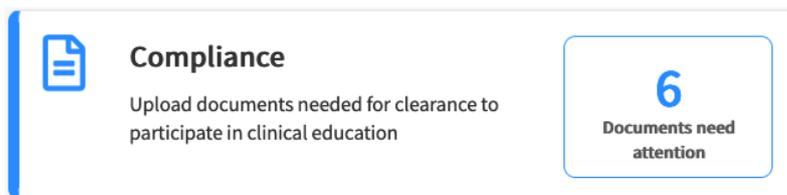


Uploading Compliance Items for Students

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.



- a. You can also access this from your left-menu.



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 (9) ↑		Category	Status	Shared with Site	Expiration Date
Annual Physical	<i>Due on Jan 31, 2022</i>	HEALTH & IMMUNIZATION	Get Started	No	-
COVID-19 Vaccination	<i>Due on Dec 31, 2021</i>	HEALTH & IMMUNIZATION	Get Started	No	-
CPR/BLS	<i>Due on Sep 30, 2021</i>	CERTIFICATIONS & TRAININGS	Get Started	Yes	-
Flu (Influenza)		HEALTH & IMMUNIZATION	Pending Review	Yes	-

- 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.

×
COVID-19 Vaccination

COVID-19 Vaccination
Get Started
Due on Dec 31, 2021

COVID Dose - 1
+

COVID Dose - 2
+

Titer Details
+

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

- To begin uploading a document and completing the information for a requirement, click on the plus (+) icon next to the document name.

×
COVID-19 Vaccination

COVID-19 Vaccination
Get Started
Due on Dec 31, 2021

COVID Dose - 1
+

+

- 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.

The screenshot shows a web form titled "COVID-19 Vaccine" with a "Submit for Review" button in the top right. The form is divided into two main sections. On the left, under the heading "COVID-19 Vaccine Details", there are three input fields: "Dose #1" with a calendar icon, "Dose #2" with a calendar icon, and a "Note" field with a pencil icon. Below these is a dashed box labeled "Upload files" with a cloud icon. Underneath the upload box, it lists supported formats: ".pdf, .doc, .jpg, .jpeg, .png, .docx, .xlsx" and states "You can only upload files with file size under 5 MB." On the right, under the heading "Guidelines For Students", there is a text prompt: "Please upload your vaccine card."

- After you have completed all required fields, click Submit for Review.

The screenshot shows a web form titled "COVID-19 Vaccination" with a "Submit for Review" button in the top right, which is highlighted with a red border. The form is divided into two main sections. On the left, under the heading "COVID Dose - 1", there are two input fields: "Dose 1 Date" with a calendar icon and a date value of "Oct 05, 2021", and a "Manufacturer" field. On the right, under the heading "Guidelines For Students", there is a text prompt: "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".

- You will be asked to confirm your submission. Click OK.

The screenshot shows a confirmation dialog box with the text "Are you sure you want to submit for review?". Below the text are two buttons: a green "OK" button and a white "Cancel" button with a grey border.

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

COVID-19 Vaccination

Pending Review

COVID Dose - 1



Dose 1 date

Oct 05, 2021

[View Document](#)

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

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:
- Not approved** – your document will include a red box with details as to why your document has not been approved. Click on the grey pencil to make the needed changes and/or upload a new document.
 - Approved** – you are good to go!

Mandatory Requirement (9) ↑	Category	Status	Shared with Site	Expiration Date
Annual Physical <i>Due on Jan 31, 2022</i>	HEALTH & IMMUNIZATION	Get Started	No	-
COVID-19 Vaccination	HEALTH & IMMUNIZATION	Approved	No	-
CPR/BLS <i>Due on Sep 30, 2021</i>	CERTIFICATIONS & TRAININGS	Get Started	Yes	-
Flu (Influenza)	HEALTH & IMMUNIZATION	Not Approved	Yes	-