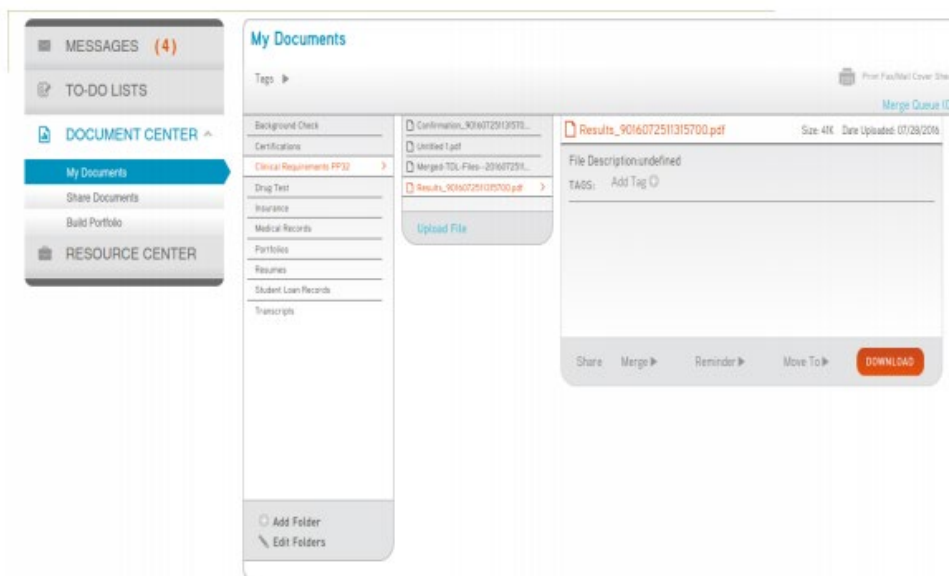


Downloading To-Do List (TDL) Summary from CastleBranch

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

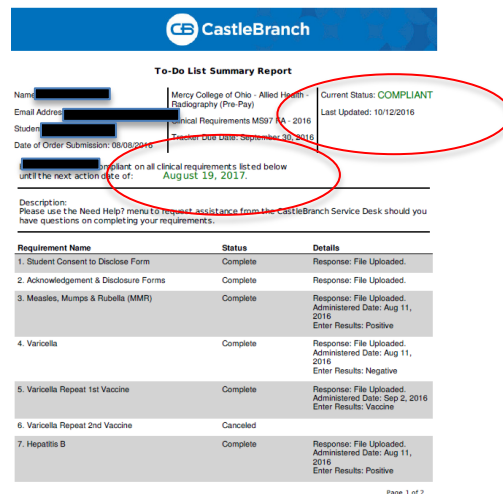
Information: for all clinical students

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.

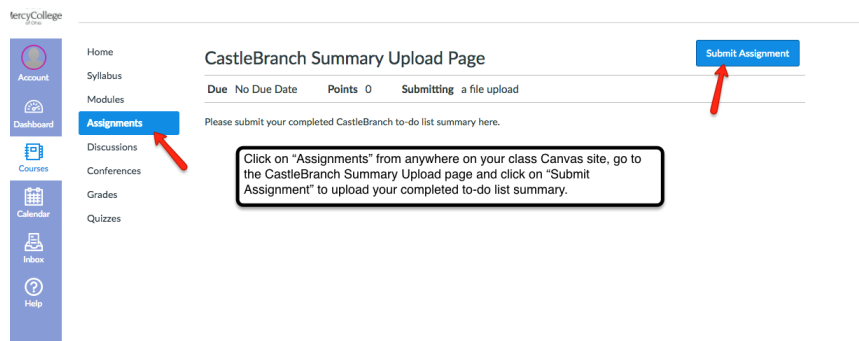
Documents uploaded to CastleBranch within one week of the deadline are not eligible for expedited processing except for instances such as the second or third vaccine of a series that is in process and cannot be completed early.



The screenshot shows a 'To-Do List Summary Report' from CastleBranch. The report includes personal information, a current status of 'COMPLIANT', and a table of requirements. A red circle highlights the 'COMPLIANT' status and the 'Last Updated' date. Another red circle highlights the 'Compliant on all clinical requirements' message and the 'next action due of' date.

Requirement Name	Status	Details
1. Student Consent & Disclosure Form	Complete	Response: File Uploaded.
2. Acknowledgement & Disclosure Forms	Complete	Response: File Uploaded.
3. Measles, Mumps & Rubella (MMR)	Complete	Response: File Uploaded. Administered Date: Aug 11, 2016. Enter Results: Positive
4. Varicella	Complete	Response: File Uploaded. Administered Date: Aug 11, 2016. Enter Results: Negative
5. Varicella Repeat 1st Vaccine	Complete	Response: File Uploaded. Administered Date: Sep 2, 2016. Enter Results: Vaccine
6. Varicella Repeat 2nd Vaccine	Canceled	
7. Hepatitis B	Complete	Response: File Uploaded. Administered Date: Aug 11, 2016. Enter Results: Positive

- 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.



The screenshot shows the Canvas interface. On the left sidebar, the 'Assignments' menu item is highlighted with a red arrow. In the main content area, the 'CastleBranch Summary Upload Page' is displayed. A 'Submit Assignment' button is highlighted with a red arrow. A text box provides instructions: 'Click on "Assignments" from anywhere on your class Canvas site, go to the CastleBranch Summary Upload page and click on "Submit Assignment" to upload your completed to-do list summary.'

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