



# myRecordTracker®

## STUDENT USER GUIDE

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## WELCOME

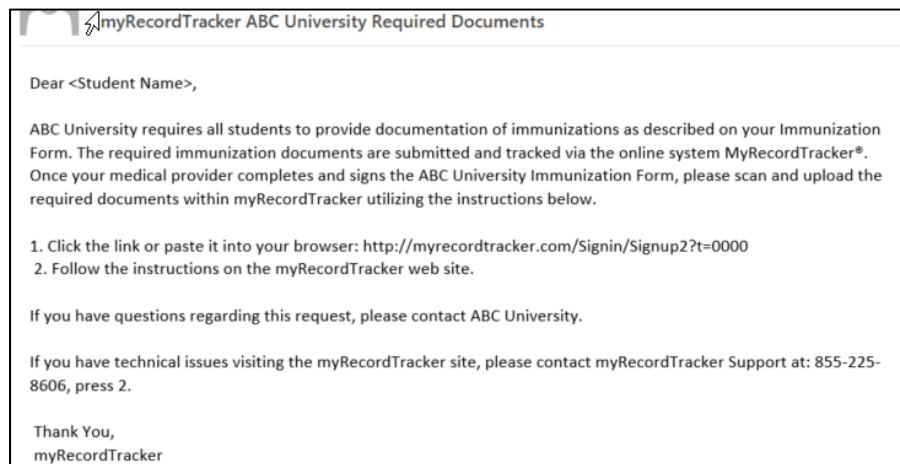
This guide will provide you with clear, concise step-by-step instructions for accessing myRecordTracker® to upload and share documentation pertaining to your student requirements. If you have questions about myRecordTracker, please contact Certiphi Screening's Customer Service or Technical Support at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




*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.

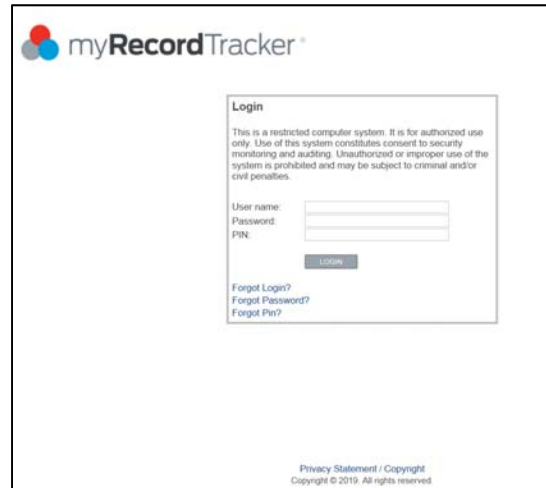
The myRecordTracker invitation email will prompt you to use a link provided to create your myRecordTracker account. When creating your account, please make note of your password, your security questions and security answers for future use. Depending on the administrator's specific requirements, you may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

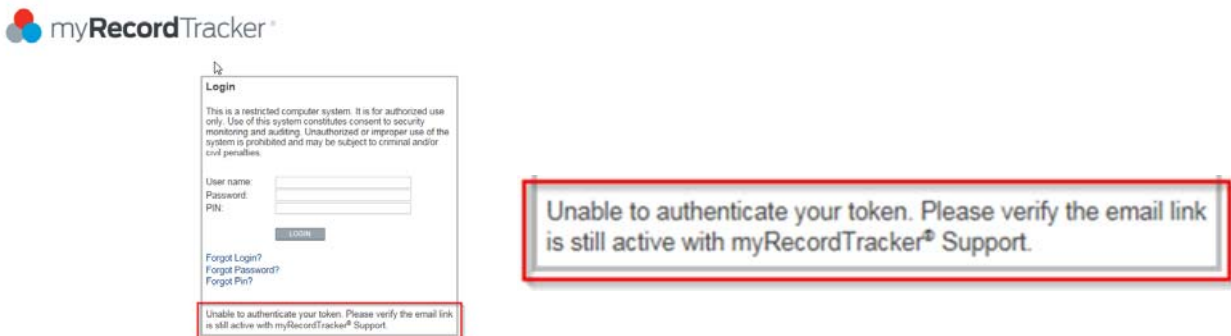
## STEP 2: ACCESSING MYRECORDTRACKER

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

Profiles

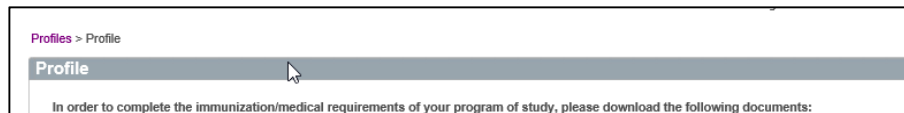
You have been assigned the following profile(s). Click on the name of a profile to complete its requirements.

Profile	Required By Date	Progress
Test School	3/14/2019	2 of 3 Requirements Completed

**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.**

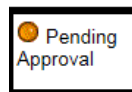
For your convenience, below are the various statuses that will show within the system. After that are instructions on how to upload documentation to the system to fulfill your requirements.

### Status examples:

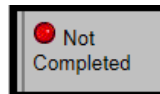
- A “Completed” status indicates that the requirement was uploaded and approved. In certain instances, the requirement is listed as “Completed” and includes an expiration date (SEE BELOW).



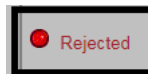
- A “Pending Approval” status indicates that a requirement was uploaded and is awaiting approval (SEE BELOW). *It can take up to 72 hours for your documentation to be reviewed once in pending approval status.*



- 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.

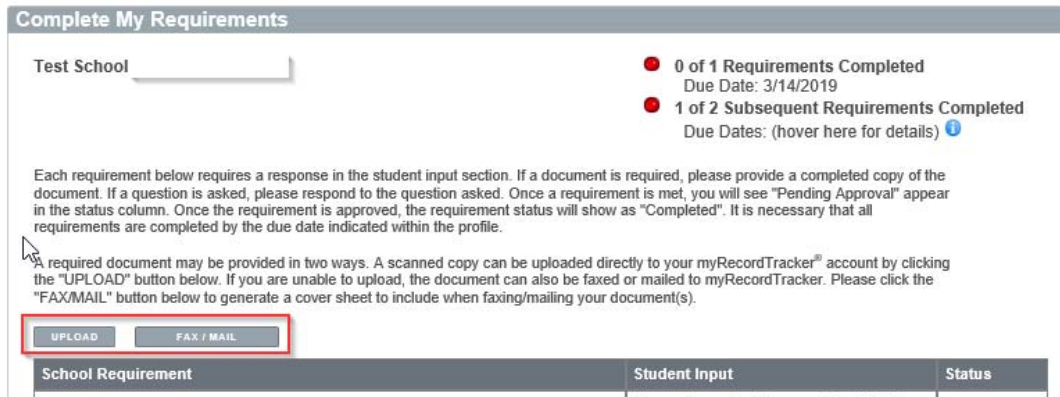


## Uploading Documentation

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.



**Complete My Requirements**

Test School

0 of 1 Requirements Completed  
Due Date: 3/14/2019

1 of 2 Subsequent Requirements Completed  
Due Dates: (hover here for details) ⓘ

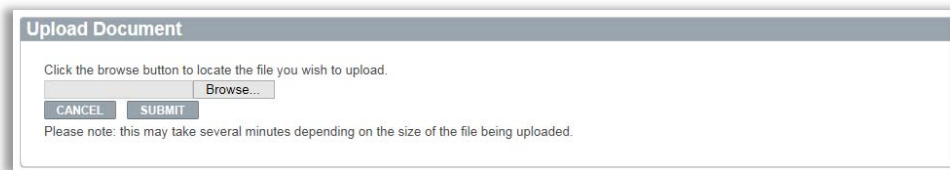
Each requirement below requires a response in the student input section. If a document is required, please provide a completed copy of the document. If a question is asked, please respond to the question asked. Once a requirement is met, you will see "Pending Approval" appear in the status column. Once the requirement is approved, the requirement status will show as "Completed". It is necessary that all requirements are completed by the due date indicated within the profile.

A required document may be provided in two ways. A scanned copy can be uploaded directly to your myRecordTracker® account by clicking the "UPLOAD" button below. If you are unable to upload, the document can also be faxed or mailed to myRecordTracker. Please click the "FAX/MAIL" button below to generate a cover sheet to include when faxing/mailing your document(s).

School Requirement	Student Input	Status
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**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:



**Upload Document**

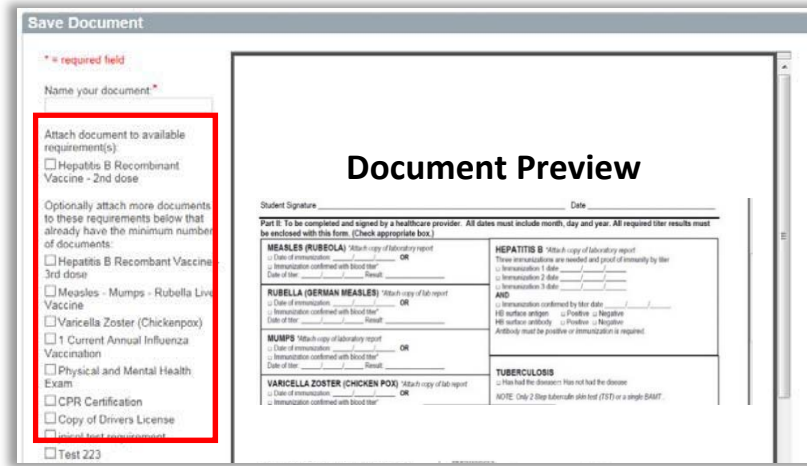
Click the browse button to locate the file you wish to upload.

Please note: this may take several minutes depending on the size of the file being uploaded.

**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
<b>Influenza</b> 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: <b>Influenza test doc</b> UNASSIGN  Add Another Document ATTACH  Expiration Date: <b>3/11/2020</b> Date of Test: <b>3/11/2019</b>	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: &lt;Student Name&gt;

Subject: myRecordTracker Notice – Due Date

Dear &lt;Student Name&gt;,

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: &lt;Student Name&gt;

Subject: myRecordTracker Individual Requirement Expiration Reminder

Dear &lt;Student Name&gt;,

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: &lt;Student Name&gt;

Subject: myRecordTracker Notice – Due Date

Dear &lt;Student Name&gt;,

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>,

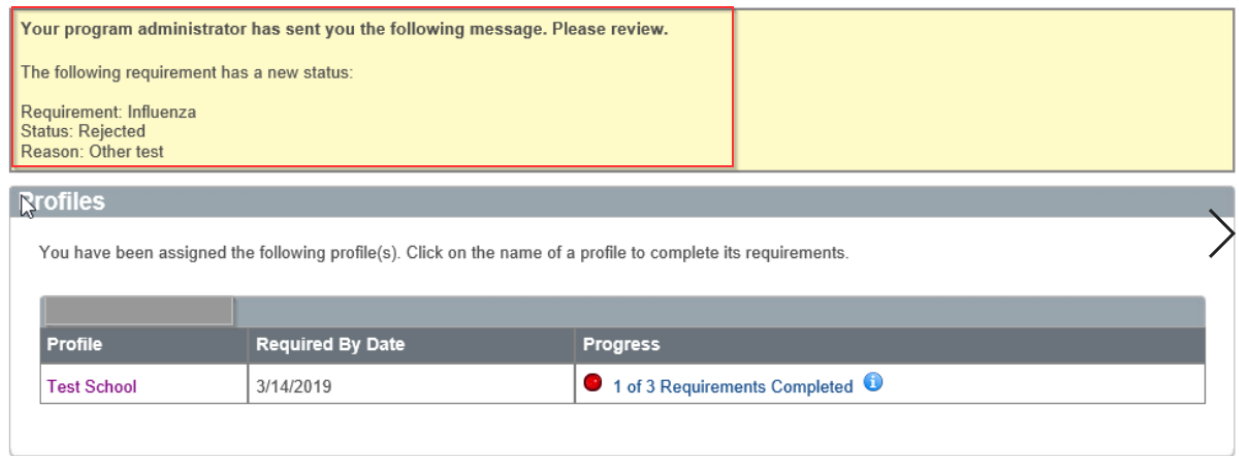
Subject: myRecordTracker – An update has been made to your account.

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).



The screenshot shows a notification box at the top with a yellow background and a red border. The text inside reads: "Your program administrator has sent you the following message. Please review." Below this, it says "The following requirement has a new status:" followed by "Requirement: Influenza", "Status: Rejected", and "Reason: Other test". Below the notification is a section titled "profiles" with a sub-header "You have been assigned the following profile(s). Click on the name of a profile to complete its requirements." Below this is a table with three columns: Profile, Required By Date, and Progress. The table contains one row for "Test School" with a required date of "3/14/2019" and a progress indicator showing "1 of 3 Requirements Completed" with a red dot and an information icon.

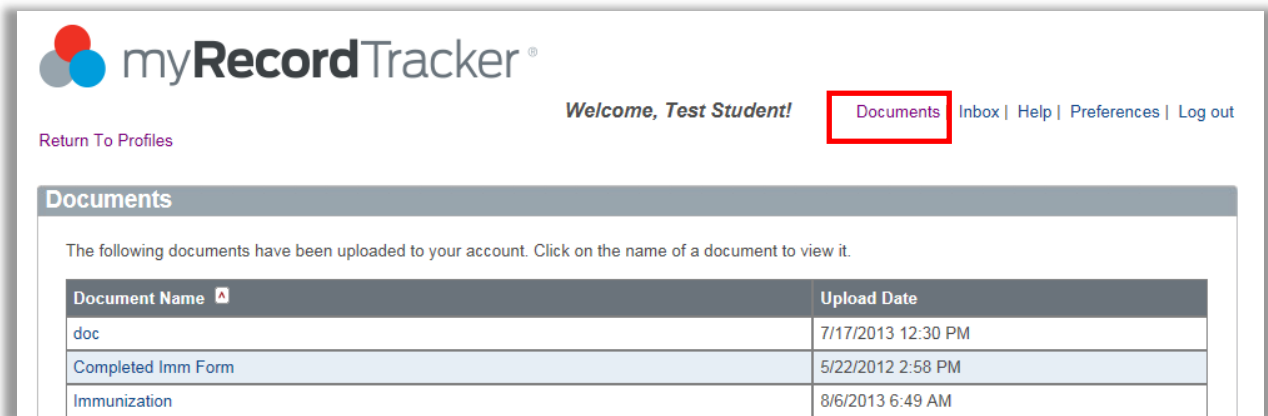
Profile	Required By Date	Progress
Test School	3/14/2019	1 of 3 Requirements Completed 

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

## STEP 5: OTHER IMPORTANT INFORMATION ABOUT MYRECORDTRACKER

### A. DOCUMENTS SECTION:

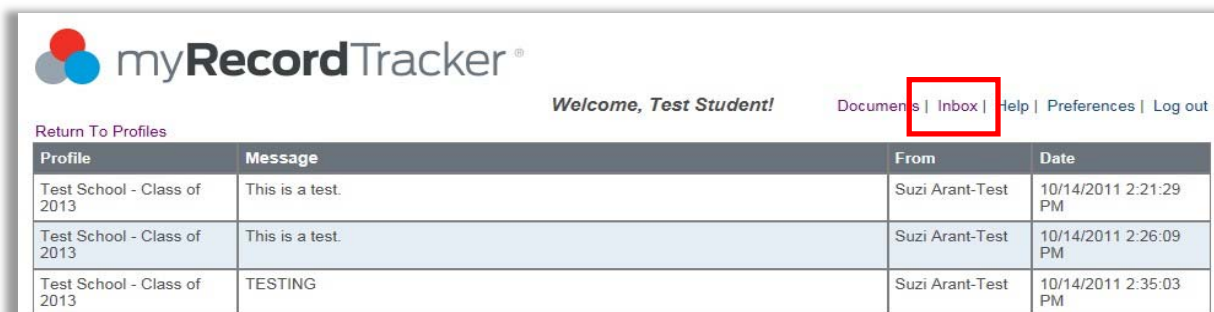
If you click the “Documents” link in the upper right-hand corner of the page, you are brought to a page that displays all documents previously uploaded to the site, including the date that the document was uploaded. Through this view, you can go back and review these documents at any time. Each document 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

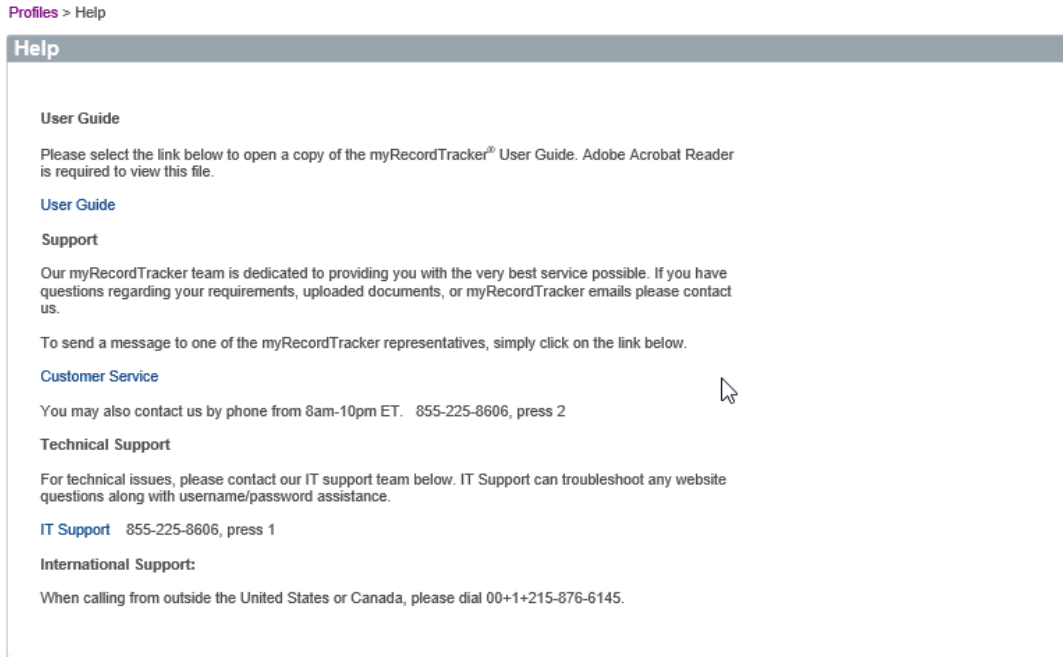
If you click the “Inbox” link in the upper right-hand corner of the site, you are brought to an inbox that contains all special instructions and emails sent from the administrator. Administrators and professors use this tool to send emails directly to student.



*Figure 13: myRecordTracker “Inbox”*

### C. HELP SECTION

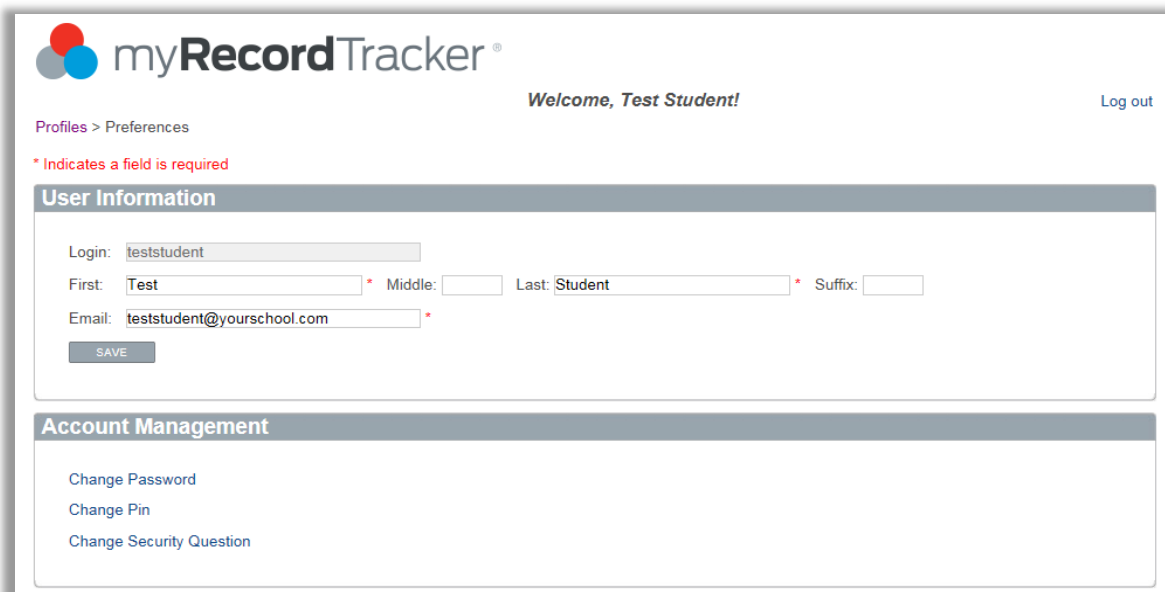
If you click the “Help” link, located next to the “Inbox” link, you will be brought to a page that provides contact information for myRecordTracker customer service and IT support. User guides are also available on the “Help” page.



**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**

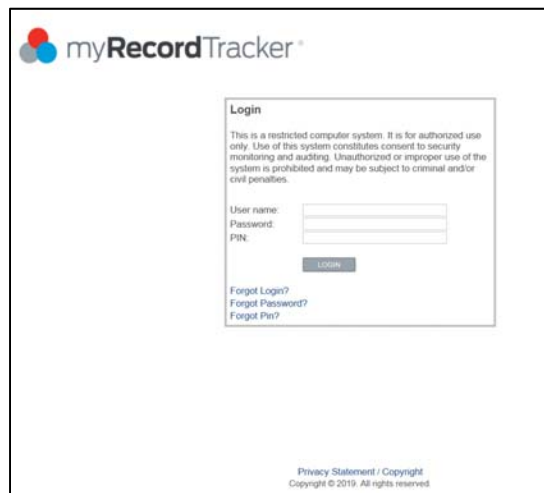
## E. DISTRIBUTE INFORMATION TO A THIRD PARTY

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 and enter your username, password and PIN. Click into your profile.

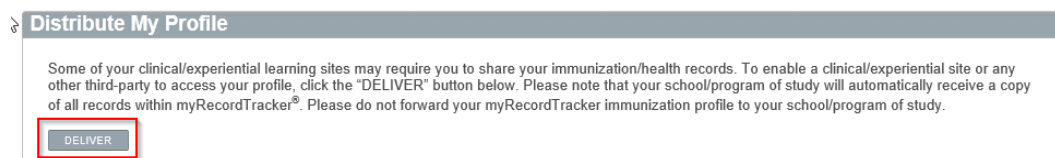
 <https://www.myrecordtracker.com/>



**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

**Distribute Your Profile - Enter Recipient**

*\* Indicates a field is required*

Please complete the questions below about the individual to whom you wish to deliver your profile.  
Check at least one requirement to deliver to the recipient.

**NOTE:** This is for your records only. myRecordTracker® does not guarantee the recipient of the profile is the person or organization listed below.

Last Name:  \*

First Name:  \*

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."

**Distribute Your Profile - Enter Recipient**

*\* Indicates a field is required*

Please complete the questions below about the individual to whom you wish to deliver your profile.  
Check at least one requirement to deliver to the recipient.

**NOTE:** This is for your records only. myRecordTracker® does not guarantee the recipient of the profile is the person or organization listed below.

Last Name: Doe  \*

First Name: Jane  \*

Organization: ABC Company  X \*

>School Requirement	>Student Input	Status	Select Check All? <input type="checkbox"/>
Influenza <small>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.</small>	You must provide 1 document to fulfill this requirement. Document #1: Influenza test doc Expiration Date: 3/11/2020 Date of Test: >3/11/2019	● Rejected	Deliver? <input type="checkbox"/>
Do you wear glasses? <small>Please answer yes or no</small>	Yes Expiration Date: 3/15/2019	● Completed	Deliver? <input checked="" type="checkbox"/>
Varicella (Titer) <small>A positive antibody titer (lab report required), if the titer is negative or equivocal, the student must have 1 booster shot. Series in process is acceptable.</small>	You must provide 1 document to fulfill this requirement. Document #1: No record assigned	● Not Completed	Deliver? <input type="checkbox"/>

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**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.

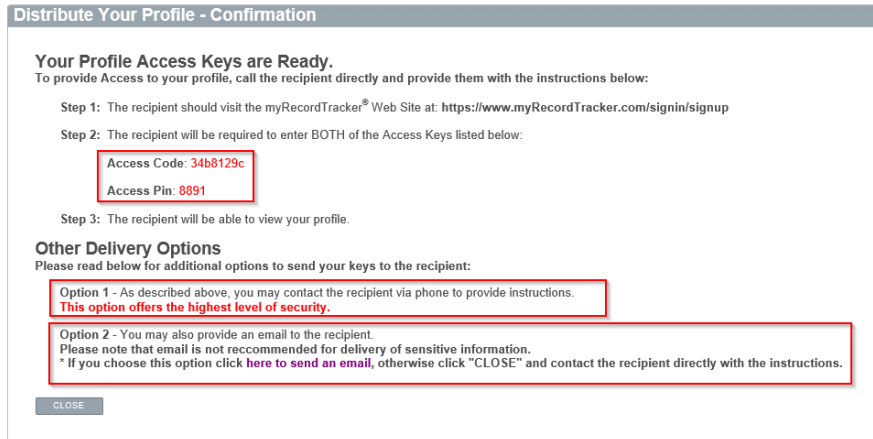
## 2. Delivery Options & Confirmation

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.



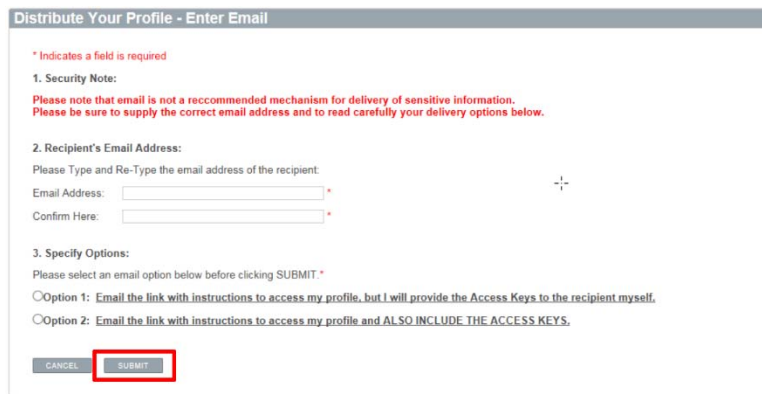
**Figure 20: Profile Access Keys and Option to Distribute Information**

### 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.

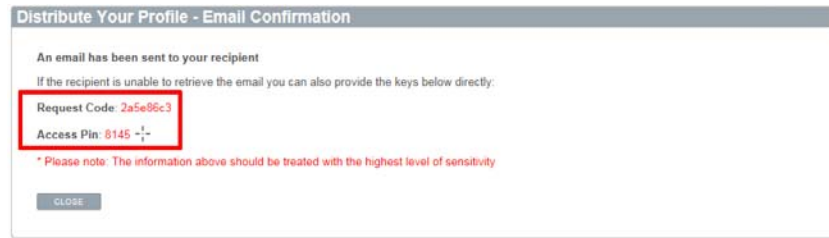
1. Option 1: Only the link with instructions to access your profile is emailed and you would need to contact the recipient directly to provide the Profile Access Keys.
2. Option 2: Both the link with instructions to access your profile and the Profile Access Keys are provided to your recipient.

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.



Compliance  
simplified.

## **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](mailto:myrecordtracker@verticalscreen.com)





# myRecordTracker® STUDENT UPLOAD DOCUMENTS STUDENT USER GUIDE

EMPOWERED BY  VERTICAL SCREEN

Proprietary information. Property of Certiphi Screening, Inc.  
This confidential information is not to be shared with any party outside of your  
department/company without the written consent of Certiphi Screening, Inc.

## How to Complete Your myRecordTracker® Requirements

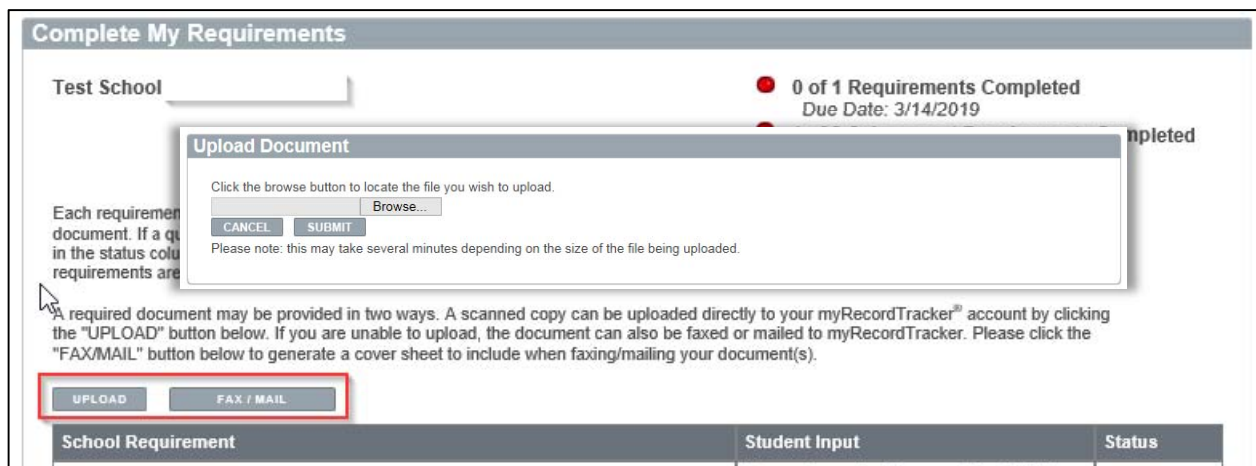
Each requirement within your myRecordTracker profile requires a response in the student input section. If a document is required, please provide a completed copy of the document. If a question is asked, please respond to the question asked (by clicking on the “Not Answered” Link). Once a requirement is met, you will see “Pending Approval” appear in the status column. Once the requirement is approved, the requirement status will show as “completed”. \* It is necessary that all requirements are completed by the **due date** indicated within the profile.

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.

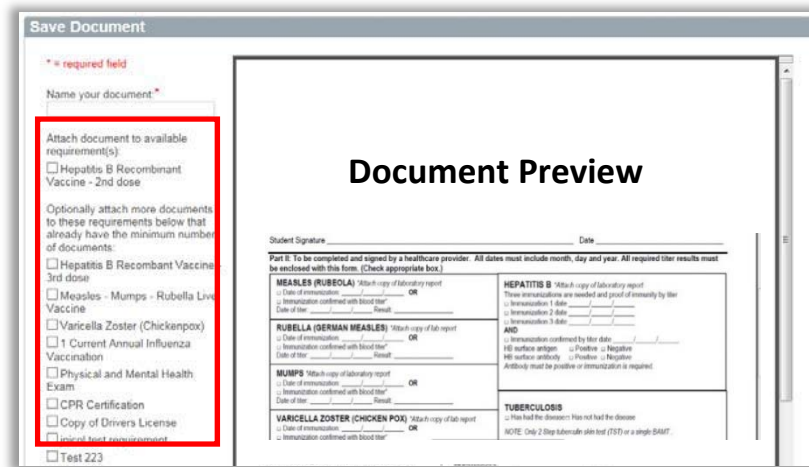
By utilizing the **“Upload”** button you are able to attach a single document to one or multiple requirements. You will be directed to the Upload Document section of the website (shown below) This will allow you to select and submit the necessary document:



**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 dialog box**

School Requirement	Student Input	Status
<p>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.</p>	<p>You must provide 1 document to fulfill this requirement:</p> <p>Document #1: <a href="#">Influenza test doc</a> UNASSIGN</p> <p>Add Another Document ATTACH</p> <p>Expiration Date: <a href="#">3/11/2020</a></p> <p>Date of Test: <a href="#">3/11/2019</a></p>	<p><span style="color: orange;">●</span> Pending Approval</p>

**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 requirements would no longer appear in the list.



Compliance  
simplified.

## 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](mailto:myrecordtracker@verticalscreen.com)