

Welcome to myCB!

After creating your CastleBranch account and placing your initial order, you will be prompted to access your secure myCB account. From within myCB, you will be able to:

- ✓ View your order results
- ✓ Manage requirements specific to your programs
- ✓ Complete tasks as directed to meet deadlines
- ✓ Upload and store important documents and records

Create Account

To create an account, go to login.castlebranch.com. Click **'Create Account'** and follow the prompts to enter your personal information.

Place Order

After creating your account, click **'Place Order'** at the top of your dashboard. You will be prompted to enter the following package code specific to your organization:

BP79 : Document Manager and Compliance Tracker

You will be asked to **verify your personal information** provided during account setup and provide additional information as needed to complete applicable searches on your specific order.

IMPORTANT! Your order will be processed with the information provided above. Review ALL personal information and make any applicable changes before submitting to avoid delays, incomplete reports or the potential for additional orders.

Payment methods include MasterCard, Visa, debit card, electronic check*, money order* or installment payment.

*Electronic check or money order payment types will delay your order by approximately 10 business days.

TO-DO LISTS

You can **respond to active alerts or To-Do list items** now or return later by logging into myCB. You will receive alerts if information is needed to process your order.

Access myCB at any time to view order status and completed results. Authorized users at your organization will have access to view your compliance status from a separate CastleBranch portal.

The myCB Help Desk is available to assist you via phone, chat or email.

Monday – Thursday 8 AM – 8 PM & Fridays 8 AM – 6:30 PM

888.723.4263 or userexperience@castlebranch.com