CP CertifiedProfile

Instructions for Submitting Documents

Within your To-Do Lists in CertifiedProfile, you may need to submit a document to one or more requirements. These instructions will walk you through your options for uploading, faxing, or mailing your documents.

preparing documents for upload

The most efficient method for document submission is uploading a scanned document to your CertifiedProfile account or to a specific requirement.
Uploading documents:

- ✔ Ensures the clearest image, which will have a greater chance of acceptance
- ✔ Is the most secure method of submission
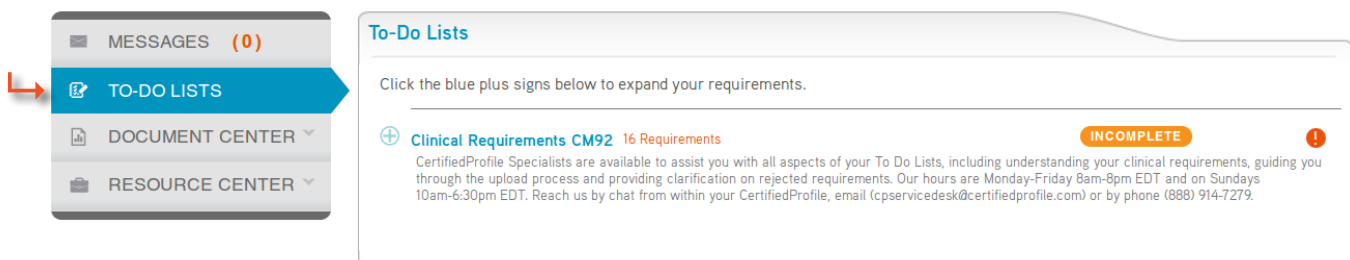- ✔ Has the quickest processing time

In order to upload a document, you need to first have an electronic version of your document. There are multiple ways to create an electronic copy, including the following:

- ✔ Take a picture with your phone and email to your computer
- ✔ iPhone users can utilitize the CertifiedProfile app
- ✔ Use a scanner or a scanner app to transfer your document(s) to your computer
- ✔ Go to a local FedEx or office supply store or other business that offers scanning services to scan your document(s) to a thumb drive. Public or school libraries often have scanners available for your use.

Once you have your document(s) in an electronic format, follow the instructions below to upload your document(s).

Uploading a document to a requirement from your computer

1. From the homepage, on the left side of your CertifiedProfile account, go to your "To-Do Lists".

✉ MESSAGES (0)	**To-Do Lists**
➔ 📝 TO-DO LISTS	Click the blue plus signs below to expand your requirements.
📊 DOCUMENT CENTER ⌄	⊕ **Clinical Requirements CM92** 16 Requirements **INCOMPLETE** ❗
🗄 RESOURCE CENTER ⌄	CertifiedProfile Specialists are available to assist you with all aspects of your To Do Lists, including understanding your clinical requirements, guiding you through the upload process and providing clarification on rejected requirements. Our hours are Monday-Friday 8am-8pm EDT and on Sundays 10am-6:30pm EDT. Reach us by chat from within your CertifiedProfile, email (cpservicedesk@certifiedprofile.com) or by phone (888) 914-7279.

2. Within your To-Do Lists, expand your tracker (by clicking on the blue + icon) and expand the requirement for which you want to upload your documentation. Once you expand the requirement, you will see additional requirement details including instructions to attach a file.

3. Under "Attach a file from either," click Browse, located next to "Your Computer or flash drive."
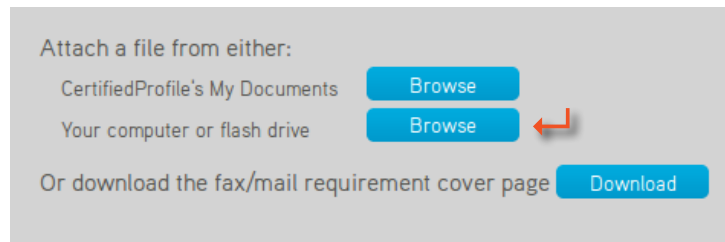
4. Then, select the file from your computer.

5. Once you have uploaded the file, the file name will display under "Attached Files" within the expanded requirement details. Check to make sure the correct file name displays. If you uploaded the incorrect document, you can click "remove document" and then upload the correct file by repeating the steps above.

Note: You will not have the option to remove a document after you have submitted the requirement for review. If you need to replace a document after you have submitted your requirement for review, you will need to contact the CertifiedProfile Service Desk to reset your requirement.

6. If you are only uploading one file, hit Submit now. You must hit the Submit button to attach the document(s) to the requirement. If you do not hit Submit, your requirement status will remain "Incomplete."

Uploading multiple documents to a requirement from your computer

1. If you wish to load more than one document, before clicking Submit you simply click Browse again (next to "Your computer or flash drive") and select your next document. You can continue this process until you have uploaded all of your documents to the requirement.

2. Once you have uploaded all of your documentation, click the "Submit" button to send your documentation for review.
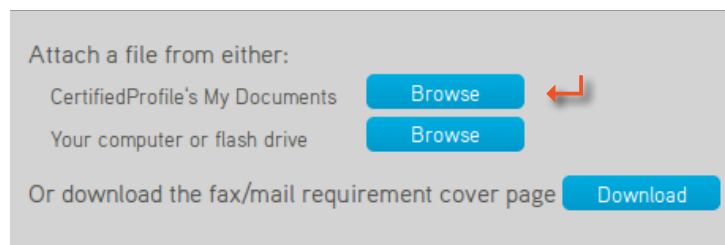
Note: All documents you upload directly to an individual requirement are also stored in "My Documents" for future use. This document storage enables you to attach the previously used document to an additional requirement.

## Uploading a document from within your Document Center

1. Within the expanded requirement details within your To-Do List, find where it says "Attach a file from either".

2. Then, click Browse next to the first option: "CertifiedProfile's My Documents".

Attach a file from either:
- CertifiedProfile's My Documents   [Browse]
- Your computer or flash drive   [Browse]

Or download the fax/mail requirement cover page   [Download]

A pop-up will display for you to select a file.

3. Select the appropriate folder. (If you have previously uploaded a document to a requirement in the tracker, click on the tracker name listed in the pop-up.) Note that your folder names may be different than the ones shown here.

My Documents

Tags ▶

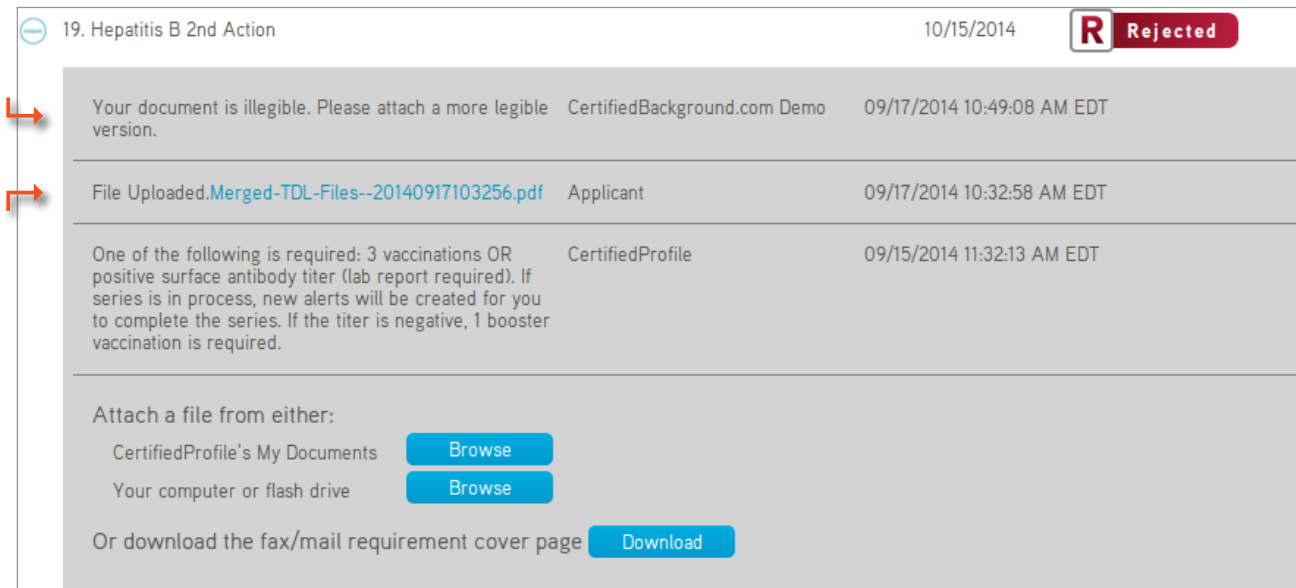| Folders	Files
Certifications	CPR Certification.pdf
Clinical Requirements CM92 ❯	Merged-TDL-Files--201409151114...
CM92 Demo	CPR Certification.pdf
Insurance	Merged-TDL-Files--201409151116...
Medical Records	Hepatitis B - 1st Vaccination.pdf
Portfolios	Merged-TDL-Files--201409151118...
Resumes	Completed BID Form.pdf
Student Loan Records	Merged-TDL-Files--201409151113...
Transcripts	Completed BID Form.pdf
	Merged-TDL-Files--201409151114...
	Results_9014091510454700.pdf
	MMR.odt

4. Locate the file you wish to attach to the new requirement, and select it. The file will load, and then you will be taken to a screen where you can either add additional files or "Submit" if you are finished uploading files for this specific requirement.
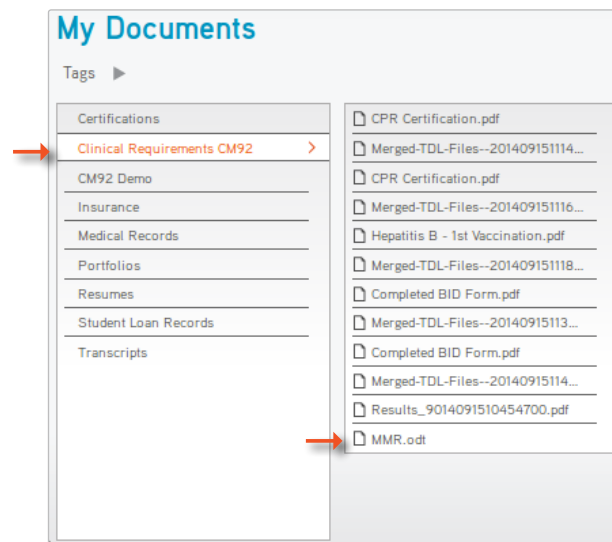
replacing a document to a requirement at rejected status

There are times when your document may be rejected, either because it does not meet the review guidelines or because it is illegible. In these instances, the requirement will be at a status of "Rejected" and you will be responsible for replacing the documentation.

1. To upload a new document expand the requirement to see the details and locate the rejection reason.

19. Hepatitis B 2nd Action		10/15/2014	R Rejected
Your document is illegible. Please attach a more legible version.	CertifiedBackground.com Demo	09/17/2014 10:49:08 AM EDT	
File Uploaded.Merged-TDL-Files--20140917103256.pdf	Applicant	09/17/2014 10:32:58 AM EDT	
One of the following is required: 3 vaccinations OR positive surface antibody titer (lab report required). If series is in process, new alerts will be created for you to complete the series. If the titer is negative, 1 booster vaccination is required.	CertifiedProfile	09/15/2014 11:32:13 AM EDT	

Attach a file from either:

CertifiedProfile's My Documents Browse

Your computer or flash drive Browse

Or download the fax/mail requirement cover page Download

Note that you can also view the file you previously uploaded by clicking the attachment provided directly under the rejection reason.
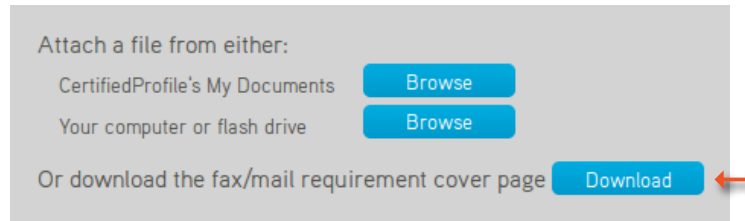
2. To submit the new document, follow the steps detailed in the previous sections for uploading a file.
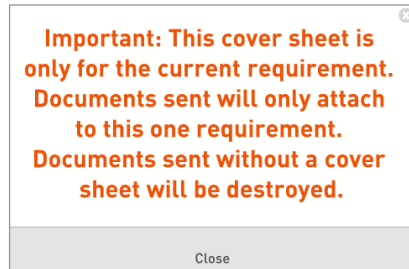
3. Submit.

Submit

faxing documents directly to a requirement

Follow the steps outlined below in order to fax a document needed for a requirement. Please note that this method will result in the document being automatically attached to the specific requirement that you have designated with the included fax cover sheet.

1. From the expanded view of the requirement within your To-Do List, find where it says "Or download the fax/ mail requirement cover page", and click "Download".

Attach a file from either:

CertifiedProfile's My Documents   [Browse]

Your computer or flash drive   [Browse]

Or download the fax/mail requirement cover page   [Download]

You will see the following warning message informing you that this fax cover page is only for the current requirement and that this cover page is required in order to process your submission.

Important: This cover sheet is only for the current requirement. Documents sent will only attach to this one requirement. Documents sent without a cover sheet will be destroyed.

Close

2. Once you have read the message, click "Close".

An additional window will open with your "Student To-Do List Cover Sheet". The requirement name will display along with other requirement, tracker, and student information (your email, for example).

3. A pop-up will also display for you to print the cover sheet. Choose the printer you need, and click "Print."

4. Follow the instructions provided on the form to fax the documentation.

Requirement:

Measles, Mumps & Rubella (MMR)

Alert ID:
Alert Type: tracker_alert
CP User ID:

Fax To: CertifiedProfile
Attention: To-Do List Clinical Requirements CM92
Fax Number: 910-256-2457

OR

Mail to: CertifiedProfile
1845 Sir Tyler Drive
Wilmington, NC 28405
Attn: TDL Document Center

Instructions:

Please use this cover sheet when faxing or mailing documents for the requirement noted above in the orange box. Any documents received without a cover sheet will be destroyed.

Please fax this cover sheet followed by the supporting documentation. When the fax is received, it will be immediately available for review. If faxing documentation for a different requirement, please use the cover sheet that is associated with that requirement. The faxed documents can be accessed in the folder titled Clinical Requirements CM92 in My Documents located in your Document Center.

If you want to fax documentation to more than one requirement, it is important that you print out the fax cover sheet for each specific requirement. You may fax documentation for multiple requirements all at once as long as the pages are faxed in the following order:

- ✔ Fax cover sheet
- ✔ Supporting documentation
- ✔ Fax cover sheet (for additional requirement)
- ✔ Supporting documentation (for additional requirement)

faxing documents directly to your document center

If you need to fax documentation for more than one requirement, you may choose to fax all documentation to your CertifiedProfile Document Center using the steps below. Please note that since all documentation will be uploaded directly to the Document Center, you will need to manually attach files to specific requirements before being able to submit requirements for review.
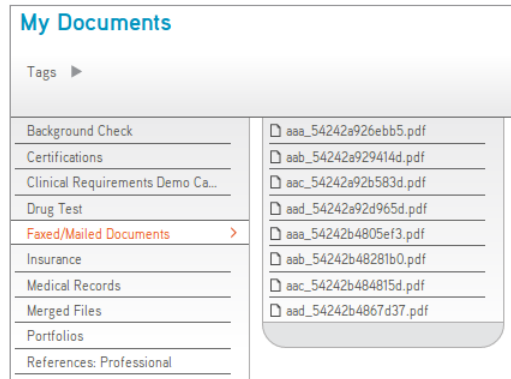
1. Go to your Document Center in CertifiedProfile.

2. Click on "Print Fax/ Mail Cover Sheet" in the right corner of the screen.
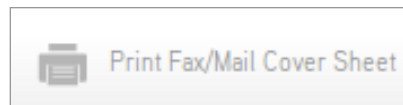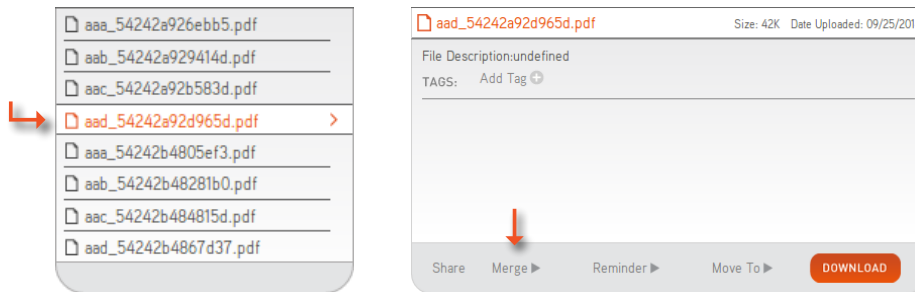

3. Read the warning message that pops up, and close. This fax cover sheet is not requirement-specific so you only need to submit your documentation with this one cover sheet.

4. Print the cover sheet and then upload it along with the documentation needed to complete your requirements.

5. Once your documentation is uploaded with the cover sheet to your account, your documentation will display under "My Documents" within a "Faxed" folder. Each page you uploaded with the cover sheet will be split into a unique pdf.

6. You may then go to your requirements in your To-Do Lists, and upload the appropriate file(s) needed for each requirement using the upload process detailed on page 5. For the step that says to "select the appropriate folder", make sure you select the "Faxed" folder in order to choose from the files you have faxed in.

For your convenience, there is also an option that allows you to merge multiple files into a single document that can then be attached to the necessary requirement(s). Follow these steps in order to merge files.

1. Find the "Faxed/Mailed Documents" folder under "My Documents".

My Documents

Tags ▶

Background Check	aaa_54242a926ebb5.pdf
Certifications	aab_54242a929414d.pdf
Clinical Requirements Demo Ca...	aac_54242a92b583d.pdf
Drug Test	aad_54242a92d965d.pdf
Faxed/Mailed Documents >	aaa_54242b4805ef3.pdf
Insurance	aab_54242b48281b0.pdf
Medical Records	aac_54242b484815d.pdf
Merged Files	aad_54242b4867d37.pdf
Portfolios	
References: Professional	

2. Click on one of the files you wish to merge, then click the "Merge" option that appears to the right of the file list. Click on the drop-down box that says "Add PDF to Merge Queue". This will add the selected file to the Merge Queue.

aaa_54242a926ebb5.pdf
aab_54242a929414d.pdf
aac_54242a92b583d.pdf
aad_54242a92d965d.pdf >
aaa_54242b4805ef3.pdf
aab_54242b48281b0.pdf
aac_54242b484815d.pdf
aad_54242b4867d37.pdf

aad_54242a92d965d.pdf   Size: 42K   Date Uploaded: 09/25/2014

File Description:undefined
TAGS: Add Tag ⊕

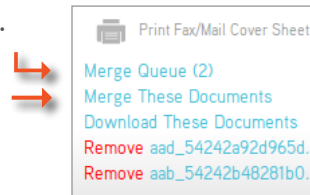Share   Merge ▶   Reminder ▶   Move To ▶   **DOWNLOAD**

3. Add as many files as you wish to merge following the same steps. In the upper right corner under Merge Queue, you can see which files have been selected so far to be merged. If you mistakenly add a file to be merged, you can click "Remove", located in red beside each file name. Doing so will remove that file from the Merge Queue.

4. When you have finished selecting the files you wish to merge and removing any mistakenly added files, click "Merge These Documents", located in the upper right corner of the page.

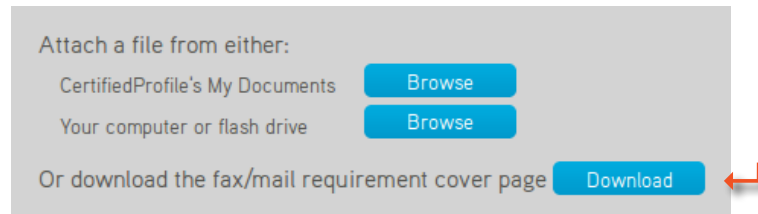Note that there are now two files in the merge queue.

Click "Merge These Documents" once you have all the files you want to combine in the Merge Queue.

🖨 Print Fax/Mail Cover Sheet

Merge Queue (2)
Merge These Documents
Download These Documents
Remove aad_54242a92d965d.
Remove aab_54242b48281b0.

5. You have now merged multiple files into one pdf document. Any merged documents will appear in their own folder titled "Merged Files", located under "My Documents" in your Document Center.

Mailing a document for a requirement

1. Within the expanded details of the requirement for which you need to mail your document, click "Download" located next to "Or download the fax/ mail requirement cover page."

Attach a file from either:
CertifiedProfile's My Documents   Browse
Your computer or flash drive   Browse
Or download the fax/mail requirement cover page   Download

You will receive a warning message stating that this cover sheet is only specific to this requirement.

2. Print the cover page. If you want to mail documentation for more than one requirement, print out the cover sheets for each specific requirement.

3. When mailing, the pages of the documentation should be in the following order:

- Cover sheet
- Supporting documentation
- Cover sheet (for additional requirement)
- Supporting documentation (for additional requirement)

4. Mail to:

CertifiedProfile
1845 Sir Tyler Drive
Wilmington, NC 28405
Attn: TDL Document Center

CP CertifiedProfile
The Power to Achieve More.