



myRecordTracker

USER GUIDE

EMPOWERED BY  VERTICAL SCREEN

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WELCOME

This guide will provide you with clear, concise, step-by-step instructions for accessing and utilizing myRecordTracker to view and maintain your student requirements. If you have any questions about myRecordTracker, please contact Truescreen at 800-803-9042, dial "0", or email us at myRecordTracker@verticalscreen.com.

ACCESSING MYRECORDTRACKER

Once your account has been setup, you will receive an Email from myRecordTracker@verticalscreen.com which contains a link for you to setup your admin account. Once you click the link, you will be brought to the myRecordTracker site to create your username, password, pin, and a security question.

Log into myRecordTracker.com using your previously created username, password and PIN.

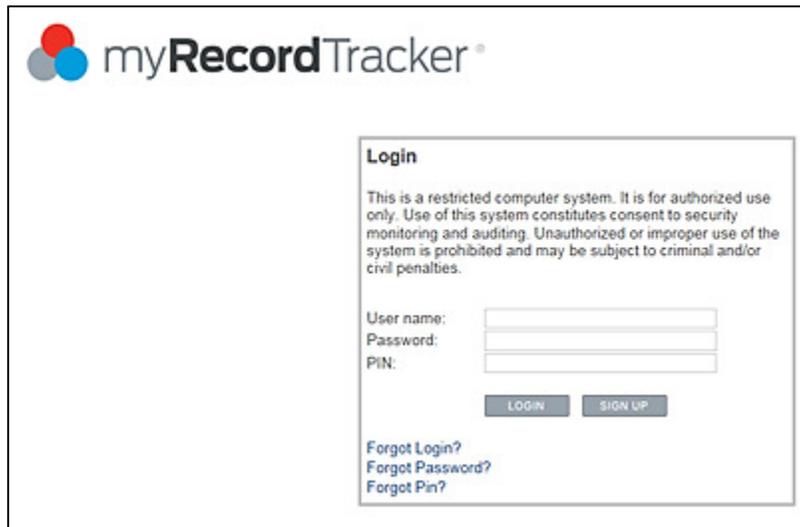


Figure 1: The myRecordTracker login screen

Once you are logged in, you will be presented with a dashboard that displays a program summary for each profile created. From this screen, you can also create and view assigned profiles, change your preferences or search for a specific student.

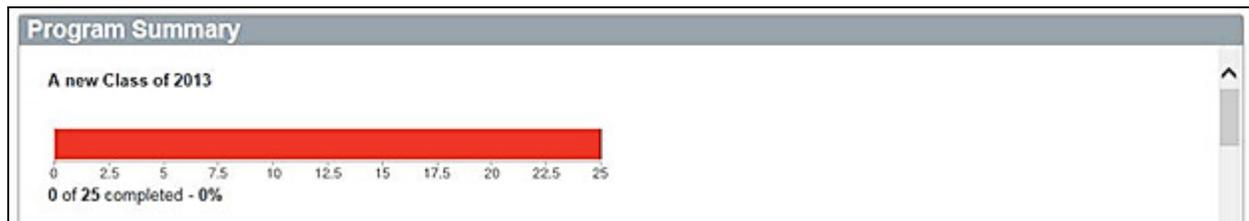


Figure 2: Program summary

The dashboard illustrates the current progress status for all of your available profiles. Further down, under Profiles, the dashboard clearly defines the expiration date and required by date for each profile.

To search for a particular student by name, email address, ID number or the profile to which they belong, click "Student Search" in the upper left-hand corner of the page and complete the available fields.



Figure 3: Student search option

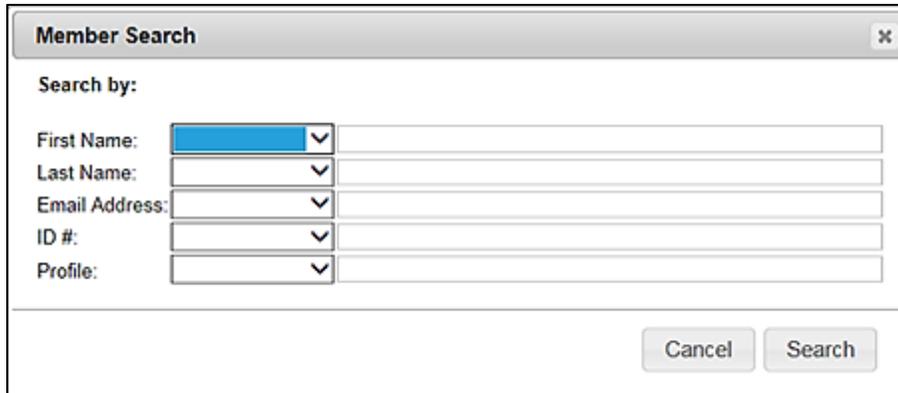


Figure 4: Student search screen

PREFERENCES

At any time, you can update/change your login information, name, email, password, PIN or security question by selecting “Preferences” on the top right-hand corner of the page. You can also update notification email settings, depending on whether or not you would like to receive all email notifications that are sent to the students as well.

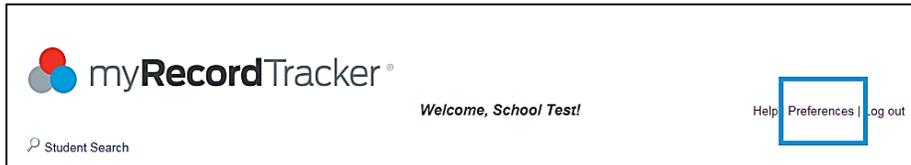


Figure 5: Preferences option

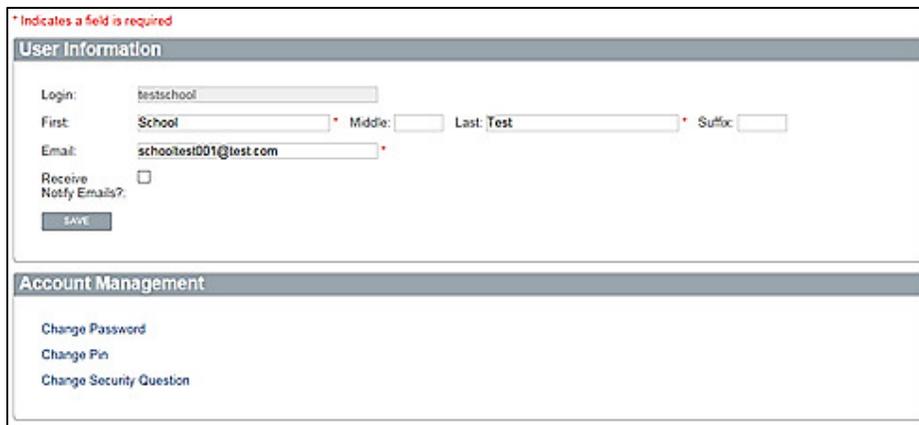


Figure 6: Preferences screen

EDITING AND MAINTAINING PROFILES

CREATING A NEW PROFILE

To create a new profile, you can “**Copy**” the existing Master Template for your current program *or* you can click “**Copy**” next to the specific program that you want to copy requirements from. You will want to create a new profile for each class that comes on board, therefore, if you have a Fall Class of 2015 and a Spring Class of 2016, each should have a separate profile so you can track the students separately from class to class.

- **Please note:** When you copy over any program, *it will not copy over any of the uploaded documents*; those will need to be uploaded again.

If you want to start with a completely blank template in which no requirements are copied over, you can select the “+” button above the Copy column. However, if you do not want to add each requirement manually, you will need to select “Copy”.

Profiles

A myRecordTracker® profile includes the information and records required for a specific group of students, for example, “First Year Students – Class of 2015.” Each profile includes:

- The school name
- The profile name – This is visible to students, so be sure that the name you select is clear and meaningful to both the students and the program administrators
- Required by date – This is the deadline by which students must upload documents and provide required information
- Expiration date – This is the date that the profile will be archived or deactivated from myRecordTracker®, as the class to which it refers will have graduated or completed the requirements
- Access code

You have been assigned the following profile(s). Click on the name of a profile to view the complete details. Click on the “+” button below to add a new profile.

Test School 1					
Profile	Required By Date	Expiration Date	Access Code	Progress	Copy
A new Class of 2013	5/13/2013	6/30/2018	TESTSCHOOL2013A	0 of 27 students completed	Copy

Figure 7: Profiles dashboard, creating profiles

Once you select “**Copy**” a new screen will appear for you to enter the information explained below. This information will be specific to the new program/class.

- **Profile Name:** This is the name of the school/program/class and is also what the student sees when they log into their mRT account (e.g. University of Truescreen – Nursing Program – Day Class of 2017).
- **Due Date:** The date that all requirements are due and need to be uploaded by.
- **Due Date Notices and Reminders:** Reminder email notifications are sent to the students prior to the due date and then after the due date if the student hasn’t completed all requirements by that date. The default settings are listed, but can be updated as desired by the program.
- **Expiration Date:** The date the profile will expire from the school and students view, typically after the class has graduated.
- **Access Code:** This should be specific to you and your program (e.g. UTNURSEDAY2017).
- **Description:** You can add a description of the program in this field if desired. Please note this is not a required field.

Copy Profile

* Indicates a field is required

Please mouse over any question mark icon below to view additional instructions.

Copying From

School:

Profile Name:

Copying To

School:

Profile Name:

Due Date: mm/dd/yyyy

Due Date First Notice # Days:

Due Date Second Notice # Days:

Due Date Third Notice # Days:

Reminder First Notice # Days:

Reminder Second Notice # Days:

Reminder Third Notice # Days:

Expiration Date: mm/dd/yyyy

Access Code:

Description:

Figure 8: New profile General Information section

After completing the above information, click **“Save.”** You will then be returned to the profiles dashboard screen. You will see the new profile listed (which will say **“Pending”** in red), and all other profiles you have setup.

- Please note:** The newly created profile will remain in pending status for 24-48 hours, pending review from our implementation team. While the profile is pending, you can still upload students, add or remove any requirements, upload documentation, etc. Once you upload students and the profile has been approved, the login instructions will automatically be sent to those students. All other updated information will be saved as well. The pending status will be removed once the profile has been approved.

Test School 1 +					
Profile	Required By Date	Expiration Date	Access Code	Progress	Copy
A new Class of 2013	5/13/2013	6/30/2018	TESTSCHOOL2013A	● 0 of 27 students completed	Copy
PENDING: Test School - Nursing Day Class of 2017	12/31/2019	12/31/2025	*****	● 0 of 0 students completed	Copy

Figure 9: Pending profile

ACCESSING A PROFILE

To access the **“General Information,” “Documents,” “Requirements”** and/or **“Students”** section of a profile, click on the name of the desired profile within the **“Profiles”** dashboard.

Test School 1					
Profile	Required By Date	Expiration Date	Access Code	Progress	Copy
A new Class of 2013	5/13/2013	6/30/2018	TESTSCHOOL2013A	0 of 27 students completed	Copy
Nursing Class of 2016	12/31/2016	9/26/2018	NURSING2016	0 of 2 students completed	Copy
Nursing Class of 2017	8/22/2015	6/30/2018	NURSING2017	0 of 2 students completed	Copy

Figure 10: Profiles dashboard, select profile

The “General Information” section displays the profile information. This information can be updated at any time by the school, if necessary.

General Information

School:

Profile Name: *

Due Date: mm/dd/yyyy *

Due Date First Notice # Days: *

Due Date Second Notice # Days: *

Due Date Third Notice # Days: *

Reminder First Notice # Days: *

Reminder Second Notice # Days: *

Reminder Third Notice # Days: *

Expiration Date: mm/dd/yyyy *

Access Code: *

Description:

Figure 11: General Information section

UPLOAD AND VIEW DOCUMENTATION

At the bottom of the “General Information” section, all required documents assigned to this profile are displayed. On this screen, you can upload, view, rename, delete and reposition all documents as necessary. The required documents are viewable by you and the students assigned to that particular profile. Please note that whenever a new profile is created, all documentation must be re-uploaded as the documentation is not automatically transferred when a new profile is copied or created.

To upload required documentation, click “**Upload.**”

The following document(s) have been assigned to this profile. Documents that are uploaded here are viewable by students assigned to this profile. Click on the “**UPLOAD**” button below to add a new document.

Document Name	Upload Date	View	Delete	Display Order
Health Verification Form	6/5/2014 11:11 AM	View	Delete	↓
Immunization Form	8/26/2013 10:13 AM	View	Delete	↑

Figure 12: The General Information section displays all required documents

Name your document and then browse your files for the document you wish to upload and click “**Submit.**” You will be able to view a copy of the document you uploaded or proceed by clicking “**Save.**”

Upload Document

Name your document:

Click the browse button to locate the file you wish to upload.

Please note: this may take several minutes depending on the size of the file being uploaded.

Figure 13: Upload document screen

REQUIREMENTS

You will want to review your requirements for EVERY new profile you create in case any changes have occurred from one class to another. Changes could include additional requirements that are added, requirements that are no longer needed or updates to the language/description for the requirement. The instructions below will show you how to add a requirement, edit a requirement, delete a requirement, and reposition a requirement.

If you are adding a new requirement or updating an existing requirement, please make sure you contact your Account Manager or Sales Executive with the updates you are making.

Requirements					
Requirements are the items that students must fulfill in order for their record to be complete.					
The following requirement(s) have been assigned to this profile. Click on the "ADD" button below to add a new requirement. Click on the name of a requirement to edit it.					
<input type="button" value="ADD"/>					
Requirement Name	Type	Approval Required	Expiration Date	Delete	Display Order
Measles, Mumps, and Rubella (MMR) <i>Please provide proof of two doses of MMR vaccine OR proof of positive titer</i>	One document is needed	Yes - Approval Required by Vendor	No	Delete	↓
Varicella <i>Please provide documentation of 2 doses of Varicella Vaccine, OR Documentation of positive titer OR provide documentation of history of having had Varicella.</i>	One document is needed	Yes - Approval Required by Vendor	No	Delete	↑ ↓
Hepatitis B (First Dose) <i>Please provide documentation of First dose administered OR documentation that series of three (3) immunizations are completed OR proof of antibody titer to Hepatitis B.</i>	One document is needed	Yes - Approval Required by Vendor	No	Delete	↑ ↓
Hepatitis B (Second Dose) <i>Please provide documentation of second dose administered OR documentation that series of three (3) immunizations are completed OR proof of antibody titer to Hepatitis B.</i>	One document is needed	Yes - Approval Required by Vendor	No	Delete	↑ ↓
Hepatitis B (Third Dose) <i>Please provide documentation of third dose administered OR documentation that series of three (3) immunizations are completed OR proof of antibody titer to Hepatitis B.</i>	One document is needed	Yes - Approval Required by Vendor	No	Delete	↑ ↓
Tetanus <i>Please provide documentation of last Tetanus, required within the last 10 years.</i>	One document is needed	Yes - Approval Required by Vendor	Yes	Delete	↑ ↓

Figure 14: Requirements screen

ADD A REQUIREMENT

Please contact your Account Manager if you need a requirement added and provide them with the following information for that requirement.

- **Requirement Name:** Provide the name of the requirement.
- **Approval Required:** Indicate one of the following options:

- **No:** This means no approval is required (for example, if a requirement is just for emergency contact information, which does not require approval).
- **By Organization:** The school will approve the requirement.
- **By Vendor:** Truescreen will approve the requirement.
- **Has an Expiration Date:** Does this requirement have an expiration date – Yes or No?
- **First, Second and Third Expiration Notice (# of Days):** Reminder notices can be sent prior to the requirement expiring. Please indicate how many days in advance of the requirement’s expiration date we will automatically send each of the 3 reminder notification emails. Please note the system will automatically list our default settings of 30 days prior, 15 days prior, and 0 days prior (meaning the day of expiration); however, these can be customized according to your preferences.
- **First, Second and Third Reminder after Expiration (# of Days):** Reminder notices can be sent after the requirement has expired, if the student has not yet uploaded new documentation. Please indicate how many days after the requirement’s date has expired we will automatically send reminder notification emails.
- **Has Date of Test?** Does this requirement have a date of test – Yes or No?
- **Instructions:** Provide detailed instructions on what information is needed to fulfill this requirement. Please ensure you are as detailed as possible, so the students know exactly what is required of them.

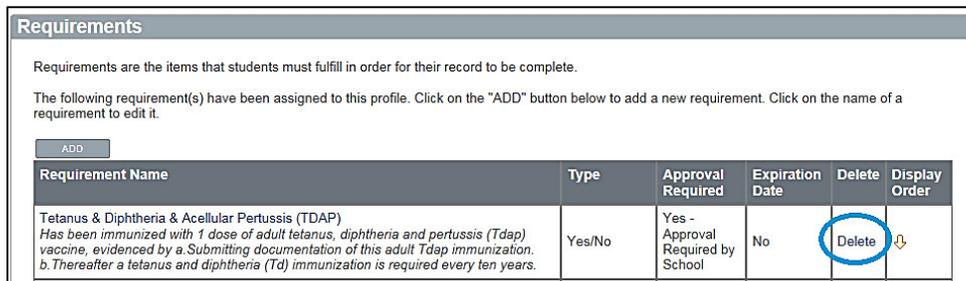
EDIT A REQUIREMENT

Please contact your Account Manager if you are editing a requirement to let them know what information is being updated.

Find the requirement you would like to edit and click on the name of the requirement that appears in blue. Update any of the information, as necessary and click “Save.”

DELETE A REQUIREMENT

Find the requirement that you no longer need to appear for that class/profile and click “Delete.”



Requirement Name	Type	Approval Required	Expiration Date	Delete	Display Order
Tetanus & Diphtheria & Acellular Pertussis (TDAP) <i>Has been immunized with 1 dose of adult tetanus, diphtheria and pertussis (Tdap) vaccine, evidenced by a. Submitting documentation of this adult Tdap immunization. b. Thereafter a tetanus and diphtheria (Td) immunization is required every ten years.</i>	Yes/No	Yes - Approval Required by School	No	Delete	↓

Figure 15: Delete a requirement

A pop-up will appear, confirming whether you would like to delete the requirement. Click “OK.” Your screen will refresh and the requirement will be removed from the list.

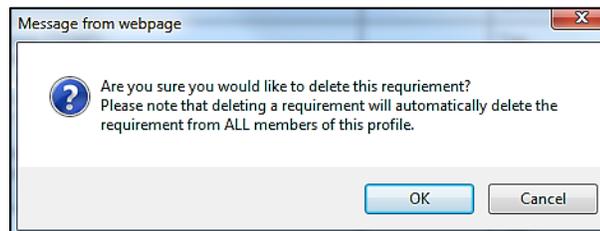


Figure 16: Approval box to delete a requirement

REPOSITION A REQUIREMENT

Go to the “Display Order” column, next to the requirement you would like to move and click either the up or down arrow to move the requirement up or down one space. Continue to click the up or down arrow until the requirement is repositioned in your preferred order.

Requirement Name	Type	Approval Required	Expiration Date	Delete	Display Order
Tetanus & Diphtheria & Acellular Pertussis (TDAP) <i>Has been immunized with 1 dose of adult tetanus, diphtheria and pertussis (Tdap) vaccine, evidenced by a Submitting documentation of this adult Tdap immunization. b. Thereafter a tetanus and diphtheria (Td) immunization is required every ten years.</i>	Yes/No	Yes - Approval Required by School	No	Delete	↓
Two-Step Tuberculin Skin Test <i>a. Initial testing is a two-step tuberculin skin test, done as a baseline prior to clinical placement. 1) This is usually an intradermal purified protein derivative (PPD) test with a negative result, followed by a second intradermal PPD test one to three weeks later. Results must be read 48 to 72 hours after each test. 2) If the student has had one or more PPD tests within 12 months of clinical placement, the student may document the most recent test as the first PPD test for Westminster College. This student must get the second PPD test within two months prior to clinical placement. 3) A single PPD test is required annually after the initial negative two-step test.</i>	Yes/No	Yes - Approval Required by School	No	Delete	↑ ↓

Figure 17: Move a requirement

STUDENTS

This section will provide instructions on how to upload a student, view the student dashboard and run management reports on your students.

UPLOAD STUDENTS

In order for students to upload their immunization records, you MUST upload them into the system. If a profile is in pending status you can upload your list and the email notifications will be automatically sent once the profile has been approved. Students can be uploaded at any time while the profile is active.

Make sure you are in the correct profile, scroll to the “Students” section and click “**Upload**” when you are ready to upload your students.

Students

EDIT INVITE EMAIL: Students are sent an invite email when they are uploaded into the system. You can edit the email sent here. [EDIT EMAIL](#)

Click the **UPLOAD** button to assign students to this profile. Student data is provided via an excel spreadsheet. Once Student have been uploaded, the system allows for email notifications to be sent.

Search For Students:
 By: Last Name

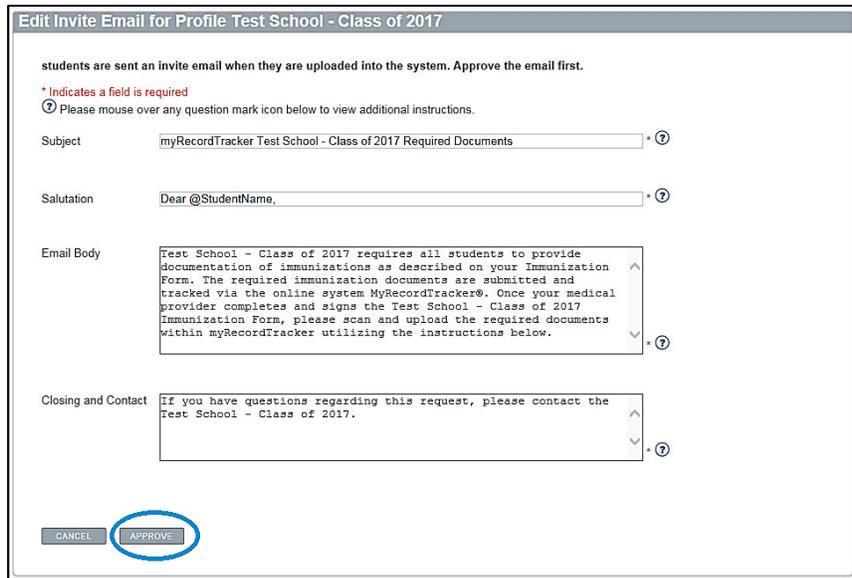
Student Reports: Export Students - Summary

No students have been added to this profile.

Figure 18: Upload Students dashboard

If this is the first time you are uploading students for this profile, the next box will allow you to “Edit” the email notification that is sent to each student. You can edit the subject line, salutation, email body, closing and contact information as needed, or you can leave the language as is.

Once you have reviewed this information, click “**Approve.**”



Edit Invite Email for Profile Test School - Class of 2017

students are sent an invite email when they are uploaded into the system. Approve the email first.

* Indicates a field is required
 ⓘ Please mouse over any question mark icon below to view additional instructions.

Subject: myRecordTracker Test School - Class of 2017 Required Documents ⓘ

Salutation: Dear @StudentName, ⓘ

Email Body: Test School - Class of 2017 requires all students to provide documentation of immunizations as described on your Immunization Form. The required immunization documents are submitted and tracked via the online system MyRecordTracker®. Once your medical provider completes and signs the Test School - Class of 2017 Immunization Form, please scan and upload the required documents within myRecordTracker utilizing the instructions below. ⓘ

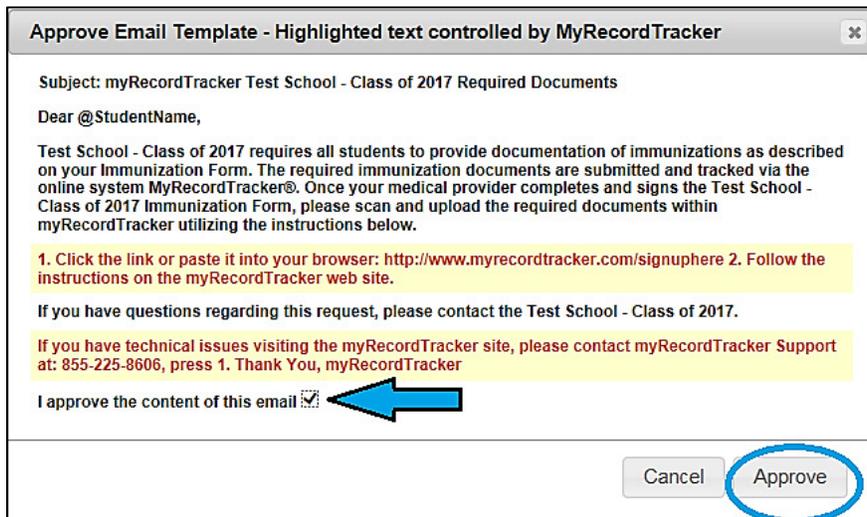
Closing and Contact: If you have questions regarding this request, please contact the Test School - Class of 2017. ⓘ

CANCEL APPROVE

Figure 19: Edit student email notification

An “Approve Email Template” box will appear showing you how the email notification will be sent to each student. Please note that the instructions highlighted in yellow/red font cannot be changed, but all other language you provided will be listed.

Check off the box next to “I approve the content of this email” and click “Approve.”



Approve Email Template - Highlighted text controlled by MyRecordTracker [X]

Subject: myRecordTracker Test School - Class of 2017 Required Documents

Dear @StudentName,

Test School - Class of 2017 requires all students to provide documentation of immunizations as described on your Immunization Form. The required immunization documents are submitted and tracked via the online system MyRecordTracker®. Once your medical provider completes and signs the Test School - Class of 2017 Immunization Form, please scan and upload the required documents within myRecordTracker utilizing the instructions below.

1. Click the link or paste it into your browser: <http://www.myrecordtracker.com/signuphere> 2. Follow the instructions on the myRecordTracker web site.

If you have questions regarding this request, please contact the Test School - Class of 2017.

If you have technical issues visiting the myRecordTracker site, please contact myRecordTracker Support at: 855-225-8606, press 1. Thank You, myRecordTracker

I approve the content of this email ←

CANCEL APPROVE

Figure 20: Approve email template

Click the “here” hyperlink to download either the standard worksheet template or the expanded worksheet template, which includes additional columns that may be necessary for your school/program.

- **Please note:** First name, last name and email address are **required** fields. You can include any other columns that are necessary. If you are downloading the template from myRecordTracker, make sure to remove the second row that contains sample information.

Once you enter all of the information for the students on your spreadsheet and save your file, complete the additional fields by naming the document you are uploading and then browse for/add your spreadsheet, indicating whether or not the first row of your Excel file contains column names, and clicking **Next.**

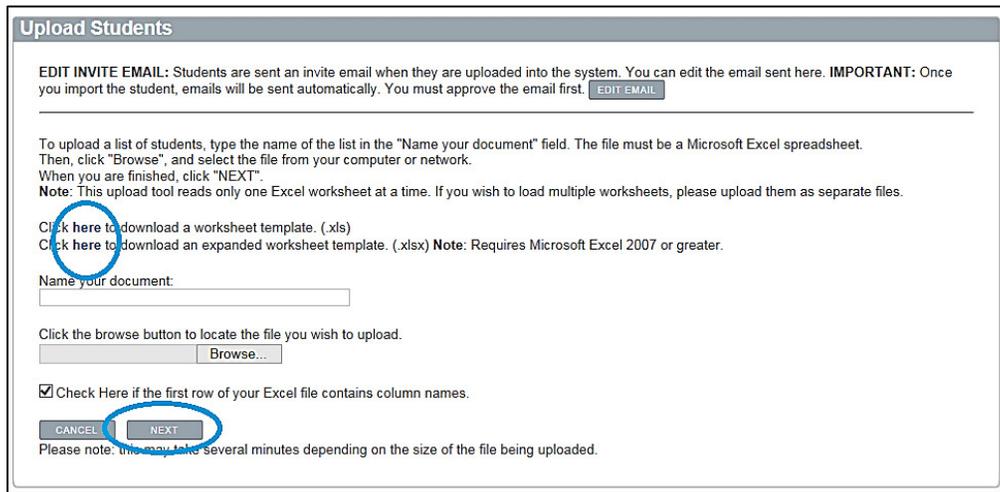


Figure 21: Upload students

The next screen will ask you to Map the columns from the Excel file to ensure that the first and last names are not backwards, etc. Once you go through each column to ensure the Excel column name matches the Mapping column name, click **Submit.** You will then be asked to confirm that you want to upload the students and the following screen will indicate that the file has been successfully uploaded. Ensure that “Send Email to New Members” checkbox is checked, so the emails will be sent to the students on your template. If you do not wish to have the email notifications sent at this time, leave the box unchecked -- you can manually send the notifications per student at a later date.

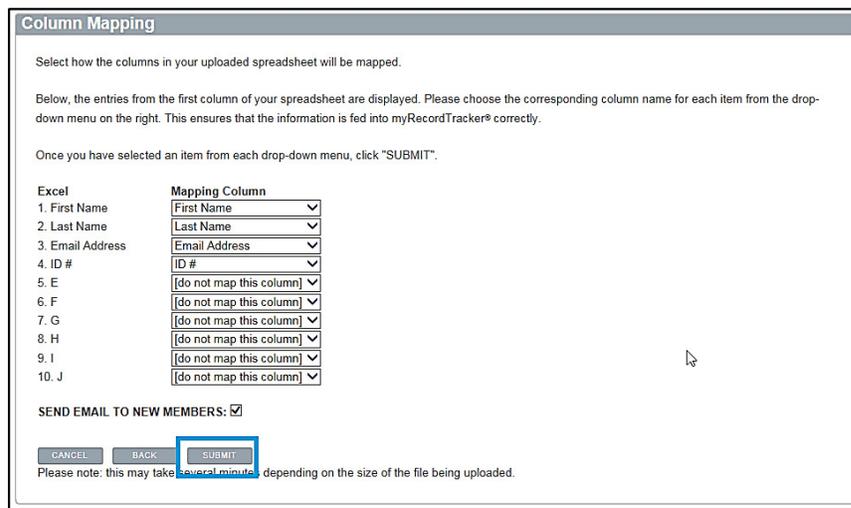


Figure 22: Upload students – Column Mapping

- **Please note:** If there are any errors with your upload and thus the student(s) could not be uploaded in our system, a red box will appear in the Column Mapping Screen indicating which row contained an error. All errors will appear on the screen in red and you will need to correct those errors on the original spreadsheet, and go through the upload process again in order for all students to be uploaded.
 - The most common error will state *“Email Address entered on row # XX is in use by another account.”* Our system will not allow the same Email address to be used twice, so if the student was originally in a different program and has now moved to the new class or program, you will need to contact our IT Support team to move the student. IT Support can be reached at 800-803-9042

x2006 or ITSupport@truescreen.com. Remove this student from the template and resubmit the upload.

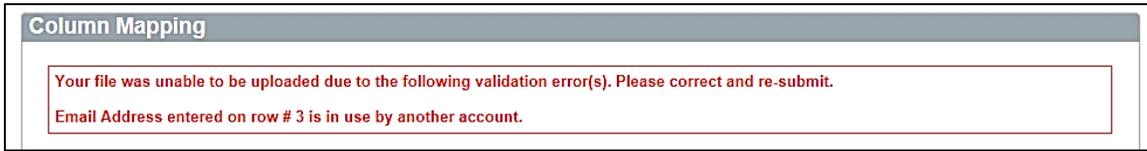


Figure 23: Column Mapping error notice

EDIT STUDENT EMAIL NOTIFICATION

The email notification sent to students can be edited at any time by clicking the “**Edit Email**” icon in the upper right hand corner of the Students module and following the prompts to edit the email notification.

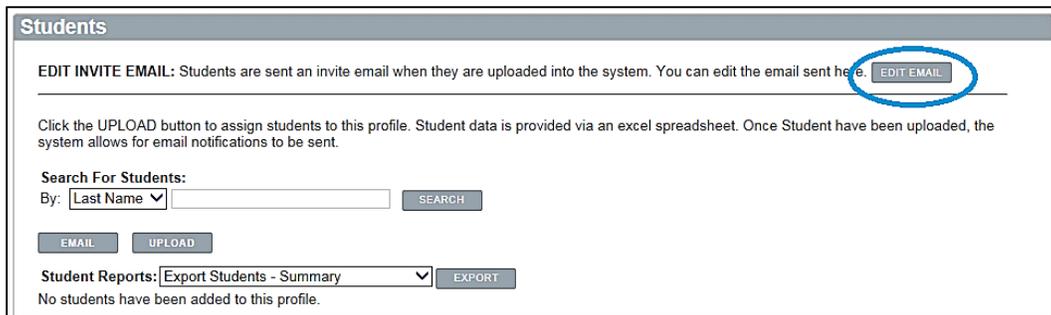


Figure 24: Edit email notification

STUDENT DASHBOARD – VIEWING AND MANAGING STUDENTS

All student accounts and documents can be managed and viewed via the “**Students**” section within each profile. Through this dashboard you can see each student, view student documentation individually, review and approve/reject uploaded student documentation (if applicable) and find out what items are remaining for each student.

In the “Students” section, you can search for a current student within a selected profile.

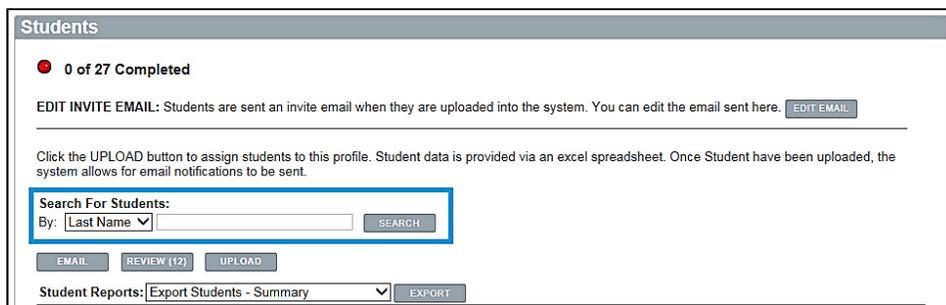


Figure 25: Search for students

You can edit the columns in the “Student” section of the selected profile so that they are in the order desired and you can also choose columns to hide or make visible to suit your needs. Selecting the “Refresh” button reloads the page and makes available the most up-to-date student requirement information.

Student Reports: Export Students - Summary										
Last Name	First Name	View	Status	Email Address	Items Remaining	Student Input Required	School Input Required	Vendor Input Required	Rejected	Delete
Andrews	Jill	View	●	apomerantz@example.com	13	13	0	0	0	Delete
Betts	Thomas	View	●	tbetts@yourschool.com	19	19	0	0	0	Delete

Figure 26: Edit columns and refresh page

If a student hasn't signed up under this account yet, you can resend the invite email directly through the dashboard.

Last Name	First Name	Status	Email Address	View	Items Remaining	Student Input Required	School Input Required	Vendor Input Required	Rejected	Delete
Andrews	Jill	●	apomerantz@example.com	View	13	13	0	0	0	Delete
Betts	Thomas	●	tbetts@yourschool.com	View	19	19	0	0	0	Delete
Casale	Michael	●	mike@infostream.bz	View	14	11	3	0	0	Delete
Cieslinski	Jackie	●	random45748412@verticalscreen.com	View	20	20	0	0	0	Delete

Figure 27: Resend student invite email

The "Students" section also displays all students currently in the profile and their status in completing the requirements. By clicking "View," you can edit the students' information, such as their name and email; edit the requirements; and view each individual student's requirements and status updates. You can use your mouse to hover over the number listed within the Student Input Required, School Input Required, Vendor Input Required or Rejected columns to see the pending requirements at a glance.

Last Name	First Name	Status	Email Address	View	Items Remaining	Student Input Required	School Input Required	Vendor Input Required	Rejected	Delete
Andrews	Jill	●	apomerantz@example.com	View	13	13	0	0	0	Delete
Betts	Thomas	●	tbetts@yourschool.com	View	19	19	0	0	0	Delete
Casale	Michael	●	mike@infostream.bz	View	14	11	3	0	0	Delete
Cieslinski	Jackie	●	random45748412@verticalscreen.com	View	20	20	0	0	0	Delete
Doe	Jane	●	jdoe@yourschool.com	View	13	13	0	0	0	Delete
Doe	Jon	●	xyz@example.com	View	10	10	0	0	0	Delete
Franklin	Mike	●	mfranklin@yourschool.com	View	19	19	0	0	0	Delete
Harrington	Shari	●	sharrington@verticalscreen.com	View	20	20	0	0	0	Delete
Imbesi	P	●	none@example.com	View	20	20	0	0	0	Delete
Jackson	Tim	●	tjackson@yourschool.com	View	20	20	0	0	0	Delete

Figure 28: View student's information

Edit Student

Jill Andrews apomerantz@example.com Edit Student

A new Class of 2013 for Test School 1 7 of 20 Completed
Due Date: 5/13/2013

* Indicates a field is required

Figure 29: Edit student's name and email address

Michael Casale mike@infostream.bz Edit Student

A new Class of 2013 for Test School 1 6 of 20 Completed
Due Date: 5/13/2013

* Indicates a field is required

Requirement Name	Response Provided	Status
Physical and Mental Health Exam <small>Has had a physical and mental health exam by a nurse practitioner, physician, or physician assistant within the last year which indicates the student is sufficiently healthy to commence the nursing program. a. The completed Westminster College School of Nursing and Health Sciences Physical and Mental Health Certificate must be submitted.</small>	One document is needed to fulfill this requirement: Document #1: test doc 02/03/16 9:02 AM Add Document UPLOAD NEW	● Pending Approval - By school (Expiration Date: 12/31/2016)
Expiration Date: 12/31/2016 UPDATE Date of Test: Not entered UPDATE Status: Pending Approval UPDATE		
CPR Certification <small>Has current cardiopulmonary resuscitation (CPR) certification. a. The CPR course must be Basic Life Support (BLS) for Healthcare Provider. It must include adult, child, and infant CPR and automated external defibrillator (AED) instruction. b. Online courses must have a hands-on skills check-off by a certified instructor. c. Renewal must occur by the last day of the month in which CPR expires. d. A copy of the front and back sides of the CPR card with signatures is needed.</small>	One document is needed to fulfill this requirement: Document #1: test doc 02/03/16 9:02 AM Add Document UPLOAD NEW	● Completed
Expiration Date: Not required UPDATE Date of Test: Not entered UPDATE Status: Completed UPDATE		
Do you wear glasses? <i>smile</i>	Not answered 1 document(s) are needed : Document #1: No record assigned. UPLOAD	● Not Completed (Expiration Date: Not entered)

Figure 30: View student's requirements

If your program is responsible for reviewing and approving/rejecting student requirements, you can view all uploaded requirements for all students at once by clicking "Review." You will approve/reject each requirement accordingly and click "Next" after you have made any updates to get to the next student and/or requirement. Or, if you prefer you can go into each student's profile separately and by clicking "View," locating the requirements in yellow that state "Pending" and approving/rejecting accordingly.

Students

● 0 of 27 Completed

EDIT INVITE EMAIL: Students are sent an invite email when they are uploaded into the system. You can edit the email sent here. EDIT EMAIL

Click the **UPLOAD** button to assign students to this profile. Student data is provided via an excel spreadsheet. Once Student have been uploaded, the system allows for email notifications to be sent.

Search For Students:
 By: Last Name SEARCH

EMAIL REVIEW (12) UPLOAD

Student Reports: Export Students - Summary EXPORT

Figure 31: Review student uploaded requirements that require approval

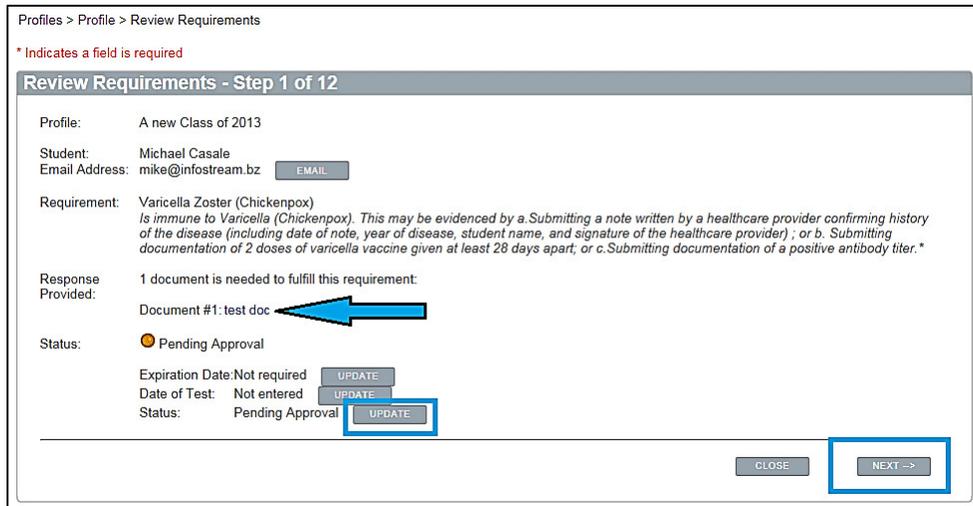


Figure 32: Review requirements which need school approval

HOW TO RUN STUDENT MANAGEMENT REPORTS

Scroll Down to “**Students**” and right above the list of students you will see “**Student Reports**” with a drop down menu of reports to choose from:

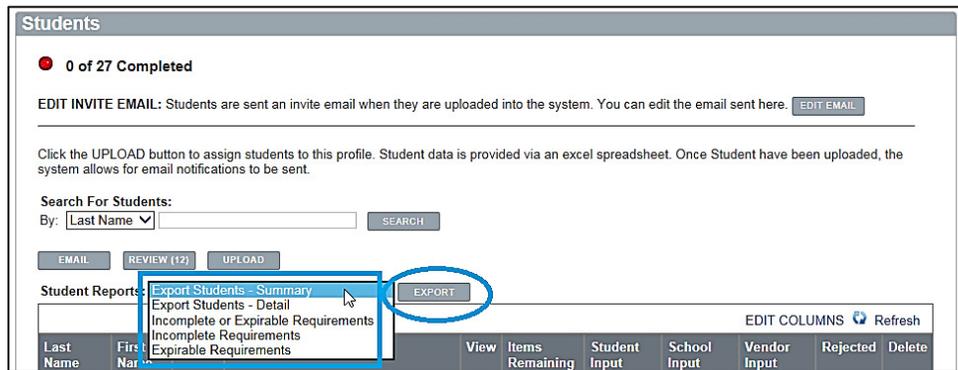


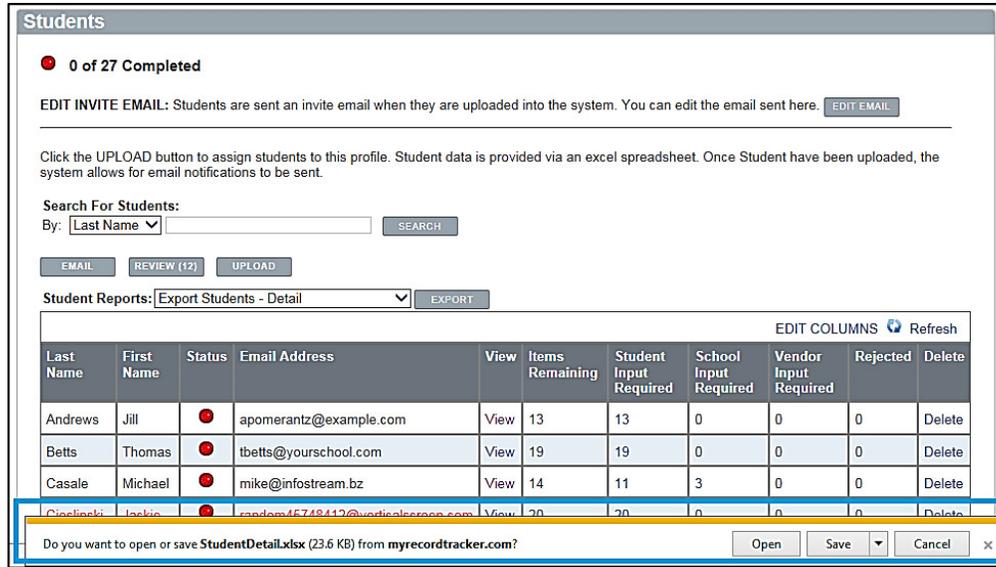
Figure 33: Student reports

Use the drop down menu to select the report you would like to run, inclusive of the following options:

- **Export Students - Summary:** This report pulls all student information that appears on the main dashboard.
- **Export Students - Detail:** This report pulls all student information, listing out each individual requirement whether complete, rejected, pending, incomplete, etc. and provides additional information for each requirement.
- **Incomplete or Expirable Requirements:** This report lists every student who has any incomplete requirements (those that have not been uploaded yet/were rejected and not yet corrected), or any expirable requirements (those that were uploaded and have an expiration date), listing each requirement separately per student name.
- **Incomplete Requirements:** This report lists every student who has any incomplete requirements (those that have not been uploaded yet/were rejected and not yet corrected), listing each requirement separately per student name.
- **Expirable Requirements:** This report lists every student who has any expirable requirements (those that were uploaded and have an expiration date), listing each requirement separately per student name.

After you select the report you want to run, click **“Export.”**

After the system has pulled the results, a yellow box will appear at the bottom of the screen which states **“Do you want to open or save <<reportname.xls>> from myrecordtracker.com?”** Select **Open** or **Save**, as desired.



Students

0 of 27 Completed

EDIT INVITE EMAIL: Students are sent an invite email when they are uploaded into the system. You can edit the email sent here. [EDIT EMAIL](#)

Click the UPLOAD button to assign students to this profile. Student data is provided via an excel spreadsheet. Once Student have been uploaded, the system allows for email notifications to be sent.

Search For Students:
By: [SEARCH](#)

[EMAIL](#) [REVIEW \(12\)](#) [UPLOAD](#)

Student Reports: [EXPORT](#)

Last Name	First Name	Status	Email Address	View	Items Remaining	Student Input Required	School Input Required	Vendor Input Required	Rejected	Delete
Andrews	Jill	●	apomerantz@example.com	View	13	13	0	0	0	Delete
Betts	Thomas	●	tbetts@yourschool.com	View	19	19	0	0	0	Delete
Casale	Michael	●	mike@infostream.bz	View	14	11	3	0	0	Delete
Craback	Jackie	●	random16748412@verticalscreen.com	View	20	20	0	0	0	Delete

Do you want to open or save **StudentDetail.xlsx** (23.6 KB) from **myrecordtracker.com**? [Open](#) [Save](#) [Cancel](#)

Figure 34: Open/Save student reports

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: 1-800-803-9042, dial “0”

Email: myrecordtracker@verticalscreen.com

Technical Support: 1-800-803-9042, ext. 2006