Colleges that have received Transcript Requests from other colleges sometimes cannot fulfill the Request immediately and put the Request "On Hold" or they may have send an Electronic Response via the Control Center and inadvertently never complete the transaction with a Transcript Release.

Transcript Colleges may apply a Hold on a Request for a couple of reasons such as Offline Records Search, Financial Hold, or any other Hold condition. Transcript Colleges may also send an Electronic Response to the Recipient College with the intention of Releasing a Transcript but for some reason never follow through therefore leaving the Request unfulfilled. **No matter what the circumstances are for not fulfilling the Transcript Request if the Request is not fulfilled it will persist until it is either fulfilled, rejected, or cancelled.**

The problem with Transcript Requests going unfulfilled:

- Target College will continue to see that these old Requests are open and pending fulfillment, sometimes for months or years
- These types of transactions consume system resources where those resources could be used elsewhere
- The Transcript Source College should be managing these exceptions using the eTranscriptCA function for "Fulfill College Transcript Requests"
- Requests need to be managed by each colleges using eTranscriptCA system

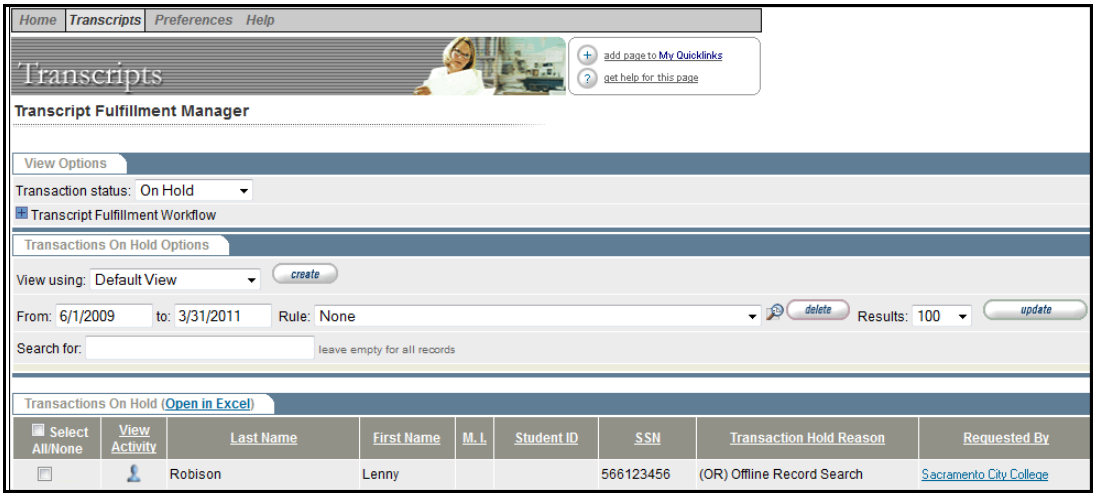
Cancelling Transcript Requests that will not be fulfilled

Transcript Source Colleges – Cancelling Old Unfulfilled Requests "On Hold"

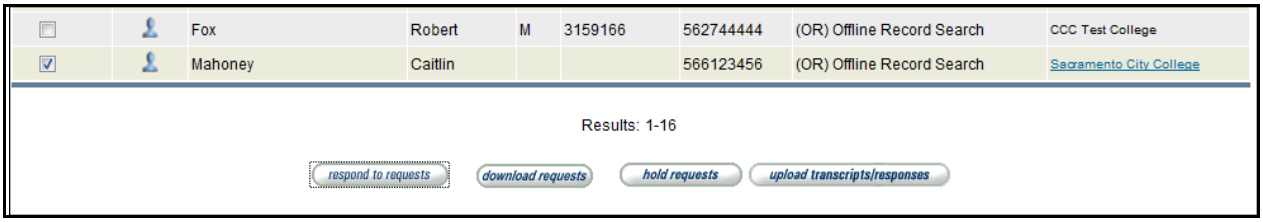
To identify the Transcript Requests on your system having an "On Hold" condition do the following:

1. From the Control Center Transcript Menu select Fulfill College Transcript Request
2. Set the Transaction Status filter to "On Hold" (screen will refresh)
3. Set the Date Range from the date of your first eTranscriptCA transaction to about 3 months ago
4. Click the update button
5. The results show all Requests "On Hold" and the Reason
6. Determine your college cutoff date for cancelling old requests (consider the Hold reason)

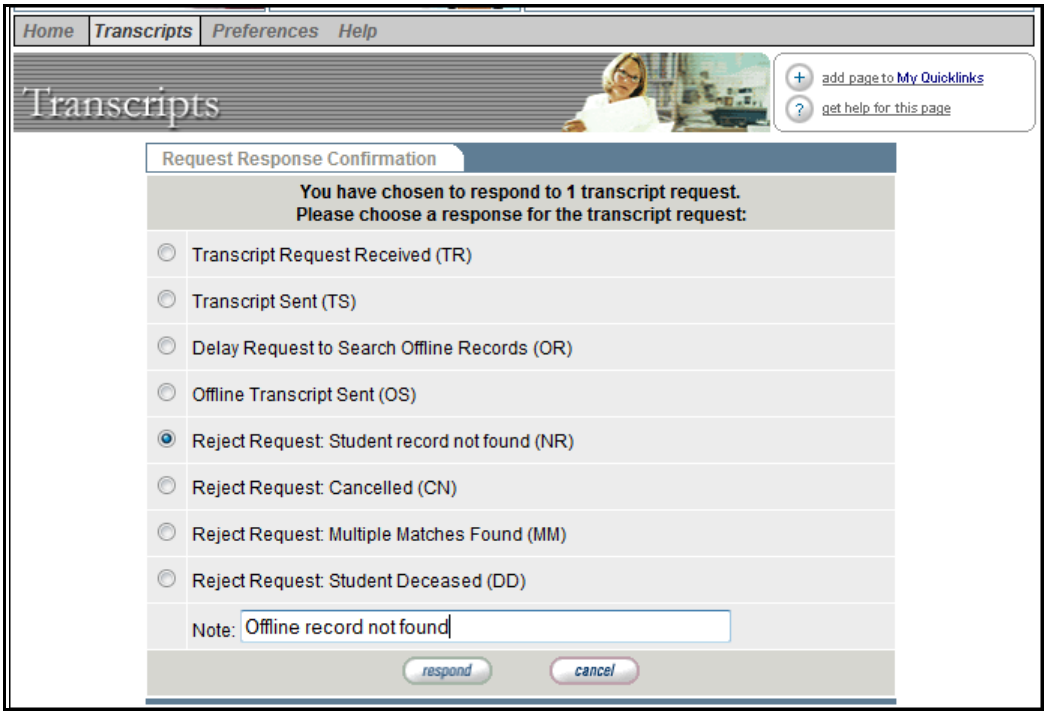
In the example below we are showing you only one of many records that were returned for this query. Based on the query parameters we know this request is older than 3/31/2011. To view details you could click on the 'blue man' icon.



To take action on the Requests select the left hand box of as many row(s) desired and click a button at the bottom of the panel. In this case we are responding to the Request so select the button "respond to request" as shown in the figure below.



If <u>one or multiple</u> Requests are selected the action taken on the panel "Request Response Confirmation" will apply to all Requests selected. In this example we are rejecting all the marked requests due to the reason of student record not found and including a text note that the Recipient College can see. The reason could also be "Cancelled" if you are removing "old" Requests (add note accordingly).

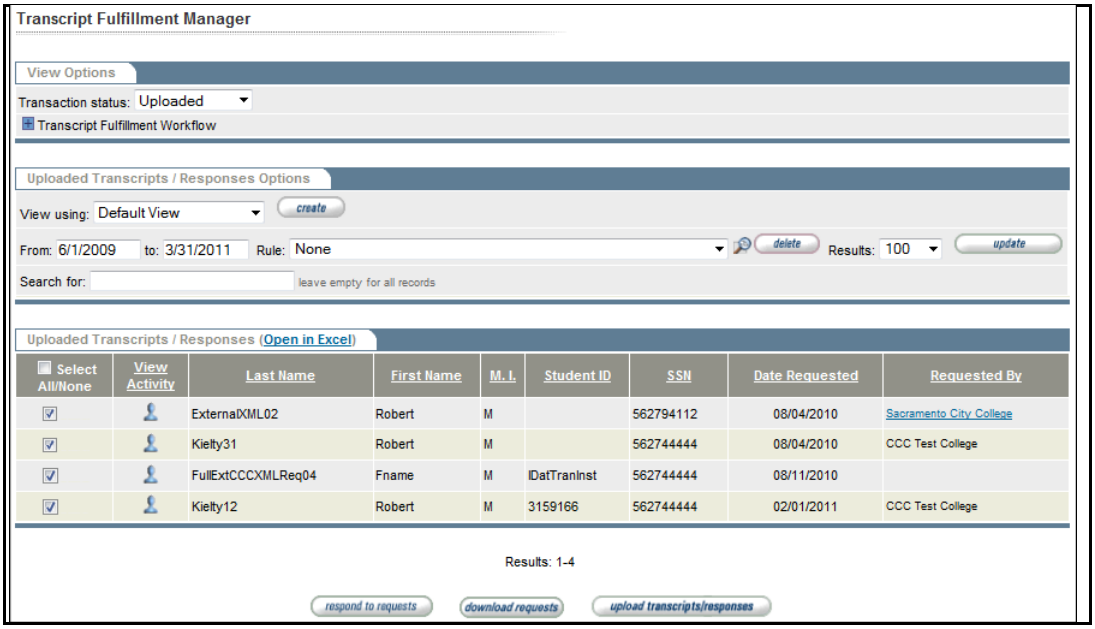


The action of clicking the button "Respond" will cancel Request(s) that had been selected so neither the Recipient College nor the Transcript College will see these as open Requests waiting for Transcripts. They will now show in Reports as cancelled or rejected with the code, reason and note selected.

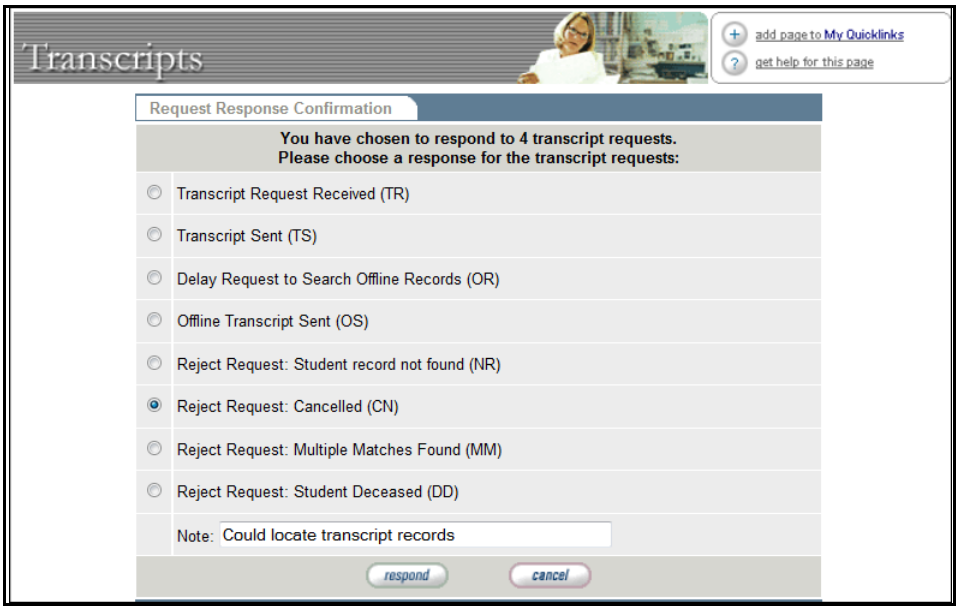
Transcript Source Colleges – Cancelling old requests that have a Response Uploaded (but no transcript released)

To identify the Transcript Requests on your system having an "Uploaded" status but no transcript released do the following:

1. From the Control Center Transcript Menu select Fulfill College Transcript Request
2. Set the Transaction Status filter to "Uploaded" (screen will refresh)
3. Set the Date Range from the date of your first eTranscriptCA transaction to about 3 months ago
4. Click the update button
5. The results show all Requests that have had a Response provided (interactive or uploaded) but no Transcript has been released to the Recipient College.
7. Determine your college cutoff date for cancelling old requests (consider date requested)



If one or multiple Requests are selected the action taken on the panel "Request Response Confirmation" will apply to all Requests selected. In this example we are rejecting all the marked requests do to reason "Reject Request: Cancelled" and including a text note that the Recipient College can see.

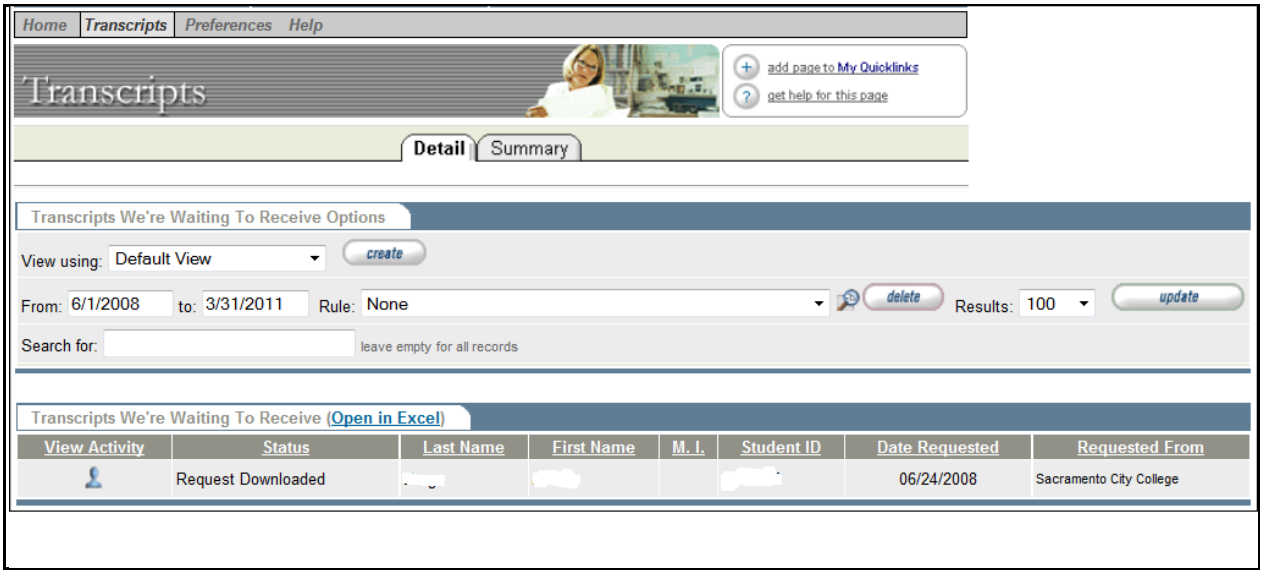

Transcripts
add page to My Quicklinks
get help for this page
Request Response Confirmation
You have chosen to respond to 4 transcript requests.
Please choose a response for the transcript requests:
Transcript Request Received (TR)
Transcript Sent (TS)
Delay Request to Search Offline Records (OR)
Offline Transcript Sent (OS)
Reject Request: Student record not found (NR)
Reject Request: Cancelled (CN)
Reject Request: Multiple Matches Found (MM)
Reject Request: Student Deceased (DD)
Note: Could locate transcript records
respond
cancel

Transcript Recipient Colleges – Cancelling Old Unfulfilled Requests "On Hold"

To identify the Transcript Requests on your system having an "On Hold" condition do the following:

1. From the Control Center Transcript Menu select Reports
2. Select report "Transcripts we're waiting to receive" – detailed view.
3. Set the Date Range from the date of your first eTranscriptCA transaction to about 3 months ago
4. Click the update button
5. The results show all Requests not fulfilled and the date of the request
6. Determine your college cutoff date for cancelling unfulfilled requests (consider the Hold reason)

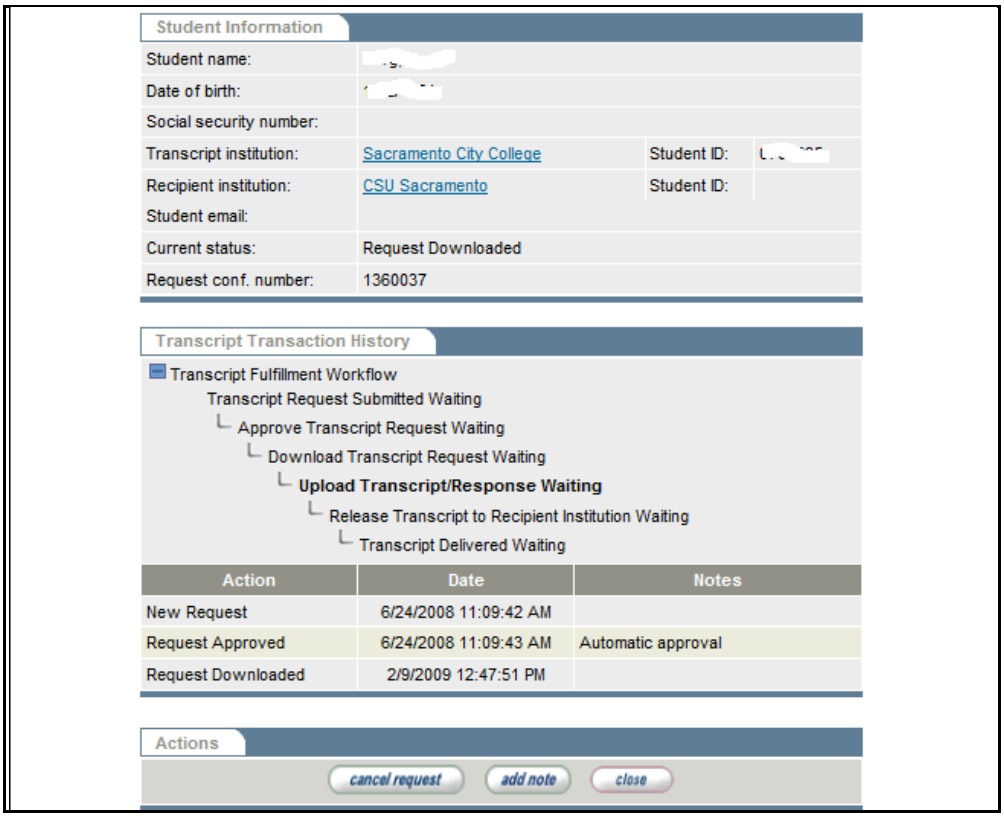
In the example below we are showing you only one of many records that were returned for this query. Based on the query parameters we know this request is older than 3/31/2011. To view details you could click on the 'blue man' icon.



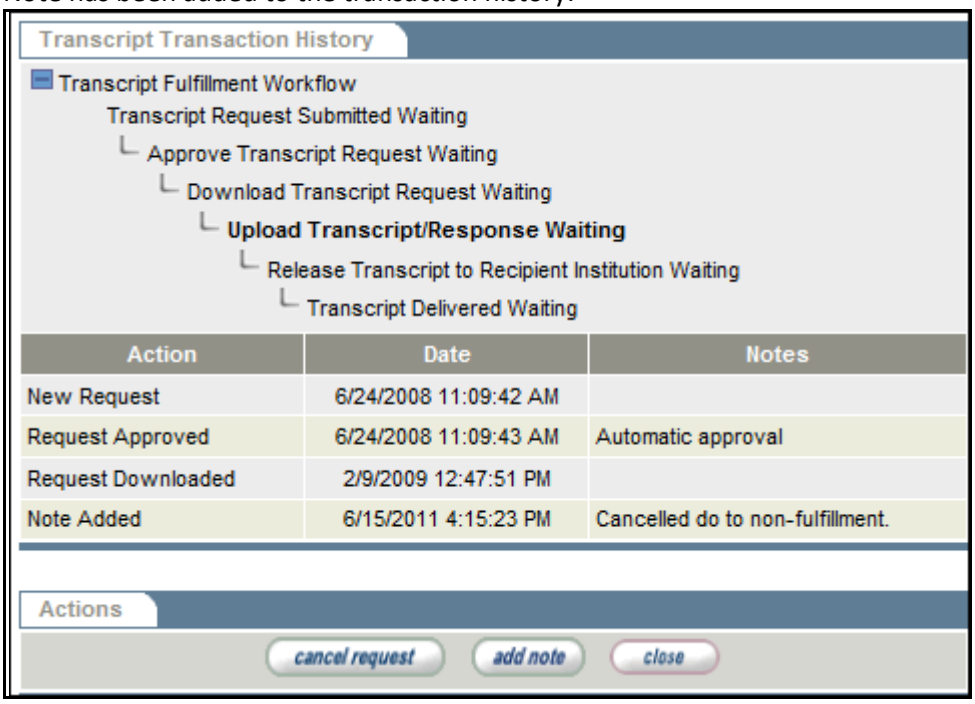
Click on the blue man icon to see the transaction history shown below. In this example the Request was downloaded by the Transcript College in 2008 and never fulfilled. You may either call the Transcript College asking them to fulfill the Request or you may cancel the Request and resubmit a new one if desired.

Before cancelling you may wish to add a note for the reason (optional). Click the button to 'add note' and update transaction (see below for result). Notice a new action was added with new date and time stamp.

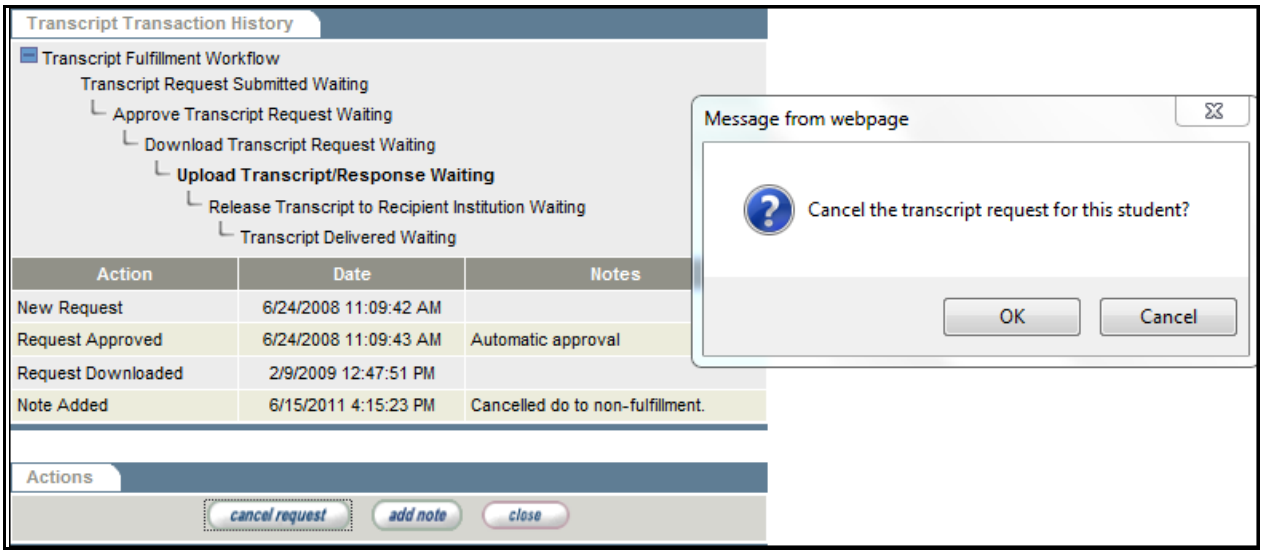
Click button to add note:



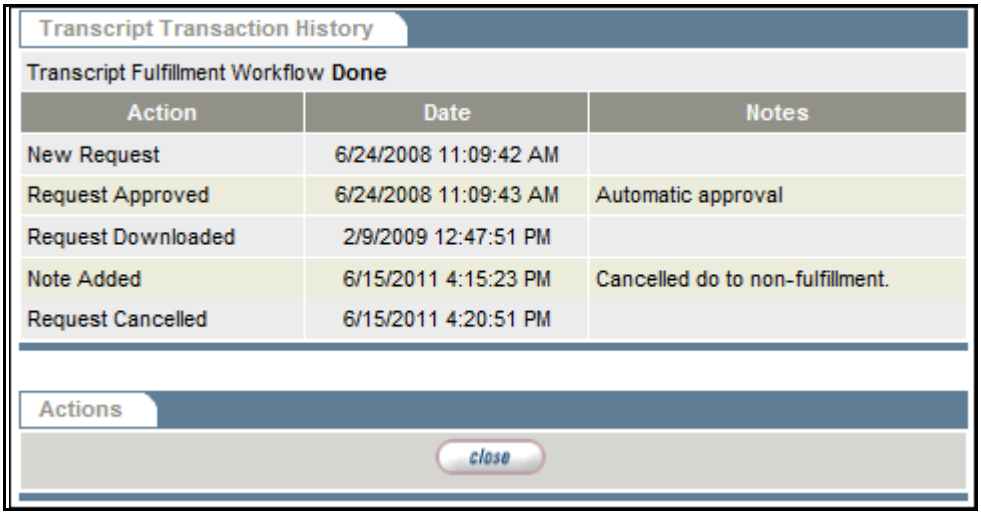
Note has been added to the transaction history:



To cancel the Request click the button 'cancel request' then click OK.



Transaction is updated with new action and date / time stamp.



The Request will no longer appear on your report for transcripts you're waiting to receive.

For the Recipient College this is the only way to cancel Requests that have aged beyond your defined limits or that you no longer need to have fulfilled. It is a faster process for the Transcript College to cancel Requests if there are many to do. You may ask the Transcript College to take action if there are many Requests to cancel.

The bottom line is that each college using eTranscriptCA should support best practices internally making sure all their Transcript Requests are Fulfilled and if not Fulfilled then make sure the transactions they've initiated are brought to closure.