

# College Counselor Procedures

## Naviance eDocs

### 1. Design new Transcript Request Form.

We suggest using something like our Application Notification and Request (ANR) to reflect self-reported grades and schools that don't require transcripts upon application (like Harper). See attached sample ANR.

### 2. Determine Whether You Will Use Milestones

The advantage of using milestones is that it is the only way to track the date of the ANR request, if a student has paid a transcript fee, or to see the date that printed transcripts are mailed. If you wish to use application milestones, determine desired milestones. Note that when you change the milestone names or order, you will lose milestone data from previous years.

To add a custom application milestone:

1. Go to **Setup > Preferences.**
2. Click **Application Milestones.**
3. Click **Add Milestone.**
4. Type a description and abbreviation for one or milestones.
5. Click the **Add Milestones** button.

JANE DOE    Class of 2013 ←    →

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**APPLICATION MILESTONES** view dates

Current Status	College	Requested	Transcript	Cnslr Form	Cnslr Letter	Sent (eDocs)	Sent (Mailed)	MYR
Pending <span style="float: right;">▼</span>	Ball State Univ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending <span style="float: right;">▼</span>	Belmont Univ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending <span style="float: right;">▼</span>	Univ of Chicago	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending <span style="float: right;">▼</span>	U of IL Chicago	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending <span style="float: right;">▼</span>	U of IL Urbana-Champaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending <span style="float: right;">▼</span>	Seton Hall Univ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Status and Milestones using this date:

### 3. Verify that the Common App/eDocs settings are correct

For all Naviance high schools, the default is that we are set up to be a Naviance school in the Common App system. This will trigger a message to students when filling out the Common App that they must use Naviance to fill out the Teacher Evaluation (TE) and School Report (SR) forms.

Be sure that the Update Active Applications feature is turned **OFF**. If you leave this on, all of the student's colleges that have been entered in the Common App appear in the "colleges I'm applying to" section. This is confusing for students, College Assistants and Registrars since these suddenly appear in their college list, when an ANR has yet to be completed.

To change the default, go to Setup – Preferences – eDocs

#### eDocs Settings

##### Common App Integration:

**Status:** Sending Documents via Naviance eDocs.

You are currently set up to track and send supporting documents for applications to Common App schools via Naviance eDocs.

Click the Use Common App button to track and send documents using the Common App website instead.

[Use Common App](#)

Warning: If you or anyone at your school uploaded or prepared any Common App documents using Naviance eDocs, those documents will have to be prepared again and re-entered on the Common App website after making this change.

##### Update Active Applications List:

This enables Naviance to add colleges from a student's Common App college list to the student's active applications list. The list is updated when a student is first matched to his or her Common App account and when you click the **Update** button on the **Send Forms** page to update the student's list of Common App colleges. If this option is turned **Off**, only the status of each of the student's Common App submissions is updated when you click the **Update** button on the **Send Forms** page.

Status: **Off** [Turn On](#)

## 4. Upload Profile (once and will be available to send for all students)

### Entering Standard High School Profile Information

The standard high school profile information affects the data that is pre-populated on NACAC and Common Application SR, MR, OR and FR forms. You will want to enter the standard high school profile information before completing your form. This information only needs to be entered once per class year.

To enter the standard high school profile information:

1. Go to any student's folder.
2. Click on the **eDocs** tab. You do not need to have a form prepared in order to update the standard high school profile information.
3. Select either NACAC or Common Application SR or MR from the Form Type drop-down menu.
4. Click **Prepare Form**.
5. If preparing a NACAC form, click the **enter the standard high school profile information** link at the top of the page, complete the form and click Update Profile to save your changes.
6. If preparing a Common Application form, complete the School Profile section at the bottom of the form, and click **Save Form** to save the form and school profile information.

If you intend to use the SR and MR forms, you will need to complete the same procedure for the second form type. If you intend to use the NACAC and the Common Application templates, you will need to enter school profile information for both templates.

### JANE DOE Class of 2013

General	Plan	Scores	Colleges	eDocs	Resume	Scholarships	Journal	Documents	Careers
<a href="#">prepare forms</a>	<a href="#">send forms</a>	<a href="#">print forms</a>	<a href="#">submission status</a>	<a href="#">previous years</a>	<a href="#">view eDocs de</a>				
<b>School Profile</b>									
This information only needs to be completed once per class.									
Percentage of students attending a 4 year college:	67	(enter 1-100)							
Percentage of students attending a 2 year college:	28	(enter 1-100)							
Graduation date:	06/02/2013	<b>*Required</b>							
Do you have a block schedule?	<input checked="" type="radio"/> No	<input type="radio"/> Yes							
If so, what year did you start with a block schedule?									
Do you use an AP curriculum?	<input type="radio"/> No	<input checked="" type="radio"/> Yes							
If you offer AP courses, do you limit the number a student can take?	<input checked="" type="radio"/> No	<input type="radio"/> Yes							
Grading scale:	<input type="radio"/> 4.0	<input type="radio"/> 100	<input checked="" type="radio"/> Other: 5.0						
Passing grade is:	D								
Class size:	550	leave blank if system count should be used							
<input type="button" value="Save"/>									

## **5. Create Custom Role for Teachers**

To give teachers the ability to send the teacher recs, you will need to create a “Custom Teacher Role”, if you have not already done so. Use the Manage Roles and Rights (under Setup-User Admin-Manage Roles and Rights) for the teacher role. The following are the recommended roles and rights to enable:

- Change my email
- Change my password
- Change my user name
- View demographics
- View GPA and academics
- View parents
- View resume
- Prepare teacher rec forms
- Submit teacher recs online
- Access main colleges tab (school area)
- View my recommendations
- Access careers section

**6. Set up teachers to be able to use Naviance for Teacher Recs:**

- Import teacher first names, last names, email addresses**

Run the SchoolLogic User Defined Report created by District (in the Others group under TS PL StaffLogin). You will need to change the School Name to specify yours. Note: this gives you some teachers from other schools as well; you may need to edit the list.

**User Defined Reports Revised - TS PL StaffLogin**

**Report Options**

Report Name:  Report Type:

Font:  Layout:

Report Format:  Student Group:

Color:  Report Group:

**Report Summary**

Selected Fields	Sort Fields	Filter
Last Name - Staff - 32 - Yes	Last Name - Staff	School Name - School = 'Prospect High School'
First Name - Staff - 32 - Yes	First Name - Staff	Inactive - Staff = False
LDAP Name - Staff - 50 - No		
ID Number - Staff - 50 - No		
Inactive - Staff - 10 - No		
User Name - Staff - 30 - Yes		
School Name - School - 30 - Yes		
Staff Indicator - Staff - 25 - Yes		

Group By:  Aggregate:

- Do the Naviance Import**

Setup – data import – Import teacher list

Make sure you have saved your import file as a .csv file before importing

**Teacher Import - Upload File**

To import your teacher list, click the Browse or Choose File button to select the text file containing your data. You may also enter an optional description to remind you of what you were importing.

Please note, if you would like to give user accounts to teachers, it will be helpful to load their email address at this time.

Description:

Data File:  2012 Teac... test.csv

Please indicate how each field or column is separated in your file.

Please indicate whether or not the first row of your data contains column headings (e.g. "first name", "birthdate", etc.)  
 No  Yes

**Student Data Import: Select Fields**

You must include both a first name and last name as separate fields.

Save Mappings Restore Fields Clear Fields

Field	Your Data	System Field
1	John	Last Name (required) ↓
2	Doe	First Name (required) ↓
3	John.Doe	Email address ↓

Continue

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Signed in as Diane Bourn from Prospect High School

- **Create User Accounts for teachers**

**Creating User Accounts for Teachers**

Naviance Succeed allows you to give specialized access to your teachers. To manage your school's teacher list in Naviance Succeed:

1. Go to **Setup > Manage Teacher List**.
2. Click **Add New Teacher**.
3. Type the first and last name in the spaces provided and if available, provide the teacher's job title and email address.
4. Click the **Add to List** button.

To create a user account for a teacher:

1. Click on **Setup > User Admin**.
2. Click **Add New User**.
3. Select the teacher's name from the Existing Contact drop -down and click **Activate User**.
4. Enter any missing information in the on-line form.
5. Click **Add User**.

The teacher will receive an automated email message with a temporary password and instructions for signing in and choosing a new password. Please note that if your teachers are uploading recommendations for use in Naviance eDocs, you will need to give teachers the ability to upload and enter information in the eDocs tab of student folders.



When you click on Activate User, the required fields should pre-populate, but you **MUST** make sure to check job function as “teacher”, permissions role as “Custom Teacher” and “User should appear in list of teachers” before the “Add User” key.

## Add User

### PERSONAL INFORMATION

Prefix: N/A

First Name: John (required)

Last Name: Doe (required)

Job Title:

Primary Job Function: Teacher (required)

Employee ID:

### ACCOUNT INFORMATION

User Name: jdoe (required)

E-mail: john.doe@d214.org (required)

Confirm E-mail: john.doe@d214.org (required)

Permissions Role: Teacher IMPORTANT

Include in teacher list:  User should appear in the list of teachers

Include in counselor list:  User should appear in the list of counselors

**Once you manually add a user account for the teacher, they will receive this email:**

welcome to Succeed from Naviance INBOX X



**Diane Bourn** mailer@email.naviance.com

10:28 AM (0 minutes ago) ☆



to me

Diane,

A Naviance Succeed user account has been created for you at Prospect High School. This message contains important information that you will need to access your account.

To access your account, use your web browser to go to: <http://succeed.naviance.com>

When prompted to sign in, please use the following information:

Account: prospecths  
User Name: BournTeacher  
Password: v43268

When you sign in for the first time, the system will require you to change your password to protect the security of your account.

To use this service, we recommend Microsoft Internet Explorer 7 or higher on Microsoft Windows, Safari (desktop only) on Mac OS X, and Firefox 3.6 or higher and Chrome on either platform. The latest versions of these browsers are available from [www.microsoft.com](http://www.microsoft.com), [www.apple.com](http://www.apple.com), [www.getfirefox.com](http://www.getfirefox.com), and [www.google.com/chrome](http://www.google.com/chrome) respectively.

If you have questions, sign into your account, click Help in the upper right corner of the Naviance Succeed window, then click Contact a Support Specialist to reach the support team.

Thank you for using Naviance Succeed.

## 7. Give Training Sessions for Teachers.

See JH and PHS PowerPoints used for the teacher training sessions.

It is recommended that you wait until late September or early October to do these.

## 8. Allow students to create Teacher Recommendation Requests Through Naviance

This is optional; you may want students to request recommendations via paper forms instead.

To allow students to create recommendation requests through Family Connection, you will first need to do the following:

1. Go to **Home > Recommendations**.
2. Click on the **Settings** tab.
3. In the Student Requests section, select the option that allows students to request or cancel recommendations from Family Connection.
4. Click **Save**.

For a student to request a **teacher** recommendation:

1. Student navigates to the **Colleges** tab in Family Connection.
2. Student clicks **Colleges I'm Applying To**.
3. Student scrolls to the **Teacher** Recommendation section and clicks **Add/Cancel Requests**.
4. Student selects a **teacher** from the drop-down menu and adds a note to the **teacher** if desired.
5. Student repeats for all **teacher** requests he or she wishes to make in this session.
6. Student clicks **Update Requests**.

Once a request has been made by student or staff, it will appear in Recommendation Request Manager.

This is what that screen looks like:

The screenshot shows the 'Teacher Recommendations' settings page. At the top, there are three tabs: 'requests', 'settings', and 'summary'. Below the tabs is the title 'TEACHER RECOMMENDATION SETTINGS'. The page is divided into two main sections: 'Approval Option' and 'Student Requests'. The 'Approval Option' section has two radio buttons: one selected for 'Recommendation requests do not require approval' and one unselected for 'Recommendation requests require approval'. To the right of these options are 'Status Indicators' with two columns of bullet points. The first column (under the selected option) has 'In Progress' and 'Completed'. The second column (under the unselected option) has 'Requested', 'In Progress', 'Completed', and 'Unable to Complete'. The 'Student Requests' section has two radio buttons: one unselected for 'Students cannot request or cancel recommendations from the Family Connection' and one selected for 'Students can request or cancel recommendations from the Family Connection'. At the bottom left of the settings area is a 'save' button.

Approval Option	Status Indicators
<input checked="" type="radio"/> Recommendation requests do not require approval	<ul style="list-style-type: none"><li>• In Progress</li><li>• Completed</li></ul>
<input type="radio"/> Recommendation requests require approval	<ul style="list-style-type: none"><li>• Requested</li><li>• In Progress</li><li>• Completed</li><li>• Unable to Complete</li></ul>

**Student Requests**

Students cannot request or cancel recommendations from the Family Connection

Students can request or cancel recommendations from the Family Connection

save



## 10. Enable Common App FERPA waiver

- Go to Connections > Family Connection
- Click Select and Update Optional Features
- Find the Common App Waiver feature and click the checkbox for the grade 12
- Click the **Update Features** button.

To have your students complete the waiver, you must enable the **Common Application** Waiver feature in Family Connection. To enable this feature:

1. Go to Connections > Family Connection.
2. Click Select and Update Optional Features.
3. Find the **Common App** Waiver feature and click the checkbox for the **appropriate** grade years.
4. Click the Update Features button.

Once you have enabled the feature, a student may complete the waiver by logging in to Family Connection and selecting **Colleges I'm Applying to** from the **Colleges** page. The waiver will be at the top of the page. When the student submits the form, the date, time and IP address will be logged for recordkeeping purposes.

If a student has not completed the online **Common Application** waiver, Succeed will prevent you from electronically submitting **Common Application** school forms for that student. You will still have the option to print the form and mail it; however, if you do submit the form through the mail the student will need to sign the waiver on the printed form.

## 11. To reset the Common app FERPA waiver

If the students checked the “no” box, it assumes they do not waive their right. If they later want to change their consent, the college counselor will need to reset their consent.

Note: this does not affect forms that have already been submitted.

JANE DOE Class of 2013

General	Plan	Scores	Colleges	eDocs	Resume	Scholarships	Journal	Documents	Careers	Success Plan	Post-grad
<a href="#">prepare forms</a>	<a href="#">send forms</a>	<a href="#">print forms</a>	<a href="#">submission status</a>	<a href="#">previous years</a>	<a href="#">view eDocs destinations</a>	<a href="#">document requests</a>					

**Prepare Forms** [how this works](#)

✔ STUDENT HAS COMPLETED FERPA CONSENT ON FAMILY CONNECTION.

✔ STUDENT WAIVED RIGHT TO SEE THIS RECOMMENDATION.

[reset consent](#)

## 12.To Change Setting So That Rank Does Not Show on NACAC and Common App SR

**Confirmation**  
Your rank and decile preferences have been updated.

**Rank and Decile Options**  
Your current setting is: **Default**  
Please select an option and click Update to change your rank and decile preferences.

Setting	Description
<input checked="" type="radio"/> <b>Default</b>	Do not display rank or decile on the student profile or any reports. Do not allow counselors to enter rank or decile numbers manually into the system.
<input type="radio"/> <b>System rank and decile</b>	Display rank and decile on the student profile and certain reports. Calculate rank and decile numbers automatically by using a basic calculation on the gpas entered into the system. Do not allow counselors to manually enter or edit rank and decile numbers.
<input type="radio"/> <b>Manual rank and decile</b>	Display rank and decile on the student profile and certain reports. Do not use system calculations for rank and decile. Use the manually entered numbers instead. Allow counselors to manually enter or edit rank and decile numbers.

## 13.Update Family Connection – Student Edit Permissions

Change the student edit permission for “Mark applications as submitted by the student”. This allows the Registrar/Assistant to select the drop down for whether the student applied Common App or school-specific on the student’s Family Connection- colleges I’m applying to. (Note: it also allows students to update this from Family Connection.)

Student Edit Permissions	Grade Levels
Edit personal and demographic information	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Edit email address	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Edit username	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12 <input checked="" type="checkbox"/> Alumni <input type="checkbox"/> Test
Edit password	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12 <input checked="" type="checkbox"/> Alumni <input type="checkbox"/> Test
Add or edit test scores	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Add active applications	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Edit active applications	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Delete active applications	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Mark applications as submitted by the student	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input checked="" type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Update which college the student is attending	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Add or edit scholarships awarded	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Test
Add or edit prospective colleges list	<input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input checked="" type="checkbox"/> 11 <input checked="" type="checkbox"/> 12 <input checked="" type="checkbox"/> Alumni <input type="checkbox"/> Test
Can sign up for college visits online	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Test

## 14. Update counselor permissions for eDocs (Setup-User Admin-Manage Roles and Rights) Below are the counselor permissions for PHS:

- Change my email
- Change my password
- Change my profile
- Change my user name
- Add/edit student groups
- Everything under "View Student Records" except:
  - View teacher rec forms
- Everything under "Edit Student Records" except:
  - Assign counselors in batch
  - Change active status of student
  - Delete student manually
  - Edit application data
  - Load transcript PDFs
  - Prepare teacher rec forms
  - Submit SR, OR, MR, FR forms online
  - Submit teacher recs online
  - Update batches of college applications for transcripts
  - Update batches of scholarship applications
- Everything under "Colleges" except:
  - Add/edit college visit schedule
  - Add/edit enrichment program list (school)
- Everything under "View Reports" except:
  - Email and schedule reports
- View scholarships
- Access careers section
- Administer Success Plan Settings
- Everything under "Supplemental Tools
- Administer peer data sharing

## 15. Updating App Plan for Student Applying Early Decision

PH: Counselors are instructed to refer any students applying binding early decision to the College Counselor who has a conversation with the student. If they decide to apply under a binding early decision, the college counselor updates the App Plan to reflect the Early Decision.

The screenshot shows a web application interface for Columbia University. The page title is "Columbia University profile :: website". The interface is divided into several sections:

- Division:** A dropdown menu showing "N/A".
- App Plan:** A dropdown menu showing "Early Decision". To its right, "College Deadline" is a text input field containing "11/01/2012", followed by "Override" and an empty text input field.
- Office Status:** A dropdown menu showing "Initial materials submitted". To its right is a link labeled "Application Milestones :: view".
- Student Status:** A checkbox labeled "student has submitted his/her application".
- Result:** A dropdown menu showing "Unknown". To its right are two checkboxes: "waitlisted" and "deferred".
- Student interest:** A dropdown menu showing "N/A", followed by the text "Expected", another dropdown menu showing "N/A", and the text "Format" followed by a dropdown menu showing "N/A".
- Flags:** A checkbox labeled "Applying to Special Program".
- Notes:** A large empty text area for notes.

At the bottom of the form is a button labeled "Update All".