

## **Instructions to Share or grant access to CastleBranch**

### **To share documents with a clinical site through a CastleBranch (myCB) account:**

1. Login to account and locate the "Document Center" in the menu on the left side of the screen.
2. Select "Share Documents."
3. Read the overview and then click "Next."
4. Enter the name and email address of the person you need to share your documents with. You have the option to share with multiple people, if necessary. Name and email are the only required fields, the rest are optional. When finished, click "Next."
5. Now you will select the files you wish to share. You will need to locate the folders containing the necessary files. Background check results are located in the background check folder, drug test results in drug test, etc. The files you will most likely need will be titled "Results\_" followed by a sixteen digit number. After selecting your files, click next.

NOTE - Your background check and drug test each have their own "results" file. Your Clinical Requirements "result" file is a summary of your To Do List. If the clinical site coordinator requests specific immunization documents, you will need to share those, as well. It might be helpful to browse your document center and rename files to make locating easier. If you need assistance with this process, please contact our student support department at [1-888-723-4263 ext. 7196](tel:1-888-723-4263).

6. Review the documents you intend to share. Here is where you can make sure you are only sharing the documents you intend to. When finished, click next.
7. On the next page, you will have the option to incorporate security features and access limits. This is not required, these features are optional and provided for added security. When finished, click next.
8. That's it. The recipient will receive an email containing a link that will allow them to view your selected documents. You can always go back to the "Share Documents" section and modify or end access, at any point.