

# BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

## STANDARD OPERATING PROCEDURES

<b>Student Record Tracking</b>		<b>SOP #: SA.007.03</b>
Effective Date	02.01.2018	
Last Revision/Review	09.05.2024	

### 1. Purpose

The purpose behind this procedure is to describe the process regarding the creation and maintenance of student records by the Office of Student Affairs (e.g. immunizations).

### 2. Related Policy/Authority

Policy B9080 - Immunization Requirements

### 3. Faculty/Staff Responsibilities

Director of Student Life, Associate Director of Student Engagement and Outreach, Assistant Director of Student Affairs.

### 4. Definitions/Abbreviations

### 5. Procedural Steps

1.1 The Office of Student Affairs maintains student records utilizing three formats:

- a. Student Information Database: Microsoft Access file titled "BCOM Student Affairs." The database is located on the Student Affairs Shared Drive (I:), under Student Affairs in the "Confidential Files" folder. The correct file has an icon without a lock. This database to house relevant data and student information as it pertains to student matriculation and ongoing policy compliance.
- b. Castlebranch: Each student is required to order the Immunization Tracker, where students are able to submit all necessary documents prior to matriculation and necessary renewals after that. Student Affairs actively monitors submission of documents and status of student compliance.
- c. PDF Files: Student Immunization documents are saved as PDF files in the Confidential Files Drive (T:) under "Immunization-Backup Copies" in a folder designated for that student's graduation year ("DO 2022"). All filenames are the "Last Name First Name" format.
- d. Physical Copy: Any sensitive documents submitted to Student Affairs physically in-person or via mail, are filed by Class in a locked filing cabinet, in the Office of Student Affairs.

2.1 Creating a New Record

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- a. Once the Office of Student Affairs receives notification that a seat deposit has been paid (from the Office of Admissions), a database record for the student is added using the “Add Students Query –DO”.
- b. The new record is updated with the following information: First Name, Last Name, Email, phone number, Class, “Accepted” student status, date of payment, campus location, and Burrell Student ID. Email address and phone number is found on AMP. BCOM Student ID is found in CAMS.

### 3.1 Document Submission

- a. Immunizations
  - i. All required immunization documents are to be submitted via the college’s Castlebranch
  - ii. Addendum to existing files: when new or current Burrell student submits supplemental documentation to be added to their existing PDF file, it is converted to PDF added as addendum pages at the end of the original PDF document.

### 4.1 Record Maintenance

- a. Immunizations:
  - i. Castlebranch tracks the status of a student’s immunization compliance per item with the following categories
    1. Complete: The item is currently in compliance with Burrell policy
    2. Pending Review: a document has been submitted to the item and is currently being reviewed by Castlebranch for compliance status
    3. Overdue: The deadline for submission has passed without documentation
    4. Rejected: a document has been submitted to the item and but has been deemed by Castlebranch to not meet compliance criteria
    5. Incomplete: No document has been submitted to the item, and the deadline date has not yet passed.
- b. Background Checks and Drug Screening
  - i. Once proof of compliance is submitted to Student Affairs by Castlebranch, data will be recorded in the following manner for both Background Checks and Drug Screens:
    1. Status:
      - a. Nothing: Student has not yet ordered the required screening
      - b. In Progress: Student has ordered, but the requirement is not yet completed.
      - c. Complete: Requirement has been completed, and no flags were found.
      - d. Fail: Requirement has been completed, and at least one flag is found.
    2. Date: the date when the requirement’s status is reported by Complio as “Complete”.
- c. New Innovations

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- i. For OMS-II students who are currently completing on-boarding requirements for clinical rotations, or for any current OMS-III or OMS-IV students, a record of their immunizations is also located in an online database, New Innovations. Prior to OMS-III, as mass upload of immunization data is done for each student. However, when additional updated are submitted by students, Student Affairs is responsible for updating the Immunization data under Personnel Record → Demographics for each student.
- ii. Data entered into New Innovations, is the same data entered into the Access Database.
- iii. In addition to updating the data, Student Affairs will also delete the currently uploaded Immunization file on the student's personnel record, and upload the most recently updated file.

### 5.1 Student Status

- a. Accepted: Student has paid their seat deposit, but has not yet matriculated into BCOM
- b. Deferred: Student has paid their seat deposit, but has elected to defer matriculation to the following year.
- c. Current: Student is currently enrolled in BCOM's DO program.
- d. Leave of Absence: Student has elected to take a temporary Leave of Absence from the DO Program, and will be re-instated upon completing terms of re-admission.
- e. Withdrawn: Student has either voluntarily chosen to withdraw from the DO program permanently, or has been administratively withdrawn from the DO program.
- f. Returning: Student is returning from Administrative Withdrawal to repeat an OMS year, or is returning from Leave of Absence.

## 6. Reports/Charts/Forms/Attachments/Cross References

## 7. Maintenance

Designed and implemented by Director of Student Life, Associate Director of Student Engagement and Outreach, Assistant Director of Student Affairs.

## 8. Signature

Approved by

Director of Student Life

9.5.2024

Date

## 9. Distribution List

Internal/External

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### **10. Revision History**

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
1/22/2021	2,5 [3.1,4.1]	Revised resource link, revised method of document submission and tracking using Castlebranch		2/1/2021
05.06.2024	2.1	Adding campus location to list of information needed		5.20.2024
09.05.2024	All	Updated Executive Director of Student Affairs to Director of Student Life.		10.16.2024
09.05.2024	All	Added Associate Director of Student Engagement and Outreach		10.16.2024