**Parchment Send** 

A guide to requesting transcripts on behalf of students







# Introduction

When a current or former student wants to send their high school transcript to a college or any other destination, you can do this on their behalf by using a feature in **Parchment Send** called **Request Transcripts**.

To Do List (11) Document Requests (3) Invite Students Web Upload Request Transcripts Report

This feature is available to Premium Senders only. If you see the Request Transcripts tab at the top of the Send home page when you are logged in (see image above), then you are a Premium Sender and have this feature available to you.

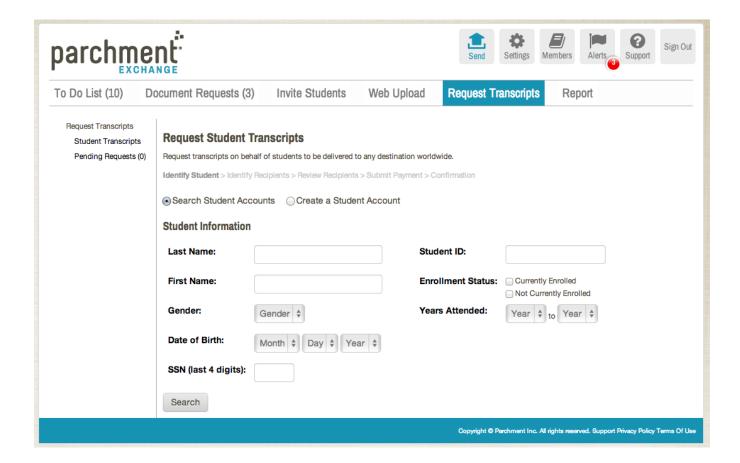
### A few things first:

- You will need a credit or debit card if you are prompted to make a payment for the order.
- All requests will be auto-approved, which means you will not see them in the 'To Do List'. Instead,
  once the requests are submitted, you will upload the transcript through your standard upload process
  to fulfill the request.
- An administrator must have a **Sender** role to access the **Request Transcripts** feature. To add this role to an existing administrator's profile, the Site Administrator needs to:
  - a. Log in to exchange.parchment.com
  - b. Click Settings > Administrators.
  - c. Click the name of the administrator.
  - d. Check the box next to Sender.
  - e. Click Save.



# **Order transcripts**

- 1. Log in to exchange.parchment.com.
- 2. Click Send > Request Transcripts.
  - Depending on your settings, you may not see all of the options you see in the screenshot below.
  - If you do not see the Request Transcripts tab, your Site Administrator will need to add the Sender
    role to your profile. Follow the instructions on the previous page to have this role added.





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- 3. If the student is already registered on Parchment.com, you will now search for them. Or you will create an account for them if they have not registered for a Parchment.com account. If the student has not registered for a Parchment.com account yet, you should encourage them to do so.
  - Select Search Student Accounts if they have a Parchment.com account.
  - Select Create a Student Account if they do not have a Parchment.com account.

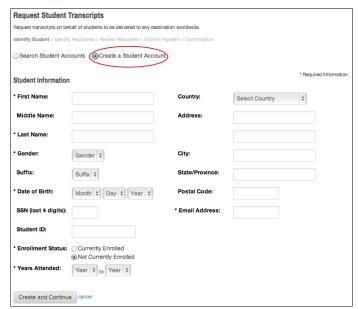
### IF YOU SELECT 'SEARCH STUDENT ACCOUNTS'

- a. Enter the student's information. You do not need to fill in all fields. However, the more information you enter, the fewer results will come back, and, therefore, it will be easier to find the student.
- b. Click Search.
- c. Once you see the student listed, select their name. Confirm it is the student you want and click **Continue**.
- d. Go to step 4 on the next page.

#### Request Student Transcripts Request transcripts on behalf of students to be delivered to any destination worldwide. Student Information Last Name: First Name: Currently Enrolled **Enrollment Status:** Gender: Gender ‡ Years Attended: Year \$ to Year \$ Date of Birth: Month \$ Day \$ Year \$ SSN (last 4 digits): Search

### IF YOU SELECT 'CREATE A STUDENT ACCOUNT'

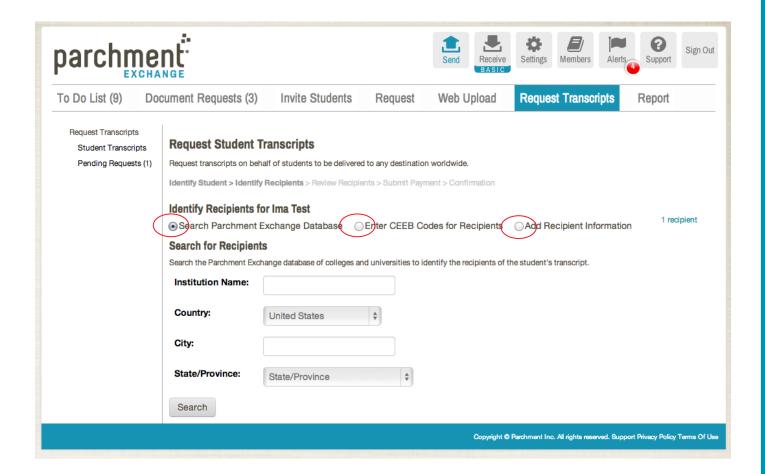
- a. Enter the student's information. Fields witha \* (asterisk) are mandatory.
- b. Click Create and Continue.
  - If nothing happens, scroll to the top because you will probably see an error message telling you that you have not filled in one of the mandatory fields.
- c. Go to step 4 on the next page.





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- 4. You will be brought to the screen where you enter the destination information. You can enter this information in a few ways:
  - You can search for the destination in our database. We recommend beginning your search for
    academic destinations this way because we maintain a database of preferred delivery methods for
    all colleges and universities nationwide, and a growing number of international institutions. Go to the
    Search Parchment Exchange Database section on the next page for instructions on how to search
    this way.
  - Or you can enter the institution's College Board Entrance Examination (CEEB) code, if you know it. Go
    to the Enter CEEB Codes for Recipients section for instructions on how to order this way.
  - Or you can add the recipient's details manually. You may need to do this if you want to send the
    transcript to a specific individual at a college, for example. Go to the Add Recipient Information
    section for instructions on ordering this way.





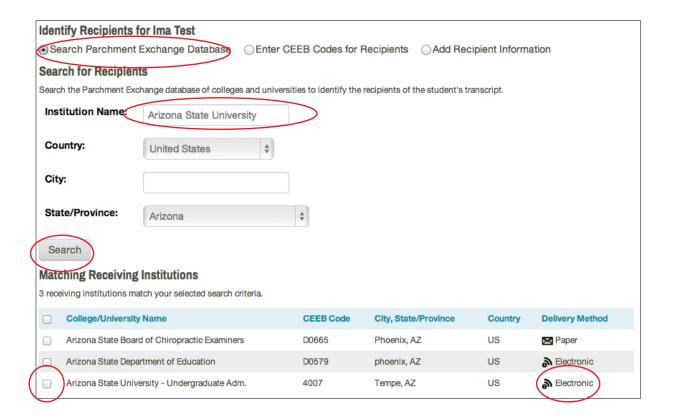
#### TO SEARCH THE PARCHMENT EXCHANGE DATABASE

- a. Select Search Parchment Exchange Database.
- b. Fill in the fields and click Search.
  - You do not have to fill in all the fields. If you enter information in more than one field, only institutions that match all selected criteria will be displayed in the search results. Therefore, if you have trouble locating your institution, try entering less criteria and searching again.
- c. Select the applicable institution from the search results.
- d. Click Save and continue and go to step 5 to review your order.



#### **EXAMPLE**

Let's say Ruby, a senior at your high school, walks into your office and tells you she needs to send her transcript to Arizona State University. Since ASU is an academic destination, you would select **Search Parchment Exchange Database** (see screenshot below). You would then enter Arizona State University in the **Institution Name** box. Then you would click **Search**, and select from the institutions that appear. You'll also see the preferred delivery method.





#### TO ENTER CEEB CODES FOR RECIPIENTS

As an alternative to searching for colleges and universities in the Parchment Exchange database, you can enter a list of CEEB codes and we will match them to the institutions in our database.

- a. Select Enter CEEB Code for Recipients.
- b. Enter the CEEB code in the first box.
  - You can enter multiple CEEB codes. If you need to add more than five CEEB codes, click add more institutions to add rows in groups of five.
- c. Click Save and Continue and go to step 5 to review your order.

Request Student Transcripts
Request transcripts on behalf of students to be delivered to any destination worldwide.
Identify Student > Identify Recipients > Review Recipients > Submit Payment > Confirmation
Identify Recipients for Ima Test  Search Parchment Exchange Database  Enter CEEB Codes for Recipients  Add Recipient Information
Enter CEEB Codes for Recipients  Enter the CEEB Codes for the receiving institutions to identify the recipients of the student's transcript.
* CEEB Code:
CEEB Code:
CEEB Code:
CEEB Code:
CEEB Code: add more institutions
Save and Add More Recipients Save and Continue
Save and Add More Recipients Save and Continue



#### ADD RECIPIENT INFORMATION

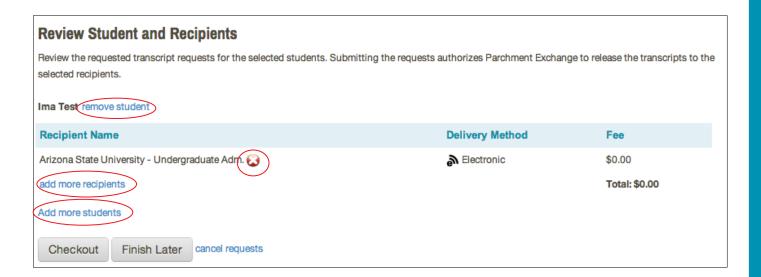
Use this option when the destination is not in our database or you do not have the CEEB code. You can send to any recipient worldwide.

- a. Click Add Recipient Information.
- b. Select a category from the drop-down menu.
- c. Enter the name as it should appear in the delivery address next to **Destination Name**.
- d. Under Delivery Method, you can select Electronic Delivery or Paper Delivery.
  - If you select **Electronic Delivery**, enter the email address and then confirm the email address by entering it again.
  - If you select **Paper Delivery**, enter the address. You can also choose to send the transcript overnight, and you can choose to send it to an international address by clicking Deliver to an address outside of the US.
- e. Click Save and Continue and go to step 5 to review your order.

Identify Recipients for Ima	
Search Parchment Exchan	ge Database
Add Recipient Information	
Select the Delivery Method and enter	er the delivery information for any destination worldwide.
Destination Information	
* Category:	Select Category 💠
* Destination Name:	
Attention Line:	nter the name as it should appear in the delivery address.
Delivery Method	
Electronic Delivery     Parchment Exchange will emai	I instructions to securely download the transcript to the email address provided. If the transcript is not downloaded
within 5 days, the request will	be canceled.
* Email Address:	
* Confirm Email Address	s:
Paper Delivery Parchment Exchange will deliv	er the transcript on security paper to the address provided.
Save and Add More Recipie	ents Save and Continue



- 5. You will be brought to the **Review your order** screen, where you can:
  - Click remove student to cancel the request for the selected student. You will be asked to confirm that you want to remove the student and all recipients. Click **OK** to remove the student, or **Cancel** to continue to submit the requests.
  - Remove individual recipients by clicking a next to the recipient's name. You will be asked to confirm that you want to remove the recipient. Click **OK** to remove, or **Cancel** to continue.
  - Click add more recipients. You will be returned to the Enter Destination Information section.
  - Click Add more students to submit requests for additional students. You will be returned to step 3.

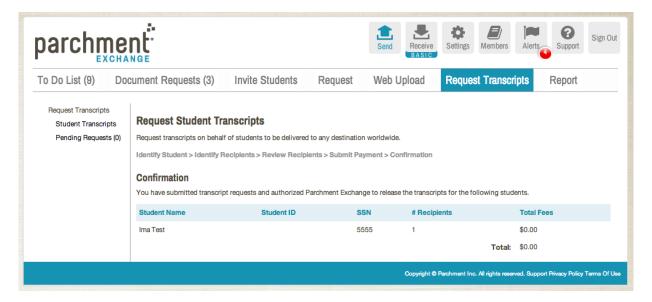


- 6. When you are ready, click **Checkout**. Or you can click **Finish Later** to checkout at a later date. The saved students and recipients will be available under **Pending Requests** in the left-hand menu. You can also click **cancel requests** to cancel all requests.
- 7. If you are prompted to make a payment, you will be brought to the payment screen. Enter your credit or debit card details and click **Submit**.



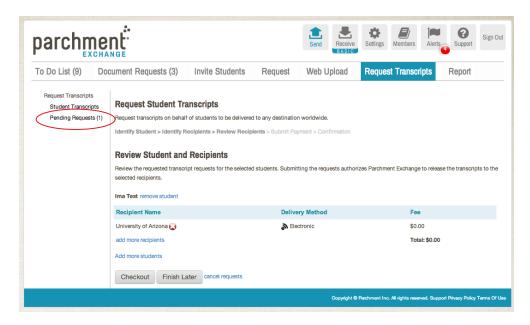


- 8. You will get a confirmation page.
  - The confirmation page is the receipt for your transcript order. Please print a copy for your records.
  - Once you have submitted the transcript requests, the transcript requests will be set to 'Approved' and
    will not appear on your 'To Do List.' To complete the request, you will need to upload the transcripts
    using your standard process.



#### **PENDING REQUESTS**

If you are unable to complete a request during your initial session, the request will remain in the Pending Requests section, which you can access at any time by clicking **Pending Requests** in the left-hand menu.





# **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!

Or click **Submit a ticket** from the **home page** of our Support Center and someone from our technical support team will get back to you right away.

