

Parchment Send K-12 User Guide



premium

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Introduction

Welcome to Parchment Send!

When transcripts take off on their journey through academia, **Parchment Send** is where they start.

This guide is for Premium Send Members. If you are interested in becoming a Premium Send Member, please [contact us](#).

To send a high school transcript to any destination worldwide, a student (current or former) creates a Parchment.com account, tells us where their transcript is, and where they want their transcript to go. Then you receive their request, upload their transcript, and we send it on its way.

IT'S A SIMPLE IDEA REALLY

Through Parchment Send, we make it super easy for you to send transcripts and other admissions documents to destinations all over the world. And, through Parchment Receive, we make it super easy to receive these documents, streamlining the admissions process and, ultimately, benefitting those you serve: the students.

WITH PARCHMENT SEND, YOU CAN:

- Automate transcript requests with your SIS.
- Upload rosters, so you can send registration codes to your students, making it faster and easier for them to register for a Parchment.com account and request transcripts.
- Allow students, parents, and administrators to track requests every step of the way.
- Place requests on hold, so you can send out the transcripts after the next grading period.
- Send documents electronically or on paper (we'll even print and mail transcripts for you).
- Send other admissions documents, such as eSSRs and letters of recommendation, along with transcripts.
- Know that the PDF you send is the PDF that is delivered.
- Control the display, print, and forwarding permissions for each document you send.
- Track and report on the number and destinations of your requests.
- Control your eCommerce settings.

Enjoy using Parchment Send. We're glad you're here and we're excited for you!

Dashboard

The Dashboard is the first place you arrive after you log in. It includes items needing attention, quick links, and analytics.

TO ACCESS THE DASHBOARD

Go to exchange.parchment.com and log in.

- If you're already logged in, click **Parchment Exchange** on the top left of any screen to access the Dashboard.
- If you forget your password, click **Forgot your password?** and follow the onscreen instructions.
- If you don't have a login, contact your Site Administrator to have one created for you.



ITEMS NEEDING ATTENTION

This section tells you about items needing attention, such as reminding you to [upload a roster](#) or telling you that we were not able to [match a transcript](#) you uploaded with the order that the individual placed.

QUICK LINKS

This section includes quick links to popular areas, such as [Approve Transcript Requests](#) and [Invite Students](#).

Quick Links

Approve Transcript Requests (1)	Invite Students
Process Document Requests (9)	Upload Admission Documents
View Report	Search for Members
Manage School Profile	Manage Administrators
Manage Send Preferences	Import Student Records
Contact Parchment	View FAQ

ANALYTICS

This gives you real-time at-a-glance metrics. By default, each graph displays data for the past year but you can change that to display for the past 30 days or for all time.

- **Transcript volume** shows the number of electronic transcripts sent by delivery method.
- **Top receiving institutions by transcript volume** shows you which schools received the most electronic transcripts from you.
- **Surcharges** shows how much money has been collected from those requesting transcripts.
- **Percentage of students using registration codes** shows how many of your students have registered for a Parchment.com account using the registration code you emailed them or handed out to them.

Transcript requests

Your **To Do List** is where you view, manage, and approve transcript requests.

To Do List (5)

Document Requests (8)

Invite Students

Request

Web Upload

Report

To access your **To Do List**:

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **To Do List**.

You will see these tabs:

- Current Requests
- Next Grading Period Requests
- Requests on Hold
- All Requests

On each tab, you will see these fields (not all fields may be populated):

- **Name**
 - You can click on the individual's name to view more information about them, such as their email address and the last four digits of their social security number.
 - The name field also shows how many destinations the individual would like to send their transcript to. You can click **View <number> destination** to get more information about these destinations, including DID# and date requested.
- **Class of**
- **Student ID**
- **Date of birth**
- **Date requested**
- **Actions** – this field will show up to three options: **Approve**, **Hold**, and **Prepare Locally**.

[View 2 destinations](#)

- Approve
- Hold
- Prepare Locally

APPROVE CURRENT REQUESTS

Once a student or parent submits a transcript request on Parchment.com, the request arrives in the **Current Requests** section of your **To Do List**.

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **To Do List**.
4. Click **Current Requests**.
 - If you have transcript requests waiting, you will see a list of the transcript requests.
 - You will also see a number in parentheses next to the **Current Requests** tab, which is the total amount of transcript requests you have waiting.

parchment EXCHANGE

Send Settings Members Alerts Support Sign Out

To Do List (8) Document Requests (3) Invite Students Web Upload Request Transcripts Report

Approve Transcript Requests

The following students and alumni have placed transcript requests. Select the name link to view detailed information about the student/alumnus and the requested recipients.

Current Requests (8) Next Grading Period Requests (1) Requests On Hold (3) Batch Requests (0) All Requests (12)

For each student/alumnus, select one of the following actions:

- Approve* Authorize Parchment Exchange to release the transcript.
- Hold* Defer processing the request. The student/alumnus will be informed of the delay via email.
- Prepare Locally* Confirm you will process the request from your office.

Requests Per Page: 25

Name	Class Of	Student ID	Date of Birth	Date Requested	Actions
John Doe View 1 destination	2007		08/18/1993	12/30/2013	<input type="checkbox"/> Approve all pending requests <input type="radio"/> Approve <input type="radio"/> Hold
Jane Smith View 1 destination	0		04/05/1986	01/06/2014	<input type="radio"/> Approve <input type="radio"/> Hold
Tom Lee View 2 destinations	2014		10/25/1980	01/16/2014	<input type="radio"/> Approve <input type="radio"/> Hold
Alice Kim View 1 destination	2014		10/02/1989	01/21/2014	<input type="radio"/> Approve <input type="radio"/> Hold

5. Find the transcript request(s) to approve, and click **Approve** under **Actions**.
6. Click **Submit**.
7. Click **Print List** or leave the screen open in the background, so you can see the list of students you need to upload transcripts for.
8. Go into your SIS and find the student's transcript and print it to the Docufide Print Driver or, if your school uploads a different way, then send it that way. We will process the request within 48 hours.

APPROVE A REQUEST THAT WAS WAITING FOR THE NEXT GRADING PERIOD TO END

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **To Do List**.
4. Click **Next Grading Period Requests**.
 - If you have transcript requests waiting, you will see a list of the transcript requests.
 - You will also see a number in parentheses next to the **Next Grade Period Requests** tab, which is the total amount of transcript requests you have waiting.
5. Find the transcript request(s) to approve and click **Approve** under **Actions**.
6. Click **Submit**.
7. Go into your SIS and find the student's transcript and print it to the Docufide print driver or, if your school uploads a different way, then send it that way. We will process the request within 48 hours.

APPROVE A REQUEST THAT WAS ON HOLD

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **To Do List**.
4. Click **Requests on Hold**.
 - If you have transcript requests waiting, you will see a list of the transcript requests.
 - You will also see a number in parentheses next to the **Requests on Hold** tab, which is the total amount of transcript requests you have waiting.
5. Find the transcript request(s) to approve and click **Approve** under **Actions**.
6. Click **Submit**.

- Go into your SIS and find the student's transcript and print it to the Docufide print driver or, if your school uploads a different way, do that now. We will process the request within 48 hours.

PLACE A TRANSCRIPT REQUEST ON HOLD

There are a number of reasons that you may place a transcript request on hold. For example, you would place the request on hold if you want to send the transcript out after the next grading period ends, or if you cannot locate a former student's records with the information provided.

Hold

✓ Select Hold Reason...

Student Hold

Hold for Grades (next grading period)

Other

- Log in to exchange.parchment.com.
- Click **Send**.
- Click **To Do List**.
- Find the transcript request and click **Hold** under **Actions**.
- Select a **Hold** reason from the drop-down menu.
 - Student Hold** – use this if a general issue prevents you from approving the request.
 - Hold for Grades** – use this to hold a transcript request until the next grades are posted. These requests are moved to the **Next Grading Period Requests** tab until the next grades are posted.
 - Other** allows you to type in a personalized message to the student explaining why the request is being placed on hold. Any information entered here will be included in the email to the student telling them the request has been placed on hold.
- Click **Submit**.
 - This places the transcript request in the **Requests on Hold** section. Or, if the hold reason was **Hold for Grades** or **Other**, these requests will be placed in the **Requests on Hold** section.

PREPARE A TRANSCRIPT LOCALLY

You may choose to prepare a transcript locally (if you don't have electronic records for a former student, for example.) However, it's important to note that you will not see the option 'Prepare locally' for an unofficial transcript. This is because the unofficial transcript remains in the student's Parchment.com Inbox.

- Log in to exchange.parchment.com.
- Click **Send**.
- Click **To Do List**.
- Find the transcript request(s) and click **Prepare Locally** under **Actions**.

Approve

Hold

Prepare Locally

5. Click **Submit**.
6. Click **Print List** or leave the web page in the background, so you can see the list of students and the addresses.
7. You can now mail the transcript(s) to the recipient(s), or they can pick them up.

Upload transcripts after approving them

After you've approved a request, you need to go into your SIS and upload the transcript.

These instructions apply to schools that print to the Docufide print driver. If you do not upload transcripts in this way, these instructions will not apply. If you have questions about uploading your transcripts, please visit our [Support Center](#).

A few things about printing to the Docufide print driver:

- Print each transcript only once.
- Print one transcript per student, regardless of how many destinations the transcript is being sent to.
- Do not print transcripts for requests that have not been approved yet. We cannot match transcripts to requests that have not been approved.
- Before printing to the print driver, do not select **Shrink to fit** or **Fit to page**, and do not enable **Auto rotate** on the **Print Settings** window. Otherwise, we have to match your documents to the requests in the system manually instead of automatically. The manual process takes more time than the automatic process, especially during busy periods.

PC INSTRUCTIONS (DOCUFIDE PRINT DRIVER)

1. Go to your SIS and open the transcript.
2. Click **Print**.
3. Select the **Docufide Secure Transcript Printer**.
4. Click **OK**.

MAC INSTRUCTIONS (DOCUFIDE PRINT DRIVER)

You must use Preview to send transcripts to Parchment Exchange. Adobe Acrobat and Adobe Reader will not work.

1. Go to your SIS and open the transcript.
2. Click **File > Print**.
3. From the Print dialog box, select **PDF**.
4. Select **Send to Docufide** from the drop-down menu.

BROWSER SETTINGS FOR WEB-BASED SIS

If you are using a web-based SIS, make sure your browser settings are correct to allow our system to automatically match a transcript to a transcript request.

If your settings are incorrect, we have to match these requests manually and this can be time consuming, especially during busy periods. Therefore, if you notice that there is a delay in delivering transcripts, this may be due to your browser settings.

Internet Explorer is the best browser to use. However, if you use Firefox or Chrome, follow the steps below to make sure that your settings are correct.

These instructions are for PC Browser settings only.

Firefox

1. Open **Firefox**.
2. Click **Firefox > Options > Applications**.
3. Click **Portable Document Format (PDF)**.
4. Under **Action**, change the default viewer from **Preview in Firefox** to **Adobe Reader**.
5. Resend a transcript and allow a few minutes to confirm that it has been processed.
6. Once it has processed successfully, resend all documents.

Chrome

1. Open **Chrome**.
2. Type **chrome://plugins**
3. Click **Disable** under **Chrome PDF Viewer**.
4. Click **Enable** under **Adobe Reader**.
5. Resend a transcript and allow a few minutes to confirm that it has been processed.
6. Once it has processed successfully, resend all documents.

Document requests

Document Requests is where you view and manage all requests other than transcript requests. This includes eSSRs (Guidance Report Requests), letters of recommendation, and school profiles.

To Do List (6)	Document Requests (8)	Invite Students	Request	Web Upload	Report
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To access your **Document Requests**:

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.

You will see up to four tabs (depending on your settings, you may not see the **Guidance Report Requests** tab):

- All Requests
- Guidance Report Requests (eSSRs)
- Letter of Recommendation Requests
- School Profile Requests

On each tab, you will see these fields (not all fields may be populated):

- Student
 - You can click on the individual's name to view more information about them, such as their email address and the last four digits of their social security number.
- Class of
- Transcript
- Document type
- College
- Date requested
- Action

ESSRS (GUIDANCE REPORT REQUESTS)

In-network Receiver schools can request that electronic Secondary School Reports (eSSRs) accompany transcripts.

You will receive these requests if you have subscribed to this service and if it is available in your state. If you're interested in subscribing, please contact your Account Executive.

When an eSSR request comes through, you will see:

- The student's transcript request in your **To Do List**.
- A request for an eSSR in the **Document Requests** tab.

Process Document Requests

The following document requests are awaiting action. Select a student's name to view detailed document request information, including transcript requests.

For colleges registered to receive eSSRs, select **Complete eSSR** for a student to complete and submit the online Secondary School Report for that student. To cancel an eSSR request, select the **Delete** link next to the college; the college will be informed that the eSSR will not be completed online. [Search for students that have placed a transcript request](#) to add an eSSR request for a student, or [prepare an eSSR](#) for a student whose transcript was not requested through Parchment Send Service.

[All Requests](#) | [Guidance Report Requests](#) | [Letter of Recommendation Requests](#) | [School Profile Requests](#)

For each document request select the appropriate action to create a printable checklist to complete the requests:

Upload Document To upload the document using the Parchment Exchange Web Upload.
Prepare Locally To confirm you will process the request manually from your office.
Cancel To cancel the request.

Student	Class Of	Transcript	Document Type	College	Date Requested	Action
John Smith	2018	Prepare Locally	eSSR	Florida Institute of Technology <input type="button" value="delete"/>	01/30/2014	Complete eSSR
Paula Terry	2013	Transcript	eSSR	Florida Institute of Technology <input type="button" value="delete"/>	09/19/2013	Complete eSSR
John Doe		Not Available	eSSR	Florida Institute of Technology <input type="button" value="delete"/>	01/10/2014	Complete eSSR
Theresa Lee		Not Available	eSSR	Ball State University <input type="button" value="delete"/>	01/10/2014	Complete eSSR

To fulfill requests for eSSRs:

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.
4. Click **Guidance Report Requests**.
5. Click **Complete eSSR** under **Action** for the student whose eSSR you want to fulfill.
6. On the next screen, you will fill in all the requested fields. These are the fields that the colleges have asked to be filled in. However, they are not mandatory. Schools can select which fields they would like completed, so you may not see all of these:
 - Student information

- Current courses
 - Diploma type
 - Enrollment information
 - Class rank
 - Cumulative GPA
 - Course selection
 - SEVIS (Student and exchange visitor information system)
 - Student ratings by category
 - Evaluation
 - Supplemental information
 - School information
 - Counselor information
7. Confirm that the information you're providing is accurate.
 8. Click **Save & Continue** or click **Save Go Back** if you don't want to submit the information yet.

Prepare an unrequested eSSR

You can fill in an eSSR for a student who has not requested a transcript through Parchment Send.

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.
4. Click the link **prepare an eSSR** (see red circled text below).

For colleges registered to receive eSSRs, select **Complete eSSR** for a student to complete and submit the online Secondary School Report for that student. To cancel an eSSR request, select the **Delete** link next to the college; the college will be informed that the eSSR will not be completed online. [Search for students that have placed a transcript request](#) to add an eSSR request for a student, or **prepare an eSSR** for a student whose transcript was not requested through Parchment Send Service.

5. Search for the college and click **Search**.
 - If the college does not appear, then they are not an in-network Receiver and you cannot send them an eSSR.

6. Select the college and click **Continue**.
7. Fill in all the fields.
8. Click **Save & Continue**.

Cancel an eSSR request

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.
4. Click **Delete**, which you'll find next to the name of the college (see red circled text below).

View Details	2013	Pending Upload	eSSR	Docufide Institute of Technology	<input type="button" value="delete"/>	11/20/2013	Complete eSSR
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LETTER OF RECOMMENDATION REQUESTS

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.
4. Click **Letter of Recommendation Requests**.
5. You can approve the request. Once approved, you need to upload the letter using [web upload](#).

SCHOOL PROFILE REQUESTS

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Document Requests**.
4. Click **School Profile Requests**.
5. You can approve the request. Once approved, you need to upload the school profile using [web upload](#).

Reports

Report allows you to run reports on all documents. You can search by:

- Student's first and last name
- Receiver
- DID#
- Class of <year>
- Document status
- Document type
- Date requested
- Date approved
- Date delivered

All documents, including those that have been requested but not uploaded, are listed here. Also, if a document was uploaded within the last 90 days, you can click the **DID#** to view it.

Student First Name	<input type="text"/>	Date Requested	<input type="text"/>	to	<input type="text"/>
Student Last Name	<input type="text"/>	Date Approved	<input type="text"/>	to	<input type="text"/>
Receiver	<input type="text"/>	Date Delivered	<input type="text"/>	to	<input type="text"/>
DID#	<input type="text"/>	Document Status	<input type="text"/>		
Class Of	<input type="text"/>	Document Type	<input type="text"/>		
<input type="checkbox"/> View only students that placed transcript requests without associated eSSR requests					
<input type="button" value="Clear All"/>					<input type="button" value="Search"/>

RUN A REPORT

1. Log in to exchange.parchment.com.
2. Click **Send > Report**.
3. Enter the fields that you would like to search and click **Search**.
 - If a document was uploaded within the last 90 days, you can click the **DID#** to view it and you can also download it.
 - To export to Excel, check the box next to the document(s) that you want to export and click **Export report to Excel**.

Registration codes

Registration codes help streamline the registration process for students. By entering their registration code on Parchment.com (or by clicking the link in the email you send them), students can create an account quickly because their information will be pre-populated.

You can upload your student roster to generate registration codes for your students. You can then print or email the registration codes.

A few things you should know about uploading your roster:

- It must be a .csv or .txt file format.
- The file must include at least the following information:
 - Student name (first and last)
 - Student date of birth
 - Student ID (must be unique across all class years)
 - Graduation/leave year
- 30 days before the start of your academic calendar, you'll see an alert on your home page reminding you to upload a new roster.

UPLOAD ROSTER

Your roster must be in a .csv or .txt file format, and must include these fields:

- Student name (first and last)
- Student date of birth

Import Student Roster

Roster Upload > Map Columns > Upload

The following fields must be included in your Student Roster file. Use the [template](#) to ensure auto mapping.

- Student Name (First and Last)
- Student Date of Birth
- Student ID (must be unique across all class years)
- Graduation/Leave Year

Roster Name

▾

Data File

File Type

Comma Delimited Tab Delimited

File Headers

Yes No

- Student ID (must be unique across all class years)
- Graduation/leave Year

To upload a roster:

1. Log in to exchange.parchment.com.
2. Click **Settings**.
3. Click **Import Student Records**.
4. Select **Roster Name** from the drop-down menu if yours is already listed.
 - This may apply if you had an update to your file.
 - If you select **Add new**, you can enter a name for your roster.
5. Under **Data File**, you can drag your file to the box, or you can click the box and then select your file.
6. Under **File Type**, select if it is a **Comma Delimited** or **Tab Delimited** file.
 - Comma-delimited has each column separated by a comma. Tab-delimited has each column separated by a tab.
7. Select if your file has headers.
8. Click **Continue**.
9. You should get a confirmation that looks like this to let you know that all the fields were correct:

You have mapped 5 of 5 required fields.

Student First Name

Student Last Name

Student ID

Date of Birth

Graduation/Leave Year

- If the system did not match them correctly, you have the opportunity to change these by using the drop-down menus.

Mapped Column (* Indicates required mapping)

* Student First Name	▾
* Student Last Name	▾
* Student ID	▾
* Date of Birth	▾
* Graduation/Leave Year	▾
Email Address	▾

10. Once everything is correct, click **Continue**.
11. Click **Upload roster**.

ADD STUDENTS THAT ARE NOT IN A ROSTER

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Invite Students**.
4. Click **Add Students**.
5. Enter the student's information.
 - All fields with a * (asterisk) are mandatory.
6. Click **Add**.

INVITE STUDENTS TO REGISTER

Once you have added students, you are ready to send registration codes. You may want to look at the **Registration Data** table (see example on right), which you can access by clicking **Send > Invite Students**. This shows you which students have and have not registered, and shows them by graduation year. This is handy if you only want to invite seniors to register, for example (see red circle in the example on the right).

Registration Data

View registrations by class. Click a value to see the list of students.

Class	Number of Students	Registered	Unregistered
Total	21	9	12
2014	15	6	9
2015	3	1	2
2016	2	1	1
2017	1	1	0
Alumni	31	0	31

Email registration codes

You can only email registration codes if you included student email addresses when you added students to the system.

[Email Registration Codes](#)

- If you do not have email addresses, you should select [Print registration codes](#).
 - If you want to use the [Registration Data table](#) to help you decide who to invite, select the number in the **Unregistered** column that you'd like to invite and then skip to **step 6** below.
1. Log in to exchange.parchment.com.
 2. Click **Send**.
 3. Click **Invite Students**.
 4. Click **Email Registration Codes**.
 5. Select the students that you want to receive registration codes.
 6. Click **Email Registration Codes**.
 7. You will see what the email will look like. Under **Customize Email**, you will see some custom settings. You

can:

- Select if you'd like additional Parchment.com features explained in the registration email.
- Add a custom message.
- Select from a drop-down menu who you would like the email to be sent from.
- Check or uncheck the box next to **Automatically attempt up to 4 emails for unregistered students**.

8. Click **Email these <number> students now**.

Print registration codes

If you want to use the [Registration Data table](#) to help you decide who to invite, select the number in the **Unregistered** column that you'd like to invite and then skip to **step 6** below.

[Print Registration Codes](#)

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Invite Students**.
4. Click **Print Registration Codes**.
5. Select the students that you want to receive printed registration codes.
6. Click **Print Registration Codes**.
7. You will see what the handout will look like. Under **Customize Handout**, you can:
 - Select whether you'd like additional Parchment.com features explained in the handout.
 - Add a custom message.
8. Click **Print handouts for these <number> students now**.
 - Printed handouts should be sorted by last name (A to Z).

Customize email

In addition to sending transcripts, Parchment.com offers free features such as detailed college information and a community discussion area. You can choose whether or not this is featured in the email you send to your students.

Explain these features
 Do not explain these features

Add a custom message:

This email will be sent from

Automatically attempt up to 4 emails for unregistered students

[Email these 12 students now](#)

MANAGE ROSTER

This tab allows you to see if students have registered for a Parchment.com account. You can also see details about the rosters that have been uploaded.

Check if your students have registered for a Parchment.com account

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Invite Students**.
4. Click **Manage Roster**.
5. Use the fields to search for a student or multiple students.
 - If you see **remove student registration** next to their name, this means that they have registered.

View roster import history

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Invite Students**.
4. Click **Manage Roster**.
5. Click **View import history** to see the details of rosters that were uploaded, including the date they were uploaded and by whom.
 - Click **View file** to see the actual file that was uploaded.

Invite Students

Edit your options for sending transcripts and other admission documents.

[Invite Students](#)
[Manage Roster](#)
[Add Students](#)

Graduation/Leave Year:

Last Name:

First Name:

Enrollment Status:

- All Enrolled Statuses
- Current Students Only
- Former Students Only

Hold List:

- All Hold Statuses
- Students 'On Hold' only
- Student not 'On Hold' only

Registration Status:

- All Registration Statuses
- Students registered with Parchment only
- Students not registered with Parchment only

[view import history](#)

Web upload (send documents other than transcripts)

[To Do List \(5\)](#)[Document Requests \(8\)](#)[Invite Students](#)[Request](#)[Web Upload](#)[Report](#)

You can send documents other than transcripts by using **Web Upload**.

You must not send transcripts using Web Upload.

- You can only send documents to destinations that receive documents electronically.
- Students are unable to place requests through Parchment.com for extra documents to be sent. They may come to you directly and ask you to send them, which you can do using Web Upload.

To send documents other than transcripts:

1. Log in to exchange.parchment.com.
2. Click **Send**.
3. Click **Web Upload**.
4. Under **Upload Document**, click **Choose File** and select the document.
5. Click **Upload**.
6. Under **Enter Student Information**, fill in the applicable fields.
 - The drop-down menu for **Select Request ID** will only be available if the Receiving institution has placed a request for a letter of recommendation or school profile. If you approved these requests in the [Document requests section](#), you can select the student's ID or enter their information, and then all the fields on the rest of this form will be populated.
7. Under **Select Document Type**, use the drop-down menu next to select the type of document.
8. Under **Select Destination**, select the country, state/province, and destination from the drop-down menus.
9. Click **Submit**.

Send settings

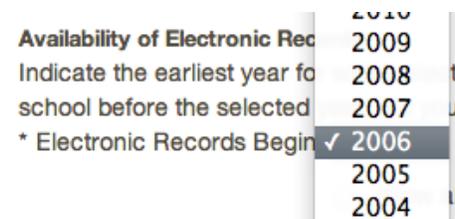
GENERAL SETTINGS

Availability of Electronic Records

This is where you select the year that your electronic records began. If a requestor graduated before this date, they will only be able to request a paper transcript. **You will still receive these requests electronically in the usual way, but you will only see the Hold and Prepare Locally options.**

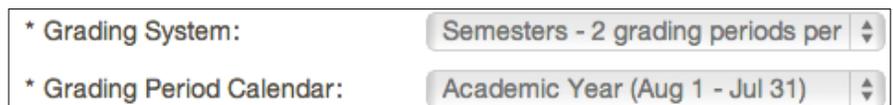
To select the year that electronic records began:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > General Settings**.
3. Under **Availability of Electronic Records**, select the year from the drop-down menu.
 - You can also check the box next to **Allow alumni before electronic records available to request transcripts for international addresses**.
4. Click **Save**.



Grading Periods

This is where you select your grading system (how many grading periods you have per year) and your grading period calendar (academic year or calendar year).



To select your grading system and grading period calendar:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > General Settings**.
3. Under **Grading System and Grading Periods**, select the applicable options from the drop-down menus.
4. Click **Submit**.
5. Directly below this section, you will see another section called **Grading Periods**, where you can select the dates that grades will be posted for your grading periods.
6. Click **Save**.

Electronic Destinations

This section shows you the list of institutions who have registered with us to receive transcripts and other admissions documents electronically.

If there is an institution not on the list that you send transcripts to regularly, we have provided sample copy that you can use to encourage them to register.

To access **Electronic Destinations**:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > General Settings**.
3. Scroll down and you will see the **Electronic Destinations** section.

STUDENT SETTINGS

Welcome Message and Image Upload

You can write a welcome message and upload an image that your students and alumni will see when they log in.

To write a welcome message:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Student Settings**.
3. Enter the welcome message in the box under **Welcome message**.

To add an image:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Student Settings**.
3. Click **Choose file** and select your image from your computer.
 - The image must be no wider than 300 pixels, and it must be a gif, jpeg or png file.
4. Click **Upload files**.
 - To remove the file, click **remove file**.

Transcript approval settings

This allows you to select whether you want to manually approve each alumni request, or only the first alumni request.

To make your selection, just click the circle next to your choice.

Transcript Approval Settings

Select approval options for alumni transcript requests.

Alumni:

- Request Approval** - each alumni request requires manual approval.
- Alumni Approval** - only the first alumni request requires manual approval.

QUEUE ASSIGNMENTS

This section allows you to assign which administrators will be responsible for approving and processing certain requests. You can select:

- **Alphabetical** - this allows you to select which administrators will see requestors with certain last names (beginning A through L, for example) that have transcript requests in the 'To do' list.
- **Student Type** - this allows you to select which administrators will see current and which will see former students that have transcript requests waiting.
- **No queue assignment** - this means that all administrators who are set up as **Primary Senders** will receive emails that there are pending requests.

PRICING

This is where you can add a surcharge. We will collect the payments on your behalf. We will then pay you the fees quarterly once we have collected at least \$500.

To access **Pricing**:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Pricing**.
3. You will see two boxes - one for current students and one for alumni. You can:
 - Enter the amount you would like to charge for transcripts in the **Surcharge** box.
 - Select whether you would like to surcharge to all transcripts or after the first one, the second one, etc.

Current Students

Surcharge:

Included Transactions: All
 After First Requests

Initiative Transactions: Include Surcharge
 Exclude Surcharge

COMMON APP SETTINGS

Our system is integrated with the Common Application. If any of your counselors use the online forms to submit Secondary School Reports, Midyear Reports, and Final Reports, you can turn on the **Common Application Online Forms Integration** in this section.

To access **Common App Settings**:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Common App Settings**.

FEE WAIVERS

Fee waivers allow students to order transcripts for free. The number of fee waivers we provide varies by state. To qualify, the student must have qualified for and received a fee waiver from the College Board or ACT.

A few things about fee waivers:

- Once you've assigned a fee waiver for a specific student, their account will update to receive the set amount of free transcripts.
- A student may only have a fee waiver assigned to them once.
- Students must have a Parchment.com account before a fee waiver can be assigned.

To assign a fee waiver:

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Fee Waivers**.
3. Enter the student's last name in the box and click **Search**.
4. When you find the student, click **Assign fee waiver**.
5. You need to confirm that the student meets the qualifications. To do this, type your name in the box and click **Submit**.

REGISTRATION CODE SETTINGS

Once you [upload a roster or add students](#), you can invite students to register for a Parchment.com account. You can email or print the registration codes right away, or you can add some settings here to invite them at a later date.

* When Registration Codes are emailed to your students, from which email address should they be sent?

- From the administrator who triggers the email delivery
- From the email address specified here:
- From a Parchment email address (registration_codes@parchment.com)

1. Log in to exchange.parchment.com.
2. Click **Settings > Send > Registration Code Settings**.
 - You can select the date that you would like to send the registration email out.
 - You can also select which email address they should be sent from.

Profile settings

This is where you edit your institution's information, such as address and website, and upload a PDF of your institution's profile.

MANAGE PROFILE SETTINGS

1. Log in to exchange.parchment.com.
2. Click **Settings** > **Profile**.
3. Fill in or edit the applicable fields.
4. Fields with a * (asterisk) are mandatory.

UPLOAD A PDF OF YOUR INSTITUTION'S PROFILE

1. Click **Browse**.
2. Select the PDF and click **Upload**.
3. Click **Save**.

Administrator settings

You can manage administrators and their roles/responsibilities in the Administrator settings page.

ADD AN ADMINISTRATOR

1. Log in to exchange.parchment.com.
2. Click **Settings > Administrators > Add Administrator**.
3. Fill in the fields in the **Personal Information** box. Fields with a * (asterisk) are mandatory.
 - There is a 36-character limit for the **Administrator Position** field.
4. Assign **Roles & Responsibilities**.
5. Click **Save**.

EDIT AN ADMINISTRATOR'S INFORMATION AND ROLES/RESPONSIBILITIES

1. Log in to exchange.parchment.com.
2. Click **Settings > Administrators**.
3. Click the name of the Administrator.
4. Edit the **Personal Information** and/or **Roles & Responsibilities** for this administrator.
 - There is a 36-character limit for the **Administrator Position** field.
5. Click **Save**.

DELETE AN ADMINISTRATOR

1. Log in to exchange.parchment.com.
2. Click **Settings > Administrators**.
3. Select the radio button to the left of the Administrator you'd like to delete.
4. Click **Delete Administrator**.
5. A pop-up message will appear to confirm. Click **Confirm**.

ROLES AND RESPONSIBILITIES

Each Role and Responsibility can be assigned to more than one administrator.

- **General Administrator** - this role can view the directory of schools and colleges, and run reports. Their settings can be changed to view transaction history or transaction history and document data.

- **Sender** - This setting allows an administrator to view data and process requests. The admin can be a Primary Sender, so they will receive emails when a document is available for download. Or they can be a Backup Sender, so they will receive escalation emails if the Primary Sender(s) is unavailable.
 - **The Primary Sender** receives an email when a document has been in the Inbox for 24 hours.
 - **The Backup Sender** receives an email when the document has been in the Inbox for 48 hours.
- **Advisor** - This setting allows an administrator to process requests for other documents, such as letters of recommendation and school profiles. They can be a Primary Advisor, so they will receive emails when a request comes in. Or they can be a Backup Primary Advisor, so they will receive escalation emails if the Primary Advisor(s) is unavailable.
 - **The Primary Advisor** receives an email when a request has been in the Inbox for 24 hours.
 - **The Backup Advisor** receives an email when a request has been in the Inbox for 48 hours.
- **IT/Webmaster** - this role has access to the **Receive Services Preferences**. You can select whether they can view transaction history only or document data.
- **Site Administrator** - this role has full access to your Parchment Exchange account, including the ability to add, edit, and delete administrators, and manage the account preferences. You must assign at least one administrator to the Site Administrator role.

Email alert if you have documents waiting

If you have documents in your **To Do List** and no administrators have logged in for 24 hours, the primary sender will get an email telling them that documents are waiting.

However, you should not rely on these emails because if another administrator logs in and doesn't action the requests, the email won't be sent out. So an entire 24 hours must pass before an email is sent out.

Matching transcripts

Our system automatically matches the transcript you upload with the order that the student placed. It then sends the transcript to its destination.

- If we cannot match a transcript automatically, we will try to match the transcript manually.
 - If we cannot match a transcript manually, you will see an alert on your [Dashboard](#). If you get this alert, follow the instructions below to match the transcript.
1. Click the **Review the unmatched transcripts and open orders link** in the alert on your Dashboard.
 - On the left side of the screen, you will see the first transcript that could not be automatically matched.
 - On the right side of the screen, you will see the first unfulfilled request.
 2. Select **Next Student** to cycle through the open student requests until you find the request that matches the transcript on the left. The first transcript you are presented will not necessarily match the first open request on the right.
 3. Once you find a student request that matches the transcript on the left, click **Match Transcript**. The request will be processed immediately with the transcript you have matched it to.
 - If you have cycled through all of the available requests and have not found a match for the transcript, you will see **Delete Transcript**. If you select this, then the transcript on the left will be removed, and you will be presented with the next available transcript.
 4. If you still have unfulfilled requests after all available transcripts have been matched or discarded, you will need to upload the transcript(s) again.

Troubleshooting

MY TRANSCRIPTS ARE PROCESSING SLOWLY OR NOT AT ALL

If your transcripts are taking longer than expected to be delivered, or they are not being delivered at all, there are a few things that you can do to make sure your transcripts are being processed correctly.

- If you are using the Docufide print driver, before printing to the print driver, do not select **Shrink to fit** or **Fit to page**, and do not enable **Auto rotate**, on the **Print Settings** window. Otherwise, we have to match your documents to the requests in the system manually instead of automatically. The manual process takes more time than the automatic process, especially during busy periods.
- If you are using a web-based SIS, **make sure your browser settings are correct**, so that we can process your documents automatically and not manually.
- You may need to reconnect to the Docufide Print Driver. To reconnect:
 1. Click **Start** and then type **Services**.
 2. For XP users, type **Services.msc**.
 3. Click the **Services** folder.
 4. From the list, click **STClientLoader**.
 5. Click **Stop the service**.
 6. Click **Start the service**.

WHAT ARE THE CORRECT BROWSER SETTINGS FOR UPLOADING TRANSCRIPTS

Go to the [Browser settings](#) help topic for details.

HOW DO I FIND WHICH TRANSCRIPTS I'VE APPROVED AND/OR SENT?

Use the **Reports** tab. You can run reports to see when a transcript request was received, approved, and/or sent. Go to the [Reports](#) section for more information.

DO I HAVE TO PRINT/SEND TRANSCRIPTS FOR EACH DESTINATION?

No. You only have to upload/print the transcript once, regardless of how many destination the student is sending their transcript to.

WHAT HAPPENS IF I FORGET TO SEND A TRANSCRIPT AFTER I APPROVE IT?

You will receive an email telling you that you have approved transcripts but not uploaded them. You will also see an alert on your dashboard.

Contact information

PARCHMENT CORPORATE HEADQUARTERS

Parchment Inc.
6263 N Scottsdale Road, Ste 330
Scottsdale, Arizona 85250

TECHNICAL SUPPORT

Go to exchange.parchment.com/support where you can search our Support Center for answers to questions. Make sure you're logged in first because we create special content just for you!

Once you're logged in, you can click **Submit a ticket** and someone from our technical support team will get back to you right away.