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 Truescreen’s Applicant Services team at 800-735-2660, ext. 2006 or myrecordtracker@verticalscreen.com.

STEP 1: EMAIL NOTIFICATION

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

![Sample email from school](image)

**Figure 1: Sample email from school**

**NOTE:** In order for you to receive the invitation email from myRecordTracker, the school 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 school.
The myRecordTracker invitation email will prompt you to use the link provided to create a myRecordTracker account. Once you create an account, you can begin fulfilling the program requirements. Depending on the school’s specific requirements, you may be asked to submit payment during this step.

**NOTE:** Please do not share the URL included in the invitation email. The URL is only available for one-time use to set up your profile and is unique to your particular profile and requirements.

**STEP 2: ACCESSING MYRECORDTRACKER**

Once your myRecordTracker account is created, you can log in to gain access to your account by visiting [www.myrecordtracker.com](http://www.myrecordtracker.com) and entering your username, password and PIN.

![myRecordTracker login screen](image)

*Figure 2: The myRecordTracker login screen*

Upon logging in, students are brought to the dashboard where they have the ability to view assigned profiles, review any attached documents, access emails from the school and change login preferences.
The dashboard illustrates all profiles available to the students and their progress in meeting each profile’s requirements. This dashboard also clearly defines the required due dates. Students have the ability to click on each profile to see more in-depth details regarding requirements and how to fulfill the outstanding responsibilities.

![Figure 3: Student dashboard](image)

**STEP 3: IMPORTANT INFORMATION ABOUT MYRECORDTRACKER**

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.

![Figure 4: myRecordTracker “Documents” screen](image)

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 school. Administrators and professors use this tool to send emails directly to student.
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.

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 5: The myRecordTracker “Inbox”

Figure 6: “Preferences” screen
If you select a profile that has been assigned to you on the dashboard, you will be brought to a page that provides a full list of your requirements, due dates and your progress on each requirement.

![Profile dashboard](image1)

**Figure 7: Profile dashboard**

All documentation needed to fulfill a requirement must be completed as directed and then uploaded directly into the system. The upload can be done through scanning, or students can also fax or mail the completed document using the provided Document Transmittal Form. For more information on uploading documents, please refer to the “Uploading: scan, mail or fax” section (page 9) of this guide.

The following is an example of a document that would need to be completed and uploaded into the system in order to meet a requirement.

![Sample requirements and status report](image2)

**Figure 8: Sample requirements and status report**
STEP 4: COMPLETING YOUR MYRECORDTRACKER REQUIREMENTS

Each requirement within the myRecordTracker profile requires a response in the “Student Input” section. 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. Once you have uploaded a required document, a status of “Pending Approval” will appear. When the requirement is approved, the requirement status will change to “Completed.”

Status examples:

![Completed](image)

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.

![Pending Approval](image)

A “Pending Approval” status indicates that a requirement was uploaded and is awaiting approval.
A “Not Completed” status indicates that the requirement has not yet been completed.

A “Rejected” status indicates that the document was uploaded, but was rejected by either the school or Truescreen. If a requirement is rejected, you will receive an email notification that a particular requirement/document was rejected.

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

**UPLOADING: SCAN, MAIL OR FAX**
A required document can be provided in three ways:

- A scanned copy can be uploaded directly to your myRecordTracker account by clicking the "Upload" button.
- The document can be faxed to Truescreen.
- The document can be mailed to Truescreen.

For faxed or mailed documents, click the "Fax/Mail" button to generate a cover sheet to include.

*Figure 10: Available uploading methods*

If you choose to upload your document, 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.
Once submitted, you will be given the opportunity to review and name the document on the myRecordTracker website. This section will indicate if you have any unfulfilled requirement(s). You can choose to attach documents to specific requirements by checking the box to the left of the unfulfilled requirement. If a single document fulfills multiple requirements, more than one requirement can be chosen.

Once a requirement is fulfilled, it 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 vaccination, that requirement will no longer appear in the list.

**NOTE:** Certain requirements require that a test date or an expiration date to be entered. It is your responsibility to enter these dates for validation. Truescreen will not enter this information into the system.
Figure 13: Student-entered date requirement.

By clicking on the requirement, you can enter the necessary test or expiration date.

Figure 14: Date entry dialogue box.

**NOTE:** You will receive an email notification alerting you to any upcoming document expiration dates. For new documentation, you can utilize the same upload or fax/mail methods available on the site. You must include a new expiration date for any new documentation.

**STEP 5: DISTRIBUTING THE PROFILE**

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 15: Click the “Deliver” button to distribute your profile.

Supply the recipient’s contact information: last name, first name and organization.

Figure 16: Enter the recipient’s contact information.

You have two options when selecting the requirements to share: 1) you can send all the requirements in the profile, or 2) you can pick and choose specific requirements. To share all the requirements, click the “Select Check All?” box in the last column on the right. To pick and choose the requirements to share, click the corresponding “Deliver?” box to the right of the selected requirement.
Figure 17: Select the records to distribute.

After completing the recipient’s contact information and selecting the records to share with the recipient, scroll down to the bottom of the screen to choose the “Submit” button.

Figure 18: Distribute your profile by clicking "Submit."

After distributing, Profile Access Keys are generated, including a myRecordTracker Access Code and Access PIN.
STEP 6: DELIVERY AND CONFIRMATION

Once Profile Access Keys have been 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 that contains the information directly to the recipient.

Truescreen recommends contacting the recipient to verbally provide the myRecordTracker website address, Profile Access Code and Access PIN; this method provides the highest level of security.

You can also choose to authorize that an email containing this information be sent to your contact. To authorize an email, locate “Other Delivery Options,” “Option 2” and click on the “click here to send an email” link.

You can now provide the recipient’s email address and select either “Option 1” or “Option 2” to determine what information is emailed. The first option emails just the link with instructions on how to access your individual profile. This option requires that you contact the recipient directly to provide the Profile Access Keys. The second option emails both the link with instructions to access your profile and the Profile Access Keys.
Click the “Submit” button to trigger the email notification to be sent to the chosen contact(s).

Figure 21: Select an option and click the “Submit” button.

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

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

**STEP 7: POTENTIAL COMMUNICATIONS**

In certain instances, you may receive email notifications regarding the status of your requirements. The following are some sample notification emails:
**myRecordTracker “Rejection” email:**

![Image of rejection email]

**myRecordTracker “Individual Requirement Expiration” email:**

![Image of expiration email]
myRecordTracker profile “Due Date Expiration” email:

CONTACT INFORMATION

If you have any questions throughout the myRecordTracker process, please contact Truescreen Monday through Friday, 8 a.m. to 10 p.m. ET.

Toll Free: 1-800-735-2660, dial “0”

Email: myrecordtracker@verticalscreen.com