Uploading Documents to CastleBranch

MercyCollege of Ohio

1. **SCANNING and uploading PDF files is the PREFERRED method of submitting documents to CastleBranch, because:**

   - You have control over the process
   - You can verify the document has been submitted
   - PDF files are easier to read, especially if the view must be enlarged to read details
   - Backup copies of the documents are stored in the My Documents area of your account.
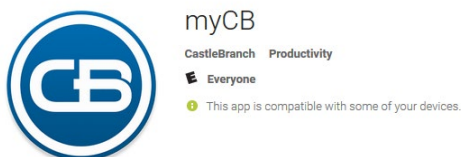
   If you do not have access to a standalone scanner, **the BEST option is to use a smartphone scanning app**. If your phone does not have a scanning app already installed, go to the appropriate app store for your phone and search for "document scanner" applications. Scanning with your phone is easy and convenient and the app has useful applications outside of CastleBranch.

   To scan and upload a document using your phone:

   - Photograph/scan a one-page or multi-page document, adjust it for maximum legibility, then save it as a PDF file (use a descriptive name so you can remember what it is)
   - Email to your personal email address
   - From your email, save the attachment to your hard drive or flash drive
   - Sign into your CastleBranch account, locate the saved PDF file, and upload directly to the requirement

   TIP: make sure your documents have a descriptive and specific name, as a copy will be saved in the My Documents section of your CastleBranch account. This is helpful if you ever need to resubmit documents as they will be easier to locate if they are named properly. You also have access to My Documents even after your account is archived when you graduate or leave (if your tracker is archived you will not be able to access documents you have uploaded to it).

2. **Using the myCB app through CastleBranch**

   myCB
   CastleBranch   Productivity
   Everyone
   This app is compatible with some of your devices.

   The myCB app allows you to photograph a document and upload directly to the requirement in CastleBranch – HOWEVER – **photographs can become blurry and difficulty to read**, causing the document to be rejected, which causes unnecessary frustration for the student. Even if you provide the correct information, it will be rejected if it is not legible because it cannot be verified.

3. **FAXING to CastleBranch**

   FAXING is time consuming, and is not ideal:

   - The correct cover page for each document must be printed from your account
   - If items are rejected, a NEW cover page must be printed (the bar code changes)
   - Documents may not attach to your account right away

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