

# Uploading Compliance Documents for Students

## STEPS V4

Your program may require that you upload compliance items to your profile which may be shared with clinical partners. These can include (but are not limited to) health and immunizations, insurance, certifications, and more!

1. Log in and from your dashboard, click on Compliance. The number within the card indicates any items that need your attention.



2. You will be redirected to the Compliance section where you will see a table with all items your program has requested you to upload. You will see any of the following statuses for each item:
  - a. **Get started:** you have not yet started working on this item.
  - b. **In progress:** you have begun filling your information for this item, but nothing has been submitted to the school.
  - c. **Pending Review:** the document has been submitted to your school.
  - d. **Approved:** the document has been reviewed by your school and it meets all requirements.
  - e. **Not Approved:** the document has been reviewed by your school and determined that it does not meet the requirements.
  - f. **Expiring:** an approved document on file is expiring.
  - g. **Expired:** the document has expired.
3. Click anywhere on the row for the item you'd like to manage.

MANDATORY REQUIREMENT (3) ↑		CATEGORY	STATUS	SHARED WITH SITE	EXPIRATION DATE
COVID-19 Vaccination		HEALTH & IMMUNIZATION	Get Started	Yes	-
CPR/BLS		CERTIFICATIONS & TRAININGS	Get Started	Yes	-
Flu (Influenza)	Due on Dec 30, 2022	HEALTH & IMMUNIZATION	Get Started	Yes	-

4. After selecting a document, a drawer will open and it will display the guidelines for your compliance requirement, a template or sample document (if your school has provided one), and any information you have previously uploaded. Please review these items before moving on.
  - a. You may see the following options:
    - i **Vaccination**
    - ii **Titer Details:** Can be used if you have titer information rather than vaccination details.
    - iii **Declination Details:** If for any reason you would like to decline a compliance requirement, you will use this option.

× COVID-19 Vaccination

Your academic program may share this document with clinical sites at which you are placed

**COVID-19 Vaccination**  
Get Started

COVID Dose - 1	+
COVID Dose - 2	+
Declination Details	+

**Guidelines For Students**  
Please include the manufacturer of your vaccine in the notes field. Only CDC vaccination cards will be accepted as proof of vaccination. If you choose to decline the right to be vaccinated against COVID-19 please complete the declination form provided in the "template" section

**Templates**  
[View documents](#)

**Samples**  
[View documents](#)

5. To begin uploading a document and completing the information for a requirement, click on the plus (+) icon next to the document name. To edit an existing item, click the pencil icon.

**COVID-19 Vaccination**  
Get Started

COVID Dose - 1	<b>+</b>
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6. Another drawer will open asking for additional details and allowing you to drag and drop a file to be uploaded. Alternatively, you may click on the cloud button to search for a file to upload.
7. After you have completed all required fields, click Submit for Review.

COVID-19 Vaccination Submit for Review

**COVID Dose - 1**

**Dose 1 Date** \* \*  
Feb 08, 2022

**Manufacturer**  
Manufacturer

**Lot Number**

**Note**

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2000 characters left

Upload Files

Supported formats: .pdf, .doc, .jpg, .jpeg, .png, .docx, .xlsx  
You can only upload files with file size under 5 MB.

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**Templates**  
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8. You will be asked to confirm your submission. Click OK.

Are you sure you want to submit for review?

OK

Cancel

9. The drawer will close, and you will see the status of the item you are working on change to Pending Review.

COVID-19 Vaccination

Your academic program may share this document with clinical sites at which you are placed

**COVID-19 Vaccination**  
Pending Review

**COVID Dose - 1**

Dose 1 date Feb 08, 2022	Manufacturer Manufacturer
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**Guidelines For Students**  
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**Templates**  
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10. Once you submit a document for approval, keep returning to check the status of your requirements. When your school has reviewed the document, it will change to:

- a. **Not approved:** your document will include a status, and once selected will show you details as to why your document has not been approved. Click on the pencil icon to make the needed changes and/or upload a new document.
- b. **Approved:** you are good to go!

<span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">1</span> Documents   Approved <span style="background-color: #ffc107; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 10px;">1</span> Documents   Pending Review <span style="background-color: #dc3545; color: white; padding: 2px 5px; border-radius: 3px; margin-left: 10px;">1</span> Documents   Needs Attention <span style="float: right; border: 1px solid #007bff; padding: 2px 5px; border-radius: 3px; color: #007bff;">Download</span>				
Please select any specific document to see its details				
MANDATORY REQUIREMENT (3) ↑	CATEGORY	STATUS	SHARED WITH SITE	EXPIRATION DATE
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CPR/BLS	CERTIFICATIONS & TRAININGS	Approved	Yes	Dec 30, 2022
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