

## **STEP BY STEP PROCESS**

## **CREATING YOUR CASTLEBRANCH ACCOUNT AND SUBMITTING DOCUMENTS**

## **Creating Your Account:** https://portal.castlebranch.com/GR85 Access the GVSU CastleBranch Portal Select "Place Order" at the bottom of the page CE CastleBranch PACKAGE SELECT ACT US alley State University Portal friendly portal guides you through program and selection to quickly place your order and create complete your order and create your account, you to your account to monitor your order status, view s, respond to alerts, and complete your ints. You will return to your account by logging into ch com and entering your usemame (email used or placement) and your socure password. 's get started by clicking the Place Order t PLACE ORDER Click on the "+" sign next to "Select" Please Select Click on the "+" sign by Students Please Select Faculty/Staff Students Select your academic program from the drop down Please Select Faculty/Staff Students Allied Health Sciences Clinical Dietetics College of Business Health Communications Health Information Management

A list of health compliance items will be displayed.

- Select/Order the "Compliance Tracker (REQUIRED)"
- There is a one-time \$35 cost for the compliance tracker. This is where you will upload documents required by your academic program.
- Payment to CastleBranch may be made by credit or debit card.
- Electronic checks are accepted for a fee.
- Once your account is set up, you will have life-time access to all documents that you submit.
- Additional fees apply if background check, drug test or fingerprinting are required.

E Health Information Management

GD55: Compliance Tracker (REQUIRED)

- GD55bg: Background Check (REQUIRED)
- GD55dt: Drug Test (REQUIRED)
- GD55zdmfp: Fingerprint (Select only if directed)
- GD55zdmhi: Health Insurance (Select only if directed)
- Items marked "(REQUIRED)" must be completed.
- Items marked as "Select only if directed" are site specific and should be completed only if instructed by the Health Compliance Officer in a separate email.

GVS Pack	<b>SU - STUDENTS - HEALTH INFORMATION MANAGEMENT</b> age Code GD55: Compliance Tracker
ABC	тис
8	About CastleBranch GVSU - Students - Health Information Management has partnered with CastleBranch, one of the top ten background check and compliance management companies in the nation to provide you a secure account to manage your time sensitive school and clinical requirements. After you complete the order process and create your account, you can log in to your account to monitor your order status view your results, respond to alerts, and complete your requirements. You will return to your account by logging into castlebranch.com and entering your username (email used during order placement) and your secure password.
ORE	JER SUMMARY
•	Payment Information Your payment options include Visa, Mastercard, Discover, Debit, electronic check and money orders. Note: Use of electronic check or money order will delay order processing until payment is received.
	Accessing Your Account To access your account, log in using the email address you provided and the password you created during order placement. Your administrator will have their own secure portal to view your compliance status and results.
	Contact Us For additional assistance, please contact the Service Desk at 888-723-4263 or visit https://mycb.castlebranch.com/help for further

Please	e Review					
GVSU - Studen Package: GD55 Medical Docum Package Cost: Additional Info This package ir and approval.	GVSU - Students - Health Information Management includes the following package contents: Package: GD55 Medical Document Manager CRR Package Cost: \$35.00 Additional Information This package includes document review. At the end of the order process, you will be prompted to upload specific documents required by your school for review and approval. You must use your GVSU email address when creating your account.					
Click the butto account to ma have the option 1 have read,	n below to continue your order and creat tage your order and view your results. If h to log in. understand and agree to the Terms and C	te your myCB account. Y you already have a myC Conditions of Use.	ou will access your B account, you will			
Cont	inue					
be sure to use your <u>G</u>	w the prompts to cr <mark>/SU email</mark> .	eate your Ca	astleBranch ac	count and fir	ialize your orde	r. Please
NOTE: Unless ordering	g a background check	<, you may e	nter all 0's in t	he social sec	urity number fie	eld.
CE Cast	leBranch			(	Contact Us Logout	
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1	2				(7)(	
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First Name: * Middle Name:						
Last Name: * Suffix:						
Phone: * Alt Phone:						
Email Address: * Confirm Email: *			Important: The email addres enter your valid email addres order. If you do not see your	s you provide will be used for a s and look for an immediate co confirmation email please chec	important order communication. Plea onfirmation email after submitting yo ck your SPAM or Junk folder.	ise ur
Country: * Address 1: *	United States of America	~				
Address 2: City: *						
State: * Zip Code: *						
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Date of Birth: *	mm / dd / yyyy					
364	OFemale OMale					
STUDENT INFO	ORMATION					
Student ID Number: Designation: Degree/Certification:	Oundergraduate Ograduate					
Expected Date of Graduation:						
* Indicates required infor	nation				Next	

Review, pay and place your order on the following screens.

Payment options include: Visa, Mastercard, Discover, Money Order or Electronic Check.

You will be given the option to "Rush" your order. Most health compliance documents are not eligible for "Rush". If you submit documents at least 3 days prior to the due date, initiate your background check and drug test (if required) at least a week in advance, it should not be necessary to pay extra.

	CB CastleBranch	1			Contact Us Logout
	Place Order:				
		3			
		0			Go Back
	MEDICAL DOCUMENT MAN	AGER CRR			
					Next
	CastleBranc	:h			Contact Us Logout
	Place Order:				
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	ORDER REVIEW				
	School Name: GVSU - Students - He CAC: GD55	alth Information Managemer	nt		
	ORDER INCLUDES				
	<u>GD55</u>				
	Medical Document Manager CRR <i>D</i> Name: Tina Barnikow				
	1 OLAI PTICE: \$55.00				Next
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	Rush including drug te	sts, immunization rec	cord review and verifica	tions of employment/educ	cation/professional license.
	. ● No, thank you, do not ru	sn my order.			
L					

CB CastleBranch			Confact Us Logout	
Place Order:				
			5 6	
ORDER CONFIRMATION				
Your order has been submitted.	Thank you.			
Next Steps:	Print Continuation Pag	je		
<ol> <li>Click "Next" below to access your myCB account to dele</li> <li>You will receive an email with your order confirmation at</li> <li>Your order confirmation can also be accessed through y</li> <li>Log in to your myCB account by going to castlebranch c</li> <li>password OR download the myCB app to your smartphone.</li> <li>Explore myCB for the other value-add features and bein</li> <li>For assistance, access the Need Help? menu within your</li> </ol>	emine if you have additional ite tached. our myCB Document Center. om and entering your usernam From within your account you effis provided to you by myCB. ar account or support.	ems to complete. he ( the email address used d can take action on any pendi	uring order placement) and your secure ng requirements and view final results.	
	Next			
Once your order is submitted, you will	receive a confi	irmation emai	l.	
From: Service Desk <servicedesk.cu@castlebranch.com> Sent: Friday, April 27, 2018 5:26 PM To: Tina Subject: myCB - Order Confirmation</servicedesk.cu@castlebranch.com>				
Tina				
You have successfully submitted your order for Grand Valley State Un Please go to <u>castlebranch.com</u> to log into your account by entering you iPhone App From within your account you can complete any pending requirements.	iversity, ur username (the email address us , view order status, and access you	sed during order placement) and ur final results.	l your secure password OR download the myCB app to your s	smartphone.
Summary of Your Rights Under the Fair Credit Reporting Act For assistance, use the Need Helf menu within your account. Thank you, Your Service Desk Team				
HOW TO FIND YOUR HEALTH COMPLIA	ANCE REQUIRE	EMENTS:		
Follow the instructions in the email to account. You may also choose to down those devices.	log into your a nload the myCl	ccount using t B app to your	he email provided when cro phone or tablet and log in u	eating your using either of
Your "To Do List" will be displayed:				

Compliance Tracker GD55 13 Requirements		INCOMPLET	E
Due Date - 10/26/2018 Please use the Need Help? menu to request assistance from th	e CastleBranch Service Desk should you have que	stions on compl	eting your requireme
Requirement	Da	te Due	STATUS
🕕 1. Measles (Rubeola), Mumps, & Rubella	10/2	26/2018	Incomplete
4 2. Varicella (Chicken Pox)	10/2	26/2018	Incomplete
3. Hepatitis B	10/2	26/2018	Incomplete
4. Tuberculosis (TB)	10/2	26/2018	. Incomplete
5. Tetanus	10/2	26/2018	Incomplete
6. CPR Certification	10/2	26/2018	Incomplete
7. Health Insurance Acknowledgment	10/2	26/2018	
8. Influenza (Elu)	10/2	26/2018	
9 Health and Immunization Form	10/2	26/2018	
10 GVSU Training Modules	10/2	26/2018	
11 Background Check	10/2	26/2018	
	10/2	6/2019	
	10/2		
'+" sign next to each item on the To on or action.	Do List to see the full desc	ription c	of the requir
'+" sign next to each item on the To on or action.	Do List to see the full desc	ription c	of the requir
"+" sign next to each item on the To on or action.	Do List to see the full desc	ription c	of the requir
<ul> <li>+" sign next to each item on the Topon or action.</li> <li>5. Tetanus</li> <li>5. Tetanus</li> <li>Immunizations must be documented on the GVSU Health and Immunization Form signed by a health care provider OR copy of a state immunization registry or patient portal document.</li> <li>ONE of the following is required:         <ul> <li>Tetanus, Diphtheria &amp; Pertussis (TdaP) vaccination within the past 10 years</li> <li>OR</li> <li>Tetanus and Diphtheria (Td) vaccination administered within the past 10 years</li> <li>AND Tetanus, Diphtheria, &amp; Pertussis (TdaP) vaccination administered after age 11.</li> </ul> </li> </ul>	Do List to see the full desc	ription c	of the requir

## UPLOADING DOCUMENTS:

You may upload documents several ways.

- Begin by saving documents or pictures, to your computer
- In your CastleBranch account (called a myCB account)
  - Click on "Document Center" on the left side of your screen; then click "My Documents"



• You will be given the option to upload files to the Document Center.

Upload File

• When you click on "Upload File" it will allow you to browse your computer and select files that you want to upload to your CastleBranch Document Center.

When you are ready to submit document(s) for a health compliance requirement:

Scroll down through the description until you see the blue "Browse" box.

 If you select the browse next to "My Documents" it will search all of the documents that you have uploaded to your CastleBranch Document Center"

OR

- If you select the browse next to "Your Computer" it will scan your computer to find the document(s) to upload for the requirement.
- Be sure to attach all documents needed for the requirement before submitted. Ex: For the 2 Step TB screening process you must upload BOTH TB tests before you submit; for Hepatitis B you must upload both documentation of the 3 Hepatitis B vaccines and the initial Hepatitis B titer.

Attach a file from either:	Desuuss	
My Documents	Browse	
Your computer or flash drive	Browse	(Acceptable File Types: .pdf, .png, .jpg, .gif, .xls, .docx, .doc)
Or download the fax/mail requ	uirement cover p	age Download

Once a document is attached, an orange submit box will appear. Click on this when you are ready to submit.

If a specific form is needed for the require description.	ement, there will be a link to download the form at the end of the					
<ul> <li>7. Health Insurance Acknow</li> </ul>	pwledgment					
Download, print, comp Insurance Acknowledg	lete, and submit the Health gment.					
Download File						
After you click submit; the item will show "In Process" until the upload is complete.						
🕀 3. Hepatitis B	Due Date: 04/27/2018 🕑 In Process					
You may continue to the next health com	pliance requirement to submit document(s).					
Once each upload is complete, the item v complete.	vill show "Pending Review" until the CastleBranch review is					
🕕 2. Varicella (Chicken Pox)	Due Date: 04/27/2018 Pending Review					
If accepted, your To Do List will show the	item as "Complete" in green.					
🕀 5. Tetanus	Complete					
If a document is not accepted, the To Do	List will show the item as "Rejected" in red.					
10. Epigeum Code Responsible Conduct of Res	earch Due Date: 04/27/2018 <b>Rejected</b>					
You will also receive an email with an exp message center in you myCB account.	lanation of the rejection, and there will be a message in your					
	MESSAGES (0)					
	C TO-DO LISTS					
Once all required documents have been s "Complete" and your To Do List will indicate	submitted, and accepted, each health compliance item will reflect ate that you are compliant.					

То-	-Do Lists				
Cl	ick the blue plus signs below to expand you	ır requirements.			
e	Clinical Requirements GA32 Staff OVPH Due Date - 04/27/2018 Please use the Need Help? menu to request assi	l istance from the CastleBranch Service Desk should you he	COMPL ave questions on c	IANT	
	Requirement	,	Date Due	STATUS	
	🕕 1. Measles (Rubeola), Mumps, & Rubella			Complete	
	🕂 2. Varicella (Chicken Pox)			Complete	
	🕀 3. Hepatitis B			Complete	
	4. Tuberculosis (TB)			Complete	
	🕀 5. Tetanus			Complete	
If you have a h test, you will r If you have heal	eceive emails in advance inf eceive emails in advance inf Ith compliance requirements t	forming you of the upcoming du hat are overdue, your account wil	eriodically Je date. I reflect "O	y such as an ann	will
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8	y s. note coosts (nor	UVE ONE	002172010		
NEED ASSISTA	NCE?				
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m	y (B)	A 🖙 Castle	Branc	<b>h</b> Solutio	n.
		N	eed H	lelp?	
Under the Bro many commor	wse Help Topics is a Studen n questions.	t Frequently Asked Questions (	FAQ) docı	ument with ansv	vers to

CastleBranch Student FAQs					
Sections					
Click to havigate directly to the section listed					
New to CastleBranch     Mapaging Your Account	CPR Certification				
Criminal Background Check	Findemaint				
Drug Test	Adult and Child Abuse Registry				
Clinical Requirements or Compliance Tracker	Additional Questions				
Under Video FAQ CastleBranch has posted multiple videos that answ how to navigate the site.	ver common questions and/or show you				
A CastleBranch Solution.	Support Videos				
Search Support Videos	Search				
Four may also contact Castlebranch unectly either	by phone of Live Chat.				
A CastleBranch Solution.	Phone				
Our team looks forward to taking your call. Please have your username (email add Call: 888.666.7788 <b>Hours of Operation:</b> Monday - Thursday: 8am - 10pm EDT Friday: 8am - 6:30pm EDT Sunday: 10am - 6:30pm EDT	dress) available.				
Should you experience an extended wait time, please use our Chat with Us option or contact our Service Desk 24/7. We will record and respond to your inquiry within 2 business hours.					
All communication information will be available within your Service History.  STILL HAVE OUESTIONS?					
Contact the GVSU Health Compliance Office at 616-331-5812. You r Compliance Officer at <u>olsonwa@gvsu.edu</u> or 616-331-5867.	may also contact Warren Olson, Health				