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Adapted for use by IISD Users

*Independent School District*

Revised 8/2016

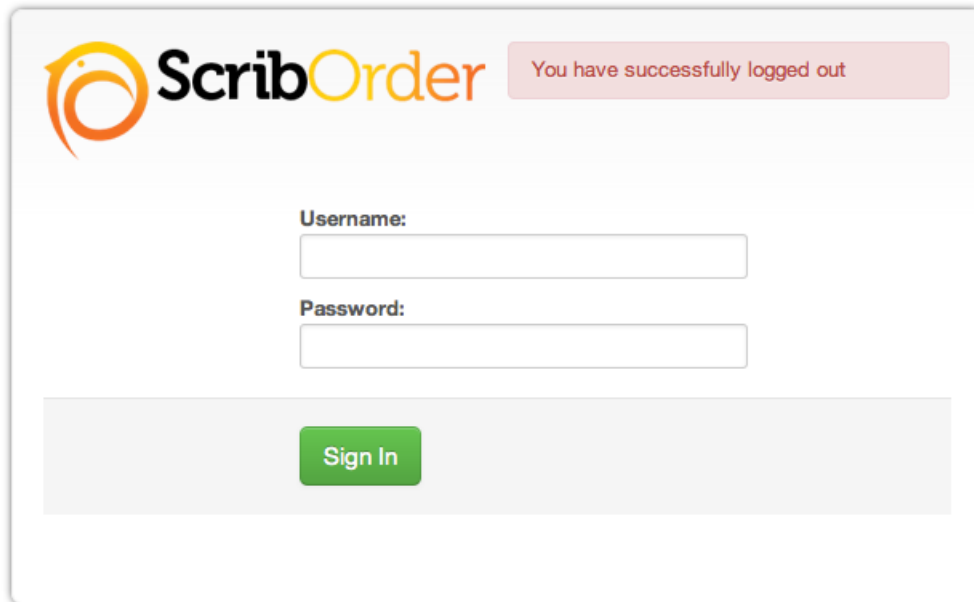
## BASIC FUNCTIONALITY

### LOGGING IN

Each user has a unique user id and password to access ScribOrder. Type in your user id and password and click the Sign In button.

Bookmark / Add to favorites the following URL:  
**<https://XXXXX.scriborder.com/appList#>**

**Sign In web page:**



Your username: the first part of your email address

Your temporary password is: recclerks16

You will be required to update your password.

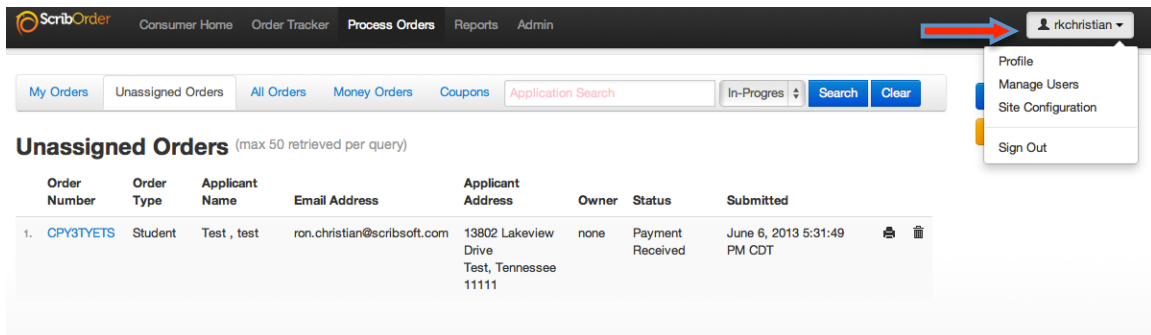
Consumer Home: <https://iisdtx.scriborder.com/>

ScribOrder Sign In: <https://iisdtx.scriborder.com/appList>

## CHANGING PASSWORD

For security purposes, it is important that each user changes their password in conjunction with the current policy. To change your password, sign in to ScribOrder and click your user id at the top right hand corner of the screen.

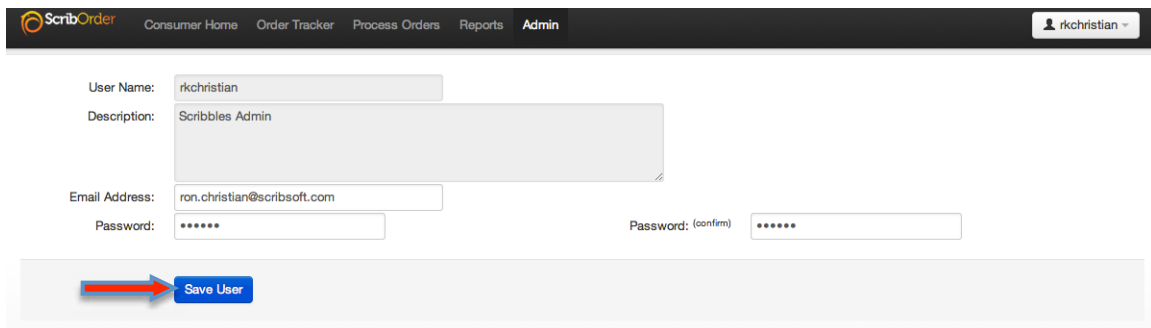
**Click on your User ID and select Profile:**



The screenshot shows the ScribOrder application interface. At the top right, the user ID 'rkchristian' is displayed with a dropdown arrow. A red arrow points to this dropdown menu, which is open and shows the following options: Profile, Manage Users, Site Configuration, and Sign Out. Below the navigation bar, there are tabs for 'My Orders', 'Unassigned Orders', 'All Orders', 'Money Orders', and 'Coupons'. An 'Application Search' field is present with 'In-Progress' and 'Search' buttons. The main content area displays 'Unassigned Orders' with a table of order details.

Order Number	Order Type	Applicant Name	Email Address	Applicant Address	Owner	Status	Submitted
1. CPY3TYETS	Student	Test , test	ron.christian@scribsoft.com	13802 Lakeview Drive Test, Tennessee 11111	none	Payment Received	June 6, 2013 5:31:49 PM CDT

**On the Profile Page Type in a new Password twice and click Save:**

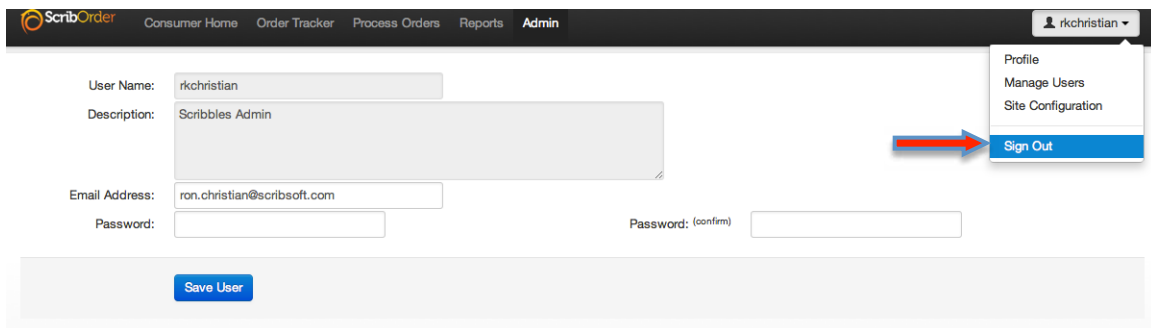


The screenshot shows the ScribOrder application interface with the user profile page. The user ID 'rkchristian' is displayed at the top right. The profile information is as follows:

- User Name: rkchristian
- Description: Scribbles Admin
- Email Address: ron.christian@scribsoft.com
- Password: (masked with dots)
- Password: (confirm) (masked with dots)

A red arrow points to the 'Save User' button at the bottom left of the form.

**Click on you User ID, Sign Out and Sign In again using your New Password:**



The screenshot shows the ScribOrder application interface with the user profile page. The user ID 'rkchristian' is displayed at the top right. The profile information is as follows:

- User Name: rkchristian
- Description: Scribbles Admin
- Email Address: ron.christian@scribsoft.com
- Password: (empty)
- Password: (confirm) (empty)

A red arrow points to the 'Sign Out' button in the user ID dropdown menu at the top right.

## HEADERS AND TABS

When you log into ScribOrder, you will see HEADERS (in the black section) and TABS (in blue front). The TABS are used to process requests where the header will take you out of the processing page to other major functions of ScribOrder.

### Default "Home" Page for ScribOrder Processors:

Order Number	Order Type	Applicant Name	Last School	Grad Year / Grade	Owner	Status	Submitted				
1. →	CRO4Z2RPU	Student	Doe, John	EAST DUPLIN HIGH SCHOOL	1987	none	Payment Received	5/8/2014 12:08:20 PM			
2. →	CSGWD453S	Student	Doe, John	DUPLIN EARLY COLLEGE HIGH SCHOOL	1987	none	Payment Received	10/3/2014 8:07:24 AM			

### HEADERS:

**Customer Home.** This takes you to the Start Order page.

**Print Queue (OPTIONAL).** See E-transcripts (page 24)

**Process Orders.** This is the default HOME page for all users that process requests.

**Reports.** This takes you to Reports.

### TABS:

**My Orders.** This is selected to view the tasks owned by the user that have not been processed.

**Unassigned Orders.** This is the default when **Process Orders** is selected. These tasks have not been completed and have not been assigned to a processor.

**All Orders.** This is search on ALL tasks including active, declined and completed tasks.

**Money Orders.** This is selected to activate money orders

**Coupons.** This is selected to manage all Coupon Codes. You can view existing Coupon Code and create new codes on this page.

**Filters.** This is selected to apply Filters to narrow the display to specific orders. You are given the option to filter all Express Shipping Orders, New Activity - Orders where the requestor has uploaded documentation or a voicemail to the order, or Central Office Orders.

**Check "My Orders" and "Unassigned Orders" daily. Move orders to "My Orders" if you are handling the request.**

# IRVING

*Independent School District*

**Do not "Deny" any orders, move it to the Student Records Specialist (Department of Document Services), make sure you make Working Notes and Save Progress on why you were unable to fulfill the request.**

**If request states it is for your campus and you do not have any records, do not "Deny" the request. Make Working Notes and Save Progress. Then move the request to the Student Records Specialist (Department of Document Services).**

## ORDER LIST

### Unassigned Orders (max 50 retrieved per query)

	Order Number	Order Type	Applicant Name	Last School	Grad Year / Grade	Owner	Status	Submitted			
1. →	<a href="#">CQWEM7LHK</a>	Student	Bridges, Forrest	CAMDEN HIGH SCHOOL	2006	none	Payment Received	12/5/2013, 3:16:48 PM			
2. →	<a href="#">CSGESACJ6</a>	Corporate	Blake, Paul <small>-Any</small>	CAMDEN HIGH SCHOOL	2003	none	Payment Received	9/29/2014, 11:17:25 PM			
3. →	<a href="#">CSJS7UZ2Y</a>	Student	Coan, Christopher	NORTH CENTRAL HIGH SCHOOL	1989	none	Payment Received	10/21/2014, 9:54:55 AM			

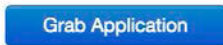
The orders are listed in date order. By default, the oldest is displayed at the top.



Unassigned/Open Orders – Displays the number of unassigned/open orders in the system



Express Shipping (Optional Feature) – Displays the number of express shipping orders. You can filter the list to show only Express Shipping orders by clicking on the number or by selecting Express Shipping from the Filters tab.



In the Order List, each order is presented with the...

**Order Number** - Clickable link that opens the Order. *Note that this doesn't assign the order to you.*

**Order Type** - What type of order it is (e.g. Current Student, Student, Corporate etc...).

**Applicant Name** – Applicant's Name

**Last School** - The school the requestor is requesting records from.

**Grad Year/Grade** - The Graduation Year or the Grade of the Current Student.

**Owner** - When the order is being processed, here it shows who it is assigned to.

**Status** - The status of the order.

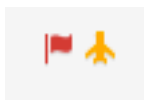
**Submitted** - The date and time of when the order was submitted.

**Note** – You can click on these headers to sort in **Ascending** or **Descending** order



The black icons at the end allow you to access the print menu, grab this particular order (similar to Grab and Process) and for administrators of the system, delete the order.

You may also see a yellow airplane icon and/or a red flag:



These indicate -

**Red Flag** - a document and/or voicemail has been attached to the application

**Yellow Airplane** - The requestor has requested Express Shipping (Only available if the Express Shipping option is activated on your site).

Routing to campus based on last school

Routing to district administrator, unable to route based on last school

#### Unassigned Orders (max 50 retrieved per query)

	Order Number	Order Type	Applicant Name	Last School	Grad Year / Grade	Owner	Status	Submitted			
1. →	CQWEM7LHK	Student	Bridges, Forrest	CAMDEN HIGH SCHOOL	2006	none	Payment Received	12/5/2013, 3:16:48 PM	🖨️	📧	🗑️
2. →	CSGESACJ6	Corporate	Blake, Paul -Any	CAMDEN HIGH SCHOOL	2003	none	Payment Received	9/29/2014, 11:17:25 PM	🖨️	📧	🗑️
3. →	CSJS7UZ2Y	Student	Coan, Christopher	NORTH CENTRAL HIGH SCHOOL	1989	none	Payment Received	10/21/2014, 9:54:55 AM	🖨️	📧	🗑️

## PROCESSING REQUESTS

### USING FILTERS

Consumer Home Order Tracker **Process Orders** Reports demo

My Orders Unassigned All Money Orders Coupons Filter Application Search In-Progress Search Clear

2 OPEN ORDERS

1 EXPRESS ORDERS

Grab Application Grab And Process

#### Unassigned Orders (max 50 retrieved per query)

	Order Number	Order Type	Applicant Name	Last School	Grade	Owner	Status	Submitted			
1. →	CSGWD453S	Student	Doe, John	DUPLIN EARLY COLLEGE HIGH SCHOOL	1987	none	Payment Received	10/3/2014 8:07:24 AM	🖨️	📧	🗑️

You can use filters on the order list to display only the orders under each filter.

**Express Shipping** - display only express shipping orders

**New Activity** - display only orders that have had a Voicemail or Documents attached to it by the requestor

**Central Office** - All orders at the central office only

To apply the filter, click on the appropriate option. To undo the filter, click on this option again.

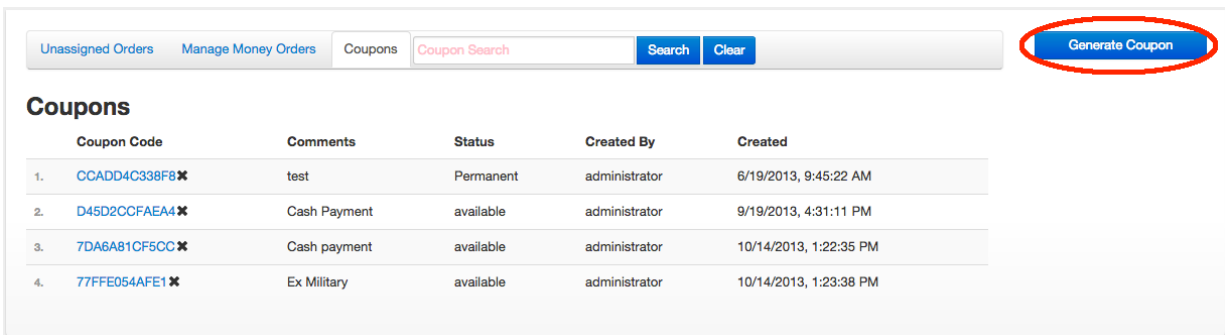
## COUPON CODES

Coupon codes are commonly used to manage hardship cases, government requests and when school districts allow for cash payment. Coupon codes can either be permanent or one time user only.

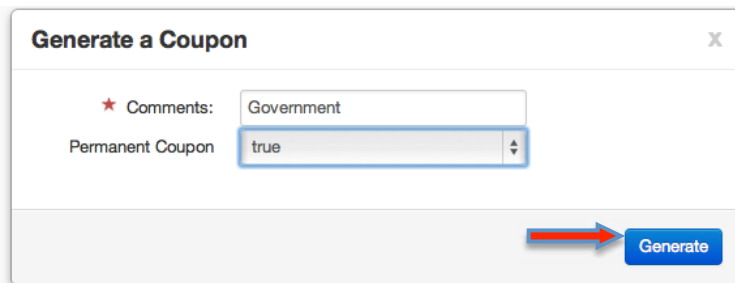
To generate a coupon code, go to the Process Orders screen and select Coupons on the grey Tab Bar.



This will take you to the list of all the existing coupon codes. From here, you can create a new code by clicking on the Generate Coupon button.



Type in the Description of the Coupon Code in the Comments box, select Permanent to True or False (one time use only) and Click Generate:

A screenshot of a form titled 'Generate a Coupon'. It has a close button (X) in the top right corner. The form contains a 'Comments' field with the text 'Government', a 'Permanent Coupon' dropdown menu set to 'true', and a blue 'Generate' button at the bottom right. A red arrow points to the 'Generate' button.

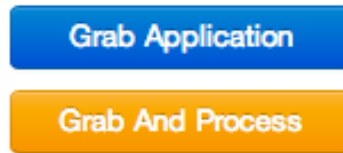
The generated coupon code will appear in the coupon list. The code format will be similar to the example below:



To delete coupon codes, click on the black X at the end of the coupon code. If you delete a coupon code, that code will not work if anyone tries to use it.

## GRAB VS. GRAB AND PROCESS

To start processing a new order, you must select either the 'Grab Application' button or 'Grab And Process'. These buttons allow you to take ownership of the task of the oldest task in the Unassigned list (first application in the list) and they also removes the application in the Unassigned list for the other users.



### Grab Application vs Grab and Process

**Grab Application** - This option grants the user ownership of the task and moves the order from Unassigned Orders to My Orders. To process the request, the user must click on the My Orders tab and click the Order Number to open the request. Think of it as grabbing an order to process at a later time e.g. after lunch.

**Grab And Process** - This option grants the user ownership of the task and opens the request so the user can process the task. In other words, to grab an order and process it now.

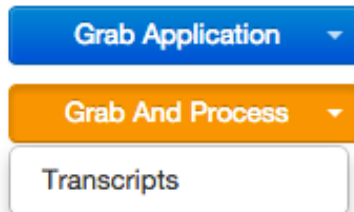
- Process any application - To grab any particular order to process irrespective of the date of submission, click on the check icon. This acts like the Grab and Process button.

### Un-assigning an application

If you need to un-assign an application from yourself, you may have grabbed one by mistake for example, navigate to the My Orders tab and then click on the black X next to your username. The application will be placed back into the Unassigned list.

### Grab Filters (Optional Feature)

If you have Grab Filters set up, when you click on Grab Application or Grab and Process you will be able to filter which order you grab based on the option you select. e.g. If you select a Transcripts from the option list, you will grab the oldest order that has a transcript requested in it, no matter where it is in the order list.





## OPTIONS ON THE REQUEST DETAIL PAGE (APPLICATION)

All of the information necessary to process a request is presented on one web page to the user referred to as the **Application**. The user will process the request from this page using Action button.

### Application Detail:

Request / Reason   Student Info   Birth Info   Parent Information   School Information   Contact Info   Survey Info   Office Use   History

Request Information  
Inform of Progress

Move Order  
Set Pending  
Approve Request  
Deny Request  
Office Use  
Save Progress  
Print

**Order Number:** CPY3TYETS   
**Order Received:** 06/06/2013 18:31  
**Status:** Instant Payment Approved   
**Processor:** Rkchristian

**Order Expires:** 08/05/2013  
**Payment History:** \$8.00,  
 Credit Card,  
 Auth-17SDPSHNM27D57N8SEA9FVO174UZBIGQ839

**Type of Document(s) Requested:** High School Transcript      **Reason(s):** Employment  
**Delivery Type:** To Be Mailed

**Delivery Addresses:** (the following addresses were submitted for review)

Name	Attention	Addr 1	Addr 2	City	State	Zip	Country	# of Copies
test		test		test	Tennessee	22222	United States	1

### Student Application

#### Name While Attending School:

★ Last Name:       ★ First Name:

Middle Name:

Maiden Name:

Last 4 SSN:

Student Id:

Suffix:

Last 4 SSN: (confirm)

### Order and Task Information:

**Order Number:** CPZL744E2   
**Order Received:** 06/09/2013 22:51  
**Status:** Money Order Received   
**Processor:** None

**Order Expires:** 08/08/2013  
**Payment History:** \$8.00,  
 Coupon/M-O,  
 Auth-WAITING MONEY ORDER-valid

### Information Requested, Reason and Delivery Method:

**Type of Document(s) Requested:** High School Transcript      **Reason(s):** Employment  
**Delivery Type:** To Be Mailed

For mail requests all addresses will be listed and an envelope can be printed automatically for each address provided (note the number of copies):

**Delivery Addresses:** (the following addresses were submitted for review)

Name	Attention	Addr 1	Addr 2	City	State	Zip	Country	# of Copies
University of Illinois at Urbana-Champaign	Admissions	601 E John Street		Champaign	Illinois	61820-5711	United States	1

*Note: You can edit the address by clicking on the pencil icon.*

**ScribCheck** – Identity authentication is used to protect the identity of student. **ScribCheck** is only used for students requesting documents to be delivered to a location other than a high education institution. Click on View Complete Check to review the comprehensive results of the of the 3rd party online verification.

**IISD Users: This is how you are confirming the identity of the requester. If the ScribCheck fails, you must obtain proof of identity from the requester.**

**ScribCheck Verification Results** [View Complete Check](#)

Automatic Scoring Models <sup>9</sup>



Knowledge Questions: 9 of 9 Correct Answers



**User Action buttons:**

**Request Information** is used to communicate to the request when you need additional information to process their order. An email and Text Message (if applicable) are sent to the requestor on your behalf by ScribOrder.

**Inform of Progress** is used to communicate to the provide information to the request about the status of their order. An email and Text Message (if applicable) are sent to the requestor on your behalf by ScribOrder.

**Move Order** is reassign the ownership of the request from the current user to another user.

**Set Pending** is not to be used unless your district requires additional steps in the workflow process. Please consult a Scribbles Software Solution Coach for more information.

**Approved Request** is used once the fulfillment of the request is successfully completed. An email and Text Message (if applicable) are sent to the requestor on your behalf by ScribOrder notifying them their order has been successfully processed.

**Deny Request** is used when the order cannot not be fulfilled. An email and Text Message (if applicable) are sent to the requestor on your behalf by ScribOrder notifying them their order could not be processed. **IISD Users: DO NOT "DENY" without permission from Document Services. See previous note on page 4.**

**Save Progress** is used in when you have added any Work Comments or made changes to the fields. The save progress button will save the changes.

**Print** is used to print the **Application** and **Envelopes**. Refer to **PRINT OPTIONS** for more details.

**Processing Comments** are required for Approving, Denying, Requesting additional information and informing of the status. The information typed will be sent to the requestor via an email on your behalf by ScribOrder. Please ignore the Contingent Deny or Contingent Approve button.

Request Information

Inform of Progress

Move Order

Set Pending

Approve Request

Deny Request

Office Use

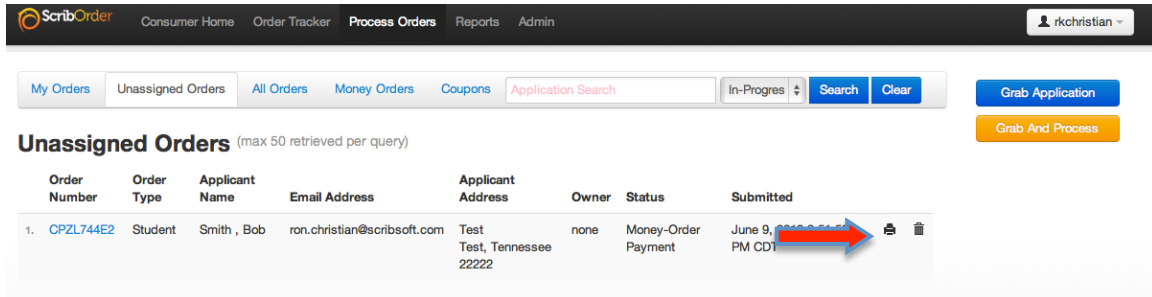
Save Progress

Print


## PRINTING OPTIONS

Printing options are most commonly used to print **Envelopes** with the address(s) provided by the request and the information requested on a one-page form referred to as the **Application**. The processor also has the option of printing a **Cover Letter** and **Receipt**.

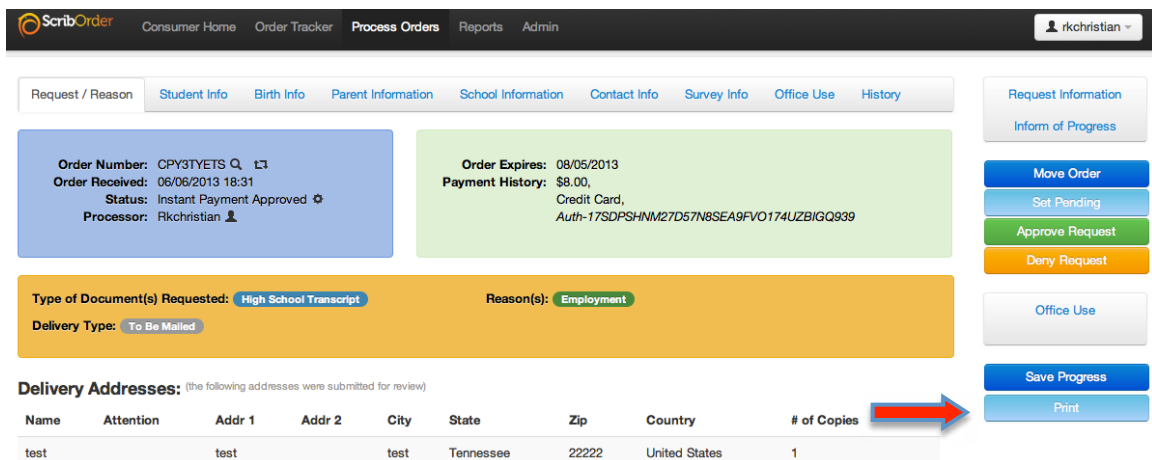
Selecting the Print Option from the Task List click the Printer Icon:



The screenshot shows the 'Unassigned Orders' page in the ScribOrder system. The page includes a navigation bar with 'ScribOrder' and various menu items like 'Consumer Home', 'Order Tracker', 'Process Orders', 'Reports', and 'Admin'. Below the navigation, there are tabs for 'My Orders', 'Unassigned Orders', 'All Orders', 'Money Orders', and 'Coupons'. A search bar is present with 'Application Search' and buttons for 'In-Progress', 'Search', and 'Clear'. On the right, there are buttons for 'Grab Application' and 'Grab And Process'. The main content area is titled 'Unassigned Orders (max 50 retrieved per query)' and contains a table of orders. The first order is highlighted, and a red arrow points to a printer icon in the action column.

Order Number	Order Type	Applicant Name	Email Address	Applicant Address	Owner	Status	Submitted	
1. CPZL744E2	Student	Smith, Bob	ron.christian@scribsoft.com	Test Test, Tennessee 22222	none	Money-Order Payment	June 9, 2013 10:52:52 AM CDT	

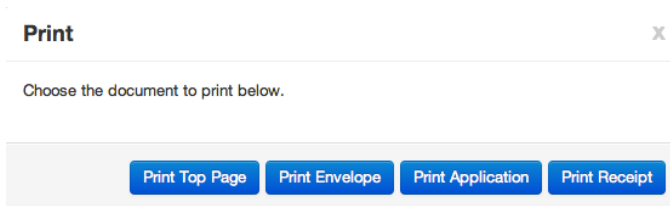
Selecting the Print Option from the Request Detail Page click the Print button:



The screenshot shows the 'Request Detail' page in the ScribOrder system. The page includes a navigation bar with 'ScribOrder' and various menu items like 'Consumer Home', 'Order Tracker', 'Process Orders', 'Reports', and 'Admin'. Below the navigation, there are tabs for 'Request / Reason', 'Student Info', 'Birth Info', 'Parent Information', 'School Information', 'Contact Info', 'Survey Info', 'Office Use', and 'History'. The main content area is divided into several sections: 'Order Information' (Order Number: CPY3TYETS Q, Order Received: 06/06/2013 18:31, Status: Instant Payment Approved, Processor: Rkchristian), 'Order Expires: 08/05/2013', 'Payment History: \$8.00, Credit Card, Auth-17SDPSHNM27D57N8SEA9FV0174UZBIGQ939', 'Type of Document(s) Requested: High School Transcript', 'Reason(s): Employment', 'Delivery Type: To Be Mailed', and 'Delivery Addresses: (the following addresses were submitted for review)'. A table of delivery addresses is shown below. A red arrow points to a 'Print' button in the right-hand sidebar.

Name	Attention	Addr 1	Addr 2	City	State	Zip	Country	# of Copies
test		test		test	Tennessee	22222	United States	1

Selecting the appropriate Print Option:



The screenshot shows a 'Print' dialog box. The dialog box has a title bar with the text 'Print' and a close button 'X'. Below the title bar, it says 'Choose the document to print below.' and there are four buttons: 'Print Top Page', 'Print Envelope', 'Print Application', and 'Print Receipt'.

## OFFICE USE INFORMATION AND AUDIT TRAIL

All user activity pertaining to a request is tracked and stored for future reference. The Audit Trail of user activity is in the green box with a date, time stamp of each action. Work comments are used to document specific internal use information pertain a request. Each user Action to automatically tracked and saved by ScribOrder. The user must click the Save Progress button to document **Work Comments**.

Special Instructions:

Processing / Informational Questions:

Workflow Office-Use:

Process	Status	Initials	Date

Work Comments :

Action Date: Action User: Action Type: Description / Notes:

09/07/13 02:39	tiffanywilliams	OwnerChange	The application was grabbed by user 'tiffanywilliams'.
09/07/13 02:41	tiffanywilliams	ApplicationApproved	The document request application was approved. Document was mailed on June 7, 2013.
09/07/13 02:41	tiffanywilliams	EmailSent	A student application 'Approved' email has been sent.



**Make sure you make Work Comments and Save Progress when you are unable to "Approve Request." Then "Move Order" to appropriate campus/department.**

**You should not "Deny" a request. You should provide Work Comments and "Move Order" to the Student Records Specialist (Document Services).**

**Requests for immunization records will be handled by Health Services. Requests for special education records will be handled by Special Education.**

**If a request asks for multiple record sections, do not "Approve Request" till all portions of the order are complete. Example, request is for a transcript and special education records. Send transcript and note this in Work Comments, then "Move Order" to special education user.**

## APPROVING REQUESTS

To approve a request, click on the Approve Request button. This will send the applicant an email, a text message (if applicable) and an automated phone call (optional).

**Approve Application** [X]

Please enter the reason for Approval. The message will be embedded within the approval email.

Rich text editor toolbar: B, I, U, ABC, Styles, Paragraph, Font Size

Path: p

Apply Template: [Dropdown]

Buttons: Contingent Approval, Approve, Cancel

Template responses may be added for your convenience and to provide consistency to processing requests. Template responses will auto-populate in Processing Comments. You may add as many Approval and Denial templates as you like. Please email [support@scribsoft.com](mailto:support@scribsoft.com) for more details.

Please enter the reason for Approval. The message will be embedded within the approval email.

Rich text editor toolbar: B, I, U, ABC, Styles, Paragraph, Font Size

YOUR ORDER FOR HIGH SCHOOL RECORDS HAS BEEN PROCESSED AND YOUR RECORDS ARE READY TO BE PICKED UP. OUR NORMAL BUSINESS HOURS ARE MONDAY TO THURSDAY FROM 7:00AM TO 4:30PM. WE ARE LOCATED AT 125 S. BLANDING SREET, LAKE CITY, SC 29560. PLEASE BRING IN AN UNEXPIRED OFFICIAL PICTURE ID WITH YOU WHEN YOU COME IN. YOUR RECORDS ARE HELD FOR 30 DAYS FROM THE DATE ORDERED.

Path: p

Apply Template: PICK UP (selected), MAIL OUT TO STUDENT, MAIL OUT TO COLLEGE, GRADUATION VERIFICATION, NON-GRADUATION VERIFICATION

Buttons: Approve, Cancel

**IISD Users: Make sure when you use a template that the language is the appropriate response for the request. You can modify the templates as needed.**

## DENYING REQUESTS

To deny a request, click on the Deny Request button. This will send the applicant an email, a text message (if applicable) and an automated phone call (optional).

**Decline Application** X

★ Please enter the reason for Denial. The message will be embedded within the denial email.

**B I U ABC** | [List Icons] | Styles | Paragraph | Font Size

[Rich Text Editor Icons]

NO RECORDS FOUND FOR Paul Blake AT Newlands Manor School. PLEASE CHECK THE NAME, SCHOOL LAST ATTENDED AND GRADUATION YEAR TO MAKE SURE THE CORRECT INFORMATION WAS PROVIDED. YOU WILL NEED TO RESUBMIT A REQUEST ONLINE IF YOU FOUND THE INFORMATION YOU INITIALLY PROVIDED WAS NOT ACCURATE.

Path: p

Apply Template: NO RECORDS FOUND

Contingent Deny Deny Cancel

Template responses may be added for your convenience and to provide consistency to processing requests. Template responses will auto-populate in Processing Comments. You may add as many Approval and Denial templates as you like. Please email [support@scribsoft.com](mailto:support@scribsoft.com) for more details.

For Current Student requests and Former Student requests, denying a request will automatically refund the full payment amount.



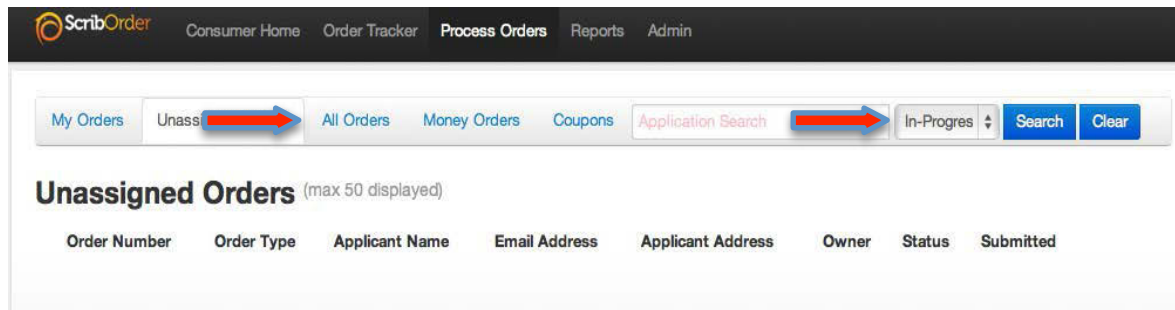
**You should not be denying a request without permission from Document Services.**

**See instructions provided on page 12.**

## ADDITIONAL FEATURES

### SEARCHING

All orders, regardless of the status, are stored and can be retrieved in ScribOrder.



To search for an order, enter the search criteria in the Application Search Box. You can search on any 'data' associated with an order (i.e. Last Name, First Name, Date of Birth, etc.). It is recommended you search using a unique type of data i.e. Order Number, Driver's License number or Student ID to retrieve the specific application. If you search on a full name, please do not enter commas or full stops.

The search field is associated with a pull-down menu. This allows you to narrow down the search by application status. If you do not know what status the application is in, select ALL in the pull-down menu.

The list of application statuses are:

- **In-Progress**
- **Requires Payment**
- **Waiting On Money-Orders**
- **Hardship Request**
- **Pending**
- **Approved**
- **Denied**
- **Payment Declined**
- **Deleted**
- **All**

If the application is assigned to a user, select the ALL tab (to the right of the Unassigned tab) to search across all applications.

The best practice is to select the ALL tab > Enter the Search Criteria (Order Number, etc.) > Select the Status in the pull-down menu.

## ACTIVATING MONEY ORDERS (OPTIONAL FEATURE)

Records requests that are being paid by money order will be in the system under Waiting for Money Order. To start processing these requests, first you will need to search for the request.

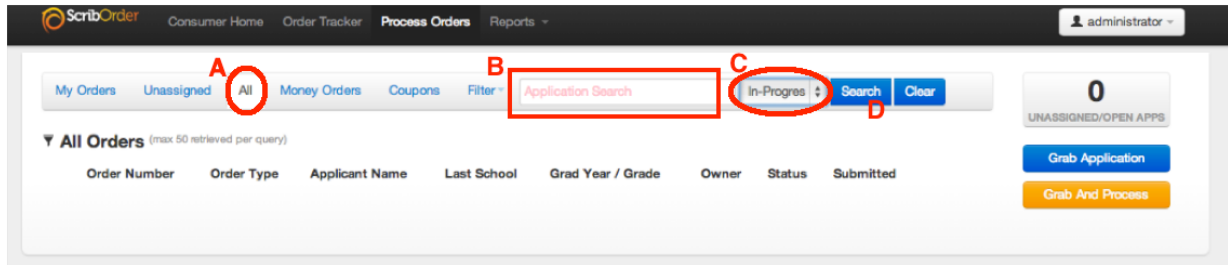
### 1 - Search on the Record Request

A – Click on the “ALL” Tab

B – Type in the name of the Requestor in the “Application Search” box (If you leave it blank on the search, it will retrieve every order)

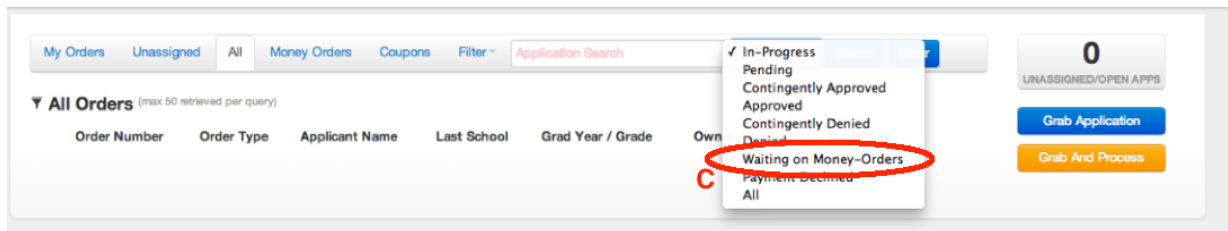
C – Select “Waiting on Money-Orders” on the drop-down menu

D – Click “Search”



The screenshot shows the ScribOrder interface with the following elements:

- Navigation tabs: My Orders, Unassigned, All (circled in red), Money Orders, Coupons, Filter.
- Search box: Application Search (circled in red).
- Dropdown menu: In-Progress (circled in red).
- Buttons: Search (circled in red), Clear.
- Summary: 0 UNASSIGNED/OPEN APPS.
- Buttons: Grab Application, Grab And Process.
- Table header: All Orders (max 50 retrieved per query).
- Table columns: Order Number, Order Type, Applicant Name, Last School, Grad Year / Grade, Owner, Status, Submitted.

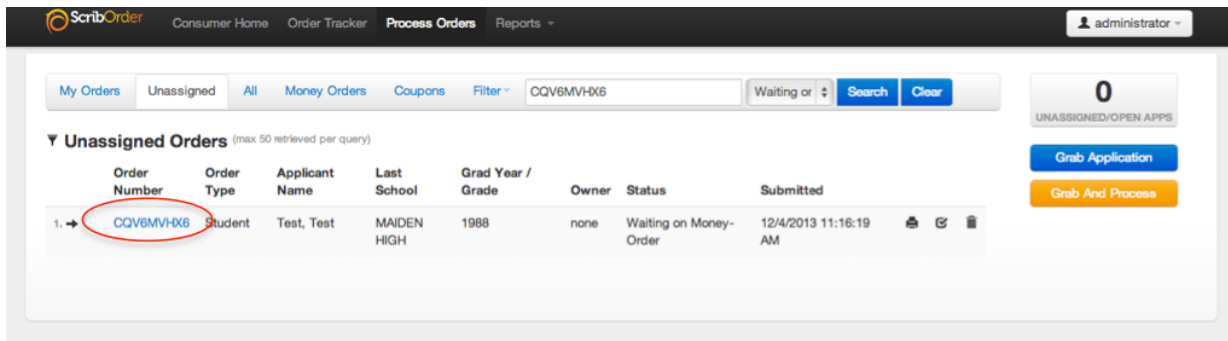


The screenshot shows the ScribOrder interface with the following elements:

- Navigation tabs: My Orders, Unassigned, All, Money Orders, Coupons, Filter.
- Search box: Application Search.
- Dropdown menu: In-Progress, Pending, Contingently Approved, Approved, Contingently Denied, Denied, Waiting on Money-Orders (circled in red), Payment Declined, All.
- Buttons: Search, Clear.
- Summary: 0 UNASSIGNED/OPEN APPS.
- Buttons: Grab Application, Grab And Process.
- Table header: All Orders (max 50 retrieved per query).
- Table columns: Order Number, Order Type, Applicant Name, Last School, Grad Year / Grade, Owner, Status, Submitted.

### 2 - Note down the Record Request Number (Order Number – NOT the Money Order Number)

You can either write down the Record Request Number or you can highlight it with the mouse and copy it (Ctrl C on your keyboard).



The screenshot shows the ScribOrder interface with the following elements:

- Navigation tabs: My Orders, Unassigned, All, Money Orders, Coupons, Filter.
- Search box: CQV6MVIHX6.
- Dropdown menu: Waiting on Money-Orders.
- Buttons: Search, Clear.
- Summary: 0 UNASSIGNED/OPEN APPS.
- Buttons: Grab Application, Grab And Process.
- Table header: Unassigned Orders (max 50 retrieved per query).
- Table columns: Order Number, Order Type, Applicant Name, Last School, Grad Year / Grade, Owner, Status, Submitted.
- Table row 1: CQV6MVIHX6 (circled in red), Student, Test, Test, MAIDEN HIGH, 1988, none, Waiting on Money-Order, 12/4/2013 11:16:19 AM.



### 3 - Click on Money Orders Tab

My Orders Unassigned **Money Orders** Coupons Filter: CQV6MVHX6 Waiting or Search Clear

UNASSIGNED/OPEN APPS 0  
Grab Application  
Grab And Process

**Unassigned Orders** (max 50 retrieved per query)

Order Number	Order Type	Applicant Name	Last School	Grad Year / Grade	Owner	Status	Submitted
1. → CQV6MVHX6	Student	Test, Test	MAIDEN HIGH	1988	none	Waiting on Money-Order	12/4/2013 11:16:19 AM

You will then be taken to this screen:

Unassigned Orders Manage Money Orders Coupons Money Order Number Search Clear

**Money Orders**  
(Activate Button only visible if order is awaiting arrival of Money Order)

Order Number	Last Name, First Name	Amount	Status	Created
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### 4 - Retrieve the order to Activate

Unassigned Orders Manage Money Orders Coupons **Money Order Number** Search Clear

**Money Orders**  
(Activate Button only visible if order is awaiting arrival of Money Order)

Order Number	Last Name, First Name	Amount	Status	Created
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- A – Enter the Records Request Number you have copied down in the Money Order Number Box
- B – Click “Search”

### 5 - Activate the Order

- A – Click on the blue “Activate” button
- B – You will see the order has been activated
- C – Click on the “Unassigned Orders” Tab

Unassigned Orders Manage Money Orders Coupons CQV6NBCLY Search Clear

**Money Orders**  
(Activate Button only visible if order is awaiting arrival of Money Order)

Order Number	Last Name, First Name	Amount	Status	Created
1. CQV6NBCLY	TEST, TEST	\$10.00	Waiting on Money Order	12/4/2013 11:19:33 AM

**Activate**

The screenshot shows the ScribOrder web application interface. At the top, there is a navigation bar with links for 'Consumer Home', 'Order Tracker', 'Process Orders', and 'Reports'. A user profile dropdown for 'administrator' is visible in the top right. Below the navigation bar, there are tabs for 'Unassigned Orders', 'Manage Money Orders', and 'Coupons'. A search bar contains the coupon code 'CQV6NBCLY' with 'Search' and 'Clear' buttons. The main heading is 'Money Orders' with a sub-note: '(\*Activate Button\* only visible if order is awaiting arrival of Money Order)'. Below this is a table with the following data:

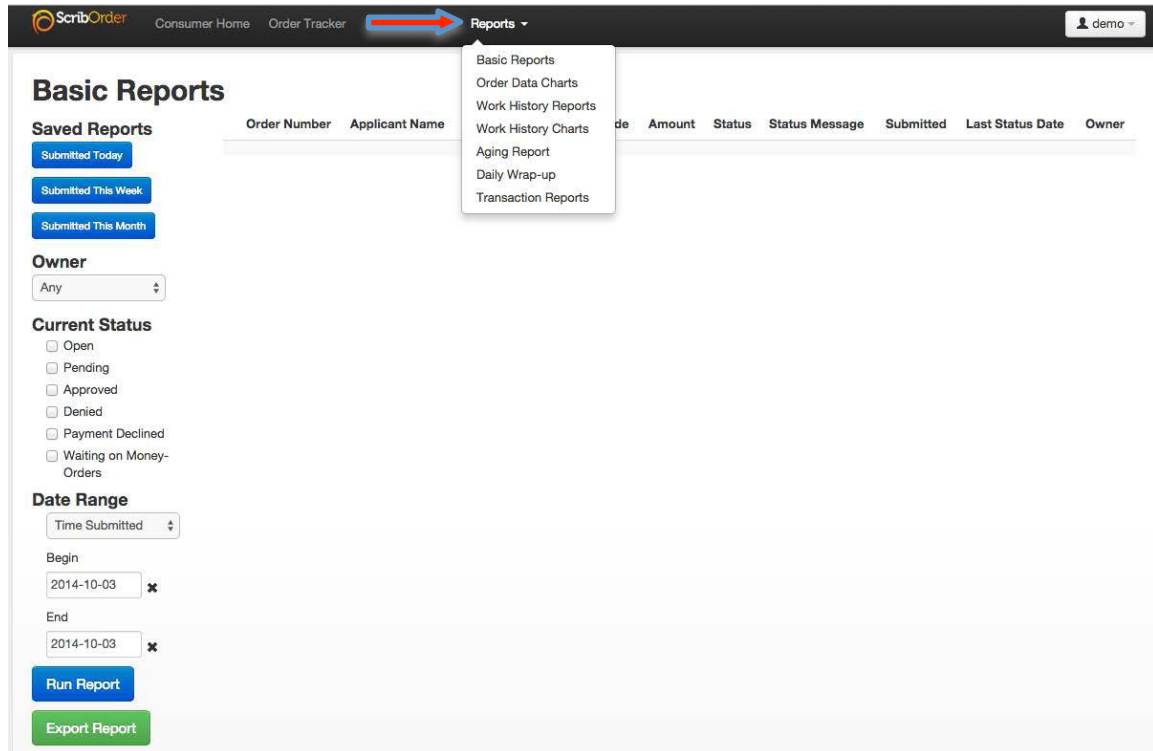
Order Number	Last Name, First Name	Amount	Status	Created
1. CQV6NBCLY	TEST, TEST	\$10.00	Money Order Received	12/4/2013 11:19:33 AM

**6 - Work the order** - Once the Money Order is 'Activated', it is now able to be grabbed as normal. You can leave it in the queue to be worked in line with the other orders or you can manually take possession of the order by clicking on the 'check' box to the right of the order. Once you have the order opened, you will notice that the status of the order is 'Money Order Received' and it is safe to complete the order.

## REPORTS **IISD Users: Document Services will be monitoring Scribbles and providing reports as needed or requested.**

There are a number of reporting options available for Administrators of ScribOrder.

To access the Reports, click on Reports in the Header:



The screenshot shows the ScribOrder web application interface. At the top, there is a navigation bar with the ScribOrder logo, links for 'Consumer Home' and 'Order Tracker', and a 'Reports' dropdown menu highlighted with a red arrow. Below the navigation bar, the 'Basic Reports' page is displayed. On the left side, there are filters for 'Saved Reports' (Submitted Today, Submitted This Week, Submitted This Month), 'Owner' (Any), 'Current Status' (Open, Pending, Approved, Denied, Payment Declined, Waiting on Money-Orders), and 'Date Range' (Time Submitted, Begin: 2014-10-03, End: 2014-10-03). A 'Run Report' button and an 'Export Report' button are also visible. On the right side, a table header is shown with columns: Order Number, Applicant Name, Order ID, Amount, Status, Status Message, Submitted, Last Status Date, and Owner. A dropdown menu is open from the 'Reports' header, listing: Basic Reports, Order Data Charts, Work History Reports, Work History Charts, Aging Report, Daily Wrap-up, and Transaction Reports.

### Reports Types

- **Basic Reports** is a summary report of all transactions for over a period of time.
- **Order Data Charts** is a breakdown of all activity including Overall Status, Overall Distribution, Status by Date, Order Type by Date, Payment by Date, Order Distribution by Date, Order Reason by Date, Ordered Document by Date.
- **Work History Report** is a detailed audit trail on all activity by Order.
- **Work History Charts** is a graphical representation of all Order activity including Overall Actions, Overall Distribution, Total Actions by Date, Actions by Date and User Actions by Date.
- **Aging Reports** is a report that highlights Orders that are aging including Overall Aging and Aging by Users. This report is used to insure Order are processed in a timely manner.
- **Daily Wrap Up Report** is a summary of Order for a given period of time broken down by Submitted, Approved and Denied.
- **Transaction Report** is a financial report on all orders including the time submitted, Purchase Type, Payment Method and Total Amount Paid.

## ATTACHMENTS AND VOICE MESSAGES

The Requestor may upload **support documentation** such as a copy of the driver's license, a notary or a signed release via the Order Tracker. The Processor clicks the file hyperlink under File Name to open the document. In addition, the Processor may add documents to the Order by clicking the Add Files icon. The Process may leave you a voice message for the Processor via the Order Tracker. The Processor clicks the Play button in the Audit Trail to listen to the message from the Requestor.

The screenshot shows the 'Attached Documents' section with a table:

File Name	Description	Attached By	Attached
<a href="#">Signed_auth.pdf</a>	Requested Documentation	ordertracker	10/03/14 13:59

Below the table is the 'Action Date' section with a table:

Action Date	Action User	Action Type	Description / Notes
05/08/14 05:11	Consumer VM	VoiceMail	
05/08/14 05:12	demo	OwnerChange	The application was grabbed by user 'demo'.
05/08/14 05:14	demo	ApprovedPhoneCall	Approved Message Delivered - 15622982619
05/08/14 05:14	demo	ApplicationApproved	The document request application was approved.' YOUR REQUEST HAS BEEN PROCESSED AND MAILED OUT TODAY TO THE ADDRESS YOU PROVIDED DURING THE ORDERING PROCESS.'
05/08/14 05:14	demo	EmailSent	A student application 'Approved' email has been sent.

The Processor clicks the Clear Notice icon on the top of the Order page once they have reviewed the information sent by the Requestor.

The screenshot shows the 'Order Details' section with the following information:

- Order Number: CRO4Z2RPU
- Order Received: 5/8/2014 12:08:20 PM
- Status: Instant Payment Approved
- Processor: None
- Order Expired: 07/07/2014
- Payment History: \$8.00, Credit Card, Auth-213995689312394TEEU8E31ER3CA17FF1P4

A red arrow points to the 'Clear Notice' button in the top right corner of the order details section.



**Supporting documentation should be provided for Corporate Request. Ensure that the appropriate paperwork/authorization is provided.**

**Third Party requests require a court order/subpoena, written consent from parent or eligible student, or must be a FERPA exception.**

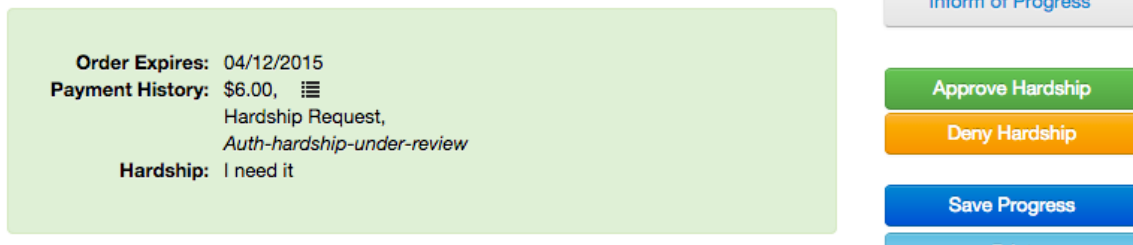
**If you are unsure, do not hesitate to contact Document Services for assistance.**

## HARDSHIP FEE WAIVER REQUESTS (OPTIONAL FEATURE)

The Hardship Request allows the requestor to request a Hardship Fee Waiver of the fees for a records request.

The request submits the reason for the request and the order appears in the Order List under the Hardship Request status.

To grant the Hardship Request, grab the order, and where the Approve and Deny buttons use to be, there are the Approve Hardship and Deny Hardship buttons.



The screenshot displays a light green box containing order information on the left and a vertical stack of buttons on the right. The order information includes: **Order Expires:** 04/12/2015; **Payment History:** \$6.00, followed by a menu icon and the text 'Hardship Request, Auth-hardship-under-review'; and **Hardship:** I need it. The buttons on the right, from top to bottom, are: 'Inform of Progress' (light blue), 'Approve Hardship' (green), 'Deny Hardship' (orange), 'Save Progress' (blue), and a partially visible 'Print' button (light blue).

The reason for the hardship request is displayed in the green payment section. If the requestor is not entitled for a fee waiver, click on the Deny Hardship button. This will send an email and text message informing the requestor that their request was rejected.

To approve the hardship request, click on the Approve Hardship button and this will activate the order to be processed normally.

## REFUNDING REQUESTS

When a Current Student request or a Former Student request is denied, the order is automatically refunded for the full amount. However, you can issue full or partial refunds in the system.

On the payment section of the Order Detail, click on the icon next to the fees.

**Order Expires:** 10/26/2015  
**Payment History:** \$9.00, ☰  
Credit Card Direct,  
Auth-LRDJMK

This will open the line item detail of the order. For each line item, you can issue a refund (where applicable).

Transaction Detail					X
item	quantity	cost	total		
0. Standard Shipping	1	\$0.00	\$0.00		
1. Official High School Transcript	1	\$5.00	\$5.00	<a href="#">refund?</a>	
2. Student Convenience Fee	1	\$4.00	\$4.00	<a href="#">refund?</a>	
Total			\$9.00		

**Currently the only Kiosk location is at Document Services, IISD Service Center, 3620 Valley View, Irving.**

## CASH/KIOSK PAYMENTS (OPTIONAL FEATURE)

Instead of issuing cash coupons for walk-ins into the office, the kiosk mode has a 'Pay at Counter' button that bypasses the credit card payment section.

Please enter your e-Signature Retry

★ Your Initials:

— For security purposes, we logged your IP Address:  
82.46.19.203, 10.13.159.77

— Date/Time of Completion: 2/17/2015 at 18:32 hours

X  
I AGREE TO THE CONTENT ABOVE VIA ELECTRONIC SIGNATURE

Coupon Code:

Pay Cash At Counter Clear Form Proceed To Checkout

### Processing the Cash/Kiosk Order

The Cash/Kiosk order will appear in the Order List with the status: Requires Payment. Before you can process the order, you will need to confirm the payment has been made by clicking the Requires Payment link.

4. 34	CT7RTKGNS	Current-Student	le, khoa	Scrib High School	Grade 12	none	Requires Payment	9/21/2015, 4:31:21 PM			
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Click **OK** on the pop-up confirmation window.

Pay for Request \$9.00 X

Optional Payment Info:

Paid Cancel

If the payment hasn't been confirmed before you try to open the order or grab the order, a warning message will appear warning the user that the payment hasn't been confirmed. You will not be able to process the order without confirming the payment.

Requires Payment X

This order Requires Payment. Are you sure you want to view this order detail without first accepting payment?

Show Detail Cancel

**IISD Users: This function is not being utilized at this time.**

## **SCRIBORDER E-TRANSCRIPTS - SENDING TRANSCRIPTS ELECTRONICALLY**

ScribOrder offers school districts the ability to send records electronically rather than via paper. In order to provide this service, ScribOrder had to employ a secure PDF signature to ensure that all records would meet the security standards to be deemed official.

The most important standard to be met is the standard set forth by AACRAO (Ref:<http://www.aacrao.org/home/about/committees/aacrao-speede-committee/best-practices-pdf-transcript-exchange>). This set of guidelines has been adopted by the membership of AACRAO, which includes all accredited universities in the United States.

ScribOrder allows the users to simply print the record from any application to the ScribOrder system. ScribOrder works just like a networked printer except that rather than printing the document on paper, the document is printed to PDF and sent through the Scribbles Software system directly from ScribOrder.