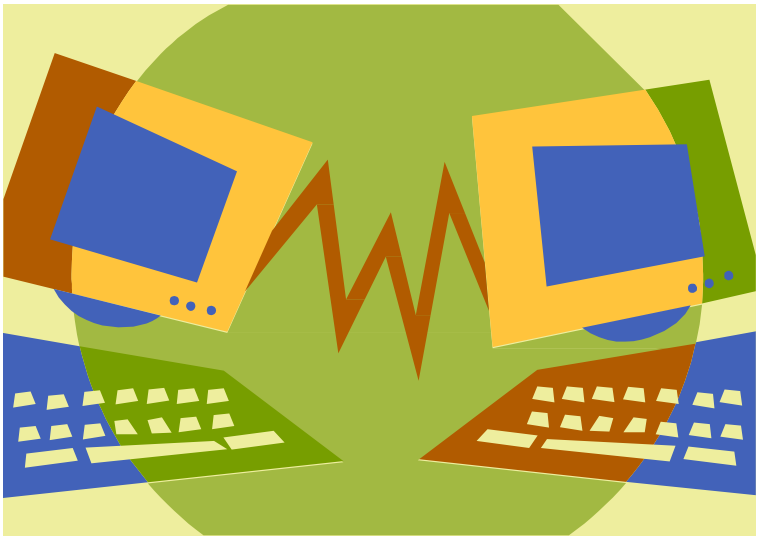
Kentucky eTranscripts



Ready…Set…Go

eTranscript Setup and Processing

Table of Contents

Overview 3

Step 1: Infinite Campus eTranscript setup 3

1a: Setup Infinite Campus Tool Rights for eTranscript functions 3

1b. eTranscript Options 5

1c. Map Credit Groups to PSEC Names 6

1d. Confirm Grading Tasks 6

1e. Confirm Courses have Transcript checked 6

1f. Confirm Courses have associated Credit Types 7

Step 2: District eTranscript Configuration of Assessments 7

2a. Confirm Assessment Setup 7

Step 2: Parchment Setup 10

2a: Parchment District Registration 10

2b: Infinite Campus Export Roster Per School 11

2c: Parchment Roster Upload Per School 12

2d: Distribute Student Registration Codes 13

2e: Promote to Students 15

2f: Parchment Support Options 16

Step 5: Handling a transcript request 17

5a. Parchment Process 17

5b. Release Transcripts from Infinite Campus 18

5c. Student/Institution receive transcript 19

Overview

Beginning in July 2013, Kentucky high school students can electronically send their transcripts to participating postsecondary members of the Parchment Exchange at no cost. The statewide adoption of electronic transcripts will complete the online process and allow for paperless delivery of all materials necessary for college admissions. This solution will reduce costs and save time for all parties. High school students and counselors benefit by having a simplified request and delivery mechanism available 24-7. Colleges and universities benefit by having one transcript format, less mail to process, and the potential to directly input transcript data to their student information systems.

Kentucky education agencies are coordinating efforts to ensure that all state school districts, colleges and universities adopt eTranscript. Standard use by all high schools and postsecondary schools means there can be only one process, format and method of delivery to support, providing efficiency for everyone.

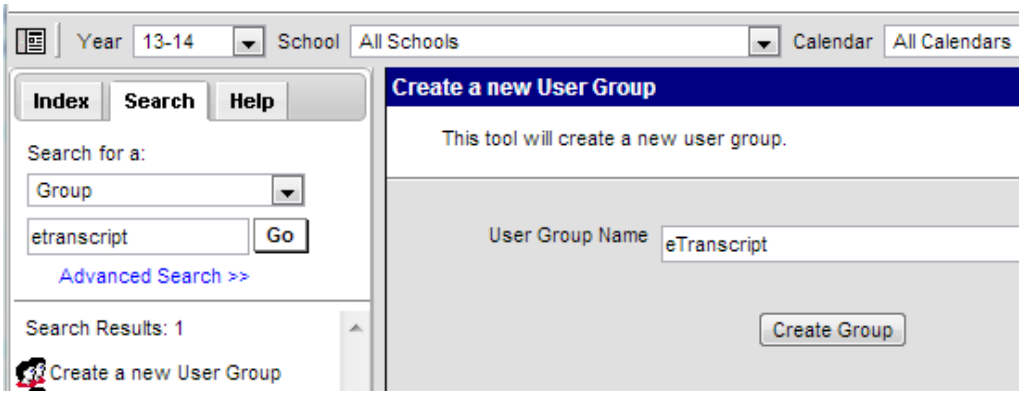
This document provides step-by-step instruction for preparing your schools and district for implementing eTranscript functionality. It is the recommendation that all of these steps be followed, and that the options detailed in the screenshots be selected and/or set up to ensure that the common Kentucky transcript is consistent for all high schools in Kentucky.

Step 1: Infinite Campus eTranscript setup

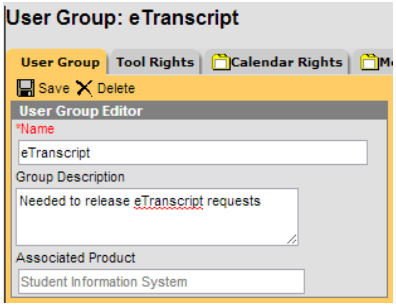
1a: Setup Infinite Campus Tool Rights for eTranscript functions

Path: System Administration > User Security > User Group
Users must be setup with the appropriate Tool Rights before they can work with eTranscripts.

1. Search for Group eTranscript in case it has been added previously
2. Users who will release eTranscripts will most likely be at the school level
   a. Select All Schools and All Calendars
   b. Click ***Create a new User Group*** and name it **eTranscript** then click **Create Group** button



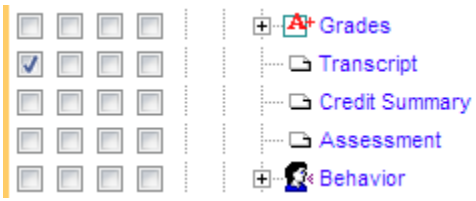
   c. Add the **Group Description**: Needed to release eTranscript requests then click **Save**.



d. Select the **Tool Rights** tab.
Expand **Transcripts > eTranscript**
Place a check in the R column then click **Save**.

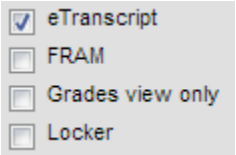
Right	R	W	A	D
eTranscript	Allows the user full rights to view, request, etc. student eTranscript information. Users should also have at least R rights to Student Transcripts.	N/A	N/A	N/A

Expand **Student Information > General**
Place a check in the R column then click **Save**.

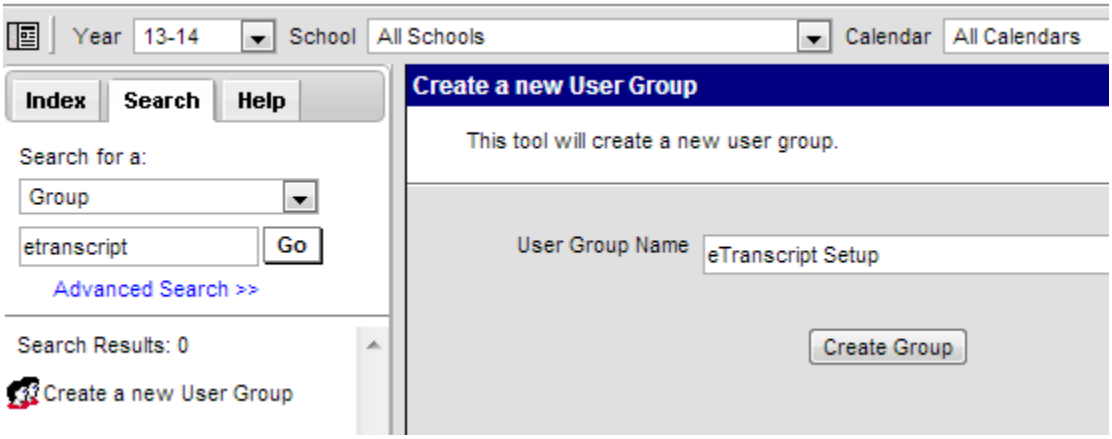


Right	R	W	A	D
Transcript	Allows user to view the details of the student's transcript.	Allows the user to edit existing entries on the student's transcript.	Allows users to add new transcript entries.	Allows users to delete transcript entries.

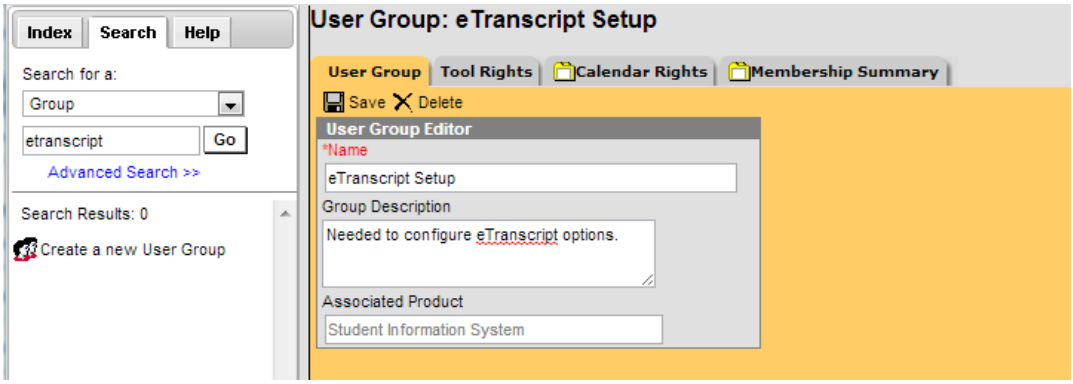
e. Add the User Group to the appropriate User accounts (list of group names varies by district)
   i. Search for **User** by the person's name
   ii. Select **User Groups** tab
   iii. Place a check by **eTranscript** then press **Save**



3. Users who can setup eTranscript options will most likely be at the district level
   a. Select All Schools and All Calendars
   b. Click ***Create a new User Group*** and name it **eTranscript Setup** then click **Create Group** button



c. Add the **Group Description**: Needed to configure eTranscript options then click **Save**.



d. Select the **Tool Rights** tab. Expand **System Administration > Preferences > eTranscript**
Place checks in the R W columns then click **Save**.

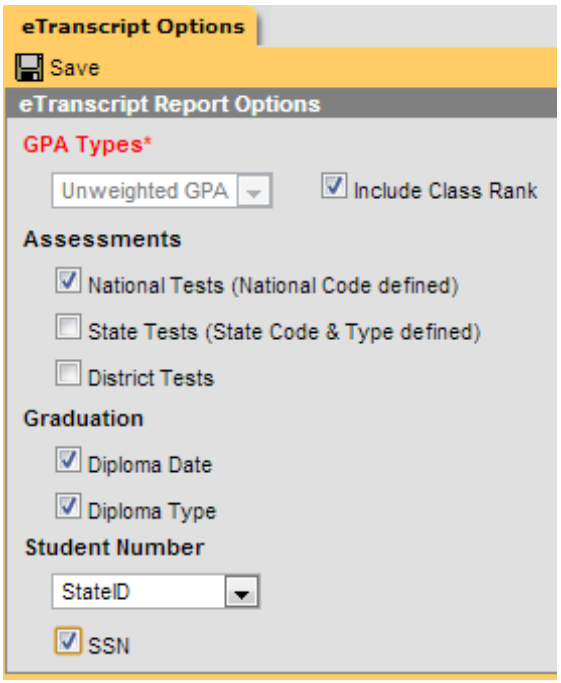
Right	R	W	A	D
eTranscript Options	Allows the user to view existing eTranscript report options.	Allows the user to edit existing eTranscript report options.	N/A	N/A

e. Add the User Group to the appropriate User accounts (list of group names varies by district)
   i. Search for **User** by the person's name
   ii. Select **User Groups** tab
   iii. Place a check by **eTranscript Setup** then press **Save**

1b. eTranscript Options

Path: System Administration > Preferences > eTranscript

1. Select the eTranscript Report Options as marked below for each High School in district. Checking the **Include Class Rank** checkbox is recommended but optional. The class rank is based on weighted GPA.
2. Be sure to click the **Save** button to update the options.



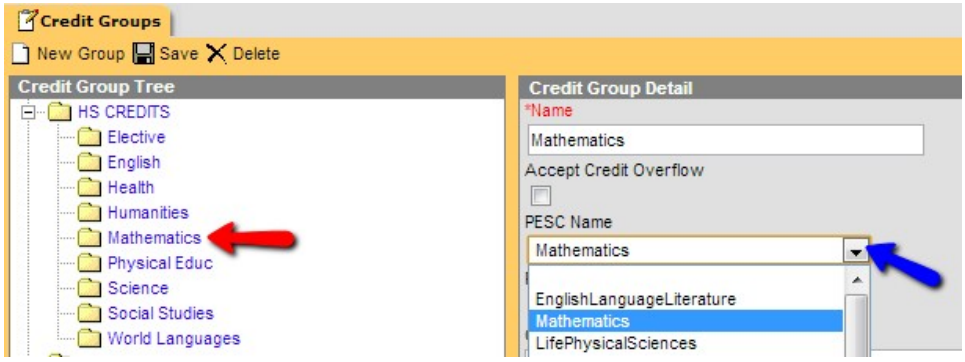
Note: SSN Use

Only the last four digits of the Social Security Number will appear on the Parchment KY Transcript; this number is used by post-secondary schools for matching students when loading transcript data electronically. Failing to include SSN can cause delays for students that can't be matched electronically.

1c. Map Credit Groups to PSEC Names

Path: Grading & Standards > Credit Groups

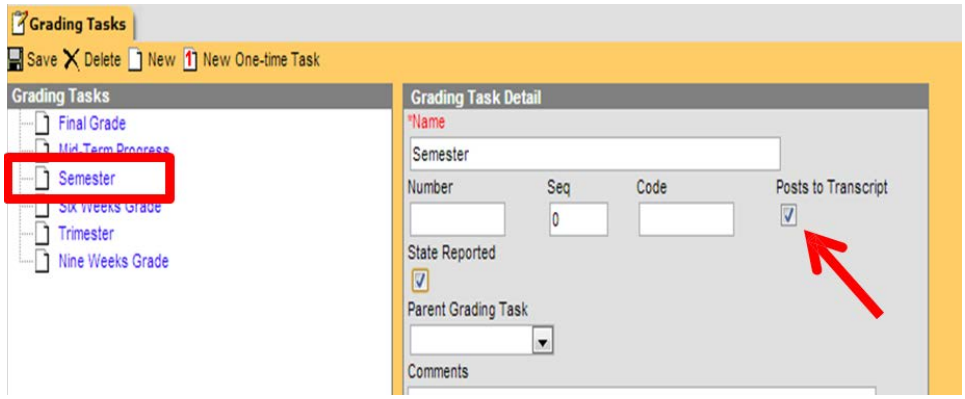
1. Select one of the proper credit groups from the ***Credit Group Tree.***
2. In the ***Credit Group Detail***, select the **PESC Name** that best correlates to the Credit Group.
3. Be sure to click the **Save** button to update the record.
4. Go to the next credit and repeat the previous steps until all High School Credit Groups have been confirmed.



1d. Confirm Grading Tasks

Path: Grading & Standards > Grading Tasks

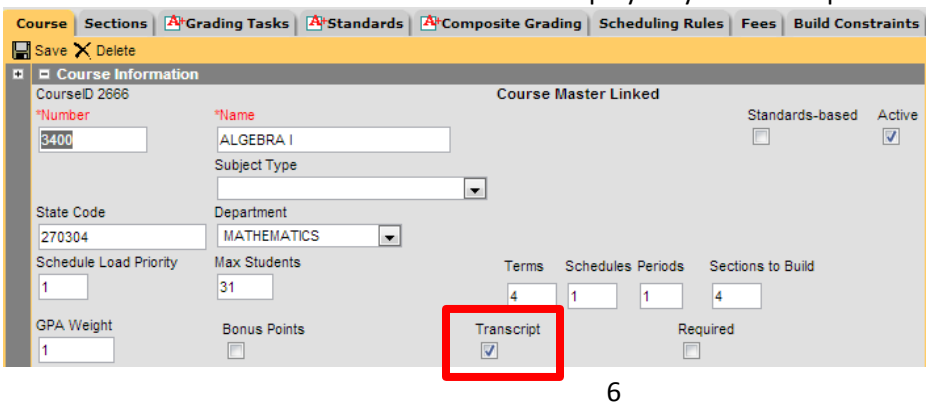
1. Select the grading task(s) that post to transcript (Ex: Semester, Trimester, Final, etc…).
2. Confirm the **Posts to Transcript** box is checked.
3. Be sure to click the **Save** button to update the record.



1e. Confirm Courses have Transcript checked

Path: Scheduling > Courses > Select a Course > Grading Tasks

1. Inspect that there is the Transcript checkbox is marked on each **Course** that should display on the eTranscript**.**
2. Confirm for all courses. If the desired courses display on your school printed transcript, this setting is correct.



1f. Confirm Courses have associated Credit Types

Path: Scheduling > Courses > Select a Course > Grading Tasks

1. Inspect that there is a value in the **Credit Group** and **Credit Type** fields in the ***Grading Task Editor*** box for the **Grading Tasks** that should display on the eTranscript**.**
2. Confirm for all courses. If the desired courses display on your school printed transcript, this setting is correct.

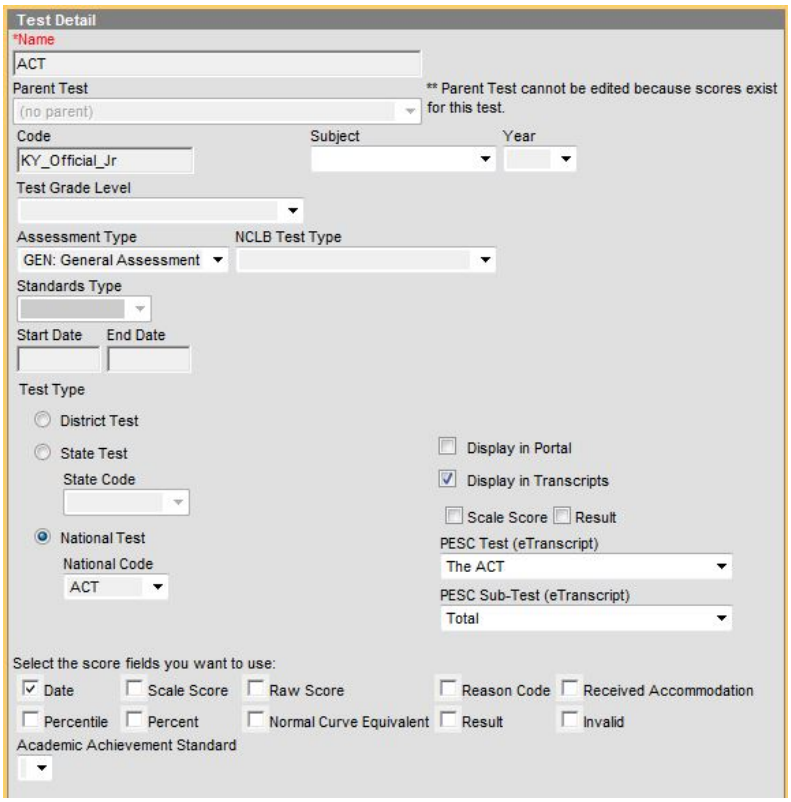
Step 2: District eTranscript Configuration of Assessments

NEW: KDE's agreement with ACT allows displaying State administered ACT assessment scores on transcripts. These test scores are available as **ACT (KY_Official_Jr)** beginning with the March 2013 scores. The **ACT (KDE) Test Detail** contains a mixture State administered Junior scores and student purchased National scores. Thus **ACT (KDE)** should no longer be marked as **Displays in Transcript**. If applicable, these steps can also be performed for locally loaded assessments to appear on the Kentucky Transcript. However, districts should be cognizant of their agreements with ACT as to what data can be provided to third parties before posting to transcripts.

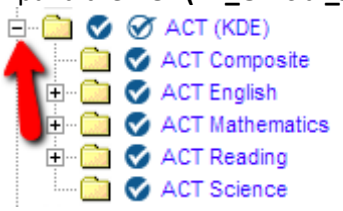
2a. Confirm Assessment Setup

Path: Assessment > Test Setup

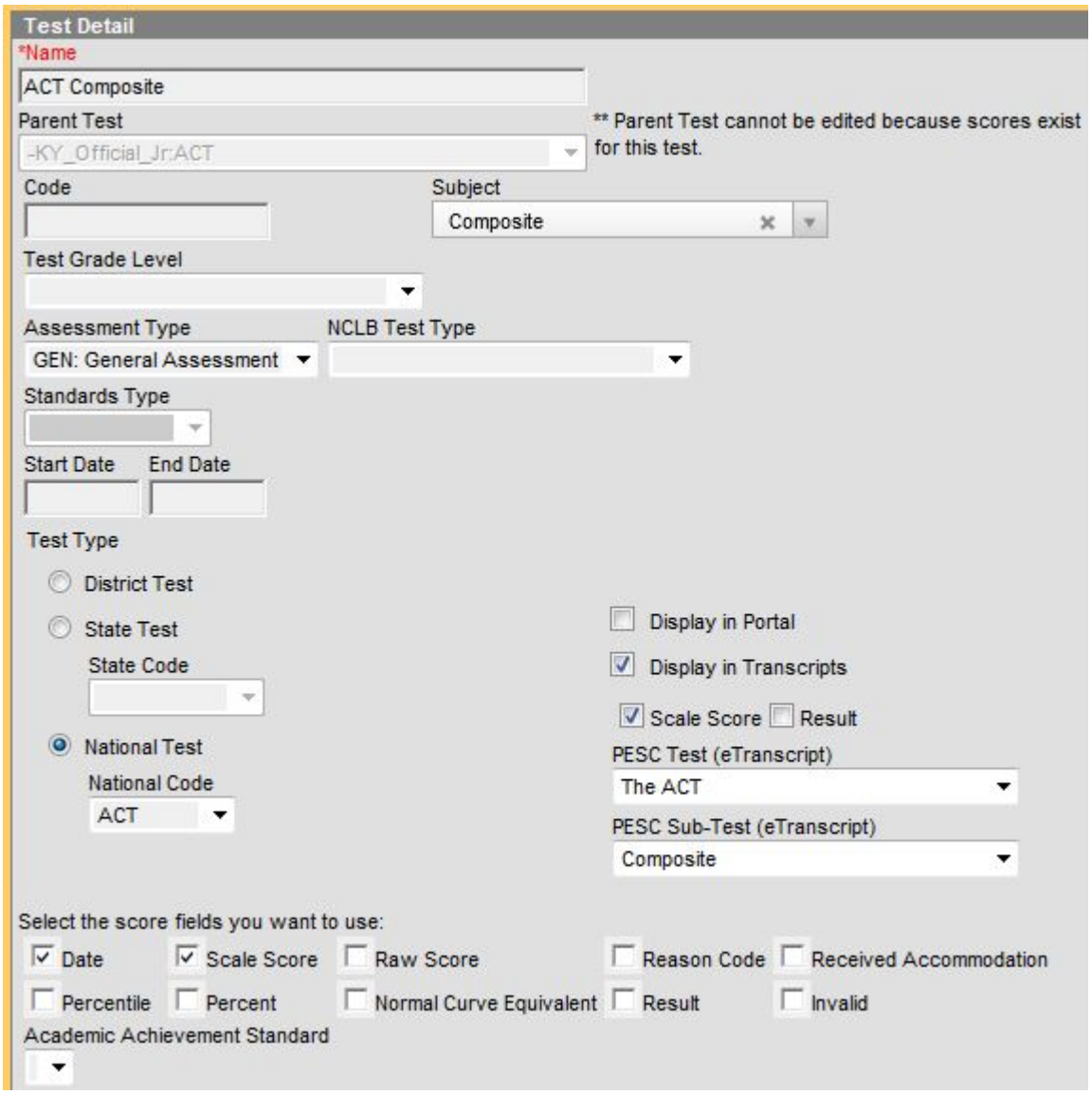
1. Select **ACT (KY_Official_Jr)** from the ***Tests*** listing**.** All other fields are locked on for this test detail.
   a. Confirm **Display in Transcripts** is checked.
   b. Confirm **Scale Score** is <u>unchecked for this level only</u>.
   c. Confirm **PESC Test (eTranscript)** has a value of **'The ACT'.**
   d. Confirm **PESC Sub-Test (eTranscript)** has a value of **'Total'.**
   e. Checking **Display in Portal** is a district choice.



2. Expand the **ACT (KY_Official_Jr)** test to reveal the sub-tests.



3. Select **ACT Composite** from the subtests under **ACT (KY_Official_Jr)**.
   a. Confirm **Display in Transcripts** is checked.
   b. Confirm **Scale Score** is checked.
   c. Confirm **PESC Test (eTranscript)** has a value of **'The ACT'**.
   d. Confirm **PESC Sub-Test (eTranscript)** has a value of **'Composite'**.
   e. Checking **Display in Portal** is a district choice. It should match for all sub-tests of the same test.



4. Repeat Step 3 for each sub-test selecting the PESC Sub-Test that is most appropriate (see Table 1 for recommendations). The post-secondary schools do not need the content test subscores so those settings should be blank.
5. Repeat Steps 1 through 4 above for any other assessments that should populate on the transcript using your best judgment to select the PESC name.

Table 1. Recommended ACT to PESC Alignments

Parent Name	Test Name	Display in Transcripts	Scale Score	PESC Test (eTranscript)	PESC Sub-Test (eTranscript)
	ACT (KY_Official_Jr)	Checked	Unchecked	ACT: The ACT	Total: Total
-KY_Official_Jr:ACT	ACT Composite	Checked	Checked	ACT: The ACT	CompositeScore: Composite
-KY_Official_Jr:ACT	ACT English	Checked	Checked	ACT: The ACT	English: English
-:ACT English	1 Usage-Mechanics	Unchecked*	Unchecked	n/a	n/a
-:ACT English	2 Rhetorical Skills	Unchecked*	Unchecked	n/a	n/a
-KY_Official_Jr:ACT	ACT Mathematics	Checked	Checked	ACT: The ACT	Math: Mathematics
-:ACT Mathematics	1 Pre-Algebra-Elementary Algebra	Unchecked*	Unchecked	n/a	n/a
-:ACT Mathematics	2 Intermediate Algebra-Coordinate Geometry	Unchecked*	Unchecked	n/a	n/a
-:ACT Mathematics	3 Plane Geometry-Trigonometry	Unchecked*	Unchecked	n/a	n/a
-KY_Official_Jr:ACT	ACT Reading	Checked	Checked	ACT: The ACT	Reading: Reading
-:ACT Reading	1 Social Studies-Sciences	Unchecked*	Unchecked	n/a	n/a
-:ACT Reading	2 Arts-Literature	Unchecked*	Unchecked	n/a	n/a
-KY_Official_Jr:ACT	ACT Science	Checked	Checked	ACT: The ACT	Science: Science

*If your district wants to continue to display the subject subtests on your paper transcripts, this needs to be checked. However, they will not show on eTranscript.

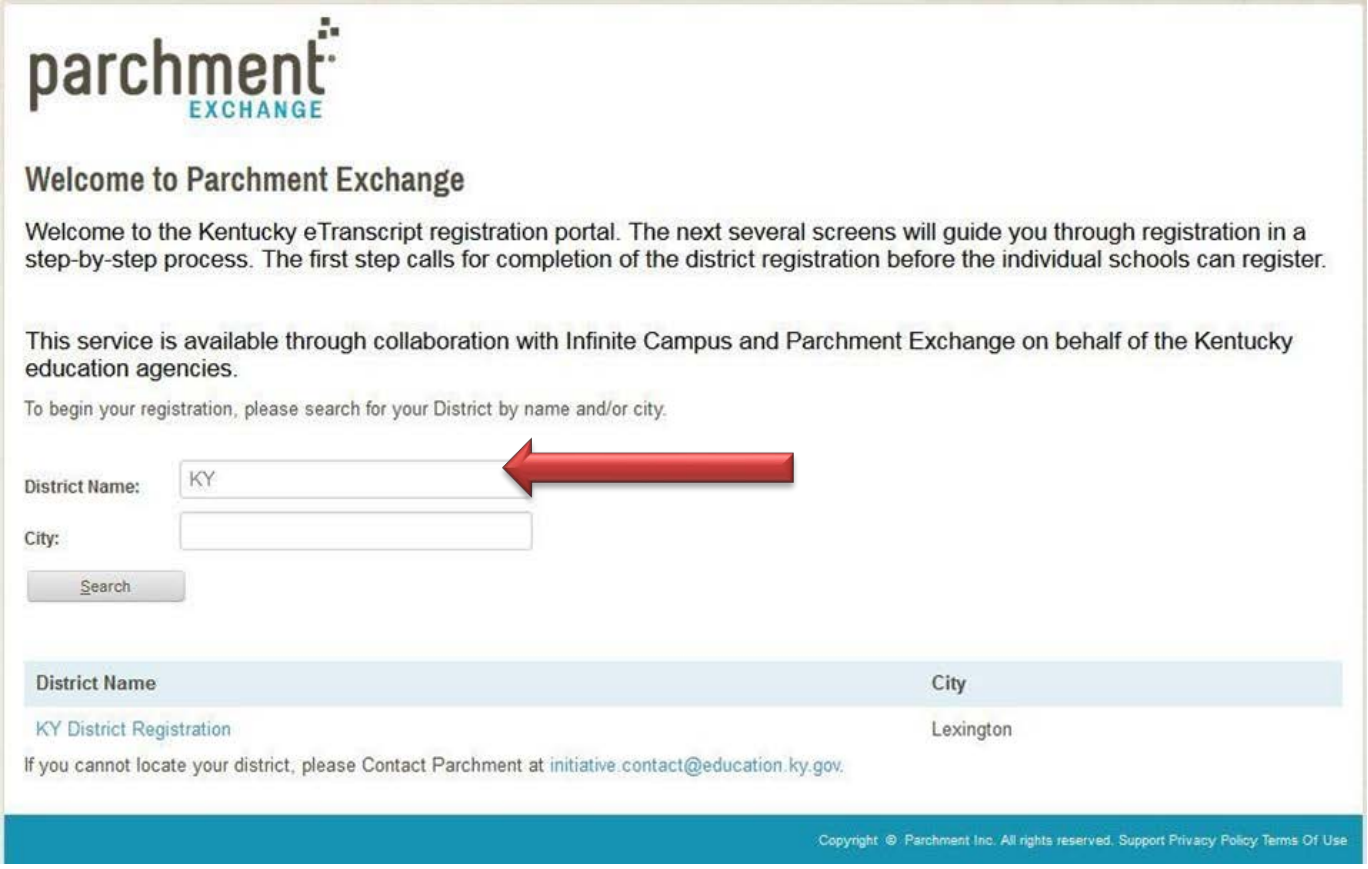
Step 2: Parchment Setup

2a: Parchment District Registration

Note: Most districts have completed this step as part of their initial setup.

Click the following link to begin your registration process:
https://exchange.parchment.com/d/districtreg/KY2013

You will be taken to the following page where you will search for your district. Enter either part of your district's name, or the entire district name in the corresponding field and click ***Search***. You will see a list of names appear near the bottom of the screen. Select the hyperlink to the district you will be registering.



Enter the district name and city and then select search to find your district; click on the district name to continue. You will be guided through a series of screens to verify your district information, provide district contacts, provide school contacts and select a preferred installation phase. At any point through the process you can choose to save and continue through the set up process or save and exit to continue the set up process at a later time.

2b: Infinite Campus Export Roster Per School

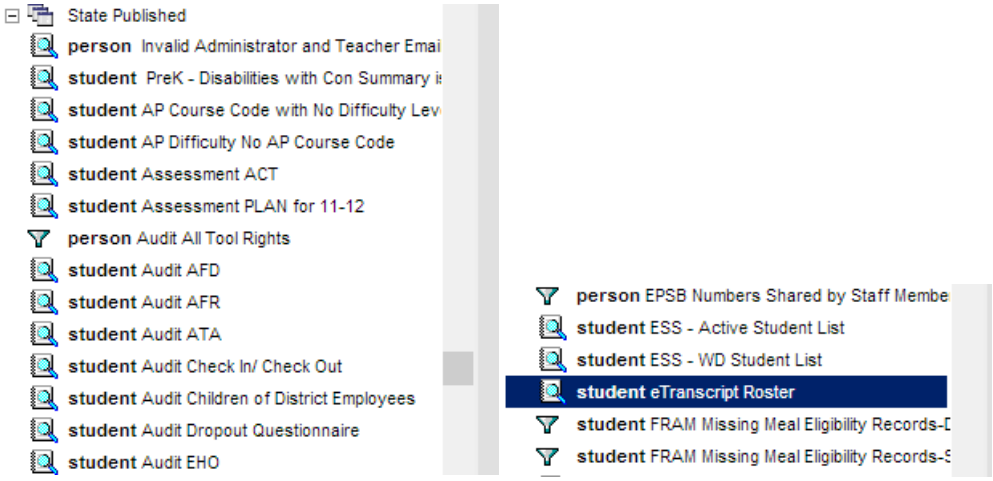
Path: Ad Hoc Reporting > Data Export

NOTE: This step should be completed initially when the school is ready to being releasing transcripts and then periodically to update the students in the eTranscript system.

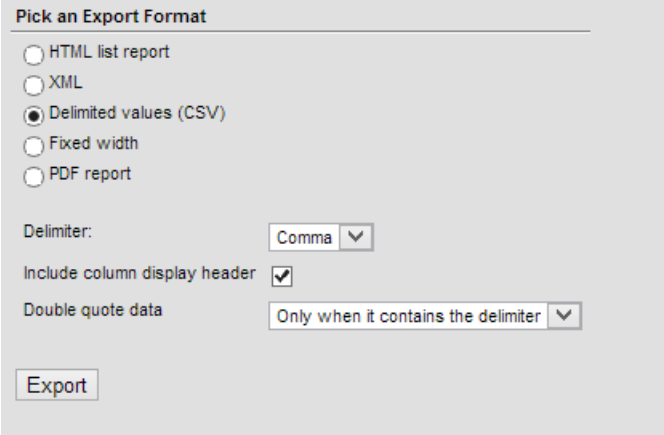
1. Select the appropriate school year and calendar for the desired student rosters.

2. Navigate to Ad Hoc Reporting > Data Export

3. Expand the State Published filter folder > Scroll to and select "**student** eTranscript Roster"



4. Export file as a CSV (See Selections Below)

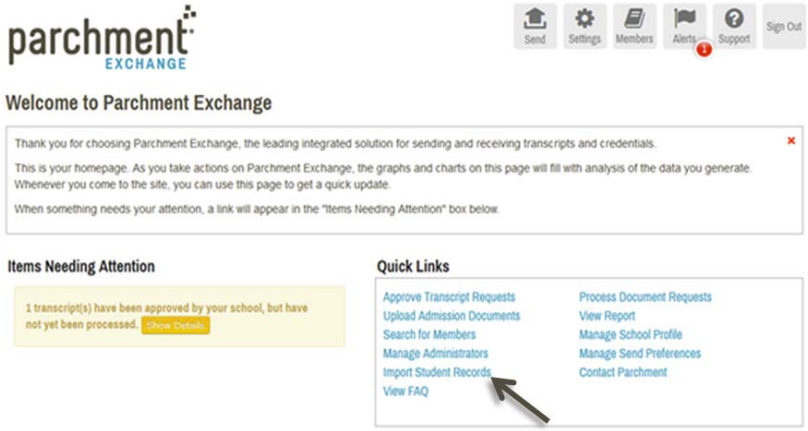


5. Save the file for importing into Parchment in a location you will remember. If exporting multiple schools, using the school name in the file name will make finding the file easier when uploading to Parchment.

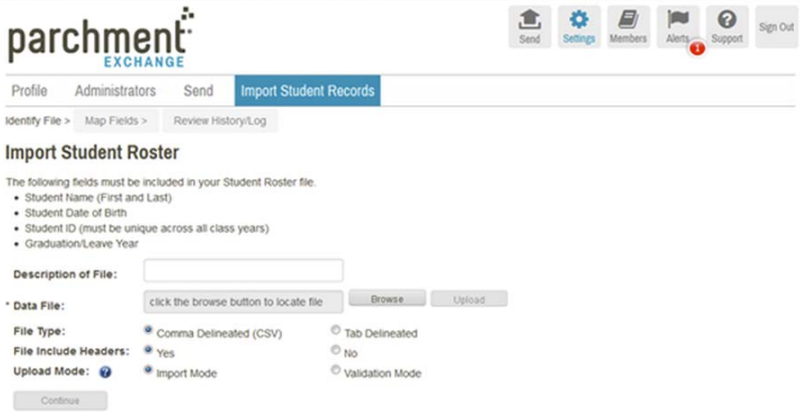
6. Repeat steps 1-5 for each school.

2c: Parchment Roster Upload Per School

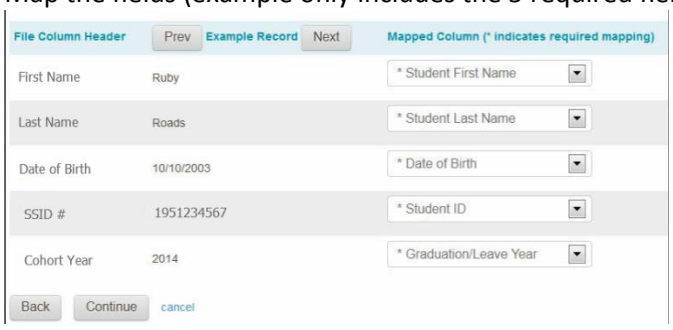
1. Upload Roster into Parchment.
   A 5 minute video covering uploading your roster and distributing Registration Codes, Registration Codes: How To, is available from Parchment: http://exchange.parchment.com/toolkit/
   a. Log onto your Parchment Exchange account
   b. Click Import Student Records in Quick Links



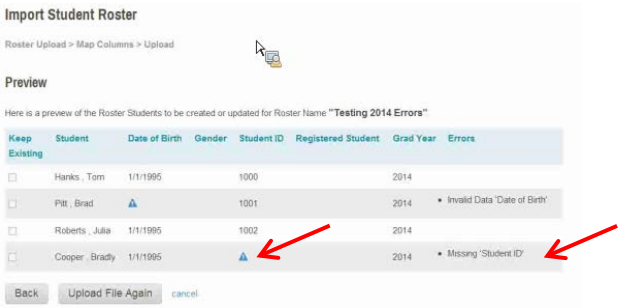
   c. Import Student Roster will be displayed. Use settings below.



      i. Describe the file as desired
      ii. Browse to select the CSV file created in Step 1b by Ad Hoc Reporting
      iii. Map the fields (example only includes the 5 required fields)



      iv. Check for errors

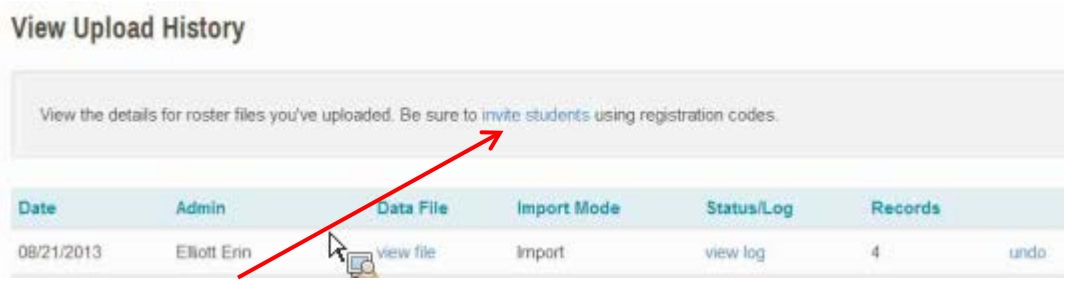


Blue triangles will display in fields with errors. The errors column will explain the error.

If necessary, correct errors then export the correct file to upload again.

v. If no errors, Click Import Roster

vi. View Upload History will display when the upload is completed



vii. Click the **invite students** link, to distribute student registration codes (see step 1d).

viii. Repeat this process for each school

2. It is highly recommended to include student email addresses in your upload so you can email out registration links to your students. If you do not have email addresses stored in Infinite Campus, you could edit the extracted file to add email addresses before uploading. *Parchment is willing to help (see 2f).*

3. It is okay to Import Student Roster multiple times throughout the year to add new students. Once students complete the registration process, the roster import process **will not** affect their accounts.

2d: Distribute Student Registration Codes

NOTE: Use of registration codes simplifies the matching process, simplifies student account setup, allows tracking of registrations, and enhances reporting functionality at the school. Use of registration codes is recommended but not required.

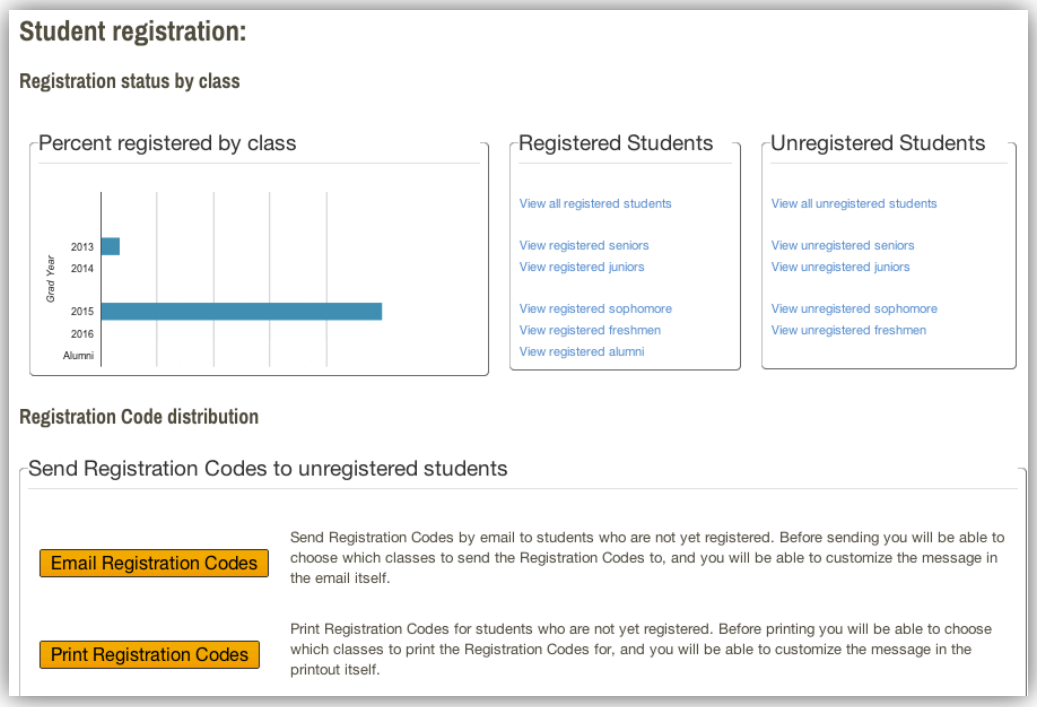
Registration Code Communication Best Practices

Week 1 - Send out registration code email/letter to all students

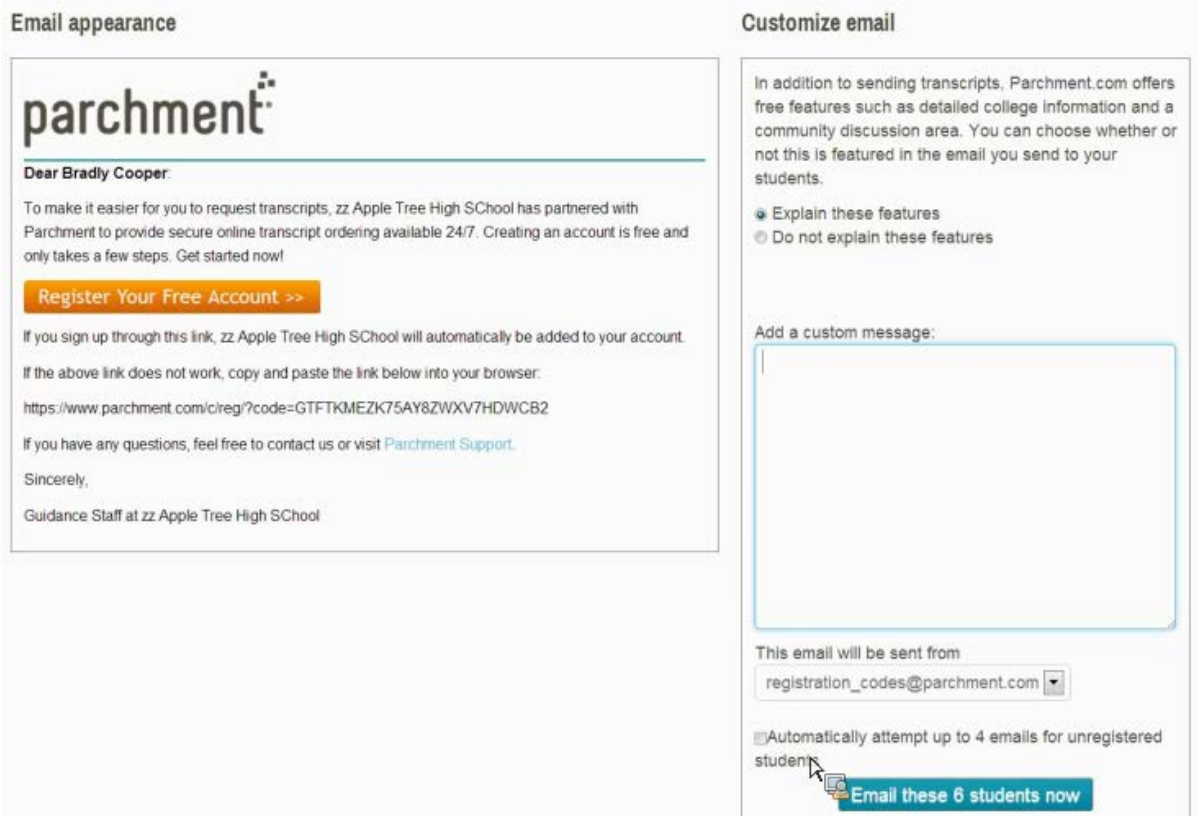
Weeks 2, 3, and 4 - Send out registration code email/letters to seniors who have not registered

1 Week Before Major College Application Deadline - Send final registration code email/letters to all seniors who have not registered

1. Press the Send button, then pick Invite Students or press the link on the upload history screen.



2. Email Registration Codes
    a. If email addresses were provided in the roster, you can email out registration links.
    b. Customize the email before sending



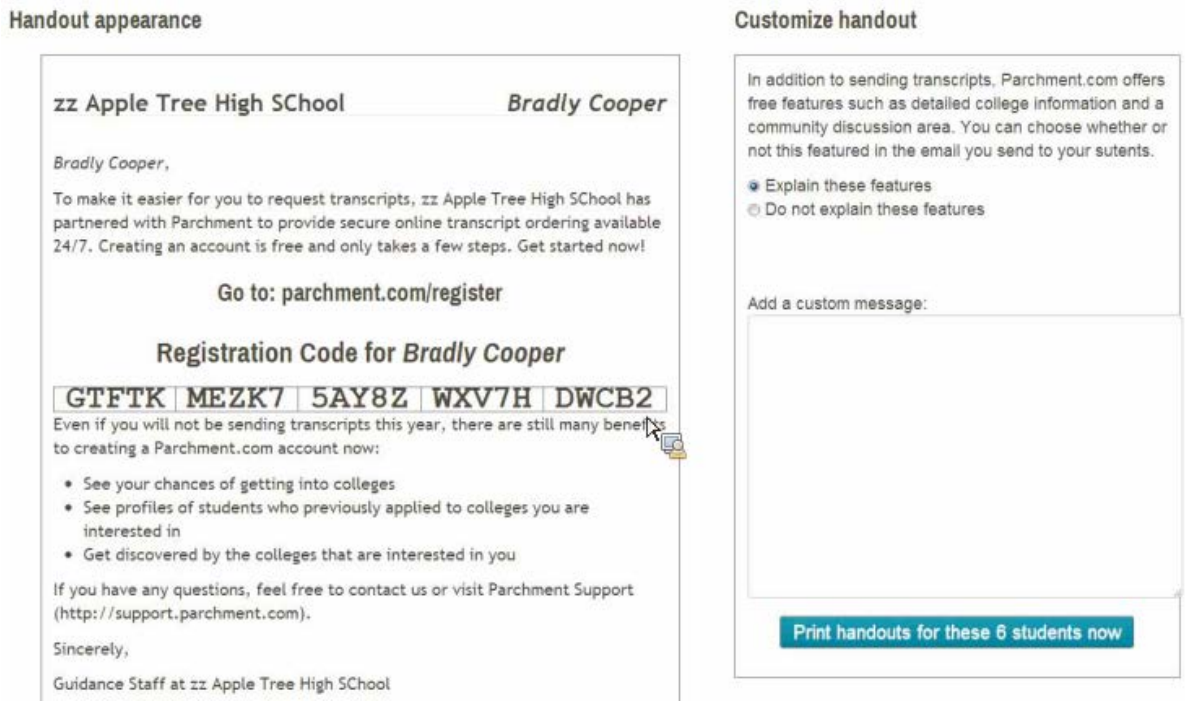
        i. Select whether or not to explain the free features of Parchment
        ii. Add a custom message if desired
        iii. Change the sending email address to a school account if desired
        iv. If you check the box to automatically send, student will receive a reminder every 3 days until registered or four messages have been sent.
    c. Press the **Email these # students now** button
    d. Note: When students register, they will be able to set their preferred email account for future communications.

3. Print Registration Codes
    a. If you prefer paper or do not have email addresses, you can print letters containing instructions and each student's registration code.
    b. Before pressing the Print Registration Codes button, you can click any column header to sort the list and check or uncheck students to include.

Check All | Uncheck All

Checked	Class year	First	Last	Registration Code	Email	Date last emailed	Send attempts
☑	Senior	Bradly	Cooper	GTFTKMEZK75AY8ZWXV7HDWCB2	Bradly@zzappletreetest.com		0
☑	Senior	Tom	Hanks	DV53KMEDY67APBEQRBQ2FXVVX	tom@zzappletreetest.com		0

    c. Customize the letters before printing



Handout appearance

zz Apple Tree High SChool — *Bradly Cooper*

Bradly Cooper,

To make it easier for you to request transcripts, zz Apple Tree High SChool has partnered with Parchment to provide secure online transcript ordering available 24/7. Creating an account is free and only takes a few steps. Get started now!

Go to: parchment.com/register

Registration Code for *Bradly Cooper*

GTFTK | MEZK7 | 5AY8Z | WXV7H | DWCB2

Even if you will not be sending transcripts this year, there are still many benefits to creating a Parchment.com account now:

- See your chances of getting into colleges
- See profiles of students who previously applied to colleges you are interested in
- Get discovered by the colleges that are interested in you

If you have any questions, feel free to contact us or visit Parchment Support (http://support.parchment.com).

Sincerely,

Guidance Staff at zz Apple Tree High SChool

Customize handout

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 featured in the email you send to your sutents.

◉ Explain these features
○ Do not explain these features

Add a custom message:

Print handouts for these 6 students now

        i. Select whether or not to explain free features of Parchment
        ii. Add a custom message if desired
    d. Press the **Print handouts for these # students now** button
    e. Distribute the letters to your students

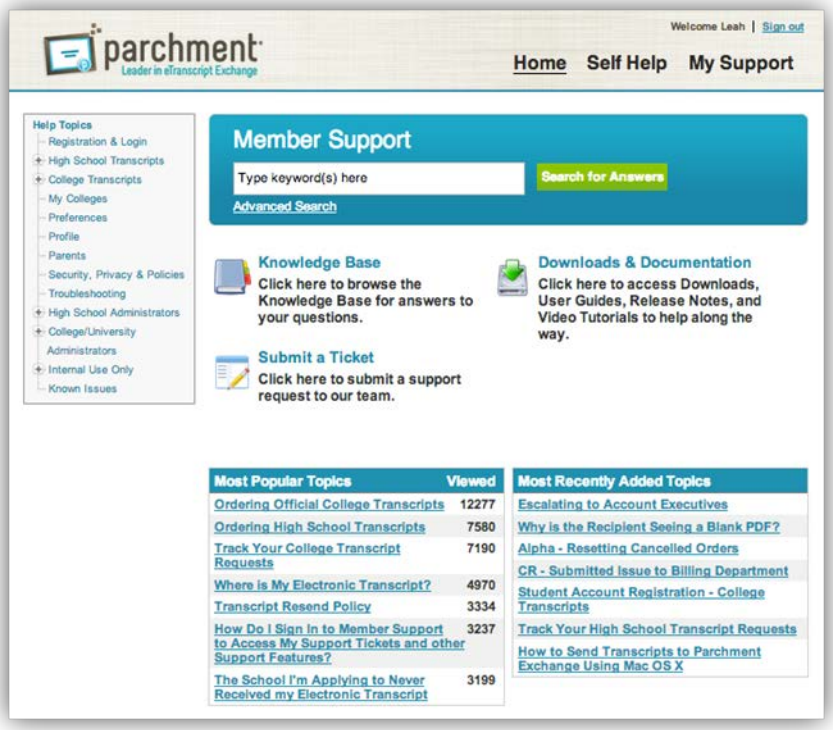
2e: Promote to Students

1. Add the Request My Transcript button to your high school websites in multiple places.

2. Display the Parchment poster in your Guidance offices. See Parchment Toolkit for resources.
3. Get the word out to everyone!
    a. Update Registrar voicemail message
    b. Publish in student flyers/newsletters
    c. Announce at faculty/staff meetings
    d. Use social media
4. Account Executive who can help you:
   Mark Asma
   Email: masma@parchment.com
   Phone: 480-719-1646 ext. 1092

2f: Parchment Support Options

1. For transcript document processing, order status, account settings/preferences, technical support, and How-to questions use Self-Help Portal or Phone Support
    a. 24/7 Self-Help Support Portal (administrators and students)
        i. Log onto your account at Exchange.Parchment.com
        ii. Click Support
        iii. Search for articles and download resources
        iv. Submit a ticket for support



    b. Live Phone Support
        i. 1-888-662-0874
        ii. 9AM – 6PM EDT
        iii. Administrator Support Only, Please No Student Calls
2. For training school administrators on Parchment Exchange, marketing and communication to students, market strategies, and all contractual questions contact Kentucky's Account Executive.
    a. Mark Asma
    Email: masma@parchment.com
    Phone: 480-719-1646 ext. 1092

Step 5: Handling a transcript request

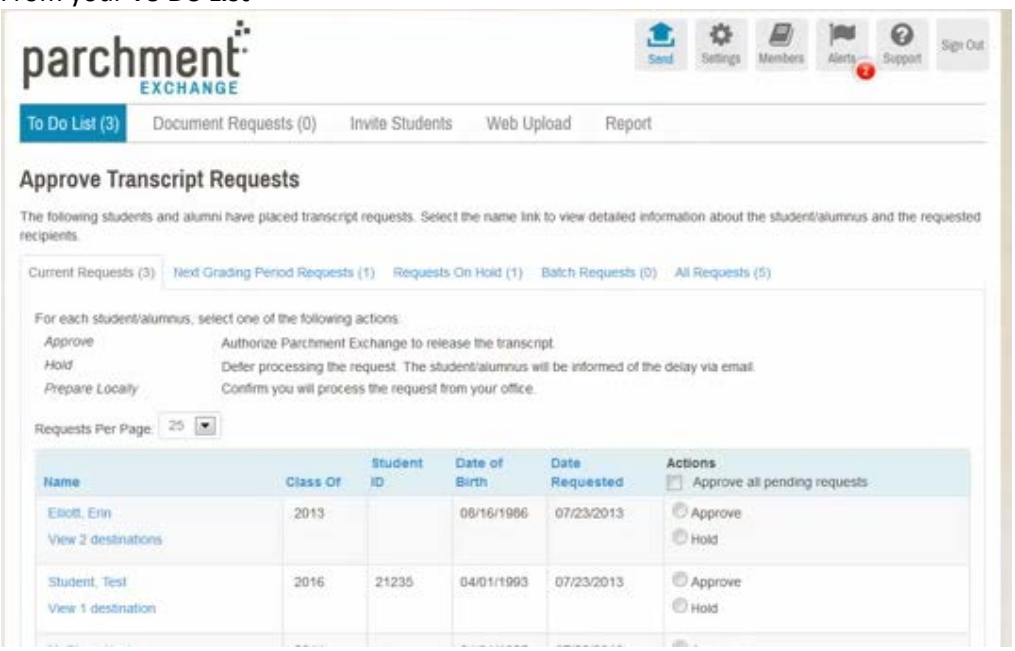
You've set everything up. Let's start approving and releasing transcripts.

A 5 minute video on Processing & Reporting is available from Parchment: http://exchange.parchment.com/toolkit/ Keep in mind that the video is not specifically for the Kentucky process. We **do not use** the Docufide printer client to release transcripts (see step 5b).

5a. Parchment Process

1. Look for pending requests in Parchment.
    a. Log onto your Parchment Exchange account
    b. Under **Quick Links**, check the **Approve Transcript Requests** (#) link. If you have pending requests, the number will display in parentheses at the end of the link. Clicking the link will take you to your **To Do List**.

2. From your **To Do List**



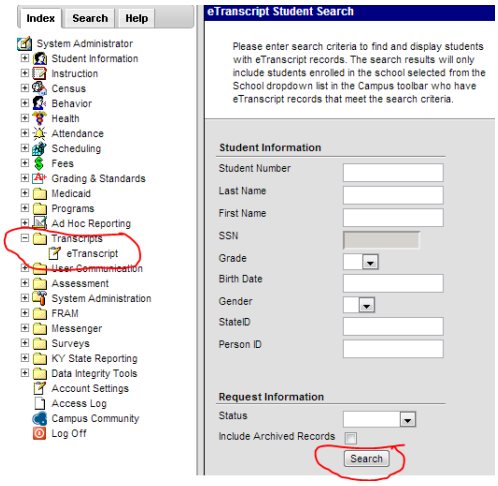
    a. Your requests are organized under 5 tabs: Current Requests, Next Grading Period Requests, Requests On Hold, Batch Requests, and All Requests.
    b. You may click on the student's name to drill down to more detailed information.
    c. **Actions** – click the radial button for the appropriate action
        i. **Approve**
            1. After marking requests as approved, press the **Submit** button.
            2. **Process Transcript Requests** will open (see step 3).
        ii. **Hold** – a request can hold for up to 30 days. The request will be cancelled automatically after 30 days unless some Action has been taken.
            1. **Student Hold**
            2. **Hold for Grades** (next grading period)
               moves to the Next Grading Period Requests tab
            3. **Other**
                a. Use the textbox to explain
                    i. Why the request is on hold
                    ii. Steps the student needs to take to get the request off of hold
                b. The student will receive an email containing the information from the textbox.
        iii. **Prepare Locally** – use when the transcript cannot be sent electronically and will be printed and

mailed at the school

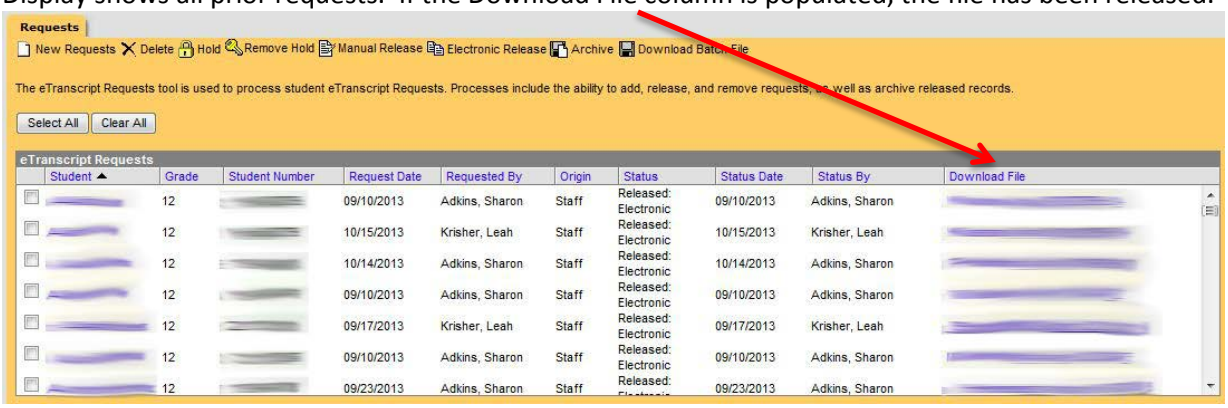
3. **Process Transcript Requests**.
    a. To print a checklist, click the **Print List** button
    b. Go to Infinite Campus to release the transcripts (see step 4b). *We are not using the Docufide printer process described in the training video.*

5b. Release Transcripts from Infinite Campus

Path: Transcripts > eTranscripts



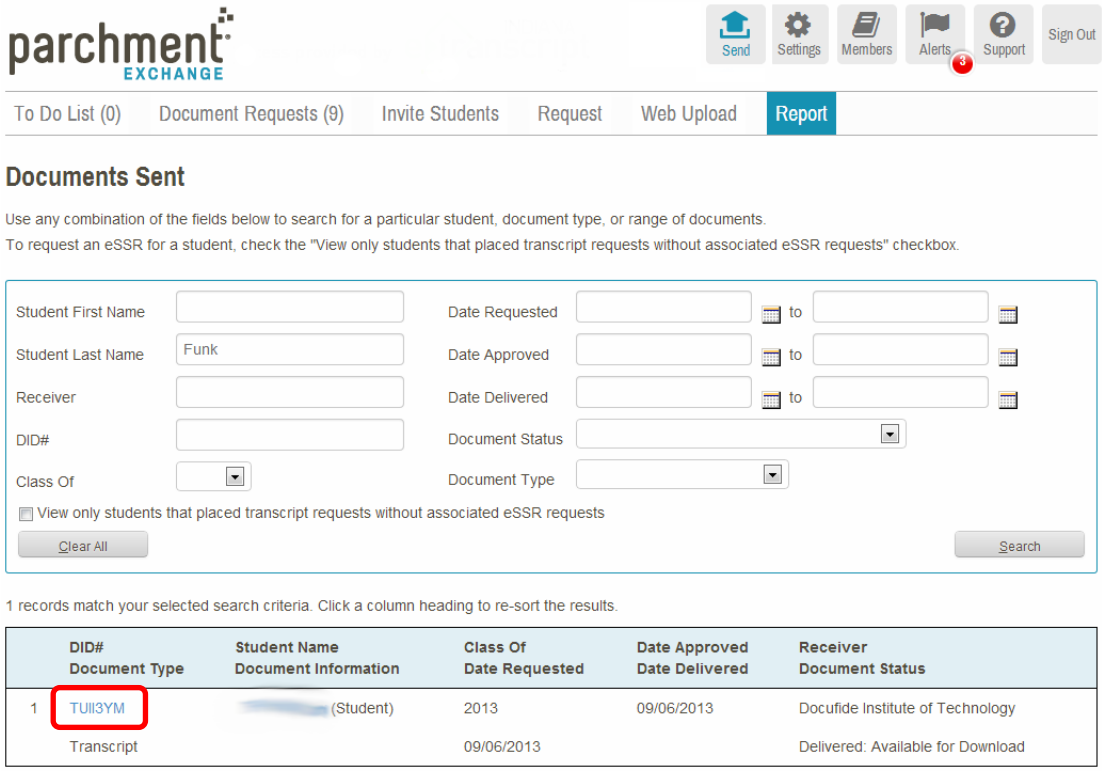
1. Click Search.
    a. Display shows all prior requests. If the Download File column is populated, the file has been released.



    b. If the student's file has not been released, click **New Requests**.
        i. Select student(s) from All Students listing on left.
        ii. Press the right arrow key to move the names to Selected Students.
        iii. Press the **Save Requests** button.
        iv. The student(s) name now shows in **eTranscripts Requests** listing on the **Requests** tab.
        Note: The listing is sorted by First Name.
    c. Mark the checkbox in front of student(s) names to be released.
    d. Press the **Electronic Release** button at the top of the **Requests** tab.
2. ONLY RELEASE TRANSCRIPTS THAT HAVE BEEN REQUESTED IN PARCHMENT. They will be rejected otherwise.
3. You can archive released files to increase workspace.
        i. Select the requests to archive by marking the checkboxes.
        ii. Press the **Archive** button.
        iii. To view Archived requests, mark the **Include Archived Records** checkbox before pressing Search.

5c. Student/Institution receive transcript

1. Student will be notified by email that the transcript has been sent. The student may view the transcript that was sent by logging into Parchment.
2. Institutions that receive electronic transcripts are notified.
3. **For you to see the transcript**
   a. Go to the Report tab in Parchment



   b. Search by student
   c. Once the report populates, the DID # will be a link for 90 days after the transcript is sent
   d. Click on the DID # to view an image of the transcript that was sent