myRecordTracker®

STUDENT USER GUIDE

EMPOWERED BY VERTICAL SCREEN

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WELCOME

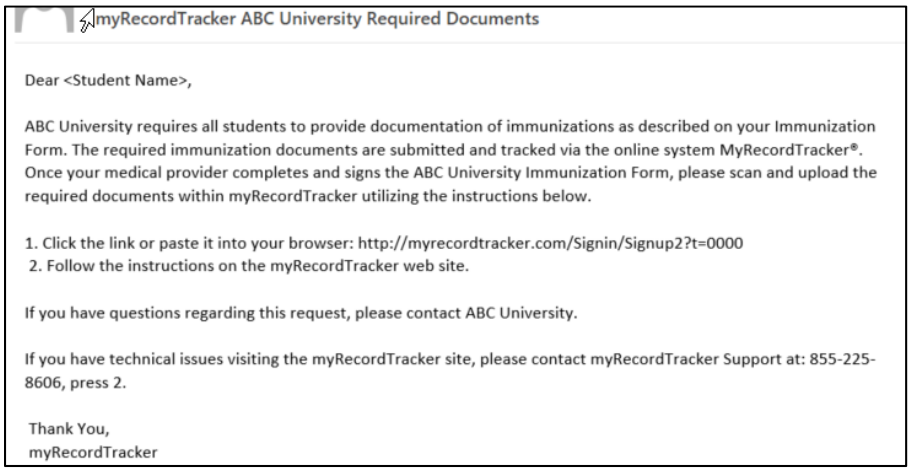
This guide will provide you with clear, concise step-by-step instructions for accessing myRecordTracker® to upload and share documentation pertaining to your student requirements. If you have questions about myRecordTracker, please contact Certiphi Screening's Customer Service or Technical Support at the phone numbers listed below or e-mail myrecordtracker@verticalscreen.com.

Please know the system is mobile friendly.

Customer Service	Technical Support	International Support
855.225.8606, press 2	855.225.8606, press 4	00+1+215-876-6145

STEP 1: INVITATION EMAIL NOTIFICATION

You will receive an email notification from myrecordtracker@verticalscreen.com with important instructions on how to create a myRecordTracker account. The following is a sample email that you will receive to initiate the record fulfillment process.



myRecordTracker ABC University Required Documents

Dear <Student Name>,

ABC University requires all students to provide documentation of immunizations as described on your Immunization Form. The required immunization documents are submitted and tracked via the online system MyRecordTracker®. Once your medical provider completes and signs the ABC University Immunization Form, please scan and upload the required documents within myRecordTracker utilizing the instructions below.

1. Click the link or paste it into your browser: http://myrecordtracker.com/Signin/Signup2?t=0000
2. Follow the instructions on the myRecordTracker web site.

If you have questions regarding this request, please contact ABC University.

If you have technical issues visiting the myRecordTracker site, please contact myRecordTracker Support at: 855-225-8606, press 2.

Thank You,
myRecordTracker

Figure 1: Sample email from administrator

NOTE: In order for you to receive the invitation email from myRecordTracker, the administrator must have uploaded your contact information into the myRecordTracker system. If you are expecting an invitation email to myRecordTracker, but you have not received one, contact the administrator. Please do not share the URL included in the invitation email as it is for your use only. The URL is only available for one-time use to set up your profile and is unique to your particular profile and requirements.

The myRecordTracker invitation email will prompt you to use a link provided to create your myRecordTracker account. When creating your account, please make note of your password, your security questions and security answers for future use. Depending on the administrator's specific requirements, you may be asked to submit payment during this step.

Once you create an account, you can begin fulfilling the program requirements. To fulfill your requirements, you will no longer use the original link provided within the email. Just go to https://www.myrecordtracker.com/.

STEP 2: ACCESSING MYRECORDTRACKER

Once your myRecordTracker account is created, you can log in to gain access to your account by visiting https://www.myrecordtracker.com/ and enter your username, password and PIN.

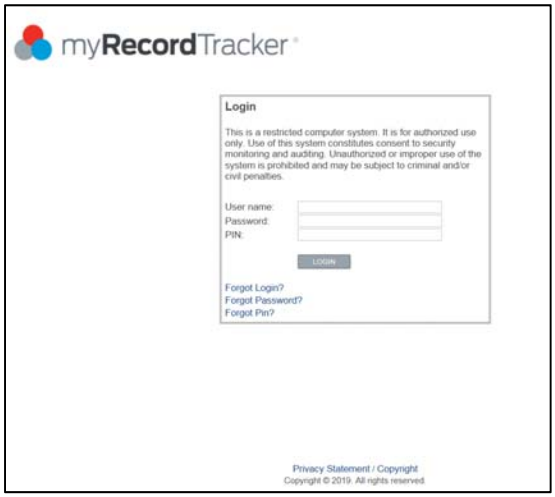


Figure 2: The myRecordTracker login screen

If you previously created your account but you are clicking on the original URL from the invitation email you received, you will see the following screen:

Figure 3: The myRecordTracker login screen with error

Upon logging in, the dashboard illustrates the following to the student:

1. Profile the student has access to
2. The profile due date of when a majority of the requirements are due by
3. Your progress in meeting the profile's requirements
4. The ability to click on the profile to see more in-depth details regarding requirements to fulfill and/or additional due dates

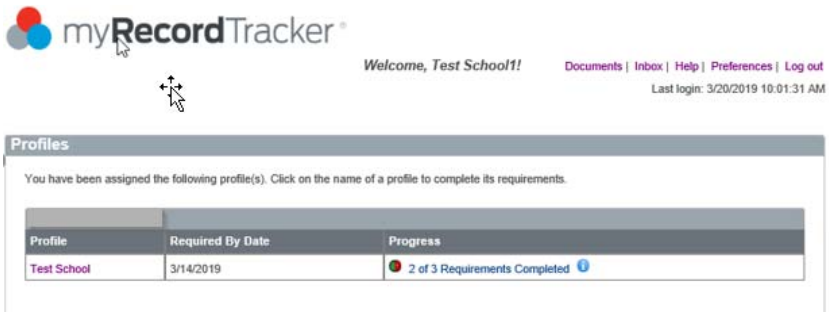


Figure 4: Student dashboard

STEP 3: COMPLETING YOUR MYRECORDTRACKER REQUIREMENTS

Once you click into your profile, you will see documentation your administrator wanted to provide to your attention through the system.

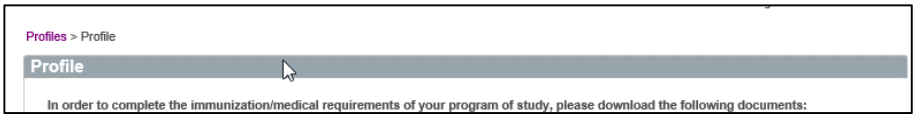


Figure 5: Client Provided Documents Section for Student

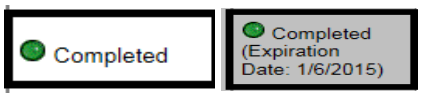
Below the "Profile" section you will see a "Complete My Requirements" section where you will see each requirement within the myRecordTracker profile that requires a response. If a document is required, you will need to upload a completed document in order to meet the requirement. If a question is asked, you are required to provide a response directly into the system. To answer the question, click on the "Not Answered" link shown. Once you have uploaded a required document and/or answer a question, a status of "Pending Approval" will appear. When the requirement is approved, the requirement status will change to "Completed."

NOTE: All requirements must be completed by the required by date indicated within the profile.

For your convenience, below are the various statuses that will show within the system. After that are instructions on how to upload documentation to the system to fulfill your requirements.

Status examples:

- A "Completed" status indicates that the requirement was uploaded and approved. In certain instances, the requirement is listed as "Completed" and includes an expiration date (SEE BELOW).



- A "Pending Approval" status indicates that a requirement was uploaded and is awaiting approval (SEE BELOW). It can take up to 72 hours for your documentation to be reviewed once in pending approval status.

- A "Not Completed" status indicates that the requirement has not yet been completed (SEE BELOW).

- A "Rejected" status indicates that the document was uploaded, but was rejected by either the administrator or Certiphi Screening. If a requirement is rejected, you will receive an email notification that a particular requirement/document was rejected (SEE BELOW).

- A half green/half red status lets you know you completed all of the requirements by the initial due dates for that point in time. Once you are able to complete all the other requirements by their specific due date, the status will update accordingly.

Uploading Documentation

With myRecordTracker being mobile friendly, you can access the system from most devices. There are multiple ways you can upload your required documents into the system. For your convenience, below are a couple of options where once your required document is attached, the requirement will automatically go into "pending" or "complete" status depending on system settings.

1. Upload a Clear Picture of a Document by clicking on the "**Upload**" button
2. Upload a Scanned Copy by clicking on the "**Upload**" button
3. Access a document directly on your smart device and save it to your device. Once saved to your device access the system and upload the document by clicking on the "**Upload**" button.

Due to the technology available today, we do not see this final option used often but Certiphi Screening still offers the ability to complete a fax/mail cover sheet by clicking on the "Fax/Mail" button. This option allows you to fax/mail your document to Certiphi Screening (cover sheet must be included per document). If this option is utilized, once the documentation is received by Certiphi Screening, it takes up to 72 hours to see your documentation attached to your requirement. This is a manual task for the representatives.

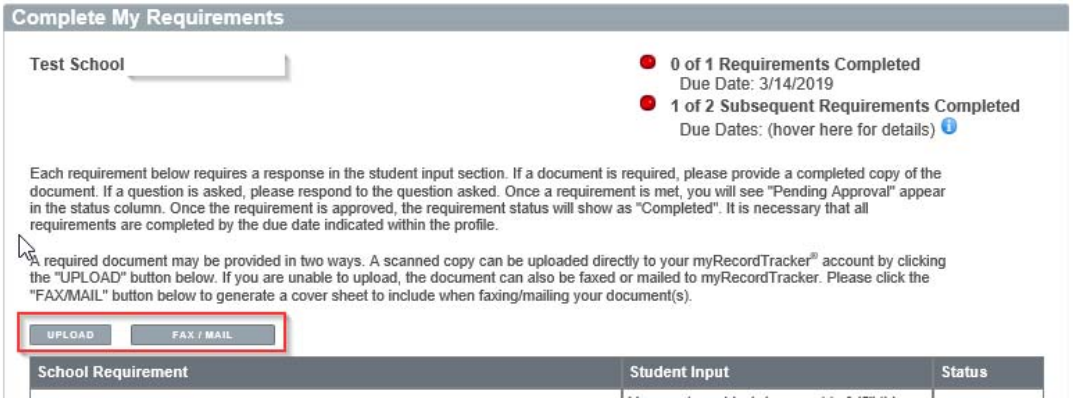


Figure 6: Complete My Requirements Section

By utilizing the "**Upload**" button you are able to attach a single document to one or multiple requirements. You will be directed to the Upload Document section of the website (shown below) .This will allow you to select and submit the necessary document:

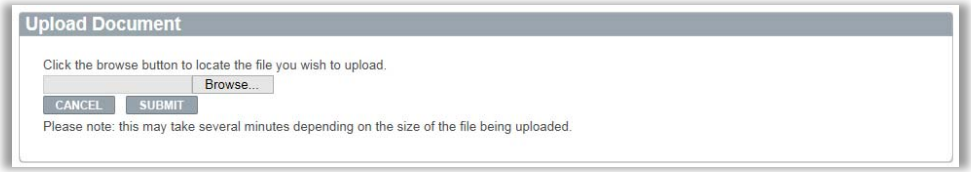


Figure 7: Uploading a Document to Requirement(s)

Once submitted, you will be given the opportunity to do the following (See Screenshots below):

1. Review the document that was uploaded
2. Name the document
3. Allow you to see the names of the unfulfilled requirement(s) that are left
4. You can decide to attach your document to multiple requirements or just one requirement by checking the box to the left of the unfulfilled requirement. **If a requirement requires an expiration date or date of test, you will be prompted to enter the date upon upload. Certiphi Screening will not enter this information into the system.
5. There is no limit to the number of documents you can attach to a single requirement.

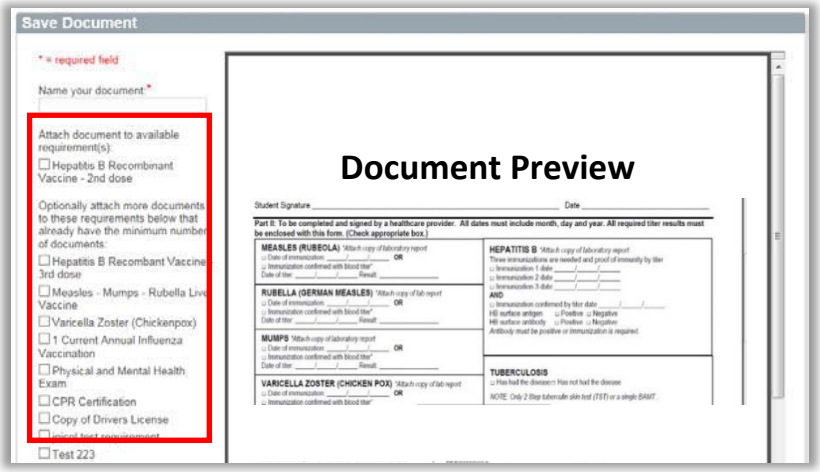


Figure 8: Document Preview

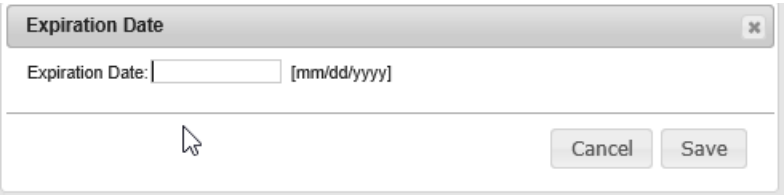


Figure 9: Date Entry dialogue box

School Requirement	Student Input	Status
Influenza *Please submit documentation of a flu shot administered during the current flu season.* *Please set the expiration date 1 year from the administered date of the vaccine.*	You must provide 1 document to fulfill this requirement: Document #1: Influenza test doc UNASSIGN Add Another Document ATTACH Expiration Date: 3/11/2020 Date of Test: 3/11/2019	Pending Approval

Figure10: Student-entered date requirement.

NOTE: You will receive an email notification alerting you to any upcoming document expiration dates. For new documentation, you can utilize the same upload methods available on the site. You must include a new expiration date for any new documentation. The expiration date you enter should follow the instructions provided and must be a future date.

Once a requirement is fulfilled, the requirement is automatically removed from the checklist, leaving only the requirements that are not yet completed. For example, if you upload a document fulfilling the requirements for Hepatitis B and MMR, both of these requirement will no longer appear in the list.

STEP 4: Automated Email Notifications from myRecordTracker®

A. Profile Due Date

Email Notification Language:
To: <Student Name>
Subject: myRecordTracker Notice – Due Date

Dear <Student Name>,
Please note that the due date to provide immunization and other health related documentation was January 1, 2019. If you have not satisfied all the requirements, please log onto https://www.myrecordtracker.com and review your profile. It is important to complete all requirements as soon as possible.

Thank you,
myRecordTracker

B. Individual Requirement Expiration

Email Notification Language:
To: <Student Name>
Subject: myRecordTracker Individual Requirement Expiration Reminder

Dear <Student Name>,
Please note that one or more of your requirement(s) expired on February 6, 2019. Please log onto https://www.myrecordtracker.com and review your profile. It is important to fulfill all requirements as soon as possible.

Thank you,
myRecordTracker

C. Requirement Specific Due Date

Email Notification Language:
To: <Student Name>
Subject: myRecordTracker Notice – Due Date

Dear <Student Name>,
Please note that the due date to provide immunization and other health related documentation was October 1, 2019. If you have not satisfied all the requirements, please log onto https://www.myrecordtracker.com and review your profile. It is important to complete all requirements as soon as possible.

Thank you,
myRecordTracker

D. Requirement Rejected

Email Notification Language:

To: <Student Name>,
Subject: myRecordTracker – An update has been made to your account.

Dear <Student Name>,
An update has been made to your account please log into
https://www.myrecordtracker.com to review.

NOTE: When you log back into your account you will notice the reason for requirement rejection (See Screenshot Below).

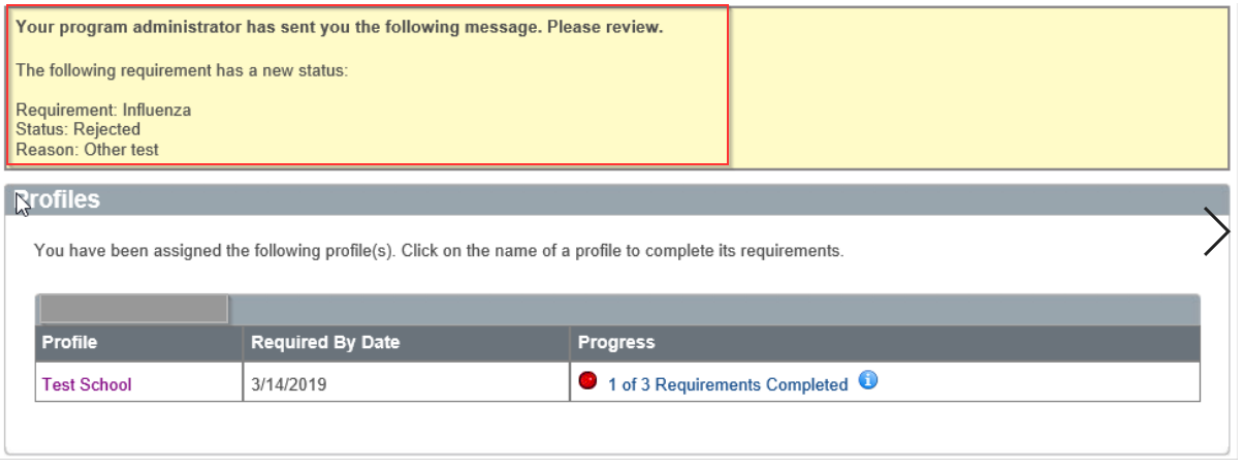


Figure 11: Student logs into account see "Requirement Rejection Notice"

STEP 5: OTHER IMPORTANT INFORMATION ABOUT MYRECORDTRACKER

A. DOCUMENTS SECTION:

If you click the "Documents" link in the upper right-hand corner of the page, you are brought to a page that displays all documents previously uploaded to the site, including the date that the document was uploaded. Through this view, you can go back and review these documents at any time. Each document has a link to the actual form so you can view the original documentation. If any of the documents listed need to be attached to a requirement and isn't already, click on "Attach" next to the requirement. You will then see a list of "Current Available Documents" you will be able to select from.

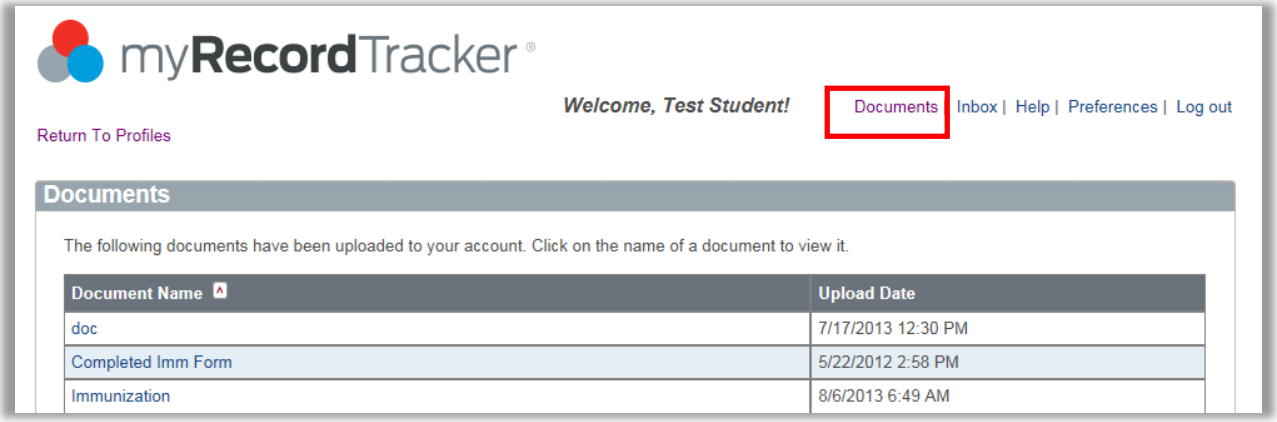


Figure 12: myRecordTracker "Documents" screen

B. INBOX SECTION

If you click the "Inbox" link in the upper right-hand corner of the site, you are brought to an inbox that contains all special instructions and emails sent from the administrator. Administrators and professors use this tool to send emails directly to student.

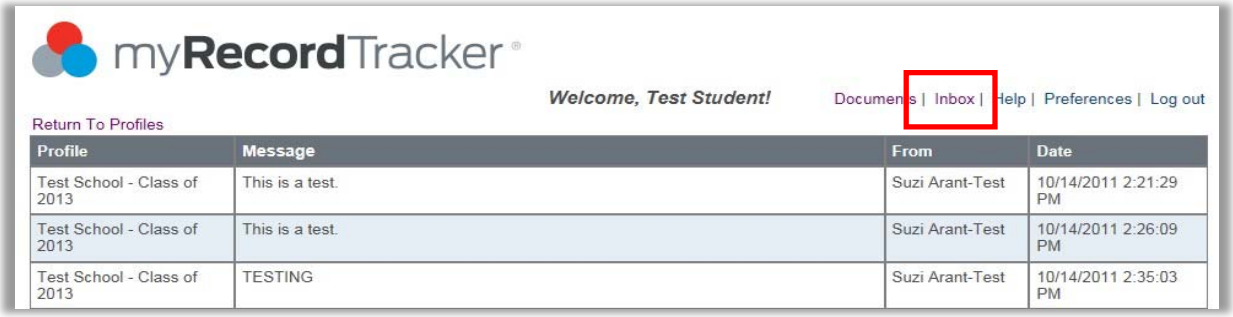


Figure 13: myRecordTracker "Inbox"

C. HELP SECTION

If you click the "Help" link, located next to the "Inbox" link, you will be brought to a page that provides contact information for myRecordTracker customer service and IT support. User guides are also available on the "Help" page.

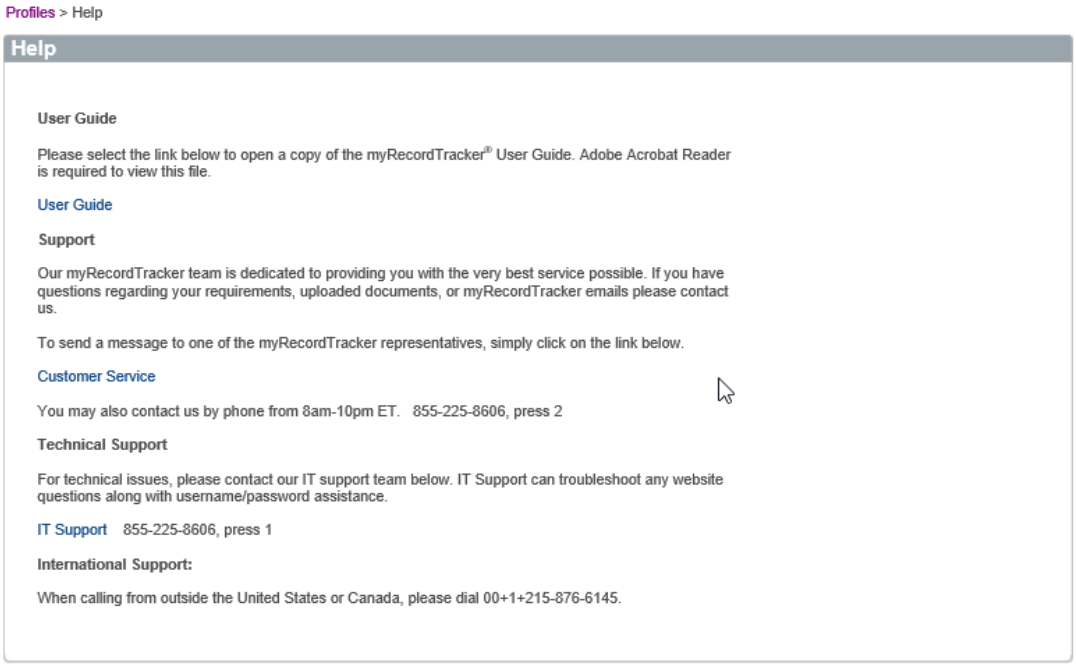


Figure 14: The myRecordTracker "Help"

D. PREFERENCES SECTION

If you click the "Preferences" link in the upper right-hand corner of the page, you will be brought to a page that allows you to update/change your name, email, password, PIN and security question.

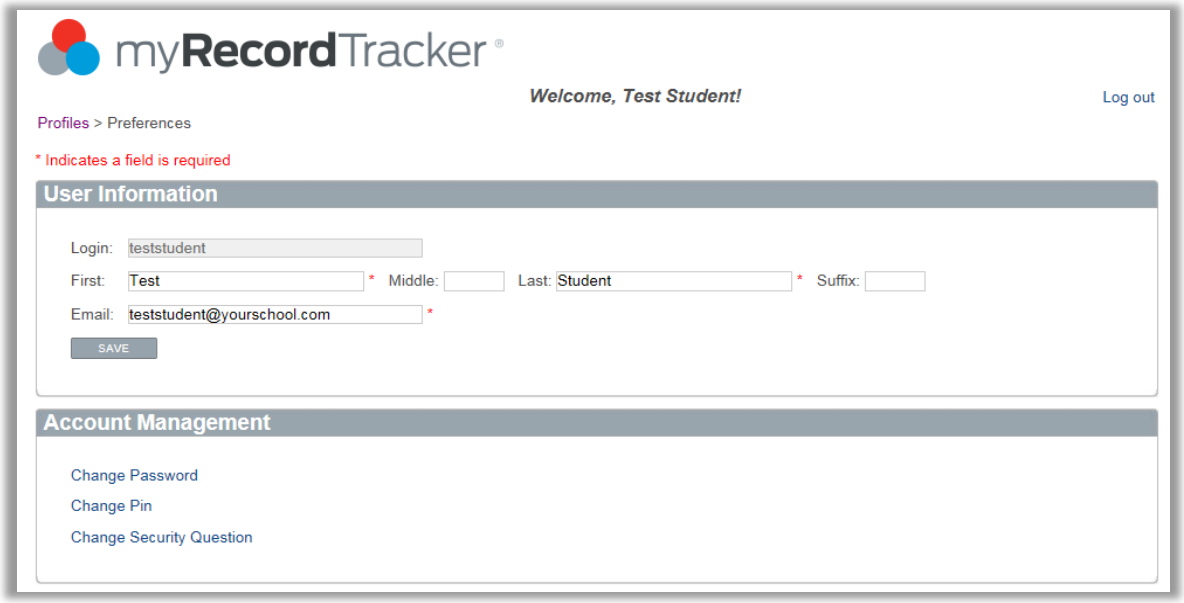


Figure 15: "Preferences" screen

E. DISTRIBUTE INFORMATION TO A THIRD PARTY

For your convenience, below are clear and concise step-by-step instructions for accessing and sharing your myRecordTracker requirements. Students who have questions about using the myRecordTracker Report Delivery Manager should contact Certiphi Screening's Applicant Services team at 1-800-803-9582 or myrecordtracker@verticalscreen.com.

1. Accessing and Steps to utilize the myRecordTracker® Report Delivery Manager

You will want to login to your myRecordTracker® account by visiting https://www.myrecordtracker.com/ and enter your username, password and PIN. Click into your profile.

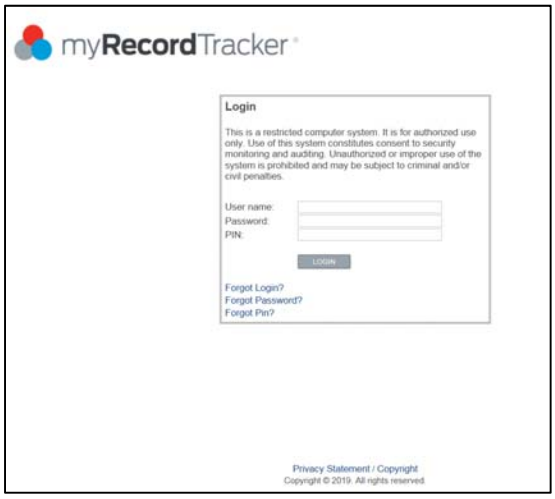


Figure 16: "Login" screen

Scroll to the bottom of the profile (below the "Complete My Requirements" section) to locate the section titled "Distribute My Profile." Clicking the "Deliver" button will begin the report delivery process.

A profile can be shared with whomever you choose. Your school/program of study will automatically receive a copy of all records within myRecordTracker; you do not need to forward your myRecordTracker immunization profile to your school/program of study.

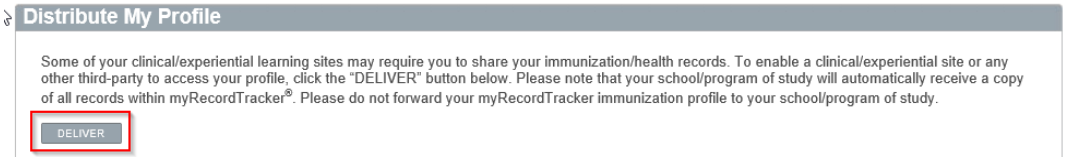


Figure 17: Click the "Deliver" button to distribute your profile

Provide the Recipient's contact information: Last Name, First Name and Organization

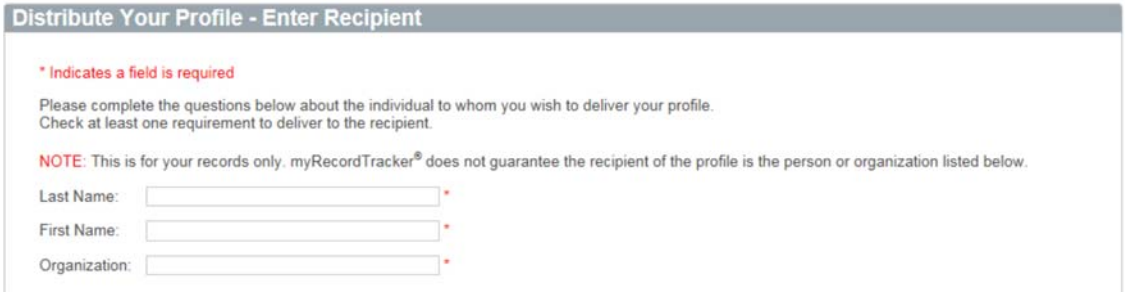


Figure 18: Enter recipient's contact information

You have two options when selecting the requirements to share: You can send all the requirements in your profile, or you can pick and choose specific requirements. To share all the requirements, click the "Select Check All?" check box in the last column on the right. To pick and choose the requirements to share, click the corresponding "Deliver?" check box to the right of the requirement you have selected. Once selected, click on "Submit."

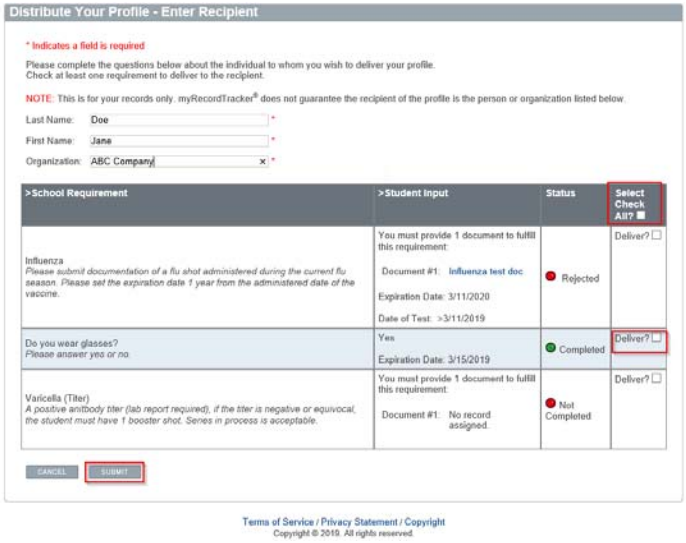


Figure 19: Select the records to distribute.

Profile Access Keys are generated, you can choose to share access to your profile either by calling the recipient directly and verbally providing the information, or by sending an email to the recipient that contains the information. Please know the third party only has up to 72 hours to access the information you shared. The access keys can only be used one time.

2. Delivery Options & Confirmation

You can choose to deliver the Profile Access Keys the following ways:

1. Call or Connect directly with the third party recipient and provide the web address, Access Code and Access Pin to the recipient.

   Certiphi Screening recommends that you contact the recipient and verbally provide the myRecordTracker website address, Profile Access Code and Access PIN to your contact. This method provides the highest level of security.

2. Email - To authorize an email, locate "Other Delivery Options," "Option 2" and click on the "click here to send an email" link.

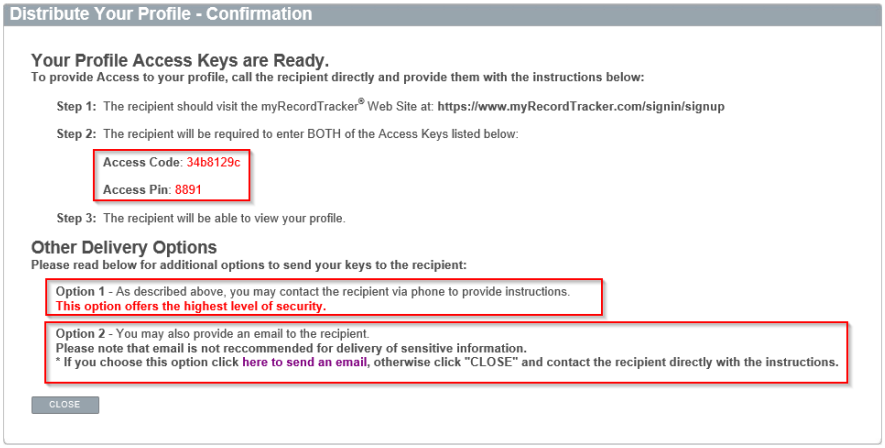


Figure 20: Profile Access Keys and Option to Distribute Information

Delivery by Email:
If you selected Email, you will want to provide the recipient's email address, and then select either "Option 1" or "Option 2" to determine what information is emailed to the recipient.

1. Option 1: Only the link with instructions to access your profile is emailed and you would need to contact the recipient directly to provide the Profile Access Keys.

2. Option 2: Both the link with instructions to access your profile and the Profile Access Keys are provided to your recipient.

Click the "Submit" button to trigger the email notification.

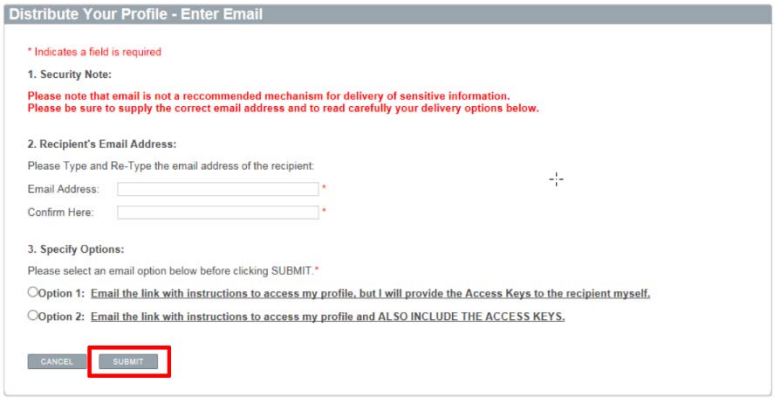


Figure 21: Provide recipient's email address, select option and click "submit" button

The system provides confirmation that an email has been sent, along with the myRecordTracker Profile Access Code and Access PIN for future reference.

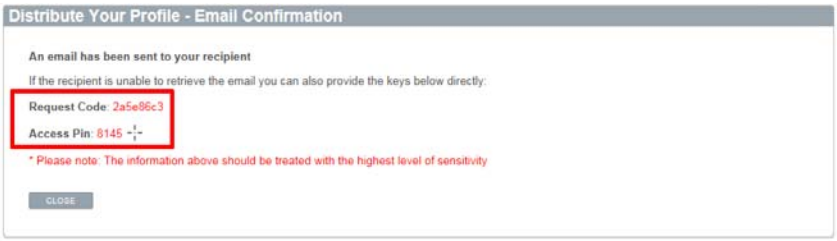
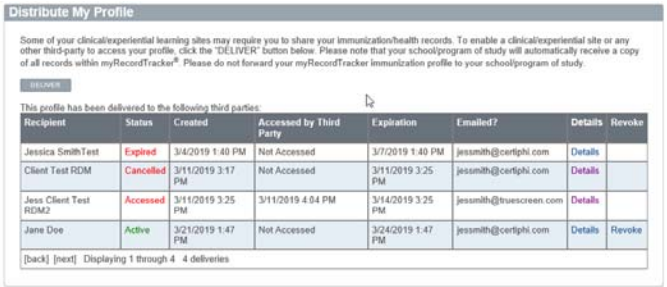


Figure 22: The email confirmation is the final step in the distribution process

Please know there is not a limit on how many times you use the Report Delivery Manager Tool. Each time you use it, the system will automatically show you and track whether the third party accessed the information you shared.



Recipient	Status	Created	Accessed by Third Party	Expiration	Emailed?	Details	Revoke
Jessica SmithTest	Expired	3/4/2019 1:40 PM	Not Accessed	3/7/2019 1:40 PM	jessmith@certiphi.com	Details	
Client Test RDM	Cancelled	3/11/2019 3:17 PM	Not Accessed	3/11/2019 3:25 PM	jessmith@certiphi.com	Details	
Jess Client Test RDM2	Accessed	3/11/2019 3:25 PM	3/11/2019 4:04 PM	3/14/2019 3:25 PM	jessmith@truescreen.com	Details	
Jane Doe	Active	3/21/2019 1:47 PM	Not Accessed	3/24/2019 1:47 PM	jessmith@certiphi.com	Details	Revoke

Figure 23: Information tracked within the Distribute My Profile section

Within the Distribute my Profile Section, you will see the following Statuses:

1. Active – From the date and time stamp indicated, the recipient has up to 72 hours to access the information you sent. They can also only use the Profile Access Code information one time within the 72 hour window.
2. Cancelled – You have the ability to "Revoke" the third party access to the information you shared. You only have the option to revoke within the 72 hour window and only if the third party has not yet accessed the information.
3. Accessed – This lets you know if and when the third party accessed the information you shared.
4. Expired – The 72 hour window for the third party to access the information you shared has passed.

CONTACT INFORMATION

If you have any questions throughout the myRecordTracker process, please contact Certiphi Screening Monday through Friday, 3 a.m. to 10 p.m. ET.

Payment Questions: 888-291-1369, ext. "3"

Customer Service: 855-225-8606, press "2"

Technical Support: 855-225-8606, press "4"

International Support: 00+1+215-876-6145

Email: myrecordtracker@verticalscreen.com