College Planning:
College Application Tools

HOBSONS

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Lesson 1: Introduction

Overview of College Planning

The College Planning tools in Naviance bring the common tasks involved with college planning into one system. College research, college applications and recommendations, scholarships, and enrichment programs can all be managed from one location, improving integration and reducing paperwork.

Course Overview

This course focuses on the college application process. After students complete their college research, they begin to narrow down their interests and decide which colleges they plan to apply to.

Upon completing this course, you will be able to:

- View applications and transcript requests
- Add applications and transcript requests for students
- Update applications
- Use the Transcript Request Manager, Application Manager, Teacher Recommendation Manager and Scholarship Application Manager to manage college and scholarship application data for multiple students
- Assist students who create a college application list and request college application materials in Family Connection
- Configure settings for the college application process in Naviance
- Generate reports

If your school is using Naviance eDocs, there is a series of courses on eDocs configuration and how to use Naviance eDocs – **Naviance eDocs: Configuration**; **Naviance eDocs: New Users**.

College Application Process

Getting Started	Students and College Applications	Counselors and College Applications
Set up the Transcript Manager and Teacher Recommendation Request Manager	Students build a list of colleges to which they are applying and request college application materials	Review college and scholarship applications and transcript requests

Lesson 2: Students and College Applications

This lesson focuses on how students can manage the college application process in Family Connection. Students are able to maintain a college application list, request transcripts, and request recommendations.

Upon completing this lesson, you will be able to:
- Assist students using Family Connection to complete the application list, request transcripts, and request teacher recommendations

Brainstorming! Before we look at how students manage the college application process in Family Connection, reflect on how students currently manage the college application process. How do they request transcripts and recommendations? How do they let you know to which schools they are applying?

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Working in Family Connection

When students log into Family Connection, they can access college application tools on the **Colleges** tab.

Build the Application List

Students can add colleges to the **Colleges I'm Applying To** list in Family Connection, if you enable this feature.

How to add colleges to the **Colleges I'm Applying To** list:
- From the **Colleges I'm Applying To** list (click **Add to this List**)
- From the **Colleges I'm Thinking About** list (check the college and click **Move to Application List**)

Activity! Add two colleges to your sample student's **Colleges I'm Applying To** list. Try adding to the list using both methods (adding and moving).

Quick Tip!

From the Home page of Family Connection, build custom links that take students through the process.

Request Transcripts and Teacher Letters of Recommendation
Students can request transcripts and teacher recommendations, if you enable these features.

How to request transcripts:
- ❯ By selecting **Request** in the **Transcript** column *while adding* a college to the **Colleges I'm Applying To** list
- ❯ By clicking the **Request Transcripts** link *after adding* a college to the **Colleges I'm Applying To** list
- ❯ By clicking the **Transcripts** link on the **Colleges** tab in the **Resources** section

Note: If a student wants to request a transcript for the NCAA, he or she must submit the request through the NCAA website.

How to request teacher recommendations:
1. From the **Colleges I'm Applying To** list, go to the **Teacher Recommendations** section.
2. Click the **Add/Cancel Requests** link.
3. Choose a teacher from the drop-down menu.
4. Enter a personal note, optional.
5. Repeat steps 3 and 4 for up to four teachers.
6. Click the **Update Requests** button to complete the request.

You can manage the requests in Naviance.

Activity! For the college that is still on your sample student's application list, request a transcript and teacher recommendation.

Updating Application Information
Once a student selects the college he or she is attending, that information can be updated in Family Connection from the **Colleges I'm Applying To** list. The student can select a college from the list and click the **Update** button to indicate the attending college.

You can also get this information by having seniors complete the Graduation Survey. More information about the Graduation Survey is found at the end of this lesson.

Build the Scholarship Application List

If students are applying for scholarships, they can indicate those scholarships in Family Connection.

How to add scholarships:
1. Click the **Colleges** tab in Family Connection.
2. Click **Scholarship Applications**.
3. Click **Add Scholarships.**
4. Click **Select** to see a list of scholarships. Select the appropriate scholarship.
5. Click the **Add Scholarships** button.

Note: If the scholarship was not added to Naviance, the student cannot add it to the list.

Updating Scholarship Application Information

When a student finds out he or she has been awarded a scholarship, the scholarship information can be updated in Family Connection.

The student should follow the steps listed above; however, instead of clicking **Add Scholarships,** the student should click **Edit Scholarships.** From here the student can update the award status and amount awarded.

Students can also update this information by completing the Graduation Survey.

Graduation Survey

If you use the Graduation Survey to obtain information about the student's attending college or awarded scholarships, the information in the student folder and on reports will be updated. When a student completes the Graduation Survey, he or she can include any scholarship in the survey, not just those listed in Naviance. You can add the scholarship to Naviance if you see it on a survey so that the scholarship appears in Family Connection.

Quiz Corner

True/False
1. A student can update application results by completing a survey in Family Connection. _____

Lesson 3: Counselors and College Applications

Lesson 3: Counselors and College Applications

This lesson focuses on how counselors can manage the college application process using Naviance. You can review students' college application lists, and transcripts and recommendations requests.

Upon completing this lesson, you will be able to:
- View student applications
- Manage transcript and teacher recommendation requests
- View scholarship application information
- Work with the Transcript Request Manager, Application Manager, Teacher Recommendation Manager and Scholarship Application Manager

Working with One Student

This section looks at working with a single student during the college application process. The next section of this lesson focuses on working with multiple students at a time. To review college application activities for a single student, you need to access the **Colleges** tab of the student folder. You can also see scholarship information for a single student from the **Scholarships** tab of the student folder.

Colleges Tab

The **Colleges** tab of the student folder shows you college information for a single student.

Application Details

Detailed information about the student's application is available from this page. You will see a list of colleges the student is applying to and in the **Application Details** section you can update information about the student's application to each school. For example you can update the office status, student status, result, etc.

Milestones

The **Milestones** page allows you to update the milestones for a student's application(s). There are some built-in milestones in Naviance and you can create your own milestones. Creating and editing application milestones is covered in **Lesson 4: Configuration**.

History

This page shows the history of the student's applications.

Prospective Colleges

This is the student's list of prospective colleges, or colleges he or she is considering. You can move colleges from this list to the active applications list by checking the college name and selecting *Convert to Active Applications* from the drop-down menu.

How to add applications for a student:
1. Display the student folder.
2. From the **Quick Links** menu on the left, click **Add Applications**.
3. Complete the information for each application you are adding.
4. Click **Add Applications**.
5. The college now appears on the list in Naviance and Family Connection.

Note: When you are adding an application for a student in Naviance, you can request a transcript for the student by checking the box in the **Release Transcript** column.

How to update application information:
1. Display the **Colleges** tab of the student folder.
2. Scroll down to the **Application Details** section.
3. Each application on the student's list can be updated from here.

Scholarships Tab

The **Scholarships** tab of the student folder shows scholarship information for a single student.

Scholarship Applications

The student's scholarship applications are listed on this page. You can add to the student's scholarship application list by clicking **Add Scholarships** from the **Quick Links** menu.

Scholarship Milestones

The **Scholarship Milestones** page allows you to update the milestones for a student's scholarship applications. Unlike application milestones, there are no built-in scholarship milestones.

Creating and editing application milestones is covered in **Lesson 4: Configuration.**

How to add scholarship applications for a student:
1. Display the student folder.
2. From the **Quick Links** menu on the left, click **Add Scholarships**.
3. Complete the information for each scholarship you are adding.
4. Click the **Add Applications** button.
5. The scholarship now appears on the list in Naviance and Family Connection.

How to update scholarship information:
1. Display the **Scholarships** tab of the student folder.
2. Scroll down to the **Scholarship Application Details** section.
3. Each scholarship application on the student's list can be updated from here.
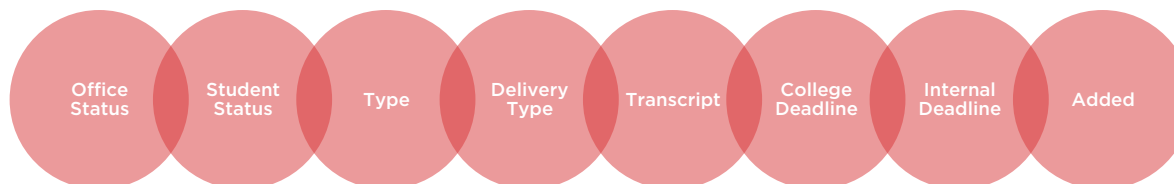
Working with Multiple Students

To review the college application activities for multiple students, use the managers in Naviance. You can take actions on a group of students without having to access each student folder.

❯ Application Manager
❯ Transcript Request Manager
❯ Teacher Recommendations Manager
❯ Scholarship Application Manager

Application Manager

The Application Manager allows you to check off steps in the college application process so that all student materials are tracked. Using the Application Manager is suggested when you want to update applications for multiple students. Before using the Application Manager, we recommend defining your application milestones. Application milestones should mimic the steps in your current process to make the transition to electronic application management easier.

Pending Apps Tab – From here you can see a list of the pending applications for the graduating class. At the top of this page you have the option to filter the results using the **Show Me** drop-down menu. Before you make any changes to the list, the **Currently Showing** field lets you know which applications are listed on the page.

Office Status | Student Status | Type | Delivery Type | Transcript | College Deadline | Internal Deadline | Added

If you want to take action on multiple applications, place check marks next to the applications you want to process and make a selection from the **Process Selected Applications** drop-down menu. Then click **Go**.

Your options for processing the applications are:
- Change the status and milestones
- Print mailing labels to colleges
- Print envelopes to colleges
- Generate mail merge files for labels
- Record transcript release
- Override application deadline
- Display printer-friendly list

Quick Tip
If you are working on all the application materials for a single student, return to the student folder and update the milestone information from **Application Milestones** section of the **Colleges** tab.

Note: You can also use the **Advanced Search** feature to find students by application type.

Transcript Request Manager

The Transcript Request Manager allows you to track the status of student transcript requests and batch update the status of transcripts.

Requests Tab – From here you can see a list of transcript requests for the graduating class. At the top of this page you have the option to filter the results using the **Show Me** drop-down menu. Before you make any changes to the list, the **Currently Showing** field lets you know which transcript requests are listed.

Added   Deadline   Mailed   Midyear   Final   Confirmed   SAT   ACT
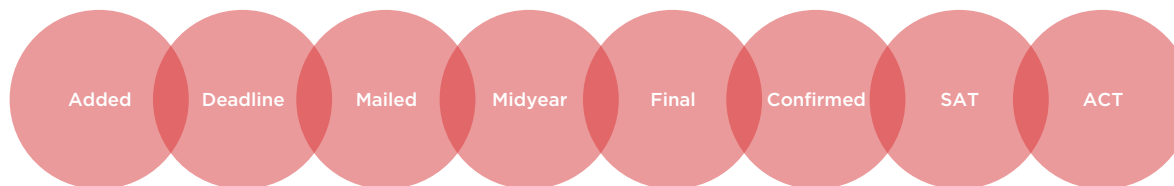
Your options for processing the transcript requests are:
- View printer-friendly list
- Print mailing labels
- Print envelopes
- Generate mail merge files for labels
- Mark transcripts as mailed (initial, midyear and final)
- Mark receipt confirmed by recipient

- Mark as paid
- Set transcript deadline
- Set mid-year or final required
- Cancel requests
- Permanently delete requests
- Restore cancelled requests

Students Tab – This tab lists the number of requested transcripts per student. You can also add transcript requests for the students listed here by clicking **Add Request** or by clicking the student's name and then clicking **Add Requests**.

Payments Tab - If you set up payments, those are listed on this tab.

Teacher Recommendation Request Manager

The Teacher Recommendation Request Manager allows you to track teacher recommendation requests and batch update the status of recommendation requests.

Requests Tab – From here you can see a list of teacher recommendation requests for the graduation class. At the top of this page you have the option to filter the results using the **Show Me** drop-down menu. Before you make any changes to the list, the **Currently Showing** field lets you know which transcript requests are listed.

Note   Action   Status   Form   Nearest Deadline
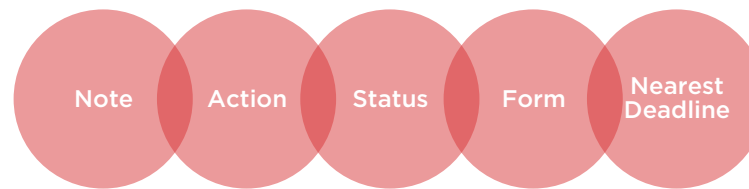
Your options for processing teacher recommendation requests are:
- View printer-friendly list
- Mark as requested
- Mark as in progress
- Mark as completed
- Mark as unable to complete
- Mark as cancelled
- Delete requests

Summary Tab – From here you can see how many recommendation requests there are for each teacher and that status of the request. The status of a teacher recommendation can be requested, in progress, or completed.

Scholarship Application Manager

The Scholarship Application Manager allows you to track students' scholarship applications. At the top of this page you have the option to filter the results using the **Show Me** drop-down menu. Before you make any changes to the list, the **Currently Showing** field lets you know which transcript requests are listed.

Pending Apps Tab – From here you can see a list of scholarships that students have applied to but have not been awarded yet.

Your options for processing scholarship applications are:
- Change status and milestones
- Enter dollar amounts awarded
- Print mailing labels
- Print envelopes
- Override application deadline
- Display printer-friendly list

Deadline   Added
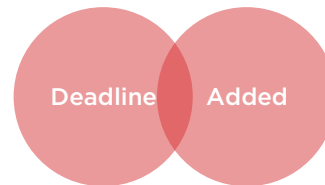
Submitted Apps Tab – Once you or a student indicates that a scholarship has been awarded, it will appear on this tab.

History Tab – this tab shows the scholarship processing history.

Mailing Manager

Using Naviance, you can print mailing labels and envelopes to colleges, non-college transcript recipients, students, and parents. To access the Mailing Manager, go to **Home > Mailing Manager**.

The mailing options are listed on this page. Each link takes you to a page where you can determine which information needs to be printed. You can print to compatible Avery® products using Naviance.

The Mailing Manager generates a PDF for you to download and print.

Quiz Corner

True/False

1. You can use the Transcript Request Manager to track students' teacher recommendation requests in Naviance. _____

Multiple Select

2. Which tools can you use to print mailing labels for colleges?
   a. Mailing Manager
   b. Application Manager
   c. Transcript Request Manager
   d. Teacher Recommendation Manager

Fill in the Blank

3. If you want to process one student's application materials, it is best to work from the _____.

Lesson 4: Configuration

Lesson 4: Configuration

This lesson focuses on the configuration options for the college application tools in Naviance and Family Connection.

Upon completing this course, you will be able to:
- Configure settings for Family Connection users
- Adjust the settings for the Transcript Request, Teacher Recommendations and Scholarship Application Managers
- Modify the preferences in Naviance

Family Connection

If you want students to be able to make requests and update their attending college in Family Connection, you need to turn those features on for students.

Request Transcripts

To allow students to request transcripts in Family Connection, go to the Transcript Request Manager and click the **Settings** tab. The current settings are displayed. If you click the **Edit** button you can make changes.

In the **General Family Connection Settings** section, you can enable the transcript request by clicking the radio button for the last option, *Display transcript request status and allow students to request transcripts.* You can then manage this setting by grade level using the check boxes under the options. This selection only makes it possible for students to request initial transcripts.

To allow students to request midyear transcripts, go to the **Request Options for Students on Family Connection** section and click the radio button for the last option, *Show options to request unofficial scores and midyear transcripts.*

To save changes to this page, click the **Save** button.

Request Teacher Recommendations

To allow students to request teacher recommendations in Family Connection, go to the Teacher Recommendation Manager and click the **Settings** tab.

In the **Student Requests** section, click the radio button for the last option, *Students can request or cancel recommendations from Family Connection.*

To save changes to this page, click the **Save** button.

Update Attending Colleges

If you want to allow students to indicate which colleges they're attending, you can enable that permission by going to **Connections > Family Connection > Select and Update Optional Features**. In the **Student Edit Permissions** section, mark which grade levels you want to have the permission, *Update which college the student is attending.*

When a student updates his or her attending college, the student can request a final transcript.

The Managers

If you plan to use the managers to monitor the college application process electronically, there may be some settings you want to adjust depending on how you want to use them. There are no settings for the Application Manager or Mailing Manager.

Transcript Request Manager

To edit the settings for the Transcript Request Manager, go to **Home > Transcript Request Manager > Settings > Edit**.

You can edit who can request transcripts (students, counselors), if parent consent is needed for transcript requests, if payment is required for transcripts, etc.

Note: Naviance does not process transcript payments.

Brainstorming! Which settings do you think you will enable for the Transcript Request Manager?

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Teacher Recommendation Request Manager

To edit the settings for the Teacher Recommendation Request Manager, go to **Home > Teacher Recommendations > Settings**.

You can edit whether or not students can request recommendations on Family Connection and require approval for recommendation requests.

Brainstorming! Will you allow students to request teacher recommendations in Family Connection?

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Preferences

There are several system preferences that affect the college application tools. To edit these preferences, go to **Setup > Preferences**.

Application Flags

These are custom flags that allow your school to track special characteristics about a college application. For example, you can flag an application as legacy, student athlete, international applicant, etc. Using application flags keep a unique application from skewing your data results. This is helpful for those doing college research and in reporting.

How to add a new application flag:
1. Go to **Setup > Preferences**.
2. Click **Application Flags**.
3. In the **Flag Options** section, click **Add New Flag**.
4. Enter a code for the application flag in the **Code** field.
5. Enter the name of the application flag in the **Name** field.
6. Click the **Add Flag** button.

You can edit or delete application flags by clicking the icons (pencil, trashcan) in the row with the application flag.

Brainstorming! What are some application flags you plan to create in Naviance?

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Application Milestones

These are specific steps in the application process that you can define and track in Naviance. Application milestones are key for tracking the components of students' applications and can be used with the Application Manager. There are some built-in application milestones that you can use, edit, or delete.

How to add a new application milestone:
1. Go to **Setup > Preferences.**
2. Click **Application Milestones**.
3. In the **Options** section, click **Add Milestones**.
4. Enter the milestone in the **Milestone** column.
5. Enter the milestone abbreviation in the **Abbreviation** column.
6. Click the **Add Milestones** button.

You can edit application milestones by clicking **Edit Milestones** in the **Options** section. To delete a milestone, click the trashcan icon in the row with the application milestone.

Brainstorming! What are some application milestones you plan to create in Naviance? Do you need to remove or edit any of the built-in application milestones?

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Scholarship Milestones

These are similar to application milestones, but for the scholarship application process. Once you create your scholarship milestones, you can use them to update and monitor progress for your students who are applying for scholarships. There are no built-in scholarship milestones.

Brainstorming! What are some scholarship milestones you plan to create in Naviance?

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Lesson 5: Reports

This lesson focuses on the reports available for college application and scholarship data in Naviance.

The following reports are available:
- Applications by College
- Applications by Student
- College Matriculation
- Deadlines
- Expected Outcomes
- Matriculation Non-US
- Matriculation US
- Student Application Summary
- Summary Data
- Teacher Recommendations – Students by Teacher
- Teacher Recommendations – Summary Count
- Teacher Recommendations – Teachers by Students
- Scholarship Detail by Scholarship
- Scholarship Detail by Student
- Scholarship Summary by Scholarship
- Scholarship Summary by Student

Applications by College - Lists each college for which there are applications along with a list of each student that has applied to that college.

Applications by Student - Lists each student for which there are applications along with a list of each college application for that student.

College Matriculation - Provides a list of each student who marked an attending college and the name of that college.

Deadlines - Display all deadlines for your quicklist or find colleges with deadlines that have not yet passed.

Expected Outcomes - Provides summary statistics on expected outcome of application results compared to actual outcomes.

Matriculation Non-US – Provides a summary of student matriculation at colleges organized by geographic region.

Matriculation US – Provides a summary of student matriculation at colleges organized by geographic region.

Student Application Summary – Provides a list of each student and summary information about the number of applications and percent accepted. Use the Applications by Student or Applications by College reports for a more detailed listing of each application.

Summary Data – Provides a list of each college and summary data on total applications, acceptances, and matriculation.

Teacher Recommendations – Students by Teacher – Provides a summary or detailed report of teacher recommendations.

Teacher Recommendations – Summary Count – Provides a summary or detailed report of teacher recommendations.

Teacher Recommendations – Teachers by Students – Provides a summary or detailed report of teacher recommendations.

Scholarship Detail by Scholarship – Provides a list of each scholarship and the students who were awarded that scholarship.

Scholarship Detail by Student – Provides a list of each student and the scholarships they were awarded.

Scholarship Summary by Scholarship – Provides a list of each scholarship that has been awarded to one or more students along with the number of scholarships awarded and the total dollar amount awarded.

Scholarship Summary by Student – Provides a list of each student who received a scholarship along with the number of scholarships awarded and the total dollar amount awarded.

Lesson 6: Conclusion

Lesson 6: Conclusion

You have completed the **College Planning: College Application Tools** training course. Now that you know which tools are available in Naviance, you can create a plan for using Naviance to electronically manage the college application process.

The college application process can be a stressful time for students and school staff. Using Naviance and Family Connection to help manage the process can save time and lessen frustration for users.

Additional Resources
If you need additional information about the college application tools, you can use the following resources:
- **Community Forums** – collaborate with Naviance Network members
- **Help Library** – read articles written by Naviance experts
- **Contact Support Services** – work with a Naviance Support Specialist via web, e-mail, or phone

All these resources are located in the Naviance Network.