

MyCB Student Instruction Manual



A  CastleBranch Solution.

MyCB, a CastleBranch solution, offers an easy-to-use, secure, online system that allows the NEOMED Credentialing staff to easily manage immunization records and other required student credential documentation. CastleBranch has provided industry leading compliance management solutions for nearly two decades. Students mail, fax, or upload their requirements directly to their myCB account for secure online storage and easy access by the student and NEOMED. The CastleBranch Quality Assurance Team reviews each record for authenticity and contacts the student if any issues arise. This self-service system provides a complete record of a student's submitted immunization requirements.

New Students

If a new student has not yet matriculated, NEOMED requires they possess, and record updated immunizations. The list of required immunizations is located in the [Immunization Requirement Policy](#). Students must be sure to complete all immunizations, other than the Influenza vaccine, PRIOR to the start of their fall courses. Once a student has proof of their immunizations record, they may upload their document(s) to [MyCB](#).

Students who do not complete their immunization requirements by the start of their program are subject to removal from the program.

For immunizations that have more than one step (ex. Hep B Series) and a required amount of time between steps, please follow the CDC timing recommendations. Students must have progressed as far as they can with all required immunizations in order to start and continue in their program. Students making progress in line with the CDC timing requirements, are required to continue to progress forward with immunizations in a timely manner until they are complete. If timely progress with incomplete immunizations is not made once the academic program has begun, students may be removed from participation in clinical educational experiences.

Current Students

Throughout their enrollment, students will record up-to-date immunizations as additional vaccinations or labs are required. Yearly requirements include an updated Influenza vaccination and Tuberculin testing by October 1. The list of required immunizations is located in the [Immunization Requirement Policy](#).

Welcome to myCB!

When you place your initial order, you will be creating your secure myCB account. The information stored in your myCB account is yours and available to you even after you leave NEOMED.

From within your myCB, you will be able to:

- ✓ Manage credentialing requirements specific to your programs
- ✓ View your verifications and uploads
- ✓ Upload and store important documents and records
- ✓ Download and print your Compliance Summary (Immunization Records)
- ✓ Send or share your records

By creating a myCB account, you are agreeing to pay for the service provided by CastleBranch. Your myCB account is paid for with a one-time fee that is included in your first-year student fees. If you choose not to attend NEOMED after you have created an account in myCB, you will be sent an invoice for \$27.50 to pay for your myCB account.

TO CREATE AN ACCOUNT (PLACE AN ORDER)

GO TO mycb.castlebranch.com

[Watch the Video](#)

In the “Place Order” field, enter the package code specific to your cohort. This code is sent to you in a welcome email from myCB (Castlebranch) and should look something like TX94neo23 for example.

myCB
A CastleBranch Solution.

User name
hint: email address

Password

Forgot Password? LOGIN

Place Order Package Code GO

Package code

HELP
SUPPORT
SUMMARY OF RIGHTS

Available on the App Store

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About Terms Security Privacy

myCB
A CastleBranch Solution.

Please Review

Northeast Ohio Medical University - Medical Admissions includes the following package contents:

Package: TX94demo
Medical Document Manager CRR

Package Cost: \$0.00

Additional Information
This is a demo code and not for applicant use.

Click the button below to continue your order and create your myCB account. You will access your account to manage your order and view your results. If you already have a myCB account, you will have the option to log in.

I have read, understand and agree to the Terms and Conditions of Use.

Continue

Please review the information about your order, check the box and Continue. Your account with myCB is paid for by your student fees. You won't be asked for money from CastleBranch.

If you create an account and decide not to attend NEOMED, you will receive a bill for \$27.50 to pay for your myCB account.

Place Order:



PERSONAL INFORMATION

First Name:

Middle Name:

Last Name:

Suffix:

Phone:

All Phone:

Email Address:

Confirm Email:

Country:

Address 1:

Address 2:

City:

State:

Zip Code:

Important: The email address you provide will be used for important order communication. Please enter your valid email address and use for an immediate confirmation email after submitting your order. If you do not see your confirmation email please check your SPAM or Junk folder.

Add in your personal information.

Use your NEOMED email address

PERSONAL IDENTIFIERS

Social Security Number:

Date of Birth:

Sex: Female Male

If you are not a US citizen and therefore do not have a Social Security Number, please enter 111-11-1111 to proceed with your order placement.

Instead of putting in your social security number, type in: 111-11-1111

STUDENT INFORMATION

Classification: Undergraduate Graduate

Degree/Certification:

Expected Date of Graduation:

Classification:

Choose a classification

*Indicates required information

Next

Use your NEOMED email address

Create a memorable password

Place Order:



CastleBranch is committed to securely storing your information. As shown below, your myCB username is your email address. Please create a password. These credentials will be required to access your account in the future.

*All of the form fields are required

Email Address:

This email address is your username.

*Username:

Password:

*Password:

Passwords are case-sensitive and must be at least 8 characters long.

*Confirm:

Create Account

Continue to next page

Place Order:



Go Back

MEDICAL DOCUMENT MANAGER CRR

Name *

Georgina Watkins

* Indicates required information

Next

Check for errors

Continue to next page

Place Order:



Go Back

ORDER REVIEW

School Name: Northeast Ohio Medical University - Medical Admissions
CAC: TX94

Personal Information:
Your Name: Georgina Watkins
DOB: 05-12-1987
SSN: 111-11-1111

ORDER INCLUDES

TX94demo
Medical Document Manager CRR
Name: Georgina Watkins

Total Price: \$0.00

Next

Place Order:



ORDER CONFIRMATION

Thank you.

Your order has been submitted.

[Print Confirmation Page](#)

Next Steps:

1. Click "Next" below to access your myCB account to determine if you have additional items to complete.
2. You will receive an email with your order confirmation attached.
3. Your order confirmation can also be accessed through your myCB Document Center.
4. Log in to your myCB account by going to [castlebranch.com](#) and entering your username (the email address used during order placement) and your secure password OR download the myCB app to your smartphone. From within your account you can take action on any pending requirements and view final results.
5. Explore myCB for the other value-add features and benefits provided to you by myCB.
6. For assistance, access the Need Help? menu within your account or [support](#).

[Next](#)

You will receive an email with your order confirmation

Place Order:



ORDER CONFIRMATION

Thank you.

Your order has been submitted.

[Print Confirmation Page](#)

Next Steps:

1. Click "Next" below to access your myCB account to determine if you have additional items to complete.
2. You will receive an email with your order confirmation attached.
3. Your order confirmation can also be accessed through your myCB Document Center.
4. Log in to your myCB account by going to [castlebranch.com](#) and entering your username (the email address used during order placement) and your secure password OR download the myCB app to your smartphone. From within your account you can take action on any pending requirements and view final results.
5. Explore myCB for the other value-add features and benefits provided to you by myCB.
6. For assistance, access the Need Help? menu within your account or [support](#).

[Next](#)

Now you can start to upload your documents and attach them to your required immunizations.

TO UPLOAD DOCUMENTS

The screenshot shows the myCB user interface for Georgina Watkins. The top navigation bar includes the user's name and profile picture, the myCB logo, and the text "A CastleBranch Solution." with a "Need Help?" link. Below the navigation bar, there is a notification about documentation review times and a link to new assistance videos. The main content area is divided into two sections: "MESSAGES (0)", "TO-DO LISTS", "DOCUMENT CENTER", and "RESOURCE CENTER". The "DOCUMENT CENTER" is highlighted with a red arrow. The "To-Do Lists" section shows a list of requirements for "Clinical Requirements TX94" with a status of "INCOMPLETE". The requirements are listed in a table with columns for Requirement, Date Due, and STATUS. The requirements are: 1. Measles, Mumps, Rubella (MMR), 2. Varicella (Chicken Pox), 3. Hepatitis B, 4. Tuberculosis (TB), 5. Tetanus, Diphtheria, & Pertussis (Tdap), 6. Influenza (Flu), and 7. CPR Certification. All requirements are marked as "Incomplete".

Upload documents into your document center for use later or put them directly into your requirements on the To-Do List.

To upload a document into the document center:

Click open the document center

Choose My Documents

Choose where you want to put it. Ex. Medical Records

Click Upload File and choose the file from your computer

The screenshot shows the myCB user interface for Georgina Watkins, specifically the "My Documents" section. The top navigation bar is the same as in the previous screenshot. The main content area is divided into two sections: "MESSAGES (0)", "TO-DO LISTS", "DOCUMENT CENTER", and "RESOURCE CENTER". The "DOCUMENT CENTER" is highlighted with a red arrow. The "My Documents" section shows a list of document categories: Certifications, Clinical Requirements TX94, Insurance, Medical Records, Portfolios, Resumes, Student Loan Records, and Transcripts. The "Medical Records" category is highlighted with a red arrow. Below the list of categories, there is an "Upload File" button, which is also highlighted with a red arrow. The "Upload File" button is located in the bottom right corner of the "My Documents" section.

Choose where you want to put it

Upload file

Files uploaded to the "Document Center" must be PDF, JPG/JPEG, PNG, GIF, XLS, DOCX and DOC. All files must be under 5 MB.

TO ATTACH A DOCUMENT TO A REQUIREMENT

Submitted documentation typically takes up to 48 hours to review (excluding weekends). Once reviewed, your documentation will be marked "COMPLETE" or "REJECTED". If your documentation is rejected, you can view the reason by selecting the rejected requirement, and reviewing the paragraph directly below the requirement name. If you have questions regarding a specific requirement(s) we invite you to contact our User Support Team at 888-866-7788, Option 1.

Exciting news! CastleBranch now offers assistance videos to better assist you with navigating your myCB account! Click [here](#) to access the new videos!

MESSAGES (0)

TO-DO LISTS

DOCUMENT CENTER

RESOURCE CENTER

To-Do Lists

Click the blue plus signs below to expand your requirements.

Clinical Requirements TX94 8 Requirements **INCOMPLETE**

Please use the Need Help? menu to request assistance from the CastleBranch Service Desk should you have questions on completing your requirements.

Requirement	Date Due	STATUS
1. Measles, Mumps, Rubella (MMR)		Incomplete
2. Varicella (Chicken Pox)		Incomplete
3. Hepatitis B		Incomplete
4. Tuberculosis (Tb)		Incomplete
5. Tetanus, Diphtheria, & Pertussis (Tdap)		Incomplete
6. Influenza (Flu)		Incomplete
7. CPR Certification		Incomplete
8. Ohio Pharmacy Intern License		Incomplete

Messages are found here

In the To-Do List, click on the requirement you want to attach a document to.

[Watch the explanation video](#)



Submitted documentation typically takes up to 48 hours to review (excluding weekends). Once reviewed, your documentation will be marked "COMPLETE" or "REJECTED". If your documentation is rejected, you can view the reason by selecting the rejected requirement, and reviewing the paragraph directly below the requirement name. If you have questions regarding a specific requirement(s) we invite you to contact our User Support Team at 888-866-7788, Option 1.

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MESSAGES (0)

TO-DO LISTS

DOCUMENT CENTER

RESOURCE CENTER

To-Do Lists

Click the blue plus signs below to expand your requirements.

Clinical Requirements TX94 8 Requirements **INCOMPLETE**

Please use the Need Help? menu to request assistance from the CastleBranch Service Desk should you have questions on completing your requirements.

Requirement	Date Due	STATUS
1. Measles, Mumps, Rubella (MMR)		Incomplete

One of the following is required:

- 2 vaccinations OR
- Positive antibody titer (any result documented by a medical professional)

If your series is in process, submit where you are in the series, and new alerts will be created for you to complete the series.

If your titer was negative or equivocal, new alerts will be created for you to receive 1 booster vaccine (administered after your titer).

If declaration waiver is submitted to this requirement, it will be rejected and you will be referred to the NEOMED Credentialing staff for approval.

Attach a file from either:

- My Documents [Browse](#)
- Your computer or flash drive [Browse](#) (Acceptable File Types: pdf, png, jpg, gif, xls, docx, doc)

Or download the fax/mail requirement cover page [Download](#)

A box will open giving you an explanation of the requirement.

The option to upload from My Documents or Browse your computer.

Choose the option you want to use, find the document you want to upload and upload.

Please allow 1 to 2 business days for your submission to be reviewed by the appropriate party. Once your requirement has been approved, you will see the status of your requirement item change from a yellow "Pending Review" to a green "Complete Icon."

If an upload cannot be verified, the tab will turn to Red and a message will be sent to you with an explanation of the problem.

HOW TO UPDATE A DOCUMENT

If you have requirements that need to be updated periodically, a “Renewal” requirement will be added to your tracker 21 days before your next submission is due. Simply upload your new document into the renewal requirement.

[Watch the Update a Document Video](#)

HOW TO DOWNLOAD YOUR COMPLIANCE SUMMARY (IMMUNIZATION RECORDS)

Go to your Document Center and open My Documents

Open your Clinical Requirements. You can download individual requirements or a full Compliance Summary.

To download individual requirements, choose the requirements you want from the To download your Compliance Summary, open Results and download your Compliance Summary.

Watch the video on how to download your [Compliance Summary](#)

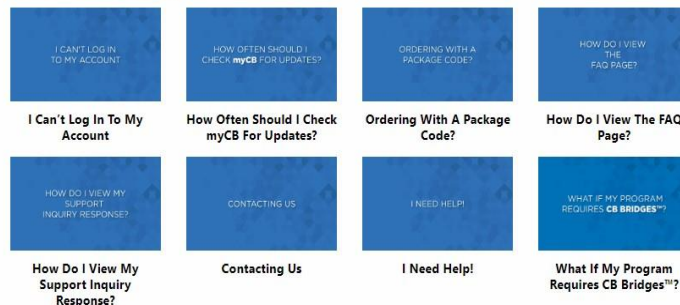
HOW TO GET HELP IF YOU NEED IT.



Clicking on the Need Help? Button opens a box with help choices.

The Video Library has many videos with answers to your questions. Here are just a few:

Account Support



I CAN'T LOG IN TO MY ACCOUNT

If you are having trouble logging into your account, remember that your username is the email address you used to place your initial order. If you can't remember your password, click the "Forgot Password?" link and enter your email address to receive a secure email. The secure email will receive a reset password link. Your password must be at least 8 characters long, include two numbers, one uppercase letter, one lowercase letter and one special character.

Additional questions? Contact the credentialing staff at NEOMED by emailing immunizations@neomed.edu