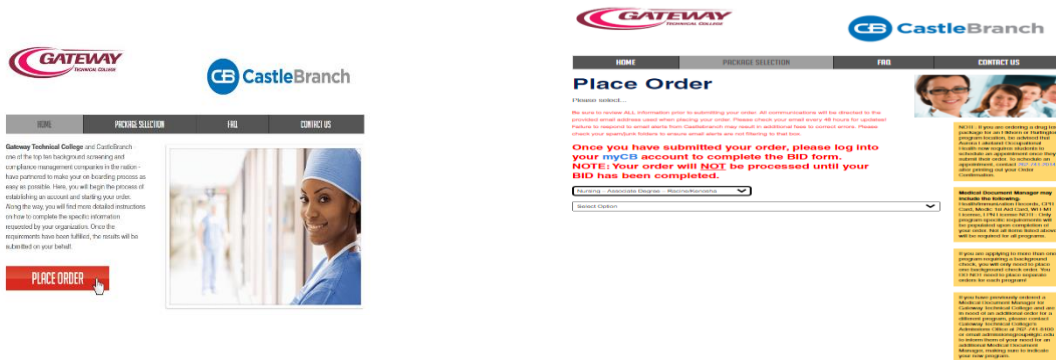# CastleBranch Order Process & FAQs

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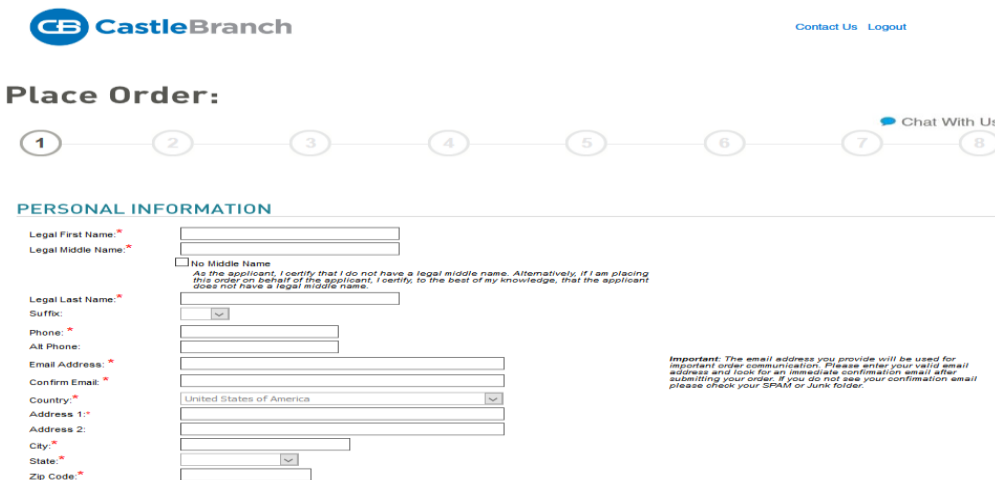
1) Student goes to Gateway Technical College's CastleBranch portal - http://gtc.castlebranch.com/ and clicks on "Place Order". Student will need to select their program from the drop down options in box #1 and then select an option from the drop down options in box #2.

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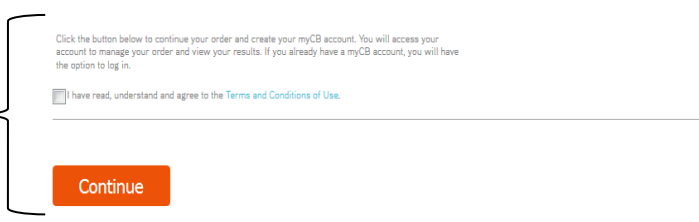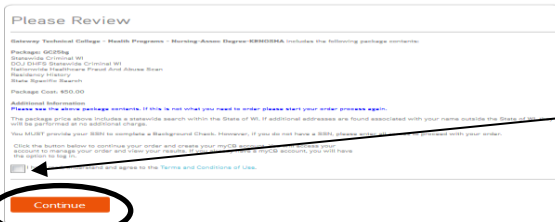
3) Enter personal information in the first page that displays. NOTE: required fields are marked by an asterisk (*). **Please provide your legal name**

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 IDENTIFIERS

Social Security Number:* [   ] - [   ] - [   ]   *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*

Date of Birth:* [mm] / [dd] / [yyyy]

Sex: ○ Female   ○ Male

STUDENT INFORMATION

Designation: ○ Undergraduate   ○ Graduate

Degree/Certification: [   ]

Expected Date of Graduation: [∨] / [∨]

* Indicates required information

[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.

CastleBranch

Place Order:

(✓) — (2) — (3) — (4) — (5) — (6) — (7) — (8)

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.

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]

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) — (4) — (5) — (6) — (7) — (8) — (9) — (10) — (11)

[Go Back]

ADDITIONAL NAMES

Please list any additional names used within the past 7 years (e.g. maidens, former married names, aliases). Click on Add Another to add an additional name.

☐ I do not have any additional names

First Name	Middle Name	Last Name	Suffix		
Elizabeth		Smith	[∨]	Remove	Add Another

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".

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.

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 CONFIRMATION

Thank you.

Your order has been submitted.

Print Confirmation Page

Next Steps:

1. Click "Next" below to access your account. Select "myCB" from your home Dashboard 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 access through your myCB Document Center.
4. To log into your myCB account, navigate to login.castlebranch.com where you will be prompted to enter your username and secure password. From your home dashboard, please select myCB. You can also access myCB by downloading the myCB app to your iPhone. 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.

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 mycb.castlebranch.com.

STEP-BY-STEP FOR ACCESSING PACKAGE REQUIREMENTS

1) Student logs into mycb.castlebranch.com 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

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 mycb.castlebranch.com 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.

**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

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!**
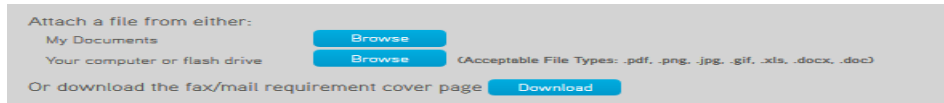
4) If using "Your Computer or Flash Drive"
   a. Click "Browse" next to the 'Your computer or flash drive' option
   b. Select file from your computer. **NOTE: Using an iPhone or iPad, student can take a picture of their health documents and submit the picture, making sure that the correct requirement 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

     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.

1) 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.
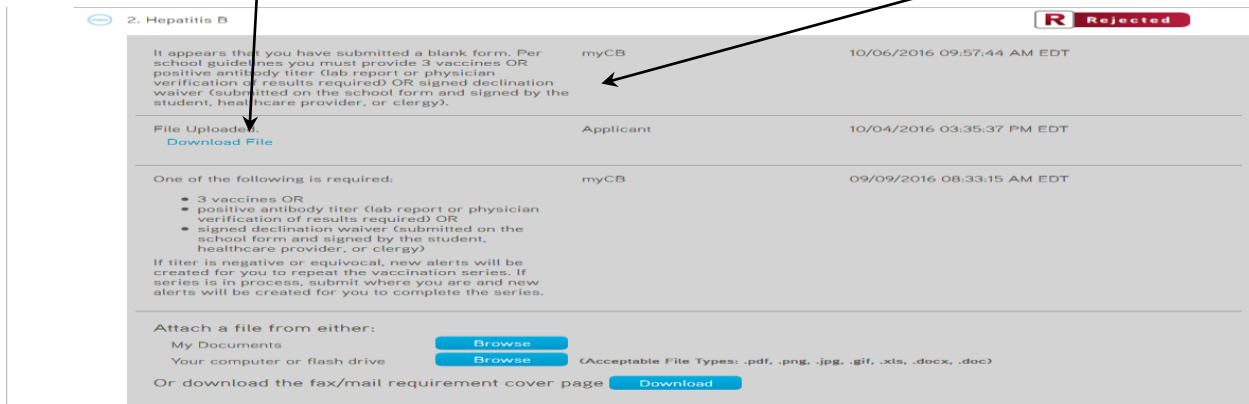
iPAD UPLOAD INSTRUCTIONS

1) Student logs into my.cb.castlebranch.com 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!**
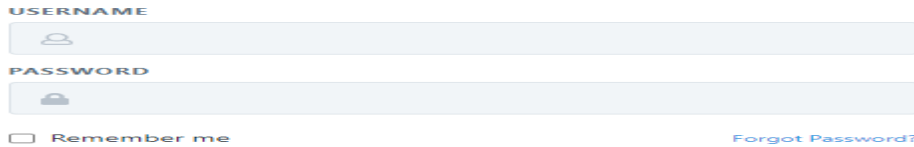   d. View photo – student can either "Retake" if necessary OR "Use Photo"
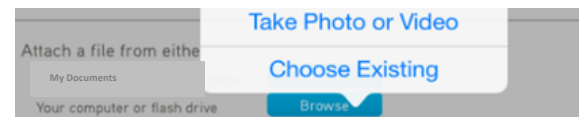
4) Once student has clicked "Use Photo", their document is now uploaded and ready for submission
5) Click "Submit"

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.

USERNAME

PASSWORD

☐ Remember me   Forgot Password?

- 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:

my CB | A CB CastleBranch Solution.

Need Help?

- 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:
  - Select school/company from drop down options
  - Select issue from drop down options
  - Provide details describing issue
  - Browse to attach file if necessary
  - 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:
    - Name *
    - 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:

_____