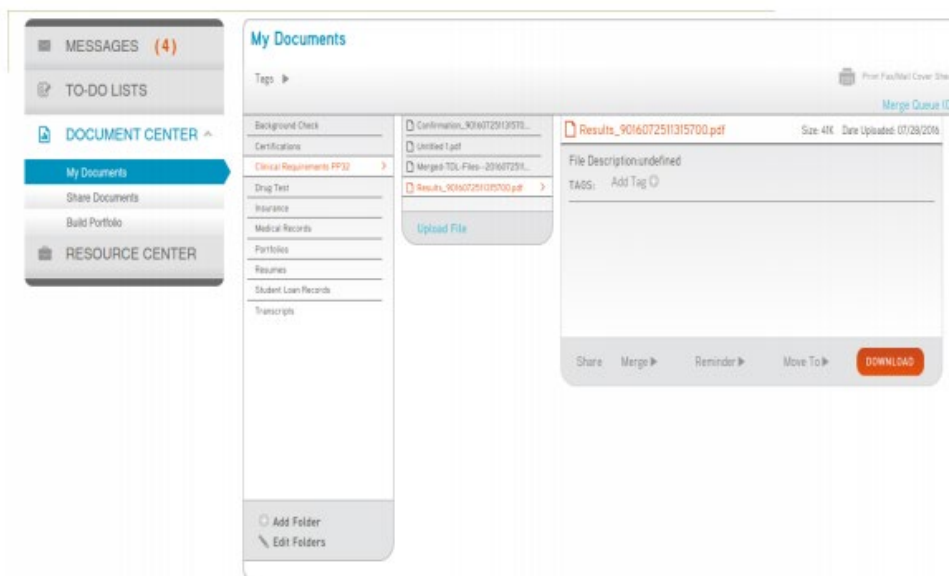# Downloading To-Do List (TDL) Summary from CastleBranch

1. Sign in to myCB.CastleBranch.com

2. Hover over **Document Center** and then click on **My Documents**.

3. A list of folders should expand to the right. **Click the folder with the same name as
your tracker** - e.g. Clinical Requirements Fall 2016

4. Within this list, click on the file titled '**Results_90**........'

5. Once the file name is selected, click the orange **download** button.
This is your To-Do-List Summary Report.

NOTE:

- **The clinical requirements tracker is associated with the semester you *started* your clinical program and will not change**, provided you remain an active clinical student. Each semester you will look for this same folder to find your TDL Summary Report.

- Students who have changed programs or have multiple trackers need to ensure they are looking at the correct tracker for the TDL Summary Report.

- **If you have trouble locating the TDL Summary Report, contact CastleBranch for assistance**:

Help Desk

Call
888.666.7788

Hours of Operation
Monday-Thursday 8am - 8pm ET
Friday: 8am - 6:30pm ET
Sunday: 10am - 6:30pm ET

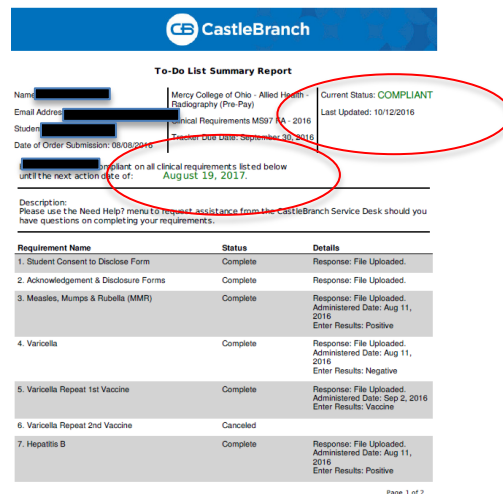**Office: Compliance and Risk Management**
Date: 6/15/21
Information: for all clinical students

Uploading TDL Summary to Canvas

Your professor may ask you to upload the *TDL Summary* to the clinical course shell in Canvas to show that your health requirements are **current,** and you are eligible to attend clinicals.

- The Status must show "*Compliant*" and **ALL ITEMS** must be "*Complete*" (or "*Incomplete*" for items not yet due). "Compliant" is a *temporary* status; additional vaccines may still be incomplete if you are in a series, and some requirements (BLS/CPR certification, TB, influenza, etc.) are subject to renewal.

- **If any items show rejected or pending, you are not compliant**. **If you have items pending review, contact CastleBranch or your program administrator for assistance.**

- The *TDL Summary* will indicate the next date a requirement becomes due. CastleBranch will send email reminders before renewal items are due; **the space to upload renewal documents will not appear until 21 days before the current document expires.** An updated *TDL Summary* may be required whenever the "compliant until" date changes.

- If your professor indicates that you are *not complete* for the semester, you likely have one or more items which will become due *during* the semester.
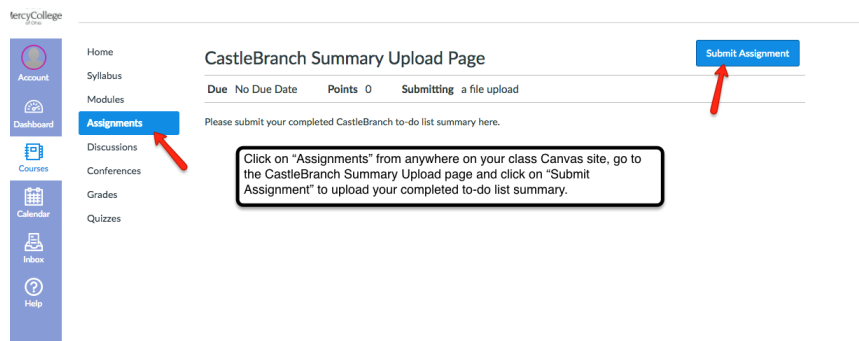
Documents uploaded to CastleBranch within one week of the deadline are not eligible for expedited processing except for instances such as the second or third vaccine of a series that is in process and cannot be completed early.

- Sign into your Clinical Course CANVAS account, select on "Assignments" on the left-hand side, go to the CastleBranch Summary Upload page and click on "Submit Assignment" to upload your PDF file.

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