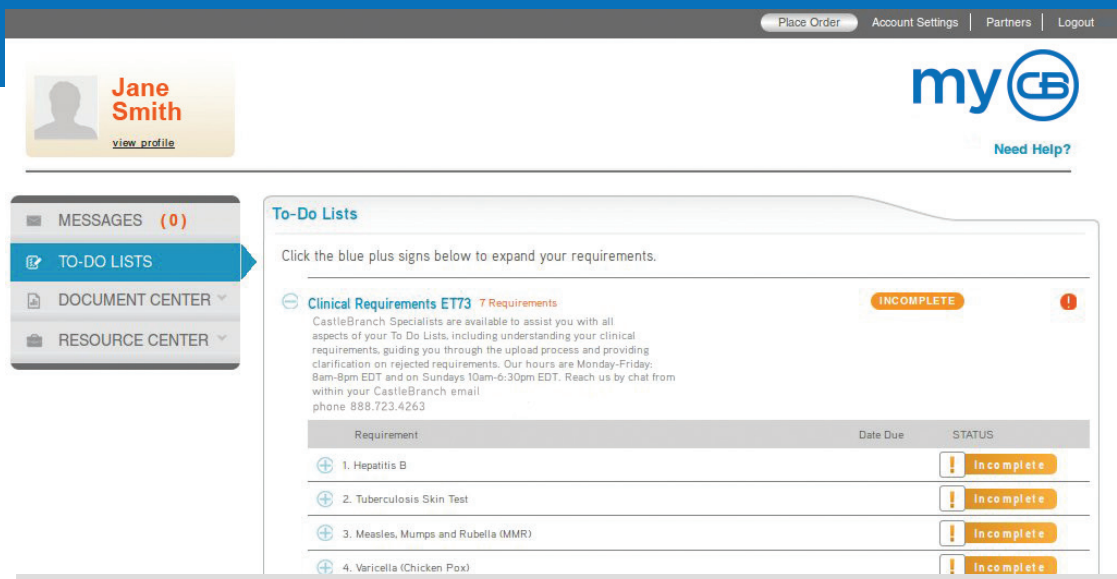


# myCB

## Reference Guide



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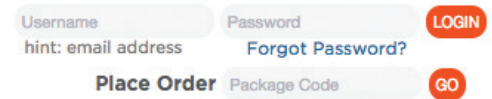
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When getting started with your myCB account, you may need help navigating the site or performing certain actions. This guide is designed to not only answer any general questions that may arise, but also to provide information on managing your profile and responding to various issues.

## Getting Started



The screenshot shows a login and order form. It includes a 'Username' field with a hint 'email address', a 'Password' field with a 'Forgot Password?' link, and a 'LOGIN' button. Below these is a 'Place Order' section with a 'Package Code' field and a 'GO' button.

### How do I place my order and create a myCB account?

From [mycb.castlebranch.com](http://mycb.castlebranch.com), enter the package code from your instruction form in the “Place Order” box located at the top right-hand side of your screen. Click “Go” to begin the order process. Login information is not needed at this time. A series of prompts will guide you through the rest of the process based on the program you are in.

### How can I obtain my package code?

You will have received an instruction form from your school administrator containing an ordering portal link and brief instructions for order placement. If you did not receive a form or have misplaced it, contact our Service Desk at 888.914.7279 or visit [mycb.castlebranch.com](http://mycb.castlebranch.com) and click on the “Contact” link to submit your request online. Your package contains items required by your school, clinical facilities, and/or the state in which you will work or be licensed.

### What do I do if I mistakenly order the wrong package?

If you realize during or soon after order placement that you ordered the incorrect package, contact our Service Desk by telephone, or live chat to cancel the order and assist you with selecting the correct package. If you wait longer than a few hours, we may only be able to provide a partial refund for the items that have not been processed.

### When do I need to enter a Social Security Number (SSN)?

#### Why do I need to provide one? What do I do if I do not have one?

A Social Security Number is required in order to facilitate a background check. We will be unable to complete your background check without this essential information. If you are not a US citizen, enter 000-00-0000 in the SSN field.

#### Why am I asked to provide an email address?

Your email address will be your username for your myCB account and is also the address where you will receive alerts and other important messages. Enter an email address you check frequently.

#### What if my current address is located outside of the US?

Enter your school address during the order process. Check your email or myCB account frequently, as an alert may be sent for updated address information.

#### Is there a fee for using the account? How long will I have access to it? Is my account secure?

You will establish your account when you place your first order. There is no fee for using your account and you have lifetime access. Your account can only be accessed by using the secure username (email address) and the personal password you create.



## Getting Started (Continued)

### **How do I place a subsequent order using a different package code? Do I need to create a new myCB account?**

You do not need to create a new account to place new orders. Either hit “Place Order” at the top of the page from within your account, or enter your new package code from [mycb.castlebranch.com](http://mycb.castlebranch.com). Make sure you enter the same email address (username) for all orders to link within the same account. If you do place an order under a different email address, contact our Service Desk to have the orders merged with your existing account. Any orders you need to place for different schools can also be placed from your existing myCB account.

### **Can I place an order over the phone?**

For security reasons, all orders must be placed online.

### **What payment options are available?**

You have several options to pay for your myCB order including: MasterCard, Visa, Discover, debit, electronic check, and money order. Note that the use of electronic check or money order will delay order processing until payment is received. A 3-installment payment option is also available. The monthly installment amount depends on the amount of the order. The installment payment includes a \$2.99 per installment payment fee. Your order will be processed in full upon initial payment. If your school is responsible for payment of your order, a school administrator will provide you with a Personal Identification Number (PIN) or a “hint” will be offered during order placement.

### **Can I rush my order?**

Depending on your package, you may be asked during the order process if you wish to rush your order. Rush orders are only available to users paying with a credit/debit card. A rush fee only applies to items within a criminal background check, rushing does not impact the speed of any other services such as drug test results or review of tracker requirements.

### **I provided incorrect information (Social Security Number, date of birth, etc.). How do I correct it?**

If you provided incorrect information during the order process, please contact our Service Desk as soon as possible. Every effort will be made to correct the information. However, depending on the progress of your order, a new order may need to be placed with the correct information. You may only be eligible for a partial refund.

### **I need to access a myCB account after order placement, but have forgotten my username and/or password. How can I retrieve this information?**

Your mCB username is the email address you entered during the order process. If you are locked out of your account due to excessive failed attempts to log in, visit [mycb.castlebranch.com](http://mycb.castlebranch.com) and access the “Contact” link to request assistance with your account settings. If you have forgotten your password, simply click “forgot password?”, and enter your username (email address). An email will be sent containing a link that will allow you to create a new password.



# Managing My Account

## How do I upload my photo?

Move the mouse over the picture icon next to your name in the top left-hand corner of your screen. Hover over “Edit Photo.” You will then be given the option to upload a new photo or remove an existing photo.

## How do I update my username/email address?

To update your username (primary email address), go to “Account Settings” in the top right-hand corner of your screen. Click on “Username (Primary Email Address)”, then click “Edit” to the right of the current email address. Enter your new primary email address and click “Submit”. You will receive an email confirmation. You must confirm the new email address before you will be able to use your new login information.

## What information goes to “Messages”?

Under “Messages,” you will find important alerts such as confirmation of order completion, notifications when faxed documents have been uploaded to “My Documents”, and reminders about upcoming due dates.

## Who will have access to myCB and order results?

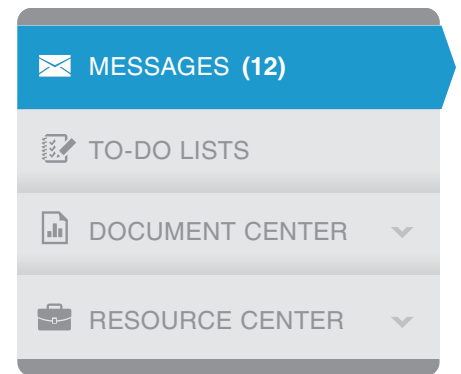
School administrators have a unique secure portal that allows authorized users to view a list of their students and/or faculty, view To-Do List progress, get status updates, and view final results. The school administrators do not have direct access to your myCB Account.

## How can I share my information with others?

Hover over “Document Center,” in the left menu, then click “Share Documents”. Follow the step-by-step process to choose your recipients, select the information you want to share, and set how long they have access to the information. Each recipient will receive an email invitation to view the shared information. You can monitor the process and see when someone has accessed your information.

## Can I combine separate documents into a single PDF?

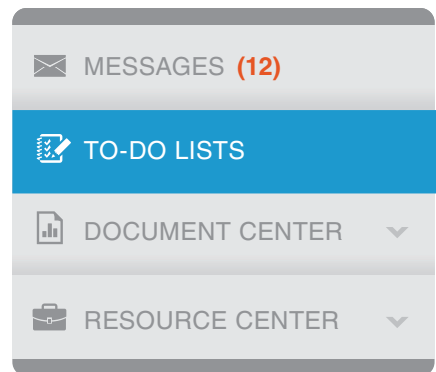
Follow the step-by-step process in “Build Portfolio” in your “Document Center” to combine documents into a single, easily-shared PDF. You may also select files from “My Documents” within your “Document Center” to combine. Click on the desired document in “My Documents”, then click “Merge” (found below the document information) to add the file to the merge queue. After adding all files you wish to merge, select “Merge Queue,” located in the top right-hand corner of “My Documents”. Click “Merge These Documents”, and a new PDF will be created and saved in the “Merged Files” folder, located within “My Documents.”



# Completing My To-Do Lists

## What items can populate in my “To Do List”?

Each item within your package will display within your myCB To-Do List. One or more of the items listed below may be included in your package. Each item may require different actions on your part. Here is a brief overview, with more detailed descriptions outlined later on in this guide.



- **Criminal Background Check** - You will see an orange alert icon (!) if you need to provide any documentation or information for your background check to be conducted. If you do not have an alert, you do not need to do anything. After your report has been compiled (3-5 business days on average) you will see a “View Results” link for your background check. You can access the link to view and/or print your completed report.
- **Drug Test (E-Chain)** - You will receive a registration form either in your email or directly in your drug test requirement. This form will assist you with scheduling your drug test and finding a location with the specified lab. If you do not receive your registration form within 48 hours of order placement, please contact our Service Desk for assistance.
- **Drug Test (Standard)** - Your drug test requirement will instruct you to go to your school administrator with your order confirmation so that you can receive your drug testing order form. At that time, either your administrator will provide you with the location where you will take your drug test, or you can choose a site from the list provided on your specified lab’s website.
- **Compliance Tracker (Medical Document Manager)** - This tracker is a custom list of requirements established by your school and based on the requirements of the clinical sites within your area. The tracker is named by your school and often is specific to a program and cohort. You will provide documentation or respond to specific questions in order to complete each requirement.
- **Fingerprint Tracker** - If the state where you will be doing your clinical rotation or employment requires a Fingerprint search, your tracker will include the steps needed to complete this requirement. Your progress will be reflected in the status of your tracker.
- **Child/Adult Abuse Tracker** - If the state where you will be doing your clinical rotation or employment requires a state abuse search, your tracker will include the steps needed to fulfill this requirement. Your progress will be reflected in the status of your tracker.

## Why is my “To-Do List” blank or missing items?

If you paid with an electronic check or money order, your payment has not yet been received. If you did not pay with either of those methods, please contact the Service Desk. If you are missing items from your to-do list, verify that the package code that displays in your myCB order is the same as the one provided on your instruction form. If they match, please contact the Service Desk.

# Background Check

## **Where can I view my Background Check Order Confirmation?**

A copy of your order confirmation was sent to the email address you provided when you placed your order. You can also retrieve a copy of your order confirmation anytime by selecting “Document Center,” then “My Documents”. Click on the “Background Check” folder located on the left side panel; then select the document titled “Confirmation”.

## **When should I expect my background check to be complete?**

Results are usually returned within three to five business days. Please note that turnaround time varies based on the specific items in your order. If five business days have passed and you are concerned about meeting a deadline, contact the Service Desk for more information.

## **Why is my background check taking longer than five days?**

Background check results are generally returned in three to five days. The time it takes to complete your background check depends on what is included in the package and the jurisdiction(s) being searched. You may experience a delay if a jurisdiction requires a clerk of court to conduct the research. Inclement weather, governmental budgeting or staffing issues, etc. can also affect the turnaround time. If your background check has been processing for more than five days, contact the Service Desk for further assistance.

## **Where do I fax my release form?**

If you are unable to sign your release form (disclosure and authorization) electronically, you will receive a notification in your “To-Do List”. Click on the orange exclamation point icon below your Background Check “To-Do List” and follow the steps to submit your release. Once you have followed those instructions carefully, fax to 901.343.9731.

## **How do I respond to a request for additional information or clarification of information?**

If additional information is required, an orange exclamation point icon will appear below your Background Check “To-Do List”. Click on the icon to view the alert and update your information.

## **Why does “In Process” appear under “Records Found” on my background check?**

“In Process” means the background check is still pending. Some jurisdictions have yet to be completed by our researchers.

## **How do I dispute criminal records?**

If criminal results were returned to you with inaccurate records, click the appropriate link in the “Completed Order Results” notification in your message center to complete the “Criminal/Civil Records Dispute” form. Please allow up to 30 business days to process your claim. If you are unable to access the “Completed Order Results” message or are having problems with the “Criminal/Civil Records Dispute” form, contact the Service Desk for assistance.



## Background Check (Continued)

### Why are there incorrect addresses on my background check?

Occasionally, your results may include a county in which you have not lived. This can happen when your address is cross-referenced with spouses, ex-spouses, loan co-signers, roommates, etc. and if you received mail at an address for a period of time but did not live at that address.

To dispute charges associated with additional addresses, click the appropriate link in the “Completed Order Results” notification located in your message center. Refunds are only given for counties containing no criminal records. If you are unable to access the “Completed Order Results” notification located in your message center, contact the Service Desk for assistance.

### How do I get a copy of my background check results?

When your background check is complete, you will receive a completed results notification. This message will be available in your myCB Message Center. The message allows you to view a PDF of the results and provides access to the criminal record dispute form. You can also click “View Results” from within your Background Check “To-Do List.” Your background check results are stored in your Document Center. Select “My Documents” from the left-side navigation menu and then, select “Background Check.”

## Drug Test

### Where do I view instructions on how to complete my drug test?

Go to your “To-Do List” and to the left of the “Drug Test” item click on the blue plus sign for the steps required to complete the process.

### How do I locate a collection site and schedule my appointment?

- **Drug Test (E-Chain)** - You will receive a registration form either in your email or directly in your drug test requirement. This form will assist you with scheduling your drug test and finding a location with the specified lab. We conduct registration every day Sunday-Friday. If you do not receive your registration form within 48 hours of order placement, please contact our Service Desk for assistance. Depending on the lab, we will either provide you with a list of collection sites in or around your current resident (entered during the order process) or will give you the link to the laboratory website and instructions on finding a collection site. It is your responsibility to schedule your appointment with the collection site and provide your unique registration code and picture ID.
- **Drug Test (Standard)** - Your drug test requirement will instruct you to go to your school administrator with your order confirmation so that you can receive your drug testing order form. At that time, either your administrator will provide you with the location where you will take your drug test, or you can choose a site from the list provided on your specified lab’s website. You will then schedule your appointment, following the instructions provided for you. On the appointment day, bring your picture ID and your drug testing order form.



## Drug Test (Continued)

### **It's been 48 hours. Why have I not received my drug test registration email?**

Check your spam/junk folders. Check your "To-Do List" Drug Test item and click on the blue plus sign to expand the informational text. If you cannot locate the email or do not have the registration information within your account, contact the Service Desk to be re-registered.

### **What if there is not a collection site near me?**

If your school is set up for electronic registration and we do not provide you with an option within 50 miles of your current address, please contact our Service Desk. We may be able to find a site closer to your school or assist you in finding a private collection site that has an agreement with one of our labs.

### **How do I complete my drug test if I am instructed to see my school administrator within the Drug Test instructions?**

If your school is located in a more rural part of the country, you may be directed to see your school administrator to get a paper chain of custody form, in lieu of being registered electronically. This form will direct you to a private collection facility.

### **How long does it take for results to be returned?**

Negative results are typically available within 3-5 business days after completing your test. Results may be sent on to our Medical Review Officer (MRO). Results processed via an MRO may take longer to be returned.

### **My test results say I am positive, but I have a prescription. What do I do?**

All non-negative tests are sent to a Medical Review Officer (MRO) for further review. The MRO will contact you for an interview; a minimum of three contact attempts will be made over a two-day time period. The MRO will request written documentation or electronic documentation for any prescriptions that may have produced positive test results. You have 24 hours to provide written documentation or electronic documentation of your prescription(s).

### **What do I do if I am contacted to retest?**

You may be contacted to retest if your drug test results in a fatal flaw or dilute negative. You will receive a new chain of custody form to take back to the lab. If specimen is rejected due to donor error, you may be contacted to place or pay for a new order.





# Compliance Tracker

## **Where do I access instructions for completing a tracker requirement within my “To-Do List”?**

Each requirement in your tracker has specific instructions listed within the requirement description. Expand the requirement description by clicking on the plus sign next to each requirement name. Also check your requirements for instruction forms to download.

## **How do I upload a document to fulfill a requirement?**

Open the requirement and click on the “Browse” button to attach your file from either your computer or “My Documents”. After the file appears under “Attached Files”, click “Submit”. The status of the requirement will change to processing while your document is being converted into a PDF file. This conversion process usually takes less than five minutes to complete. If you have waited over 24 hours and your document is still processing, please contact the Service Desk.

## **What file format is acceptable and is there a maximum file size?**

The most common file types are .jpeg, .png, .doc, PDF. All files are converted to a PDF format within our system as PDFs are the most universally viewable document for browsers and applications. There is a maximum file size of 5mg.

## **How do I upload multiple documents to fulfill a requirement?**

Open the requirement, click on the “Browse” button, and attach your first document. Click the “Browse” button again to attach additional documents. Click “Submit” when all documents have been uploaded.

The status of the requirement will change to “In Progress” while your documents are being converted into a single PDF file. This conversion process usually takes less than five minutes to complete. If you have waited over 24 hours and your document is still processing, please contact us at: [servicedesk@castlebranch.com](mailto:servicedesk@castlebranch.com).

## **Can I attach the same documents to multiple requirements at one time?**

Even if the information for multiple requirements is included within a single document, the same document must be attached to each individual requirement. A reviewer reviews one requirement at a time and the attached documents for that specific requirement. Therefore, the documentation must be attached to each requirement for the review to be completed.



## Compliance Tracker (Continued)

### How do I fax documents to fulfill a requirement?

Within the requirement, click the download button next to “or download the fax/mail requirement cover page.” Print the fax cover page. Note that this cover sheet is only specific to that requirement. For security reasons, documents that are faxed without the appropriate cover sheet will be destroyed. Fax the cover sheet and documentation to the fax number provided on the cover sheet with the cover page first, followed by your documentation. If you are completing multiple requirements, you will need to include each requirement’s corresponding cover sheet.

When faxing, the pages of documentation should be in the following order:

1. Fax cover sheet
2. Supporting documentation
3. Fax cover sheet (for additional requirement)
4. Supporting documentation (for additional requirement)

### How do I mail documents to fulfill a requirement?

Within the requirement, click the Download button next to “Or download the fax/mail requirement cover page.” Print the cover page. Note that this cover sheet is only specific to that requirement. For security reasons, documents that are mailed without the appropriate cover sheet will be destroyed. Mail the cover sheet and documentation to the address that is displayed on the cover sheet with the cover page first, followed by your documentation. If you are completing multiple requirements, you will need to include each requirement’s corresponding cover sheet. When mailing, the pages of the documentation should be in the following order:

1. Cover sheet
2. Supporting documentation
3. Cover sheet (for additional requirement)
4. Supporting documentation (for additional requirement)

Documents are uploaded to your requirement within 48 hours of receipt. We recommend using a mail carrier with a tracking service.

### How do I fax or mail documents to “My Documents” for secure storage?

Select “Print Fax/Mail cover sheet” from the upper right-hand side of “My Documents”. Then, choose the appropriate cover sheet. All documents transmitted with a Fax/Mail cover sheet will be stored in the “Faxed/Mailed Documents” folder. Documents uploaded to “My Documents” will not be attached to any requirements in your tracker. If you need to attach a document from “My Documents” to a specific requirement, open the requirement, choose “Upload file” then select “My Documents”.



## Compliance Tracker (Continued)

### **Who reviews and approves my documents and how often are they reviewed?**

Your employer or school determines who will review your documents. This may be school/organization personnel or a dedicated team at CastleBranch. Documents are reviewed in the order in which they are submitted. However, as a school deadline approaches, those student documents become our priority. Our goal is to help you become compliant as quickly as possible. If you have submitted your documents for approval and your deadline is within 48 hours, please contact our Service Desk to ensure the review process is expedited.

### **Why would my document be rejected?**

Documents may be rejected if they are illegible, loaded to the wrong requirement, or do not meet the specific guidelines. Our team is unable to make subjective approval decisions, therefore we adhere strictly to the stated guidelines. If we provide you with a reason for rejecting your requirement that is unclear on what you need to do to gain approval, please contact our Service Desk.

### **How do I avoid common mistakes when responding to requirements?**

- Remember to hit the “Submit” button when attaching documents to a requirement. If you forget to hit the submit button, the requirement will remain in process and is not visible to the reviewer until you go back into your account and submit.
- Make sure that all fields on your forms are completed, signed and dated before attaching to your requirement.
- If multiple files need to be submitted to a single requirement, ensure all are attached prior to hitting submit.
- When uploading to your document center, title each document as they are uploaded so that you can be sure the correct documents are uploaded to their respective requirements.
- Fax all documents with the fax cover-page before the documentation for each requirement.

### **What do I do if I have a requirement needing multiple vaccinations and I have only completed my first shot in the series?**

Most schools accept a series in process. When reading through the requirement, if the school accepts a series in process, upload your vaccination and a new requirement will be added to your tracker for the next step.

### **Can my school see my tracker progress and supporting documents?**

Authorized users at your school can view the progress you are making on your requirements and the documents you have attached to each requirement.

### **Will I be given reminders when I have an approaching due date or when something is overdue?**

Yes, you will be sent an email once a week if you have requirements that are approaching or have passed their due date.



## Compliance Tracker (Continued)

### **When I have completed my tracker requirements and am compliant, is there a way to print or download my results?**

The results summary is available for download in “My Documents.” The PDF file labeled “Results\_####” is located in the folder with the corresponding tracker name. This results summary gives a snapshot of the current status of your tracker and the progress of each requirements within the tracker.

### **What does a tracker status of “Compliant” mean?**

“Compliant” is a temporary status of completion when you have completed all current requirements on or before their due date. Most compliance trackers contain renewable requirements, the most common being, TB, CPR, and Seasonal Flu. Each year, your tracker will be updated with a renewable requirement 21 days before the requirement is due. You will be sent an email reminder 60 days before the requirement due date and 30 days before the requirement due date. 21 days before the requirement is due, it will populate to your tracker and will be available for you to provide the current year documentation. In order to remain compliant, you must respond to each requirement on or before its due date. Your school most likely will not allow you to attend clinicals without being compliant. You may be pulled from your clinical rotation if you do not remain compliant.

### **What does a tracker status of “Overdue” mean?**

Your tracker status reads “Overdue” when the overall tracker due date passes and you have one or more incomplete requirements or when a specific requirement due date passes and you have not provided the necessary documentation.

### **Where can I see the tracker due date?**

If your school has established a tracker due date, it will be located immediately below the tracker name. Some requirements may be due before other requirements and will have a due date prior to the tracker due date. Some requirements, the seasonal flu vaccine being the most common, may be due after the other requirements within the tracker or even after the overall tracker due date.

### **What does the tracker status of “Rejected” mean?**

Your tracker is not yet overdue, but you have one or more requirements that are currently rejected and needs your attention.

### **What does a “To-Do List” status of “Archived” mean?**

A “To-Do List” with a status of “Archived” reflects an inactive order; for example, this may occur when a student graduates or leaves a program of study. You will receive a notification in your myCB message center when your tracker is archived. You will no longer be prompted to pay renewals or receive notifications pertaining to trackers within your “To-Do Lists” that have been archived. Documents within an archived To-Do List are no longer reviewed by myCB.

### **How do I know if I will have a tracker renewal fee?**

Within your order confirmation page upon order placement, you will have an item with the word “annual” in the item name.



## Compliance Tracker (Continued)

### How do I pay for my annual tracker renewal fee?

If your tracker requires a renewal payment, you will begin receiving notifications 30 days prior to the renewal date. You will also see a “Pay Renewal” button on your “To-Do List”. Click the icon to renew. If you do not renew prior to the renewal date, your “To-Do List” will be locked. You will still be able to access your uploaded documents from within your document center; however, you may not take action on unfulfilled requirements until the renewal is paid.

Note that if subsequent annual fees are missed, renewal fees for all years missed are due at the time of payment.

## Fingerprint

### How long does it take to get fingerprint results and who gets the results?

The time it takes to receive your results depends upon the package ordered. Once your fingerprints have been taken, you should expect the following turnaround times:

- **Florida or Michigan Live scan fingerprint results:** Your school administrator will have web access to your results within three to five days.
- **Pennsylvania Cogent fingerprint results:** Will be mailed to you by the state agency, and you will be asked to upload your results into your myCB fingerprint requirement. Turnaround time may vary due to USPS involvement.
- **Ohio Live scan fingerprint results:** Will be pulled from the state agency website and uploaded to your requirement within five to seven days.
- **Nationwide Rolled fingerprint results:** Will be mailed to CastleBranch and uploaded to your requirement 10-15 weeks from the date of receipt.

### What do I do if I do not receive a fingerprint packet for my Nationwide FBI Results within a week?

Contact the Service Desk to verify your address.

### What do I do if I paid for my fingerprint scan twice?

If you paid both at the time of order and at the fingerprint site, contact us for assistance. It may be necessary to re-print.



# Abuse Registry

## Who receives my Abuse Registry results?

The recipient of your Abuse Registry results depends upon your order. Typically, results are sent directly to you. You will need to upload the results to your requirement. Your “To-Do List” instructions will advise on how you will receive your results. In some cases, the results may be sent to CastleBranch, and a representative will upload to your requirement.

## When should I receive my results?

Abuse Registry results are generally returned within three to six weeks, but may take longer depending on your state’s specific process.

# Need Help?

## Who do I contact if I have questions? How do I ask for assistance after I have placed my order?

If you need assistance, you can use any of the “Need Help?” menu options. Go to the menu, located in the top right-hand corner of your homepage, and select any the following:

- **Browse Help Topics:** Includes answers to the most frequently asked questions.
- **Chat with Us:** Available Monday-Friday 8am-10pm and Sunday 10am-6:30pm EST
- **Contact Service Desk 24/7:** Allows you to enter an inquiry, along with attachments, to our Service Desk team at your convenience.
- **View Service History:** Stores all communication between you and our Service Desk team for future reference. You can view all inquiries made within the “Service Desk 24/7” system, update, view responses, and view attached documents.
- **Call Us:** Available Monday-Friday 8am-10pm and Sunday 10am-6:30pm EST

Your Service Desk is available to assist you M-F 8am-10pm & Sunday 10am-6:30pm EST call 888-914-7279 or log in to your account and click “Need Help” for additional options

