

CastleBranch Order Process & FAQs

STEP-BY-STEP ORDERING PROCESS

 Student goes to Gateway Technical College's CastleBranch portal - <u>http://gtc.castlebranch.com/</u> and clicks on "Place Order". Student will need to select their program from the drop down options in box #1 and then select an option from the drop down options in box #2.



2) Once student has selected their program and what they wish to order, the will be taken a review page showing package details. NOTE: Picture is a sample ... contents and information may vary depending upon package ordered Review Terms and Conditions of Use and click box preceding "I have read, understand and agree to the Terms and Conditions of Use", then click "Continue".

| | Please Review | - |
|---|---|---|
| | Bateway Technical Gellege - Health Peograms - Horning-Assec Degree KEHOBHA includes the following package contacts: Peckage 60250g Gausswick Crimina W | 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 |
| | Do.J. Di 1975 Bistevolog Criminal WI Nataliannolog Hankarase Pasad And Abusa Bisan Nataliannoj Hankara | the option to log in. |
| | Package Cest. 490.00 | I have read, understand and agree to the Terms and Conditions of Use. |
| | Please say the above prices environment. If this is not what you need to enter please start your order process again. | |
| | The peckage price above includes a streawide search within the State of WI. If additional addresses are found associated with your name outside the State of State of State of WI. If additional addresses are found associated with your name outside the State of Stat | |
| | You MURT provide your BBN to complete a Bankground Chaols. However, if you do not have a BBN, please anter plan or in present with your order. | |
| | Click the button below to continue your order and create your myCB account is not scleas your account to manage your order and view your results. If your alter priority and the your is to be the test of the science | |
| | In the second and agree to the Terma and Conditions of Use. | |
| | | Continue |
| | Continue | _ |
| • | | |

3) Enter personal information in the first page that displays. NOTE: required fields are marked by an asterisk (*). Please provide your legal name

| Place Order: | CB Cas | tle Branch | | | | Contact Us Logout |
|--|---------------|--------------------------|---------------------------------|---|--|--|
| 1 2 3 4 5 6 7 8 8 | Place Or | der: | | | | |
| Legal First Name. Legal Middle Name. Legal Middle Name. Legal Last Name. Legal Last Name. Suffix: Confirm Enai: Co | 1 | | | | | |
| Legal Middle Name. Legal Middle Name. An the applicant, i certify that i do not have a legal middle name. Atternatively, if I am placing the other and the applicant is entify in the based of my knowledge, that the applicant is entity in the based of my knowledge, that the applicant is entity in the based of my knowledge, that the applicant is entity in the based of my knowledge, that the applicant is entity in the based of my knowledge, the applicant is entity in the based of my knowledge, the applicant is entity in the based of my knowledge, the applicant is entity in the based of my knowledge, the applicant is entity in the based of my knowledge, the applicant is entity in the | PERSONAL IN | FORMATION | | | | |
| Legal Last Name | | | ot have a legal middle name. Al | tematively, if I am placing riedge, that the applicant | | |
| Phone: Important: The small address you provide will be used for all address and look for an immediate confination and all after all address and look for an immediate confination and all after all address and look for an immediate confination and all after all address and look for an immediate confination and all after all after all address and look for an immediate confination and all after all address and look for an immediate confination and all after all address and look for an immediate confination and all after all after all address and look for an immediate confination and all after all | - | | | | | |
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| Email Address * | | | | | | |
| Country." United States of America Address 1: Cdy:" | | | | | Important: The email ad- | dress you provide will be used for |
| Country." United States of America Address 1: Cdy:" | | | | | important order communi address and look for an | cation. Please enter your valid email immediate confirmation email after iou de pot soci your confirmation email |
| Address 1:" Address 2: City:" State:" | | | | | please check your SPAN | or Junk folder. |
| Address 2: | | United States of America | ~ | | | |
| City." | | | | | | |
| State.* | | | | | | |
| | | ~ | | | | |
| | | | | | | |

4) Enter "Personal Identifiers". If student does not have a Social Security Number, they should enter all ones. "Student Information" is **not** required. When finished, click "Next".

| PERSONAL IDE | ENTIFIERS |
|---|----------------------------|
| Social Security Number: [*] Date of Birth: [*] Sex: | <pre></pre> |
| STUDENT INFO | O Undergraduate O Graduate |
| Degree/Certification: | Undergraduate Graduate |
| Expected Date of Graduation: | |
| * Indicates required infor | mation Next |

5) Student's email address will be their username for their myCB account. This field will auto-fill with the email provided on the previous page under "Personal Information". NOTE: A different email address cannot be added in this step. Student will be directed to create a password for their myCB account. Hit "Create Account" when completed.

| Car Car | stleBran | ch | | | | | |
|---|----------|--|--|--|--|----------------------------|------|
| Place O | rder: | | | | | | |
| | 2 | | 4 | | | | |
| CastleBrar your myCB credentials Email Addr This email address | ess: | mitted to so e is your en equired to a | ecurely stor nail address ccess your a | ing your inf . Please cre account in t | ormation. As eate a passw he future. | s shown bel vord. These | low, |
| Userr | name: | | | | | | |
| Password: Pass | word: | | Passwords ar long. | e case-sensitive and mus | t be at least 8 characters | | |
| Cor | afirm: | | | | | Create Accoun | |
| | | | | | | | |

6) After account has been created, student will be presented with the following page where they will need to enter any alias/former names they have had. Click "Add Another" if more names need to be added. If student has no previous names, they will simply check the box for "I do not have any additional names". The related fields will no longer display. Click "Next".

| | 3 | | | |
|---------------|----|--|--|---------|
| DDITIONAL NAM | FS | | | Go Back |

7) Student will enter any previous addresses they have had within the last three years next. Select "Add Another" if student has lived in multiple locations within the last 3 years. If student does not have any previous addresses, they simply check the box for "I do not have any additional addresses". The related fields will no longer display. Click "Next".

| PREVIOUS ADDRESSES | | | |
|--|---|--|------|
| Please list all previously used addresses. Clu | k on Add Another to add an additional address. | | |
| - I do not have any additional addresses | | | |
| | | | |
| Country | Content States of America | | |
| Address 1 | 55 South Street | | |
| Address 2 | | | |
| City I | Bakerton TI | | |
| Charles - | 43/235 | | |
| ZE CODE | | | |
| * Institution, responsed information | | | Next |
| PREVIOUS ADDRESSES | | | |
| | | | |
| Please list all previously used addresses. Cli | ck on Add Another to add an additional address. | | |
| I do not have any additional addresse | | | |
| | | | |
| * Indicates required information | | | Next |
| | | | |

- 8) Review product information page and click "Next".
- 9) Student will be taken to "Order Review" page which shows "Order Includes" information based upon package selected when beginning the order process. REVIEW ALL INFORMATION CAREFULLY! Please Note: At any point student can click "Go Back" to return to the previous screen to correct errors; however, once student has been directed to the previous page, they will have to click "Next" to continue back through the order process.

| Place Orc | der: | | | Live Chat 🍩 | Help |
|-----------|------|--|---|-------------|------|
| ORDER R | | | 5 | Ga | Back |

- 10) Once the student has reviewed their information and all is correct, they will hit "Next" to select the payment method and complete all required fields that display.
 - a. Credit Card/Debit Card -- Visa, MasterCard, or Discover. Order typically will take approximately 3-5 business days to complete; however, may take as many as 7-10 business days to complete depending upon volume of orders received.
 - b. Monthly Installments total charge divided into 3 payments with an additional transaction fee of \$2.99 per installment added. The Initial payment will be 50% of your order total. The remaining balance will be divided evenly to set your installment rate. Charges will occur on the same date each month. Order will be processed upon receipt of first payment and take approximately 3-5 business days to complete. NOTE: Must have a Visa, MasterCard, or Discover to use this option
 - c. Electronic Check an additional \$10 processing fee will be added to the total charge, with a \$10 service charge for returned checks. Please allow 7-10 business days to confirm available funds and then approximately an additional 3-10 business days to complete.
 - d. Money Order an additional \$10 processing fee will be added to the total charge. Background check orders will not begin processing until the Money Order is received and results may take up to 2 weeks to complete. NOTE: Contact CastleBranch Service Desk at (888) 723-6243, option 1, for total cost <u>before</u> mailing money order.

11) Once payment information has been completed, click "Submit". Student will be taken to the "Order Confirmation" page which will direct them in their next steps to complete the package requirements.

| ORDER CONF | IRMATION |
|---|--|
| | Thank you. |
| | Your order has been submitted. |
| | Print Confirmation Page |
| Next Steps: | |
| 2. You will receive a | w to access your account. Select "myCB" from your home Dashboard to determine if you have additional items to complete. n email with your order confirmation attached. |
| 4. To log into your n From your home da account you can tak | mation can also be access through your myCB Document Center. MyCB account, navigate to login.castlebranch.com where you will be prompted to enter your username and secure password. Subboard, please select myCB. You can also access myCB by downloading the myCB app to your iPhone. From within your e action on any pending requirements and view final results. the other value-add features and benefits provided to you by myCB. |
| | Next |

12) Student has now created their myCB account and has access using their username and password to complete requirements. Students can access their account directly at <u>mycb.castlebranch.com</u>.

STEP-BY-STEP FOR ACCESSING PACKAGE REQUIREMENTS

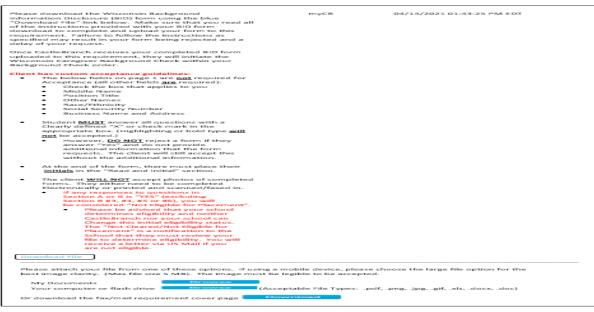
 Student logs into <u>mycb.castlebranch.com</u> using their username {email address} and password {created during the order process} to access their To-Do Lists. First-time access will require student to set-up their dashboard by following screen prompts. Once dashboard has been set up, student can continue to their myCB to-do lists. NOTE: Pictures are samples, documents and contents will vary based upon package ordered.

IMPORTANT NOTE: For all Background Check packages, students will be required to have the *1. Complete Required BID Form* requirement in their Wisconsin Caregiver Background Check with BID Form to-do list completed for CastleBranch to process their order and run the background check! Failure to submit the BID will delay the processing of student's order!

2) Student access their requirements by clicking on the "blue" words **OR** the symbol next to the requirement

| Tent | | Need Help? |
|---|--|---|
| olehead temperature check apon entry Submitted documentation typically takes Do you have new documents to submit t normed. Please allow approximately 21 | SC for a chug assessit, you must away a manifeliare covering such as a bandwine, sourt, or handwise must. The Ang doors with a temperature greater than 1002 or without a mask will be tamed away. 3.6 days to minime (makeding availation) if you have questions equating you To-Do Lott, we inside you to a a completed requirement or a general sequent? We can help? Clair IEEE to soland a wegant. We will have database days for a response. | econes our Video FAQ's pitch turns for assistance p your Service History updated oo you can stay |
| MESSAGES (0) | To-Do Lists | |
| TO-DO LISTS | Click the blue plus signs below to expand your requirements. | |
| DOCUMENT CENTER | Wisconsin Caregiver Beckground Check with BD Form (Pageword) Applicant with advance two supported the scheme Bankground effortemation (Davahase Bitt) form, Ca designed Check results. | |
| | Attention Applicant, II is important that you respond to this requirement as soon as Watching Caregover Background Check under this BC form is received. | pass-Ble. CastleBranch will not order your |
| | Second active to | Owne Due 214708 |
| | (a) 1. Complete Required BID Form | 1 Incomplete |
| | Beckground Check | |
| | Your order confirmation page is now available within the Document Center/My Occuments/Backgr | ound Check fulder. |
| | | |

3) The requirement's information box opens. Student needs to read this information carefully as it explains what is needed to complete the requirement. For the Background Check ONLY and Recheck ONLY packages, click the "blue" words to access the BID form which is a fillable pdf file and is best completed using pdf software. For the Medical Document Manager ONLY package, click on #1 to open the Gateway Forms requirement and then click the "blue" words (Gateway Forms for Download) to access all forms needing to be completed for your program.



STEP-BY-STEP FOR UPLOADING COMPLETED FORMS

1) Student logs into <u>mycb.castlebranch.com</u> using their username {email address} and password {created during the order process} to access their To-Do Lists.

Student accesses their To-Do Lists and expands the requirement they wish to fulfill by clicking on the icon.

NOTE: NO PHOTOCOPIES ACCEPTED FOR BID FORMS! Submitting a BLANK BID form, a copy of your results, a photocopy of your completed BID form, or order confirmation for the BID requirement will delay processing of your background check order. Please complete the BID electronically using pdf software, save and upload to meet this requirement. If pdf software is not available, print BID and fax/mail cover sheet from your requirement as you will need to fax your completed form to CastleBranch at the number listed on the cover page. CastleBranch will not process your order until you have submitted a completed BID form. You *must* submit your BID within 90 days from date of order or your background check will be canceled! You have up to 90 days to submit your BID to have CastleBranch add your background check back to your initial order. After 90

| MESSAGES (0) | To-Do Lists | | |
|-------------------|---|-------------------------------------|------------------|
| TO-DO LISTS | CEO de live pus signi teces is equint por regurements | | |
| DOCUMENT CENTER * | Warsman Categoriel Beckground Check with BC Form 1 Pro- Automatical sectors for interacting Manipulation and Management Automatical Sectors (Sectors) (Se | | |
| RESOURCE CENTER | Compare the special times any the size some face some that the facing some faces savely. | | |
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- 3) Choose upload option
 - a. My Documents use this option if the document was previously saved in student's Document Center
 - b. Your Computer or Flash Drive use this option if the document is saved to the computer or a flash drive (acceptable file types: .pdf, .png, .jpg, .gif, .xls, .docx, .doc)
 - c. Fax/Mail download the fax/mail requirement cover page if the document will be faxed or mailed directly to CastleBranch. NOTE: each requirement must be accompanied by the appropriate cover sheet downloaded directly from your requirement!



- 4) If using "Your Computer or Flash Drive"
 - a. Click "Browse" next to the 'Your computer or flash drive' option
 - b. Select file from your computer. **NOTE: Using an iPhone or iPad, student can take a picture of their health documents and submit the picture, making sure that the correct requirement has been selected. The entire form needs to be captured and legible prior to uploading.** (See iPad instructions)
 - c. Once uploaded, the file name will display under "Attached Files" within the expanded requirement details. Make sure the correct name displays. If an incorrect document was uploaded, click "remove document" and re-upload the correct form repeating steps above.
 - d. If only uploading one file, click "Submit" to attach the document to the requirement. If student does not click "submit" the requirement will remain "Incomplete". **NOTE: To submit multiple pages, follow instructions below.**
- 5) For multiple pages

Submit

- a. After attaching first page or taking picture of first page, click "Browse" again next to the 'Your computer or flash drive' option
- b. Select next document/page
- c. Continue this process until all documents/pages have been uploaded.
- d. Click "Submit" to attach the document to the requirement.
- 6) If uploading a document from the Document Center
 - a. Click "Browse" next to the 'My Documents' option. A pop up will display for student to select a file.
 - b. Select the appropriate folder. Locate the file student wishes to attach and select it. The file will load and student will then be taken to a screen where they can either upload more files or click "Submit".
- 7) If faxing/mailing documents directly to CastleBranch
 - a. Click "Download" next to the 'Download the fax/mail requirement cover page'. NOTE: a warning message will appear informing you the fax cover page is only for the specific requirement.
 - b. A pop-up screen will display for student to print the cover sheet.
 - c. Follow the directions provided on the form.



- d. If student wants to fax/mail documentation to more than one requirement, it is important that they print out the fax cover sheet for each specific requirement. They may fax documentation for multiple requirements all at once as long as the pages are faxed in the following order:
 - i. Fax/Mailing cover sheet
 - ii. Supporting documentation
 - iii. Fax/Mailing cover sheet (for additional requirement)
 - iv. Supporting documentation (for additional requirement)
- e. If mailing, follow steps above and mail to:

CastleBranch 1845 Sir Tyler Drive Wilmington NC 28405 ATTN: TDL Document Center

STEP-BY-STEP FOR REPLACING REJECTED FORMS

There are times when a document may be rejected, either because it does not meet the review guidelines or because it is illegible. In these instances, the requirement will have a status of "Rejected" and student will be responsible for replacing the documentation.

- To upload a new document, expand the requirement to see the details and locate the rejection reason.
 NOTE: Student can view the previously uploaded file by clicking the attachment provided directly under the rejection reason.
- 2) To submit the new document, follow steps detailed in Step-by-Step for Uploading Completed Forms.

| Θ | 2. Hepatitis B | | R Rejected |
|----------|--|---------------------------|---|
| | It appears that you have submitted a blank form, school guintimes you must provide 3 vaccines C school guintimes you must provide 3 vaccines verification of results required OR signed declin waiver (submitted on the school form and signed student, hear Accere provider, or clergy). | DR hation | 10/06/2016 09:57:44 AM EDT |
| | File Uploadel. Download File | Applicant | 10/04/2016 03:35:37 PM EDT |
| | One of the following is required: • 3 vaccines OR • positive antibody titer (lab report or physic verification of results required) OR • signed declination waiver (submitted on th school form and signed by the student, healthcare provider, or clergy) If the is negative or equivocal, new iters will be series is in process, submit where you are and n alerts will be created for you to complete the series. | e If New | 09/09/2016 08:33:15 AM EDT |
| | Attach a file from either: My Documents Your computer or flash drive Or download the fax/mail requirement c | Se CAcceptable File Type: | s: .pdf, .png, .jpg, .gif, .xls, .docx, .doc) |

iPAD UPLOAD INSTRUCTIONS

- 1) Student logs into <u>my.cb.castlebranch.com</u> using their username {email address} and password {created during the order process} to access their To-Do Lists.
- 2) Student accesses their To-Do Lists and expands the requirement they wish to fulfill by clicking on the icon.
- 3) To upload form by taking a photo of student's document
 - a. Click "Browse" next to 'Your computer or flash drive'
 - b. Select "Take Photo or Video" option
 - c. Take your photo NOTE: Make sure entire form is included and legible!
 - d. View photo student can either "Retake" if necessary OR "Use Photo"



- 4) Once student has clicked "Use Photo", their document is now uploaded and ready for submission
- 5) Click "Submit"

| ~ | |
|---|------------------------------|
| image.jpg | remove document |
| Attach another file from eithe CertifiedProfile's My Documents Your computer or flash drive | Browse Browse |
| | uirement cover page Download |
| | |

Take Photo or Video

Choose Existing

Attach a file from eithe

FORGOTTEN PASSWORDS, LOCKED myCB ACCOUNTS, AND CONTACT INFORMATION

• For assistance with resetting your myCB account password – student can click "Forgot Password?" and follow screen prompts to receive password reset instructions.



• For assistance unlocking a locked myCB account – student should contact a CastleBranch Service Desk Representative for assistance (see Contact Information).

CONTACT INFORMATION

If student has any questions or concerns regarding the ordering process, their To-Do list, or background check result information, they need to contact a CastleBranch Service Desk Representative from their myCB account by clicking "Need help?" and selecting one of the options:



- Video FAQ contains the Video FAQ library that contains a variety of short videos that can assist with various topics
- Browse Help Topics review topics to determine if questions/concerns are answered within topics
- Submit Support Inquiry Contact Service Desk 24/7 student will need to complete form:
 - o Select school/company from drop down options
 - Select issue from drop down options
 - Provide details describing issue
 - Browse to attach file if necessary
 - o Submit to send email to CastleBranch Service Desk Representative
- View Support Inquiries tracks student's communications with CastleBranch Service Desk Representatives
- Call Us will display phone number (888-723-4263, option 1) to contact and hours available for calls CastleBranch Service Desk Representatives are available:

Monday- Friday 7:00am – 7:00pm CST

Closed Saturday Sunday 9:00am – 5:30pm CST

- Chat With Us student will need to complete form, providing answers to all sections with * asterisks:
 - o Name *
 - \circ $\;$ Email on your account email address *
 - Date of Birth *
 - Last 4 of Social Security Number *
 - School indicate Gateway Technical College
 - What can I help you with today? *
 - Click "Chat Now!"

Email address used when placing order:

Password: