CUNY-BARFITA

eTranscript Processing with Unparalleled Customer Service

CUNY | June 5, 2015
Our Credentials. Your Solutions.

Since 1997 Credentials Has Serviced Students as an Agent for Higher Education

- Process Focused
  - Degree and Enrollment Verification
  - TranscriptsPlus®
- Industry Leading
  - RoboRegistrar® Integrated Automation
- Consumer Facing
  - Transcript Network™
  - eRoboMail™
Effective 1/14/2015, Credentials and eScrip-Safe merged the online ordering and electronic distribution services

New Enterprise includes:
- Over 800 Sending Institutions
- Close to 3,000 Receiving Institutions

Security Paper and Diplomas on Demand not part of the merger

Company managed out of Northfield, IL with Customer Service and print offices in Loveland, OH and Las Vegas, NV

New Enterprise is called: Credentials e-SCRIP-SAFE
Design Elements Overview

Registrar Support Services

The Complete Solution
Automating The Process Is The Key To Maximizing The Benefits

Credentials Inc.

TranscriptsPlus®

Firewall

RoboRegistrar®

SIMS/PeopleSoft

TranscriptsNetwork™

Paper Transcript Or Electronic Transcript

Credentials Solutions
• CUNY- Online transcript ordering & payment forms
• 3rd party certified PCI-DSS compliant
• Student charged when order is completed
• Branded & Customized Order Forms
• Over 3,000 Parameters Set During Implementation
RoboRegistrar® AUTOMATED FUNCTIONS

- Locates Records CUNY First & SIMS
- Performs Student & Alumni Authentication
- Checks for Financial Obligations
- Communicates with Students via Email and Text Messaging
- Creates FedEx Air bills
- Facilitates a Variety of Fulfillment Options
  - Add print requests to both systems
  - Could print your transcripts at Credentials
  - Could create EDI & XML
  - Could create School-to-School PDF
  - Could create 3rd Party PDF
Sending Institutions

• In Network (EDI, XML, PDF)
• Third Party (Secure PDF)

Receiving Institutions (including UAPC)

• No cost to receive
• E-mail alerts when transcripts arrive
• Can Import directly into SIS
  • EDI or XML to tables
  • PDF into imaging
New Network
Receiving Institutions Overview

School to School (over 3,000 in network)

- EDI, XML and PDF supported
- Agency Relationship Established with Regional Hubs (Texas, OBR, etc.)
- TS130, TS131, TS146 all supported
- Data elements can differ (possible to include SSN, DOB)
- Includes academic work and legend
- Controlled Access to Registrar Support Services
- E-mail reminders sent 3 times/day when work is pending
- Color Coded Identification of Transcripts

Third Party PDF

- 2 Emails sent for each transaction-must utilize access code
- Transcripts removed 24-30 hours after downloaded
- Includes cover page, watermarks, printed copy, header, footer, signature of Registrar, logo, and legend
We print. We stuff. We mail.

High-speed printing, folding, inserting & stamping
Tamper-proof envelopes
USPS Intelligent Mail Barcoding

Highly specialized rendering
Copy & thermal protections
Your institution’s watermark
Accommodates attachments
REGISTRAR SUPPORT SYSTEM MENU

TranscriptsPlus®
- Work with New or Problem Orders
- Work with Held Orders
- Transcript Order Payment
- Ready to Go Orders
- TP Batch Inserts/Envs
- Transcript Airbills
- Transcript Customer Service
- Scan Authorization Forms
- Manage Transcript Obligations

TranscriptsNetwork™
- List of Senders and Receivers
- InBound Transcripts
- OutBound Transcripts
- Manage Electronic Partner List

Administrative Tasks
- Change Password
- Manage Messages
- View/Edit Calendar
- RoboRegistrar® Functions
- User Administration
- Client Service Bulletins

Reporting, Downloads, etc.
- TP Control Reports
- Transcript Order History
- End of Day File Download
- Work with Reports
- Work with Current Addresses
Communication

Answer student/alumni questions before they ask them

Email and text message notifications include:

- Transcript Order Receipt
- Authorization Notification
  - has been authorized
  - authorization received
  - authorization required
  - authorization reminder(s)
- Transcript Order has a problem
- Transcript Order has been canceled
- Transcript Order Completed
- Transcript has arrived
- Attachment Needed
- Transcript Order Credit Card Failed
- Transcript Order has been received
- Transcript Order has Bad Recipient Email
Credentials’ Industry Leading Customer and Client Service

- Client Relationship Managers
- Customer Service Representatives
- 13.5 hour/day Live Customer Service operators
- Online Order Status 24/7
Transcript Delivery Optimization with Credentials

TranscriptsNetwork™

eRoboMail™

Print at Institution

3rd Party PDF

XML

EDI

PDF

eTranscript

California

eTranscript

CALIFORNIA

Texas Server

Ohio Board of Regents
Our Recommendations

■ CUNY First
  > Enhance Robo software at Cedar Crestone in Atlanta
  > Allow Credentials to modify software to extract data for electronic transcripts and eRoboMail®

■ SIMS
  > Make Credentials your data warehouse
  > Allow us to maintain the system and be able to extract data for electronic transcripts and eRoboMail®
Recent Enhancements

- New Nevada branch office for expanded customer service hours and faster West Coast USPS delivery for eRoboMail.

- Sending PDF transcripts to Graduate application services.
  - AMCAS
  - LSDAS
  - PHARMCAS, etc.

- Added “Reason For Ordering Transcript” to the TranscriptsPlus® order form
Coming Attractions

- Reverse Transfer Degree Programs
  Currently working with selective schools in WI and OH

  Gets the Student’s Approval and performs the function without releasing all your data

- Directly Importing EDI/XML transcript data into Student Information Systems with RoboRegistrar®. Beta sites in CA and NY
One Option for Students to “OPT IN” for Reverse Transfer Degree Program

**Special Order Condition(s):**

**Attachments:**
Some recipients require that you include additional information pages ("Attachments") with your transcript when it is sent to them. Any transcript order with an Attachment is limited to a single recipient and is only eligible for delivery as a printed transcript (i.e. mailed).

- ONLY check this box if you have an attachment or enclosure that must be sent with your transcript

---

**Other information required by University of Wisconsin - Madison:**

<table>
<thead>
<tr>
<th>Primary Reason for Ordering</th>
<th>For a Reverse Transfer Degree Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attended From Year</td>
<td>2006</td>
</tr>
<tr>
<td>Attended To Year</td>
<td>2008</td>
</tr>
</tbody>
</table>

**Approximate Years**

in YYYY Format
MADISON COLLEGE and University of Wisconsin - Madison Reverse Transfer Agreement

The Madison College and University of Wisconsin - Madison Agreement facilitates the reverse transfer of credit from the University of Wisconsin - Madison to Madison College for students who have transferred from Madison College. This reverse transfer of credit is intended to add accumulated credits toward an Associate's Degree, which is awarded by Madison College if the student has fulfilled the graduation requirements. In order to qualify for this program, you must have earned at least 30 credits and be in good standing at Madison College.

By selecting "I DO wish to take advantage of the Reverse Transfer Agreement" below, you give permission to the University of Wisconsin - Madison to release your demographic and academic data (full name, birthdate, matriculation term, last four digits of SSN, course information including term, session, subject description, number, title, credits, and grade) to Madison College in support of the Agreement. Your confidential records will be used only for the purposes of this Agreement and this consent will remain in effect indefinitely unless revoked in writing.

- I DO wish to take advantage of the Reverse Transfer Agreement
- I DO NOT wish to take advantage of the Reverse Transfer Agreement

Please Read and check the box to continue...Although we make every effort to maintain current school addresses in our database, IT REMAINS YOUR RESPONSIBILITY TO ENSURE THAT THE CORRECT ADDRESS IS USED ON YOUR TRANSCRIPT ORDER.

Clicking the "Cancel This Recipient" button will clear any information you have entered for this recipient and take you back to the Basic Order Information screen to change your selection and restart your recipient entry.

Cancel This Recipient  Next

2nd Option For Opting In
Sending Institutions

You are allowed to enable up to 3 sending institutions for Reverse Transfer.

First Sending Institution

School: SUNY Oswego
Student ID at Sending Institution: 0432198765

Second Sending Institution

School: University at Albany, SUNY
Student ID at Sending Institution: A654321890

Third Sending Institution

School: Fordham University
Student ID at Sending Institution: F9875645321

Register
# Import Processing

## Incoming Student Information

- **Student Name:** Margarita
- **College of the Sequoias SID:**
- **Transfer School:** Porterville College

[Back to List] [Refresh]

## SUMMER 2001

<table>
<thead>
<tr>
<th>Location</th>
<th>Dept</th>
<th>Code</th>
<th>Description</th>
<th>Units</th>
<th>Grade</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HMSV</td>
<td>P095</td>
<td>Success Seminar</td>
<td>0.000</td>
<td>UG</td>
<td>Import</td>
</tr>
<tr>
<td>In Sys</td>
<td></td>
<td></td>
<td><em>Course not found in your system</em></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## FALL 2001

<table>
<thead>
<tr>
<th>Location</th>
<th>Dept</th>
<th>Code</th>
<th>Description</th>
<th>Units</th>
<th>Grade</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>ENGL</td>
<td>P050</td>
<td>College Writing</td>
<td>0.000</td>
<td>W</td>
<td>Import</td>
</tr>
<tr>
<td>In Sys</td>
<td></td>
<td></td>
<td><em>Course not found in your system</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>MATH</td>
<td>P055</td>
<td>Elementary Algebra</td>
<td>0.000</td>
<td>W</td>
<td>Import</td>
</tr>
<tr>
<td>In Sys</td>
<td></td>
<td></td>
<td><em>Course not found in your system</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>SPCH</td>
<td>P101</td>
<td>Intro to Public Speaking</td>
<td>0.000</td>
<td>F</td>
<td>Import</td>
</tr>
<tr>
<td>In Sys</td>
<td></td>
<td></td>
<td><em>Course not found in your system</em></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### FALL 2008

<table>
<thead>
<tr>
<th>Location</th>
<th>Dept</th>
<th>Code</th>
<th>Description</th>
<th>Units</th>
<th>Grade</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>ENGL</td>
<td>P101A</td>
<td>Expository Composition</td>
<td>0.00</td>
<td>W</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>ENGL</td>
<td>P101A</td>
<td>Expository Composition</td>
<td>0.00</td>
<td>W</td>
<td>Import Grade Changed/Import</td>
</tr>
<tr>
<td>5</td>
<td>ENGL</td>
<td>P112</td>
<td>Forms of Literature: Chicano</td>
<td>0.00</td>
<td>W</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>ENGL</td>
<td>P112</td>
<td>Forms of Literature: Chicano</td>
<td>0.00</td>
<td>W</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>INFS</td>
<td>P090</td>
<td>Genral Computer Lab</td>
<td>0.00</td>
<td>UG</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>INFS</td>
<td>P090</td>
<td>Genral Computer Lab</td>
<td>0.00</td>
<td>UG</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>MATH</td>
<td>P051</td>
<td>Intermediate Algebra</td>
<td>0.00</td>
<td>F</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>MATH</td>
<td>P051</td>
<td>Intermediate Algebra</td>
<td>0.00</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>PHED</td>
<td>P106</td>
<td>Shape Up</td>
<td>0.00</td>
<td>NC</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>PHED</td>
<td>P106</td>
<td>Shape Up</td>
<td>0.00</td>
<td>NC</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>PHOT</td>
<td>P140</td>
<td>Phot Digital Retouch/Restoratn</td>
<td>2.00</td>
<td>A</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>PHOT</td>
<td>P140</td>
<td>Phot Digital Retouch/Restoratn</td>
<td>2.00</td>
<td>A</td>
<td></td>
</tr>
</tbody>
</table>

### SPRING 2009

<table>
<thead>
<tr>
<th>Location</th>
<th>Dept</th>
<th>Code</th>
<th>Description</th>
<th>Units</th>
<th>Grade</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>BIOL</td>
<td>P110</td>
<td>Principles of Biology</td>
<td>0.00</td>
<td>F</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>BIOL</td>
<td>P110</td>
<td>Principles of Biology</td>
<td>0.00</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>ENGL</td>
<td>P101A</td>
<td>Expository Composition</td>
<td>0.00</td>
<td>F</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>ENGL</td>
<td>P101A</td>
<td>Expository Composition</td>
<td>0.00</td>
<td>W</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>HLED</td>
<td>P112</td>
<td>Health Education</td>
<td>3.00</td>
<td>B</td>
<td>Do Not Import</td>
</tr>
<tr>
<td>In Sys</td>
<td>HLED</td>
<td>P112</td>
<td>Health Education</td>
<td>3.00</td>
<td>B</td>
<td></td>
</tr>
</tbody>
</table>
How can Credentials optimize the process for you?

- Sending & Receiving solutions for all file formats
- Integration of incoming transcripts with imaging system
- Responding to electronic requests for transcripts efficiently
- 13+ hour/day customer service for you and your students
The total package transcript solution.

Save time and money with a complete transcript solution.

We offer the industry’s only comprehensive and fully-integrated transcript processing solution to handle all of the mundane clerical tasks in your workflow. Together, these products make the processing, transmission, and sharing of academic records quick and easy.
Thank you for attending!

Jack Weber, EVP
847-716-3030
weber2@credentialssolutions.net

Natalie Spooner, Sales Director
315-777-3278
spooner3@credentialssolutions.net