

Registrar and College Assistant Procedures

Naviance eDocs

College/Career Assistant (CCA) Does the Following:

1. Stamp date on Application Notification and Request (ANR) to track the day received.

2. Sort all ANRs before processing

- Two piles: those requiring transcripts and those that use self-reported grades
- then alphabetize within pile by last name

3. Verify that the FERPA Waiver was Completed

If the ANR specifies that the student applied via the Common App, verify that the student has completed the Common App FERPA waiver (click on the eDocs tab for the student). If not, send an email or note to the student saying nothing further can be done until they complete the waiver.

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 consent will need to be reset.

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

Brian Bourn Class of 2012

General	Plan	Scores	Colleges	eDocs	Resume	Scholarships	Journal	Documents	Careers
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[prepare forms](#) | [send forms](#) | [print forms](#) | [submission status](#) | [previous years](#) | [view eDocs destinations](#) | [pending requests](#)

Prepare Forms [how this works](#)

✔ STUDENT HAS COMPLETED FERPA CONSENT ON FAMILY CONNECTION.

❗ STUDENT DID NOT WAIVE RIGHT TO SEE THIS RECOMMENDATION.

[reset consent](#)

Initial Checklist | Teacher Checklist

4. Adding Applications When No Transcript Is Required

When an ANR Form is received and **no transcript is requested**, the college application should be added to Naviance. (Note: the application will automatically be added when the transcript is added so **this step can be skipped for all ANRs where a transcript was requested.**)

- Open the student folder.
- Click *ADD APPLICATIONS* in the side menu
- Enter the College and App Type information for up to 10 colleges. Click the “initial materials submitted” box
- Click the *ADD APPLICATIONS* button on the bottom

ADD ACTIVE APPLICATIONS

JANE DOE

App Type Initial materials submitted? select from quicklist or type a "quick name" or click lookup

Regular Decision Yes N/A University of Illinois at Urbana-Champaign ::lookup

Regular Decision Yes N/A (type quick name or click lookup) ::lookup

5. Viewing Applications When No Transcript Was Requested

New applications that you enter (without transcript requests) will be displayed on the *Submitted Apps* tab of the Application Manager.

Application Manager

pending apps submitted apps history summary

SUBMITTED APPLICATIONS

Grade/Class: class of 2013 (grade 12)

Currently showing: 2 applications
All applications submitted in the past 7 days

Show me: (select list) go or advanced search

Quick lookup: last name: and/or college: go

<input type="checkbox"/> all	College	Student	Office Status	Student Status	Type	Delivery Type	Transcript	Submitted
<input type="checkbox"/>	U of IL Urbana-Champaign	DOE, JANE	Initial materials submitted	-	RD		no request	8/17/12

6. Adding Applications when Transcript Is Required

When an Application Notification and Request (ANR) Form is received and **a transcript was requested**, record the transcript request:

- Go to Home – Transcripts and enter a student’s name where it says, “add a request for this student.
- **MAKE SURE YOU UNCHECK THE “SELECT” BOX UNDER “RELEASE TRANSCRIPTS FOR CURRENT COLLEGE APPLICATIONS** (These are those that you do not need to send a transcript (i.e. self-reported). If they do not need a transcript, you must uncheck the box, in order for them to continue to show up as “no request)

The screenshot shows a web interface for managing transcript releases. It is divided into two main sections:

- Release Transcripts for Current College Applications:** This section features a table with a 'select' column and a 'College' column. The first row shows 'American Univ' with a checked checkbox. To the right of the table are four checkboxes: 'Include SAT', 'Include ACT', 'Send mid-year', and 'Send final', all of which are currently unchecked.
- Release Transcripts for New College Applications:** This section includes a dropdown menu for 'App Type' set to 'Regular Decision'. Below it is a search field with the text 'select from quicklist or type a "quick name" or click lookup'. The search field contains 'N/A' and has a 'lookup' button to its right. Below the search field are four checkboxes: 'Include SAT', 'Include ACT', 'Send mid-year', and 'Send final', all of which are currently unchecked.

- Under the “Release Transcripts for New Applications” heading, type the quick name or use the lookup to find the college. Do this for all the transcript requests you have for the student.
- Note: You cannot release transcripts for current college applications at the same time that you release transcripts for new college applications. You must do one, click add requests at the bottom, and then go back in and release the other.
- (JH) If there is a transcript fee being paid, mark as “paid” and record the payment at the bottom of the page.
- Make sure to click “add requests” at the bottom.
- For Common App transcript requests, go to the student’s eDocs tab, click on “send forms” and then click the “update” button. If it indicates the college is not in the student’s Common App application list, the Registrar will not be able to send until the student adds that college to their CA account.

7. Counselor Form or Letter of Rec Required?

Check the ANR Form to see if an SR or Counselor Letter of Rec was requested

- Route the ANR Form and any attached SR to the counselor
- The counselor checks the list of colleges that do not require counselor forms and determines whether one is needed. The counselor checks if they have already completed a form/letter.
- The counselor completes the NACAC or Common App SR through Naviance (or the attached paper form if necessary.)
- The counselor uploads a letter of rec in Naviance if required
- The counselor completes a NACAC Fee Waiver form when requested by the student and attaches it to the ANR
- The counselor indicates on the ANR what needs to be sent. Counselor makes copies of any paper forms that will be mailed and holds onto them in case forms are lost in mail.

8. **Sending Transcript and Supporting Materials** (Registrar)

- When the counselors return the ANR to the CCA, she passes them along to the Registrar.
- If Common App, you also must send an associated form with each CA transcript (i.e. SR or MYR) unless the counselor checked a box on the SR saying they cannot provide a written evaluation.

To Send Electronically:

- Open the student folder for the student whose forms you wish to send
- Click the eDocs tab
- Upload the student's transcript: Print student's pdf transcript from SL to their eDocs page (Note: some Registrars may choose to upload all transcripts at one time in early September and then upload new ones only when a grade change is received).
- Click Send Forms tab and then hit the update button
- If the school accepts both the CA and their own application AND the student is not applying via CA (as specified on the ANR), the Registrar must go to the student's Family Connection side and click on the "applied via Common app?" dropdown to specify that the student did not apply using the CA.
- Click the Match button to match the student with their CA profile (Only required if the student is applying to CA colleges)
- If there is a NACAC Fee Waiver attached to the ANR, the Registrar will scan the fee waiver and upload it to the "other SR" document. Note: you must upload one for each specific college since the name of the college is used on the NACAC Fee Waiver form.
- Click the check box(es) corresponding to the form(s) you wish to send.
- Click the Review and Confirm button
- If there is an Early Decision Alert (EDA), Registrar will not be able to send. Notify the College counselor.
- Review the list of documents being sent on the page that appears.
- Click Submit

To Send Via Mail:

- Registrar will put transcript and any attached paper materials in the mail.
- To mark these as mailed in Naviance, Registrar does the following:
 - Go to Home – Transcripts, enter the name of the student in the "Quick Lookup" box.
 - Click the box to the left of the name
 - Use the drop-down to select "mark as mailed" and hit go.
 - On the next screen, also check the box next to "Mark office status of college application as" and use the dropdown to select "initial materials submitted", then hit continue.

9. (JH) Changing the Office Status and Updating Milestones

Sort all ANRs by student within date if you are processing multiple dates

- Display a student folder
- Click the Colleges tab and then milestones
- Click on *Initial Materials Submitted* under Current Status and check any milestones that are pertinent
- Enter in the correct date at the bottom and click on Update Status and milestones
- The *Pending* status is automatically changed to *Initial Materials Submitted* when eDocs electronically sends a transcript.

JANE DOE Class of 2013

General | Plan | Scores | Colleges | eDocs | Resume | Scholarships | Journal | Documents | Careers

active applications | milestones | history | graphs | prospective colleges | comparison | event registrations

APPLICATION MILESTONES [view dates](#)

Current Status	College	Transcript	Cnslr Form	Cnslr Letter	Sent (eDocs)	Sent (mailed)	MYR
Initial materials submitted	Ball State Univ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initial materials submitted	Belmont Univ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending	Univ of Chicago	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending	U of IL Chicago	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending	U of IL Urbana-Champaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pending	Seton Hall Univ	<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: 07/30/2012

The student sees the following in Family Connection when they click on colleges I'm applying to and view detailed status:

application milestones

[back to college list](#)

Office Status	College	Transcript	Cnslr Form	Cnslr Letter	Sent (eDocs)	Sent (mailed)	MYR
Initial materials submitted	Ball State Univ	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
Initial materials submitted	Belmont Univ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Pending	Univ of Chicago						
Pending	U of IL Chicago						
Pending	U of IL Urbana-Champaign						
Pending	Seton Hall Univ						

We see the detail of the dates in Naviance Succeed when we click on milestones and view dates

JANE DOE Class of 2013

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APPLICATION MILESTONES [edit](#)

College	Transcript	Cnslr Form	Cnslr Letter	Sent (eDocs)	Sent (mailed)	MYR
Ball State Univ	7/30/12			7/30/12		
Belmont Univ	7/30/12	7/30/12	7/30/12	7/30/12		
Univ of Chicago						
U of IL Chicago						
U of IL Urbana-Champaign						
Seton Hall Univ						

10. Students Can View Their Applications in Family Connection

For any college using self-reported grades rather than the transcript, the student sees “no request” in Family Connection (under the Colleges tab) when they click on colleges I’m applying to:

colleges I'm applying to
[view detailed status](#) | [compare me](#)

College	Type	Applying via Common App?	Submissions	Deadline	Transcript	Office Status	My App.	Results	Actions
<input type="checkbox"/> Ball State Univ	RD	-		5/1/13	requested	Pending		Unknown	
<input type="checkbox"/> Bowling Green State Univ	RD	-		7/15/13	requested	Pending		Unknown	
<input type="checkbox"/> U of IL Urbana-Champaign	RD	-		1/2/13	no request	Initial materials submitted		Unknown	

The student will see the following in Family Connection (under the Colleges tab) when they click on “transcripts” on left. Note that those that were entered via the application manager will not show up here because no transcript is required.

11. Processing Common App Midyear Requests

After 7th semester grades are finalized:

- The College Counselor will ask counselors if they have any seniors for whom they would like to revise their recommendation since the SR was originally sent. Route all Midyear Transcript Requests to only those counselors who want to revise their recommendation information so that they can fill out a Common App Midyear Report (MR) in Naviance. Otherwise, the Registrar or CCA will fill out the Common App MR:
 - The Registrar will keep a list of seniors who had any drop/adds to their senior schedule. She will then update the attendance dates, respond to the questions on discipline, course changes, etc. and hit send.
- If you don’t use milestones, the office status will automatically change to Midyear Submitted when the Registrar electronically sends the MR and transcript.
- If you use milestones (JH), To change the Office Status and (JH) Updating Milestones
 - Sort all Midyear Transcript Requests by student within date if you are processing multiple dates
 - Display a student folder
 - Click the Colleges tab and then milestones
 - Click on Mid-year submitted under Current Status and check the MYR milestone.
 - Enter in the correct date at the bottom and click on Update Status and milestones
 - *Initial Materials Submitted* is overridden by *Midyear Submitted* but if we check both milestones, we should know that both were sent.

transcript status

College Application Transcripts

Confirmation Number	College	Requested	Due	Mailed	Mid-Year	Final	Confirmed Receipt
6798329	Ball State Univ	8/17/12	5/1/13	pending	-	-	
6798330	Bowling Green State Univ	8/17/12	7/15/13	pending	-	-	