

Electronic Transcript Management System (eTMS) User Guide

For High Schools and School Boards





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Accessing eTMS

To access eTMS, log in to the Partner Portal at: www.ocas.ca.

The screenshot shows the OCAS website interface. At the top right, there is a navigation bar with "Log In / Register" and "Français". Below this, the OCAS logo is displayed on the left, and a navigation menu is partially visible. A drop-down menu is open under "Log In / Register", listing four options: "Data Warehouse", "Partner Portal", "International Portal", and "Apply to an Ontario College". A blue arrow points to the "Partner Portal" option. Below the screenshot, a white callout box contains the following text:

Click **Log In / Register** at the top right of the OCAS website. Then, select **Partner Portal Login** from the drop-down menu.

You can also log in by visiting the following link: partnerportal.ocas.ca

Be sure to bookmark this URL for quick one-click access.



Accessing eTMS



Click **Partner Account**.



OCAS Partner Portal / Portail de partenaires OCAS

Choose how you want to sign in / Veuillez sélectionner votre mode de connexion:



OCAS Employee Account / Compte d'employé(e) OCAS



Partner Account / Compte de partenaire

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Accessing eTMS

Log in using the username and password provided in the Partner Portal registration email.

Note: Login information is case sensitive.



LOG IN

Username

[Forgot your password or username?](#)

Password

Log in

Request Account

If you don't have an OCAS partner account you can request one below.

Request Account

Manage your account access with the link: **Forgot your password or username?**

Accessing eTMS – eTMS Only Users

If you have eTMS only access, you will go directly to eTMS after log in.

The screenshot shows the eTMS interface for users with eTMS-only access. At the top, the Ontario Colleges logo and tagline 'ontariocolleges.ca APPLY TODAY. CHANGE TOMORROW.' are visible, along with a 'Français' link. The main heading is 'eTMS'. Below this are three navigation buttons: 'Transcript Requests' (highlighted), 'Reports', and 'Notifications'. A search bar is located below the navigation. The main content area features a filter bar with tabs for 'To Be Processed', 'Incomplete', 'In Progress', and 'Completed'. Below the filter bar, there are pagination controls and download options for CSV and PDF. A table displays a list of transcript requests with columns for Date Requested, Age, Reference Number, Name, Request Type, Date Last Attended, Send Date, Request Status, and Action. The first row shows a request from 2016/08/25, marked as 'Past Due', with a reference number H20160825012033 and a status of 'Action Required'. The action column contains a radio button for 'Upload Transcript' and a link to 'Upload Transcript'.

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Français

eTMS

Transcript Requests Reports Notifications

+ Search

To Be Processed Incomplete In Progress Completed

Pages: |<First <Previous 1 2 3 4 5 6 7 8 9 10 Next> Last>|
Showing 50 Items per Page. Page 1 of 112, Items 1 - 50 of 5585

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2016/08/25	Past Due	H20160825012033	othree, samabcd	Original	Mar. 2015	Send Transcript Now	Action Required	Upload Transcript



Accessing eTMS – Dashboard

If you have been granted access eTMS as well as other functions in the Portal, you will land on the Dashboard Home screen after log in. Access eTMS from the link on the Dashboard or sidebar.

The screenshot shows the OCAS Dashboard Home screen. The top navigation bar includes the OCAS logo, a menu icon, the text 'Settings', a gear icon, and a user profile icon 'B'. The left sidebar contains a list of navigation items: 'Dashboard', 'Applicant Management', 'eTMS', and 'Transcript Management'. A blue arrow points from the 'Transcript Management' link in the sidebar to a callout box. The main content area is titled 'Home' and features two primary cards. The 'Applicant Management' card lists 'Search Applicants', 'Upload OST File', and 'High School Reports'. The 'eTMS' card lists 'Transcript Management'. A blue arrow points from a callout box to the 'Transcript Management' link under the 'eTMS' card.

OCAS Settings

Home

Dashboard

Applicant Management

eTMS

Transcript Management

Applicant Management

- Search Applicants
- Upload OST File
- High School Reports

eTMS

- Transcript Management

Click the **Transcript Management** link under **eTMS** on the Dashboard.

Navigate to the **Transcript Management** link under **eTMS** on the sidebar.



eTMS Features

Français

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eTMS

Transcript Requests

Reports

Notifications

Transcript Requests – Access all transcript requests at a high school or school board.

Reports – Access Summary and Detailed Reports (see pages 39 & 40 for details).

Notifications – Access to customizable email notification options (see pages 14 & 15 for details).

ALL HIGH SCHOOLS

Search

To Be Processed

Incomplete

In Progress

Completed

Pages: |<First <Previous 1 Next> Last>|

Showing 50 Items per Page. Page 1 of 1, Items 1 - 10 of 10

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2020/02/11	Past Due	H20200211025994	Armstrong, Justin	Original	Victoria Park Night School	Aug. 2019	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript



eTMS Features

Français

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APPLY TODAY. CHANGE TOMORROW.

eTMS

Transcript Requests

Reports

Notifications

High School Name (Board users only) – School board staff have access to requests for all of their schools.

High School Name:

ALL HIGH SCHOOLS

Select

+ Search

Search – Access basic and advanced search options (see pages 35 & 36 for details).

To Be Processed

Incomplete

In Progress



Completed

Pages: |<First <Previous 1 Next> Last>|

Showing 50 Items per Page. Page 1 of 1, Items 1 - 10 of 10

Date Requested	Age	Reference Number	Name	Request Type	Source
2020/02/11	Past Due	H20200211025994	Armstrong, Justin	Original	Victoria P School

Download to CSV – View all transcript request details provided by each applicant. The information can be filtered and sorted, if required.

Download to:  

Download to PDF – View all transcript request details provided by each applicant.

on (No Upload)



eTMS Features – Tabs

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Français

eTMS

- Transcript Requests
- Reports
- Notifications

Search

- To Be Processed
- Incomplete
- In Progress
- Completed

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 10 of 10

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2020/02/11	Past Due	H20200211025994	Armstrong, Justin	Original	Victoria Park Night School	Aug. 2019	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript

To Be Processed – View transcript requests to be processed or requiring other follow up.

Incomplete – View transcript requests with an exception. (e.g. Student Not Found, On Financial Hold, No Academic Data, File Upload error)

In Progress – View transcript requests currently being processed by the system.

Completed – View completed or fulfilled transcript requests.






eTMS Features – Request Table

To Be Processed | Incomplete | In Progress | Completed

Pages: |<First <Previous 1 Next> Last>|

Showing 50 Items per Page. Page 1 of 1, Items 1 - 10 of 10

Download to:  

Date Requested 	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2020/02/11	Past Due	H20200211025994	Armstrong, Juston	Original	Victoria Park Night School	Aug. 2019	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2020/02/24	Past Due	H20200224026421	Pagac, Walter	Original	Valley Park Jr Hs	Dec. 2017	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2020/03/05	Past Due	H20200305026778	Padberg, Alvera	Original	East Metro - Gallaway	Nov. 2017	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript

Date Requested – Date a transcript request was paid. By default, the table is sorted by Date Requested from oldest to newest request (ascending order). Click the arrow to sort from newest to oldest.

Age – Age of the request(s) in number of days. If a request reaches the Service Level Agreement (SLA) threshold time, it will be yellow. If a request goes beyond the SLA time, it will be red.

Reference Number – Number assigned by the system when the transcript request was initiated. Click the Reference Number links to view the transcript request details.



eTMS Features – Request Table

Name – Applicant’s first and last name as provided on their ontariocolleges.ca application. Click the name link to jump to the Applicant Details page. Hint: To sort the table in alphabetical order by last name, click the **Name** heading.

Request Type – Type of request.

Source (Board users only) – The institution that is the provider of the transcript or the source of the transcript.

Date Last Attended – Year and month the applicant last attended high school.

Send Date – Date the transcript request is to be sent. (e.g. Send Transcript Now, Send End of Term)

Request Status – Status of the request.

Upload Transcript – By default, the Upload Transcript option is selected and provides easy access to the Upload Transcript function.

Action (No Upload) – Click this option and select the appropriate action when an electronic file (XML) cannot be uploaded.





eTMS Features – Re-Upload Transcript

Located on the **Completed** tab, an XML file can be uploaded again to eTMS.

To Be Processed | Incomplete | In Progress | **Completed** ←

Pages: |<First <Previous 1 Next> Last>|

Showing 50 Items per Page. Page 1 of 1, Items 1 - 8 of 8

Download to:  

Date Requested ↑	Reference Number	Name	Request Type	Source	Date Last Attended	Last Updated By	Date Completed	Request Status	Re-Upload Transcript
2013/06/18	H20130618001181	Ouactest1, Ocas	Original	A Y Jackson Secondary School	Aug. 2016	System/Système	2013/06/18	Electronic Transcript Sent	Re-Upload Transcript
2017/03/03	H20170303013762	Halalala, Testuser	Original	Lakeshore Collegiate Institute	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/04/20	H20170420014038	testttff, sam	Original	Adult Day School Continuing Education	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/12/02	H20171202016100	Williamson, Haley	Original	Adult Day School	Jan. 2014	ONCO\etmsadmin	2017/12/03	Electronic Transcript Sent	Re-Upload Transcript
2019/09/30	H20190930024615	Testing, testerfive	Original	A Y Jackson Secondary School	Nov. 2015	PARTNER\uat.890227.hsetmsoni	2020/04/03	Electronic Transcript Sent	Re-Upload Transcript
2020/02/28	H20200228026620	Kutch, Raoul	Original	Burnhamthorpe Collegiate Institute	Oct. 2011	PARTNER\uat.66052.fullaccess	2020/09/22	Hardcopy Transcript Sent	Re-Upload Transcript
2020/03/24	H20200324027183	Kemmer, Dominic	Original	R H King CI Night School	Aug. 2013	AS\marioncu	2020/03/26	Electronic Transcript Sent	Re-Upload Transcript
2020/09/13	H20200913029219	Welch, Jovani	Original	West Toronto Collegiate Institute	Jul. 2019	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript



Transcript Requests

Reports

Notifications



Summary Notification Settings

Select the **Enable Summary Notification** checkbox below to be notified by email whenever there are requests that are to be processed.

Note that this configuration does not affect the request Non-Fulfillment Notifications to the requestor which are always sent immediately and cannot be turned off.

Enable Summary Notifications:

Notify transcript requests fulfilled:

Select a day: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Select a time: Time Zone:

Email:

Notify of Transcript Requests which are waiting to be processed for or more business hours

Notify of any to be processed Transcript Requests

Clear

Submit



Notifications

Enable Summary Notifications – Enables email notifications. Users will receive email notifications whenever there are processed or pending requests.

Notify transcript requests fulfilled (for Auto eTMS users only) – Email sent to user to identify how many requests were fulfilled by Auto eTMS.

Select a day – Select the day(s) to send email notifications.

Select a time – Select the time to send email notifications.

Time Zone – Select the time zone for email notifications.

Email – Enter the email addresses that will receive email notifications. Use a semicolon (;) to separate each email address.

Notify of Transcript Requests which are waiting to be processed for or more business hours – Set the number of hours to receive a notification for transcript requests requiring attention. **Note:** The system recognizes eight business hours as equivalent to one day.

Notify of any to be processed Transcript Requests – An email will be sent as each transcript request occurs.



Submit – Save the current notifications settings. **Note:** Click Submit each time any changes are made.

Clear – Clear all fields and disable notifications. **Note:** Changes will not be saved until the Submit button is clicked. If clicked by accident, simply close the browser and re-open Notifications.



Auto eTMS

Auto eTMS is a web service that automatically matches applicant transcript requests to student records in a board or school's Student Information System (SIS). When a transcript request is successfully matched with information in the SIS, an electronic transcript file is returned and automatically loaded into eTMS. The transcript request then moves to the **Completed** tab in eTMS, and its status is updated to **Electronic Transcript Sent**.

Download to:  

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 8 of 8



Date Requested	Reference Number	Name	Request Type	Source	Date Last Attended	Last Updated By	Date Completed	Request Status	Re-Upload Transcript
2013/06/18	H20130618001181	Ouactest1, Ocas	Original	A Y Jackson Secondary School	Aug. 2016	System/Système	2013/06/18	Electronic Transcript Sent	Re-Upload Transcript
2017/03/03	H20170303013762	Halalala, Testuser	Original	Lakeshore Collegiate Institute	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/04/20	H20170420014038	testttf, sam	Original	Adult Day School Continuing Education	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/12/02	H20171202016100	Williamson, Haley	Original	Adult Day School	Jan. 2014	ONCO\etmsadmin	2017/12/03	Electronic Transcript Sent	Re-Upload Transcript

The transcript is then sent to the applicant's college choices through a nightly transmission.



Auto eTMS – Re-Upload Transcript

If for any reason a transcript needs to be resent through eTMS, the Re-Upload Transcript option is available to upload a new XML file under the **Completed** tab.

Download to:  

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 8 of 8

Date Requested	Reference Number	Name	Request Type	Source	Date Last Attended	Last Updated By	Date Completed	Request Status	Re-Upload Transcript
2013/06/18	H20130618001181	Ouactest1, Ocas	Original	A Y Jackson Secondary School	Aug. 2016	System/Système	2013/06/18	Electronic Transcript Sent	Re-Upload Transcript
2017/03/03	H20170303013762	Halalala, Testuser	Original	Lakeshore Collegiate Institute	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/04/20	H20170420014038	testttff, sam	Original	Adult Day School Continuing Education	Feb. 2015	PARTNER\uat.66052.fullaccess	2020/09/21	Hardcopy Transcript Sent	Re-Upload Transcript
2017/12/02	H20171202016100	Williamson, Haley	Original	Adult Day School	Jan. 2014	ONCO\vetmsadmin	2017/12/03	Electronic Transcript Sent	Re-Upload Transcript

Note: If you have uploaded the wrong transcript, please use the **Re-upload Transcript** option to upload the correct one.

Please also send an email to service@ocas.ca in order for us to remove the incorrect transcript from our system.



Auto eTMS

If Auto eTMS is unable to match the information from a transcript request to a student record in a board or school's SIS, the request will remain in the **To Be Processed** tab of eTMS and its status will be changed to **Auto-Fulfillment Error**.

Transcript Requests | Reports | Notifications

High School Name: ALL HIGH SCHOOLS

To Be Processed | Incomplete | In Progress | Completed

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 12 of 12

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2019/09/25	Past Due	H20190925024529	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
	Past				Lakeshore CI Night		Send		



Transcript Requests

If a discrepancy in the transcript request details prevents Auto eTMS from locating a matching student record, quite often it can be matched manually, and an electronic transcript (XML) file of the transcript can be uploaded. To view all of the details about an individual transcript request, click the **Reference Number** link.

Transcript Requests | Reports | Notifications

High School Name: ALL HIGH SCHOOLS

To Be Processed | Incomplete | In Progress | Completed

Pages: |<First <Previous 1 Next> last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 12 of 12

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2019/09/25	Past Due	H20190925024529	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript



Transcript Request Details

The **Transcript Request Details** window also indicates if a request could not be automatically fulfilled and the reason why.

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Print

TRANSCRIPT REQUEST DETAILS

Could not automatically fulfill request. Please fulfill manually. Reason: Connection Failure: unknown

Action : Provide Response

Upload Transcript

Choose File No file chosen

Upload

If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.

Note that fields that have no values are hidden for your convenience.

TRANSCRIPT REQUEST INFORMATION

Date Received	2019/09/25
Reference Number	H20190925024528
Application Number	200025387
Account Number	210022924114
Request Type	ORIGINAL
Current Status	Auto-Fulfillment Error
Last Updated By	System/Système

STUDENT INFORMATION

Surname Robyn



Uploading Transcripts

Upload Transcript can be accessed through the Reference Number link or from Upload Transcript on the eTMS main screen.

Transcript Requests | Reports | Notifications

High School Name:

Search

Reference Number – Click the Reference Number link.

Upload Transcript – Click the Upload Transcript link on the eTMS main screen.

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 12 of 12

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2019/09/25	Past Due	H20190925024529	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2020/02/04	Past Due	H20200204025802	Rohan Rosemary	Original	Lakeshore CI Night School Cont Ed	Apr. 2019	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript



Uploading Transcripts – Reference Number Link

The **Reference Number** link opens the Transcript Request Details window. Click **Choose File** to locate the stored transcript file in your system.

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Print

TRANSCRIPT REQUEST DETAILS

Could not automatically fulfill request. Please fulfill manually. Reason: Connection Failure: unknown

Action : Provide Response

Upload Transcript

Choose File No file chosen

Upload

If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.

Note that fields that have no values are hidden for your convenience.

Note: The **Upload Transcript** action is selected by default.

Date Received	2019/09/25
Reference Number	H20190925024528
Application Number	200025387
Account Number	210022924114
Request Type	ORIGINAL
Current Status	Auto-Fulfillment Error
Last Updated By	System/Système

STUDENT INFORMATION



Uploading Transcripts – Reference Number Link

Select the transcript file. You will then be returned to the Transcript Request Details window and see the file you selected in the **Choose File** box. Click **Upload** to upload the file to eTMS.

The screenshot shows a file explorer window on the left with a list of transcript files. The file '200025387' is selected. A blue arrow points from this file to the 'File name' field in the web interface. The web interface, titled 'TRANSCRIPT REQUEST DETAILS', shows an error message: 'Could not automatically fulfill request. Please fulfill manually. Reason: Connection Failure: unknown'. Below the error, there are two radio buttons: 'Provide Response' (unselected) and 'Upload Transcript' (selected). The 'Upload Transcript' option is active, showing a 'Choose File' button with the filename '200025387.xml' and an 'Upload' button. A blue arrow points to the 'Upload' button. To the right of the 'Upload' button, there is a note: 'If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.' Below the error and upload options, there is a section titled 'TRANSCRIPT REQUEST INFORMATION' with a table of details.

TRANSCRIPT REQUEST INFORMATION	
Date Received	2019/09/25
Reference Number	H20190925024528
Application Number	200025387
Account Number	210022924114
Request Type	ORIGINAL
Current Status	Auto-Fulfillment Error
Last Updated By	System/Système

To cancel the transaction, click the X (top right of the window) or the **Close** button (bottom of page).

Note: After you have successfully uploaded a transcript file from your system, eTMS remembers the last folder you chose a file from so you won't have to search for the folder again.



Uploading Transcripts – eTMS Main Screen

On the eTMS main screen, the **Upload Transcript** button is selected by default. Click the **Upload Transcript** link to open the upload window.

Transcript Requests | Reports | Notifications

High School Name:

Search

To Be Processed | Incomplete | In Progress | Completed

Pages: | <First <Previous 1 Next> Last> |
Showing 50 Items per Page. Page 1 of 1, Items 1 - 12 of 12

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn_Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2019/09/25	Past Due	H20190925024529	Robyn_Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2020/02/04	Past Due	H20200204025802	Rohan_Rosemary	Original	Lakeshore CI Night School Cont Ed	Apr. 2019	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript



Uploading Transcripts – eTMS Main Screen

Click **Choose File** to locate the stored transcript file in your system.

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Upload Transcript
2019/09/25	Past Due	H20190925024529	R						
2020/02/04	Past Due	H20200204025802	R						
2020/02/04	Past Due	H20200204025804	R						
2020/02/04	Past Due	H20200204025813	R						
2020/02/16	Past Due	H20200216026214	R						
2020/02/20	Past Due	H20200220026295	R						
2020/03/12	Past Due	H20200312026956	R						

Upload Transcript File (XML or PDF)

Reference Number: H20190925024528

Student Name: Thompson Robyn

Date of Birth: 1986/03/27

If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.

Select Transcript File:

No file chosen



Uploading Transcripts – eTMS Main Screen

Select the transcript file. You will then be returned to the upload window and see the file you selected in the **Choose File** box. Click **Submit** to upload the transcript file to eTMS.

The image shows a file explorer window on the left and an eTMS upload form on the right. The file explorer is open to 'This PC > Desktop > Transcripts XML' and shows a list of files. The file '200025387' is selected. The eTMS form is titled 'Upload Transcript File (XML or PDF)' and contains the following information:

Reference Number	H20190925024528
Student Name:	Thompson Robyn
Date of Birth	1986/03/27

If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.

Select Transcript File:

Choose File 200025387.xml

Submit Cancel

Click **Cancel** to cancel the transaction.



Validation Screen

The system compares the information from the transcript request to the information in the XML file. The **Transcript Request Details** validation screen appears when a mismatch occurs between data fields in the request and the XML file you are attempting to upload. The fields used for comparison are **First Name**, **Surname**, **Date of Birth**, and **Gender**.

TRANSCRIPT REQUEST DETAILS		
FIELD	TRANSCRIPT REQUEST	TRANSCRIPT SUBMITTED
FIRST NAME	randy	RANDY
SURNAME	rizzo	RIZZO
DATE OF BIRTH	1991/08/28	1991/08/29
GENDER	M	M
HIGH SCHOOL NUMBER	0	000060162542
OEN	000000000	948743687
HIGH SCHOOL BSID	722790	722790
DATE LAST ATTENDED	2010/02	N/A
OSSD ISSUE DATE	N/A	2010/02/02

No - Cancel and Return to Previous Screen Yes - Save and Continue

Mismatches are shown in red text.



Validation Screen – Options

The validation screen appears whether you upload the XML using the Reference Number link or the Upload Transcript link from the eTMS main screen. You have the option to cancel or save the upload.

TRANSCRIPT REQUEST DETAILS		
FIELD	TRANSCRIPT REQUEST	TRANSCRIPT SUBMITTED
FIRST NAME	randy	RANDY
SURNAME	rizzo	RIZZO
DATE OF BIRTH	1991/08/28	1991/08/29
GENDER	M	M
HIGH SCHOOL NUMBER	0	000060162542
OEN	000000000	948743687
HIGH SCHOOL BSID	722790	722790
DATE LAST ATTENDED	2010/02	N/A
OSSD ISSUE DATE	N/A	2010/02/02



Validation Screen – Options

If you wish to Cancel the upload, select **No - Cancel and Return to Previous Screen**.

See **Action (No Upload)** on page 30 for next steps.

If you wish to save, select **Yes - Save and Continue** to complete the upload for the request.

Note: If you have uploaded the wrong transcript, please use **Re-Upload Transcript** to upload the correct one.

Please send an email to service@ocas.ca in order for us to remove the incorrect transcript from our system.



Action (No Upload)

When you cannot upload a file using eTMS, you can choose an alternative action from the **Select Action** drop-down list. You can access the Select Action drop-down list through the **Reference Number** link or from **Action (No Upload)** on the eTMS main screen.

eTMS

Transcript Requests

Reports

Notifications

High School Name:

ALL HIGH SCHOOLS

Select

Reference Number – Click the Reference Number link to access the Select Action drop-down list.

Action (No Upload) – Click Action (No Upload) to access the Select Action drop-down list.

To Be Processed | Incomplete | In Progress | Completed

Pages: |<First <Previous 1 Next> Last>|
Showing 50 Items per Page. Page 1 of 1, Items 1 - 12 of 12

Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input type="radio"/> Upload Transcript <input checked="" type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	<input type="text" value="-- Select Action --"/> <input type="button" value="Submit"/>
	Past				Westview Centennial		Send		



Action (No Upload) – Reference Number Link

Click **Provide Response** to view and select from the drop-down list of actions. Then, click the **Submit** button to save.

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Print

TRANSCRIPT REQUEST DETAILS

Could not automatically fulfill request. Please fulfill manually. Reason: Connection Failure: unknown

Action : Provide Response Upload Transcript

-- Select Action --
 -- Select Action --
 Hardcopy Transcript Sent
 Student Not Found
 No Academic Data
 On Financial Hold

that have no values are hidden for your convenience.

If an XML transcript is available in your Student Information System, please upload the XML file. If an XML is not available, please upload a PDF.

Submit

TRANSCRIPT REQUEST INFORMATION

Date Received	
Reference Number	See Explanations on page 33 for a full description of each Action.
Application Number	200025387
Account Number	210022924114
Request Type	ORIGINAL
Current Status	Auto-Fulfillment Error
Last Updated By	System/Système

STUDENT INFORMATION



Action (No Upload) – eTMS Main Screen

Select the appropriate action from the drop-down list. Then, click the **Submit** button to save.

To Be Processed | Incomplete | In Progress | Completed

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Download to:

Date Requested	Age	Reference Number	Name	Request Type	Source	Date Last Attended	Send Date	Request Status	<input type="radio"/> Upload Transcript <input checked="" type="radio"/> Action (No Upload)
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	<input type="radio"/> Upload Transcript <input checked="" type="radio"/> Action (No Upload) -- Select Action -- -- Select Action -- Hardcopy Transcript Sent Student Not Found No Academic Data On Financial Hold
2019/09/25	Past Due	H20190925024528	Robyn Thompson	Original	Westview Centennial Summer School	Aug. 2014	Send Transcript Now	Auto-Fulfillment Error	Submit
2020/02/04	Past Due	H20200204025802	Rohan Rosemary	Original	Lakeshore CI Night School Cont Ed	Apr. 2019	Send Transcript Now	Auto-Fulfillment Error	-- Select Action -- Submit
2020/02/04	Past Due	H20200204025804	Rodriguez Mavis	Original	York Detention Centre	Jan. 2019	Send Transcript Now	Auto-Fulfillment Error	-- Select Action -- Submit
2020/02/04	Past Due	H20200204025813	Roberts Santino	Original	Alderwood CI Night School	Aug. 2013	Send Transcript Now	Auto-Fulfillment Error	-- Select Action -- Submit

See Explanations on page 33 for a full description of each Action.



Action (No Upload) – Explanations

Hardcopy Transcript Sent – The transcript is only available in hardcopy format and is being sent to OCAS. The Board or school cannot locate an electronic transcript (XML file) in their Student Information System (SIS) or PDF, and may have a transcript in an archive format only.

The Board or school can email a PDF to service@ocas.ca, mail or fax a hardcopy transcript to OCAS, and then sets the Request Status to **Hardcopy Transcript Sent**. This informs OCAS and the applicant that a hardcopy transcript has been sent. The transcript request is then moved to the **Completed** tab.

Student Not Found – The student's record could not be located in the Board or school's SIS. The Request Status is updated in the application to inform the applicant that their student record could not be found. The applicant is sent an automated email with instructions to contact their Board or school. The transcript request is then moved to the **Incomplete** tab.

No Academic Data – The student is registered at a Board or school and is found in the SIS, but no academic data is available to send (i.e. student pre-registered only).

On Financial Hold – The transcript request is on hold due to outstanding fees owed to the Board or school by the applicant. The Request Status is updated in the application to inform the applicant that a payment is outstanding and the transcript request will not be processed. The applicant will be sent an automated email with instructions to contact the Board or school to settle the outstanding fees. The transcript request is then moved to the **Incomplete** tab and can be further actioned at a later date.



Applicant Search

To search for a transcript request, click **Search** to access basic search functions.

eTMS

Transcript Requests

Reports

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Search

To Be Processed

Incomplete

In Progress

Completed

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Download to:

Date Requested	Age	Reference Number	Name	Request Type	Date Last Attended	Send Date	Request Status	<input checked="" type="radio"/> Upload Transcript <input type="radio"/> Action (No Upload)
2016/08/25	Past Due	H20160825012033	othree, samabcd	Original	Mar. 2015	Send Transcript Now	Action Required	Upload Transcript
2016/08/26	Past Due	H20160826012037	UQHZ, sam	Original	Feb. 2009	Send Transcript Now	Action Required	Upload Transcript
2016/08/26	Past Due	H20160826012039	IXFN, sam	Original	Feb. 2009	Send Transcript Now	Action Required	Upload Transcript
						Send		



Applicant Search – Basic Search

You can search for transcript requests by creation date (Start Date / End Date), Application and Account numbers, Ontario Education Number (OEN), Reference Number, and the applicant's name. Click Search to perform the search based on your criteria or Clear to clear all fields.

eTMS

Transcript Requests Reports Notifications

Search

Start Date	<input type="text"/>	Application Number	<input type="text"/>	Account Number	<input type="text"/>
End Date	<input type="text"/>	OEN	<input type="text"/>	Reference Number	<input type="text"/>
		First Name	<input type="text"/>	Last Name	<input type="text"/>


+ More Search Options

Search Clear

Click **More Search Options** to access advanced search functions.

Applicant Search – Advanced Search

You can perform an advanced search using More Search Options.

 More Search Options

Date Last Attended



To



Show Status:

Select All

To Be Processed:

Action Required

Incomplete:

File Upload Error

On Financial Hold

No Academic Data

Student Not Found

In Progress:

Transcript File Uploaded to OCAS

Complete:

Electronic Transcript Sent

Hardcopy Transcript Sent

Request Cancelled

Search

Clear

To Be Processed

Incomplete

In Progress

Completed

Date Last Attended – Search for requests by the date the applicant last attended high school.

Show Status: Select All – Search all tabs and request statuses to retrieve a result.



Applicant Search – Advanced Search

To Be Processed: Action Required – Search for requests only within the To Be Processed tab with Action Required status.

Incomplete – Search within the Incomplete tab for the following request statuses: **File Upload Error, On Financial Hold, No Academic Data,** and **Student Not Found**

In Progress: Transcript File Uploaded to OCAS – Search within the In Progress tab for requests with electronic transcript files waiting to be processed by OCAS' system.

Complete – Search within the Complete tab for the following request statuses:

Electronic Transcript Sent – Requests with electronic transcript files sent to the institutions.

Hardcopy Transcript Sent – Requests with hardcopy transcripts sent to the institutions.

Request Cancelled – Requests that have been cancelled by OCAS.



Reports




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eTMS

Transcript Requests **Reports** Notifications

Start Date & End Date – Select transcript request creation date range.

Date Transcript Request Received

Start Date:  End Date:  Select High School: ALL HIGH SCHOOLS 

(Dates refer to date transcript request paid by applicant)

Clear **Run Report**

Clear – Clear all report criteria.
Run Report – Generate a report based on the specified criteria.




Select High School (Board users only) – Generate a report by a specific school.



Reports – Summary

Reports

Date Transcript Request Received

Start Date:  End Date:  Select High School: 

(Dates refer to date transcript request paid by applicant)

Summary | Detailed

Summary – View the status of transcript requests by the selected date range.



Date Range : 2020/09/01 to 2020/09/30




Total Transcript Requests	Original Transcript Requests	Re-Issue Transcript Requests
To Be Processed	15	0
Action Required	0	0
Auto Fulfillment Error	15	0
Incomplete	0	0
On Financial Hold	0	0
Student Not Found	0	0
No Academic Data	0	0
File Upload Error	0	0
In Progress	0	0
Completed	1	0



Reports – Detailed

Reports

Date Transcript Request Received

Start Date:  End Date:  Select High School: 

(Dates refer to date transcript request paid by applicant)

Summary **Detailed** **Detailed – View transcript request details by applicant by the selected date range.**

Pages: |<First <Previous 1 Next> Last>| Download  

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Application Number	Reference Number	Date Paid	First Name	Last Name	Date of Birth	Student Number	Source	Date Last Attended	Number of Transcripts	Amount Collected
200013192	H20200910029194	2020/09/10	Ethan	Vinten	2002/01/15	0	A Y Jackson Secondary School	Mar. 2014	0	\$24.00
210002001	H20200910029180	2020/09/10	Samuel	Abbott	2003/01/26	0	Downsview Secondary School		0	\$24.00
210002835	H20200903029135	2020/09/03	Constantin	Lemke	1966/10/18	71zxzz5def12	Fernie House	Apr. 2017	0	\$24.00
210003067	H20200906029143	2020/09/06	Tanner	Cole	1954/12/17	3rmjhwci5mmz	Maple Leaf Night School	Jul. 2018	0	\$24.00
210003134	H20200906029149	2020/09/06	Cindy	Doyle	1997/02/18	5tbwbf0a7isz	Westview Centennial Night School	Aug. 2020	0	\$24.00
210003152	H20200906029153	2020/09/06	Savannah	Mayer	1967/03/13	bf017qcf1wgx	Elia Middle School	Dec. 2017	0	\$24.00
210003457	H20200908029162	2020/09/08	Jeffry	Hackett	1966/05/14	s41gwtlj47sr	F H Miller Night School	May. 2020	0	\$24.00
210003511	H20200909029173	2020/09/09	Kariane	Hirthe	1993/02/26	0fbu70otiaws	Weston CI Summer School	Apr. 2013	0	\$24.00

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