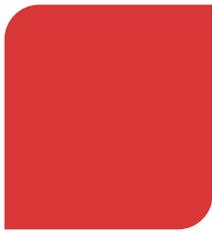
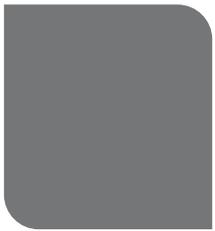




Naviance eDocs



Lesson 1 – Naviance eDocs Overview

- Overview of Naviance eDocs
- College Application Process
- Naviance eDocs Navigation

Lesson 2 – Student Activities

- Common App Account Matching
- Adding College Applications in Family Connection

Lesson 3 – Viewing Student Requests

- The Application, Transcript, and Teacher Recommendation Managers
- Student Folder – eDocs Tab

Lesson 4 – Preparing Initial Documents

- Types of Documents
- Preparing Documents

Lesson 5 – Sending Initial Documents

- Sending Documents
- Tracking Submitted Documents

Lesson 6 – Processing Subsequent Documents

- Explanation of Change
- Grade Report
- Optional Documents
- Mid-year Documents
- Final Documents

Lesson 7 – Reports

Lesson 8 – Configuration

- Account Activation
- User Roles and Permissions
- Family Connection Settings
- Updating Student Data

Lesson 9 – Conclusion

Appendix

Course Overview

The course is designed to take you through the process of using Naviance eDocs to manage the college application process. Naviance eDocs supports Common App and other electronic destinations (non-Common App).

Upon completing this course, you will be able to:

- › Help students use Family Connection to request transcripts and teacher recommendations
- › Use the manager tools to view document requests
- › Upload and prepare initial, mid-year, optional and final materials
- › Send initial, mid-year, optional and final materials
- › Track the submission of sent materials
- › Generate eDocs reports
- › Configure eDocs features

Lesson 1: Naviance eDocs Overview

What is Naviance eDocs?

Naviance eDocs is an electronic college application tool, allowing high schools to prepare and send college application documentation electronically to more than 3,000 electronic destinations including all Common Application destinations.

With Naviance eDocs, high schools are able to prepare, send, and track college application documents electronically. The solution is available year round, and students' documents are available for submission three years after graduation.

Partnerships

Naviance has partnered with the Common Application, Parchment, and the NCAA to provide secure delivery of college application materials.



With Naviance eDocs, you can submit electronic documents to every Common Application member institution. The Common Application serves students, member institutions, and secondary schools by providing applications that students and school officials can submit to Common Application member colleges and universities.

Naviance provides secure electronic delivery of college application materials to all colleges and universities that subscribe to Parchment Exchange.

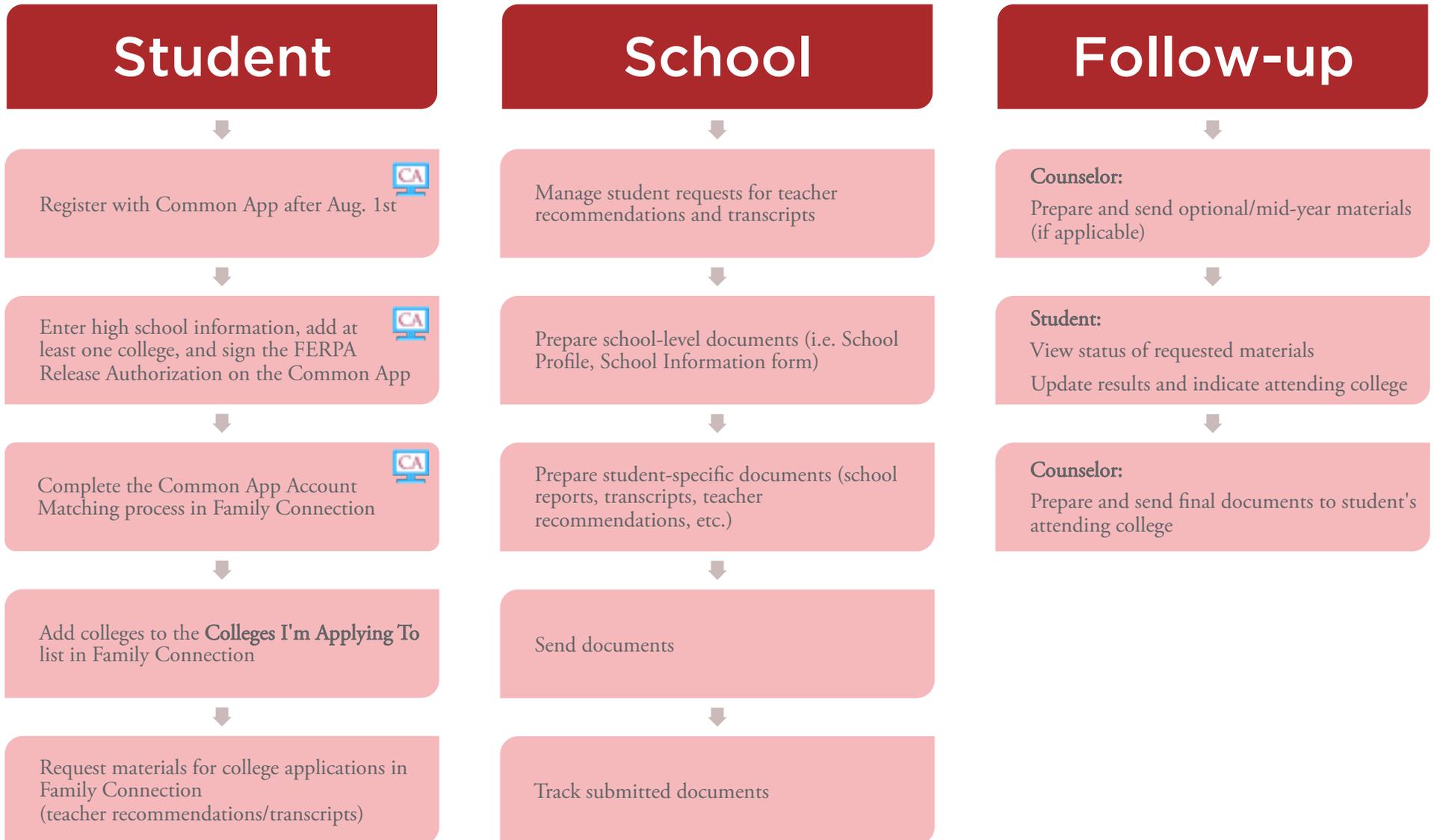


Naviance eDocs facilitates the delivery of transcripts directly to the NCAA to support student athletes in completing their NCAA initial eligibility application.

Brainstorming! Before we look at how you can use eDocs to manage the college application process electronically, write down your current process for supporting the college application process.

College Application Process

The diagram below outlines the Naviance eDocs application process. Keep in mind that you have the flexibility to make adjustments to this process to best fit the needs of your school. If a student is not applying to Common Application destinations, they do not need to complete the steps with the Common Application icon.



Naviance eDocs Navigation

To be able to access Naviance eDocs, users must have the appropriate permissions. More details on user roles and permissions related to eDocs can be found in **Lesson 8: Configuration**.

To access Naviance eDocs for an individual student:

From the eDocs tab of the student folder school users will be able to do the following:

- View student details including the document checklists
- Prepare and send documents for a student's applications
- Track the submission status for materials sent
- Print documents to send to non-electronic destinations
- View documents prepared in previous years
- Access a list of all eDocs destinations

To access the eDocs Options menu:

From a student folder, school users may also access school-level documents. These documents will be covered in more detail in **Lesson 4: Preparing Initial Documents**.

1. Open a student folder.
2. Click the **eDocs** tab for this student.
3. The **eDocs Options** menu is located in the upper left hand corner of the folder above the **Quick Links** menu.

Lesson 2: Student Activities

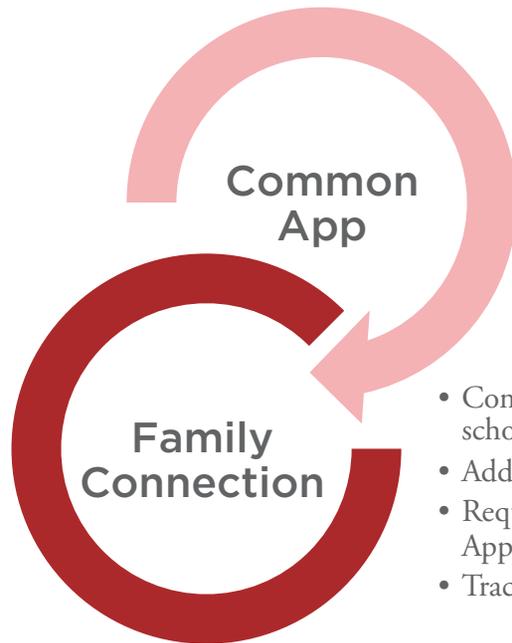
Lesson Objectives

Upon completing this lesson, you will be able to help your students:

- › Complete the Common Application matching process
- › Add colleges to their active application list
- › Request transcripts
- › Request teacher letters of recommendation
- › Process other document requests

What can students do in Family Connection?

Let's look at the student's college application activities, which prompt actions you will take in supporting his or her application process. The steps include procedures if students are applying to Common Applications destinations. If a step is required for Common Application, it is noted.



- Register for the Common Application after August 1st
- Enter high school information, add at least one college, and sign the FERPA Release Authorization on Commonapp.org

- Complete the Common Application Account Matching process (if applying to a Common Application school)
- Add non-Common Application colleges to the **Colleges I'm Applying To** list
- Request transcripts and teacher recommendation letters for Common Application and non-Common Application destinations
- Track status of requested transcripts and recommendations

Lesson 2: Student Activities

Common App Account Matching

If a student applies to a Common Application destination, the Common App Account Matching process must be completed in Family Connection before you can submit documents for the student. Students who are applying to Common Application destinations should complete the following steps:

1. Register on commonapp.org.
2. Enter high school information, add at least one college, and sign the FERPA Release Authorization on Commonapp.org.
3. Complete the Common App Account Matching process on Family Connection using their Common Application username (e-mail address they used when registering on commonapp.org) and Date of Birth.

Note: Students will only see the matching screen in Family Connection if they are assigned to a counselor in Naviance.

Adding a College to the Colleges I'm Applying To List

To add an active application, the student should complete the following steps:

1. Click the **Colleges** tab.
2. Click **Colleges I'm Applying To**.
3. Click **Add to This List**.
4. Click **Lookup**.
5. Find a college he or she is applying to and click the link with the college name.
6. The college is added to the **College** column. The student should continue adding colleges until they are all added.
7. Indicate the type of application, if a transcript is needed and whether the application has been submitted.
8. Click **Add Colleges**.

Note: You can add colleges to the student's active application list in Naviance. You do not have to sign in to Family Connection to add colleges to the list for a student.

Quick Tip!

If a student has a Common Application destination on his list in Family Connection, the student needs to indicate if he is applying via Common

Document Requests

Students can request the following college application materials in Family Connection:

- Transcript
- Teacher Letter of Recommendation
- Other Documents

Requesting Transcripts

There are different ways a student can request initial 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* the college to the **Colleges I'm Applying To** list
- By clicking the **Transcripts** link on the **Colleges** tab, in the **Resources** section

Requesting Letters of Recommendation

To request a teacher letter of recommendation, the student should complete the following steps:

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 Request** button to complete the request.

Other Document Requests

Students applying to Common Application destinations may request two additional documents through their Common Application account:

- Common Application Fee Waiver
- Early Decision I or II Agreement

If a student needs a transcript to fulfill NCAA eligibility requirements, he or she must submit the request through the NCAA website. This request will appear within your Naviance account to prepare and send.

Additional information on working with these documents will be covered in **Lesson 5: Sending Documents**.

Quiz Corner

True/False

1. Students can apply to colleges in Family Connection. _____

Multiple Select

2. Students can request which of the following documents in Family Connection:
 - a. Transcripts
 - b. Teacher Recommendations
 - c. Counselor Evaluations

Lesson 3: Viewing Students Requests

Lesson 3: Viewing Students Requests

Lesson Objectives

Upon completing this lesson, you will be able to:

- Access the Application, Transcript, and Teacher Recommendation Managers
- View the eDocs tab of the student folder
- Understand how these tools can help you manage the college application process

How are student requests managed?

Naviance eDocs allows you to send documents electronically but there are additional tools and features that help you manage the college application process.

The managers are located on the **Home** page of Naviance. The **eDocs** tab is available within a student folder.

The Application Manager

The Application Manager is a tool for managing the application process online. If you are using eDocs, the office status will update when you send documents electronically. Also, the application will be moved to the **Submitted Apps** tab and you will see the date you submitted the materials in the **Submitted** and **Transcript** columns.

The Transcript Request Manager

The Transcript Manager lists all the students who have requested a transcript in Family Connection. If you submit a transcript using eDocs, the date of submission will appear in the **Mailed** column.

Teacher Recommendation Manager

You will be able to view the Teacher Recommendation Manager as a counselor. This can help you determine if there are teacher recommendations outstanding that need to be uploaded to Naviance.

Student Folder – eDocs Tab

From the **eDocs tab** of the student folder, you can view student details and prepare and send documents for a student's application. If you attempt to *prepare forms* for a student prior to his or her graduation year, you will receive a warning because these forms will not persist from year to year. However, you can *upload documents* for a student before his or her graduation year and they will be available in the **Prepare** section in the eDocs tab.

When you upload documents for a senior, those documents are available to send for three years after graduation. This allows you to send application materials for alumni.

Quiz Corner

True/False

1. If you are using Naviance eDocs, you cannot use the Application Manager in Naviance. _____
2. You can upload documents for a student prior to his or her year of graduation and the documents will be available in the **Prepare** section in the eDocs tab to send during his or her graduation year.

Multiple Select

3. Where can you find out which colleges a student is applying to in Naviance?
 - a. Student Folder > Colleges tab
 - b. Student Folder > eDocs tab
 - c. Colleges > Student Application
 - d. Application Manager

Lesson 4: Preparing Initial Documents

Lesson 4: Preparing Initial Documents

Lesson Objectives

Upon completing this lesson, you will be able to:

- Prepare school-level documents
- Prepare student-specific documents

How are documents prepared electronically or printed from Naviance eDocs?

There are two types of document that can be prepared in Naviance eDocs: school-level documents and student-specific documents.

School-Level Documents

In Naviance eDocs, school-level documents are defined as documents that contain information that is relevant to all student applications. These documents only need to be prepared one time and will be available for all students in Naviance. There are two school-level documents in eDocs:

School Profile

A school profile is an informational document about your high school that you prepare. Information contained in a school profile typically includes demographic data, curriculum and grading scale information, college history acceptance rates, test score ranges, and other community-focused information.

School Information Form

The School Information form is completed by filling out a form in eDocs and is used to add and update common information (e.g., graduation date, class size, international school information) displayed on the Common App and NACAC forms in eDocs.

Preparing School-Level Documents

To prepare school-level documents:

1. Open any student folder.
2. Locate the School Profile and School Information form in the **eDocs Options** menu.
3. If the document has not been prepared, click the **Upload** or **Prepare** button to begin preparing the document. You can also replace a school-level document at any time by clicking the **Replace** button. **Note:** There can only be one version of each school-level document at a time.
4. Complete the form or upload the file.
5. Click the **Save** button.

Student-Specific Documents

When preparing documents that contain information about a single student, you will be working with student-specific documents in Naviance eDocs. The student-specific documents are categorized into three tables: Counselor Documents, Teacher Documents, and Transcripts. A full description of each document and the requirements for preparing these documents in eDocs can be found in the **Appendix**.

Counselor Documents

- Common App School Report
- NACAC School Report
- Other School Report
- Written Evaluation
- Leaving Exam Results
- Current Year Courses

Teacher Documents

- Common App Teacher Evaluation
- Letter of Recommendation

Transcripts

- Initial Transcript
- Transfer Transcript

Preparing Student-Specific Documents

You can upload documents or prepare forms for a student from the eDocs tab of his or her student folder.

To upload/prepare student-specific documents:

1. Open a student folder.
2. Click the **eDocs** tab.
3. Click the **Prepare** tab.
4. Click the **Add** button to add a document to the Counselor Document, Teacher Documents, or Transcripts table.
 - a. To prepare a form,
 - Click the **Prepare a Form** button.
 - Select the form type from the drop down list.
 - Complete the form, then click **Save**.
 - b. To upload a document,
 - Click the **Upload** button.
 - Complete all required selections.
 - Click **Choose File** to locate the document to upload.
 - Click **Upload File**.
5. Once prepared, the document will appear in the corresponding table. If you need to view, replace, or delete a document, click the corresponding link in the **Actions** column of the table. **Note:** If you upload a document that is already prepared for the student, the document will override the existing file.

Lesson 5: Sending Initial Documents

Lesson 5: Sending Initial Documents

Lesson Objectives

Upon completing this lesson, you will be able to:

- › Send initial materials
- › Process additional Common Application requests
- › Track the submission of sent materials

Sending Documents Electronically

You can send documents to electronic destinations or Common Application destinations using Naviance eDocs. For institutions that do not accept electronic documents, you will need to print and mail the student's materials. After all the materials are uploaded to a student folder, navigate to the **Send** page to send the materials. **Note:** Although school-level and student-specific documents are prepared separately in eDocs, they can be sent together.

To send documents:

1. Go to the student folder whose materials you are sending.
2. Click the **eDocs** tab.
3. Navigate to the **Send** section.
 - a. If you are sending documents to an electronic destination, you can send documents individually by checking the box next to the forms you want to submit (e.g. Active Transcript). You can also send materials as a packet by checking the box next to the destination name.
 - b. If you are sending documents to a Common Application destination, all counselor documents must be sent together by checking the box next to the destination name. The teacher documents can be sent before, with, or after the counselor documents.
 - c. If you are sending documents to a print/mail-only destination, you can select the documents during this process and the office status will be automatically updated. However, you will need to print the documents from eDocs in order to send them via mail. More information on batch printing documents can be found in the **Print Destinations** section of this lesson.
4. Click **Review and Confirm** to continue.
5. The **Review and Submit Forms** page appears. From this page you can edit or submit the materials. After you review the materials, click the **Submit** button to send them.
6. The **Submission Status** page appears. A history of submissions for the student appears.
 - a. Materials submitted to electronic destinations will be tracked by an ID number.
 - b. Materials submitted to Common Application destinations will be tracked, but will not display an ID number.

Quick Tip

Date of birth is a required field for sending materials electronically. You can update DOB manually in a student folder or via a data import update.

Lesson 5: Sending Initial Documents

Common Application Considerations

To be able to send documents to Common Application destinations using Naviance eDocs, the student must complete the Common App Account Matching process in Family Connection.

Once the matching process is complete, the colleges on the student's Common Application list will pull into the student's active applications list.

If you have a student who is requesting a Common Application Fee Waiver or who is applying Early Decision I or II via the Common Application, follow the steps below to fulfill the requests.

Common Application Fee Waiver

If a student wants to request the Common Application fee waiver, he or she must complete the request in Common Application. You will see an alert for that application in the **Send** section of the **eDocs** tab in Naviance.

To complete a fee waiver request:

1. Click the link in the alert to open the form.
2. Complete the form.
3. Submit the form. The form is immediately submitted to Common Application.

Early Decision Agreements

If a student applies Early Decision I or II to Common Application destinations, you will receive a notification in the **Send** section of the **eDocs** tab in Naviance.

To sign an Early Decision Agreement:

1. Click the link in the alert to open the form.
2. Complete the form.
3. Submit the form. The form is immediately submitted to Common Application.

Click the link in the alert to submit the Early Decision Agreement to Common Application. The alert is then removed from the application materials.

Note: College lists, Early Decision Agreements, and fee waiver requests are pulled into Naviance automatically as part of the Common Application integration.

Quick Tip

If you would like up-to-the-minute Common Application information, click the Update button on the Send Forms page in the student folder.

Viewing Submission Status

The **Submission Status** section of the **eDocs** tab allows you to view the submission status of the electronic documents you have sent. For electronic destinations, there is an ID that allows you track the document if for some reason a college does not receive the document. **Note:** Common Application document submission will not display an ID as the documents are tracked via the student's Common Application.

Printing Documents

For schools that do not accept electronic documents or if you need to mail any documents you have uploaded to or prepared in Naviance, go to the **Print** page of the **eDocs** tab in Naviance.

How to print documents:

1. Open the student folder.
2. Click the **eDocs** tab.
3. Navigate to the **Print** section.
4. Enter a description in the **Batch Description** field. This is required.
5. Select the documents you want to print.
6. Click **Batch Selected Documents to Print**.
7. A file with the documents you selected in available at the top of the page.
8. Click the **Download** button.
9. Save and open the file.
10. Print the file.

Once you have your documents printed, you can use the Mailing Manager to print labels or envelopes. Detailed instructions for using the Mailing Manager are available by going to Naviance Network > Help Library.

Lesson 6: Processing Subsequent Documents

Lesson 6: Processing Subsequent Documents

Lesson Objectives

Upon completing this lesson, you will be able to:

- › Explain how the Explanation of Change document and the Grade Report/Report Card are used
- › Understand what subsequent documents are available

Subsequent Documents

After you prepare, upload, and send the initial materials for a student, you can move on to preparing subsequent material submissions. This could be for optional, mid-year, or final documents for a student. A full description of each document and the requirements for preparing these documents in eDocs can be found in the **Appendix**.

Counselor Documents

- Common App Mid-year, Optional, or Final Report
- NACAC Mid-year Report
- Other Mid-year, Optional, or Final Report
- Explanation of Change
- Grade Report/Report Card

Transcripts

- Mid-year, Optional, or Final Transcript
- Transfer Transcript

These documents are prepared and sent in the same way as the initial documents.

Explanation of Change and Grade Report/Report Card

When sending subsequent documents for a student, you have options for providing updated information about the student's disciplinary history, change of grades, or correction of transcripts. Additionally, interim grades can be sent if necessary.

- **Explanation of Change (Optional, Mid-year, or Final):** An uploaded document that details changes to disciplinary information, change of grades, or correction of transcripts. If you respond "Yes" to any of the questions in the "Evaluation" section of the Common Application forms, you must prepare and upload an explanation of change.
- **Grade Report/Report Card:** The Grade Report/Report Card reflects changes to grades for courses that are in progress. This document can be especially helpful for students who are applying Early Decision or Early Action. For Common Application destinations, it must be sent with the Common App Optional Report.

Lesson 6: Processing Subsequent Documents

Subsequent Documents

Optional

The optional materials (Optional Report; Optional Transcript; Optional Explanation of Change) can be sent at any time after the initial documents have been submitted and before the final documents.

Some reasons you may need to send an optional transcript:

- You sent the student's end of year grades for the junior year because he or she applied EA/ED. Now you want to send the student's first semester grades.
- Your school is trimester based.

Mid-year

Mid-year materials may be optional or required by a college. You will need to determine if mid-year materials are required for a specific college.

Final

As the end of the school year approaches, it will be time to send final application materials to the colleges your students are attending. If you set the appropriate permissions, students can indicate the colleges they are attending in Family Connection. If not, this information must be updated in the student folder in Naviance.

Note: For Common Application destinations, a final report and transcript can only be sent to **one destination**.

Brainstorming! How do students notify the school of their attending colleges? How can you have them do this electronically using Naviance and Family Connection?

Quick Tip!

Many Naviance clients use the Graduation Survey to find out which colleges students plan to attend. This acts as a final transcript request!

Lesson 7: Naviance eDocs Reports

Lesson Objectives

Upon completing this lesson, you will be able to:

- Generate reports for submission status and college matriculation.

Online Submission Status Report

There are two reports that you can generate when using Naviance eDocs.

- eDocs Online Application Form Submission Status
- College Matriculation

You can access these reports by going to **Reports > College Reports**. You can view, schedule, e-mail or customize either report.

eDocs Online Application Form Submission Status

This report provides the status of forms submitted online to electronic and Common App destinations.

College Matriculation

This report provides a list of students who indicated their attending colleges and the names of the colleges.

Quick Tip!

Create a quicklist of mail-only destinations and add an application flag category for paper submissions to Common App destinations. This allows you to run a filtered report to track those applications.

Lesson 8: Configuration

Lesson Objectives

Upon completing this lesson, you will be able to:

- Complete Naviance eDocs activation
- Update user roles and permissions related to eDocs
- Enable Family Connection settings related to eDocs
- Update relevant student data for Naviance eDocs

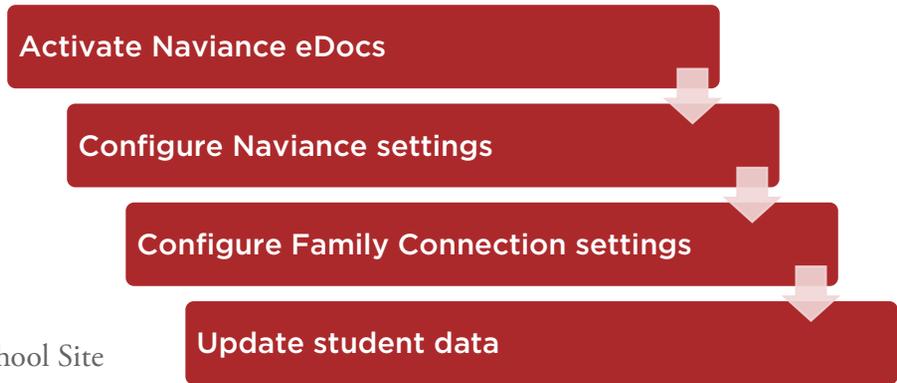
Account Activation

Naviance eDocs activation should be completed annually for each school. Activation only needs to be completed by one school user, typically the School Site Manager.

To activate Naviance eDocs for your school’s account, click the **Activate Now** button in the Naviance eDocs notification on the **Naviance Home** page.

During the activation process, you will be asked to:

1. Accept the terms and conditions for using eDocs.
2. Select from the following options in regards to the way you **submit documents via eDocs**:
 - **Common App integration:** The optional integration with Common Application allows you to prepare and submit college application documents to Common Application directly from Naviance eDocs.
 - **Update Active Applications List with the Common App integration:** If you choose to use the Common Application integration, you also have the option of turning on an automatic sync which will keep the students’ active applications list in Naviance up to date with any changes the student makes to their applications on the Common Application.



Quick Tip!

If you select Common App integration, you will not be able to prepare or submit any documents through the Common Application website. All documents must

User Roles and Permissions

Counselors, teachers, and registrars will need access to Naviance in order to use Naviance eDocs. If user roles, accounts, and the teacher list have not been setup in Naviance, this needs to be done prior to implementing Naviance eDocs.

To be able to access Naviance eDocs, the user must have *at least one* of the following permissions:

User Permissions	Description	Recommended for...
View all teacher recommendation forms	User can view teacher recommendations created by <i>any user</i>	Admin only
View counselor documents (SR, OR, MR, FR forms)	User can view counselor documents created by <i>any user</i>	Admin only
Prepare my teacher recommendation forms	User can prepare teacher recommendations	Teachers
Prepare counselor documents (SR, OR, MR, FR forms)	User can prepare counselor documents	Counselors
Prepare transcripts	User can prepare transcripts for students	Registrars
Submit all teacher recommendation forms	User can send teacher recommendations created by <i>any user</i>	Admin only
Submit my teacher recommendation forms	User can send <i>their own</i> teacher recommendations	Teachers
Submit counselor documents (SR, OR, MR, FR forms)	User can send counselor documents created by <i>any user</i>	Counselors
Upload single transcripts	User can upload a single transcript	Registrars, Counselors

Note: Permissions listed in the table are only related to Naviance eDocs. Additional permission recommendations by user role are outlined in the **Permissions Checklist** in the Help Library. Detailed information about managing user roles and permissions is provided in the **Configuring Naviance for Schools** training course.

Family Connection Settings

If you want students to use Family Connection to manage the college application process (request transcripts and teacher recommendation letters or maintain a college application list), those settings must be turned on in Naviance.

Common App Matching and Application List Settings

The settings can be managed from **Connections > Family Connection > Select and Update Optional Features**. To enable a feature, check the box to select the grade level for which students you want to see that feature and click the **Update Features** button. Explanations of the features related to eDocs are listed in the table below.

Family Connection Settings		What does this feature do?	For which grade levels will you enable this feature?
Colleges tab			
Common App Account Matching	Allows students to match their Common App account so the school can send documents to Common App via eDocs.	<input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	
Student Edit Permissions			
Add active applications	Allows students to add applications to their Colleges I'm Applying To list	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	
Edit active applications	Allows students to edit applications on their Colleges I'm Applying To list	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	
Delete active applications	Allows students to delete applications from their Colleges I'm Applying To list	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	
Mark applications as submitted by the student	Allows students to indicate if they have submitted their application for a college on their Colleges I'm Applying To list	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	
Update which college the student is attending	Allows students to choose a college from their Colleges I'm Applying To list that they will be attending	<input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> alumni	

Activity! Use the Family Connection Features table to check off which grade levels you will enable for each feature.

Options for Requesting College Application Materials

If you want students to request application materials in Family Connection, you can enable the options from Naviance.

How to turn on transcript requests:

1. Go to **Home > Transcripts Request Manager**.
2. Click the **Settings** tab.
3. Click the **Edit** button.
4. In the **General Family Connection Settings** section, select *Display transcript request status and allow students to request transcripts*.
5. Choose the grade levels you want to be able to request transcripts.
6. Click the **Save** button.

How to turn on teacher recommendation requests:

1. Go to **Home > Teacher Recommendations**.
2. Click the **Settings** tab.
3. Select *Students can request or cancel recommendations from Family Connection*.
4. Click the **Save** button.

Note: If you allow students to request teacher letters of recommendation, it is important to have your teacher list imported into Naviance.

Updating Student Data

There are attributes of the student record import that should be imported or updated prior to using Naviance eDocs each school year. Those attributes include:

- First Name
- Last Name (required)
- Date of Birth (required)
- GPA
- Counselor

Lesson 9: Conclusion

Lesson 9: Conclusion

Naviance eDocs is a cost- and time-saving tool that can ease the college application process for school staff, students and parents. Our partnerships with Parchment® and Common App allow us to securely send millions of documents each application season.

As you begin implementing eDocs, remember to think of your current process and how the features of eDocs can improve the process.

Each year we strive to enhance the eDocs product and as enhancements are released, we communicate those changes through e-mail, the Naviance Network and webinars.

Additional Resources

If you need additional information about Naviance eDocs, 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.

Appendix: Document Descriptions

Student-Specific Documents in Naviance eDocs

The table below provides a description of each document that can be prepared and submitted via Naviance eDocs.

Counselor Documents

Document Name	Description	eDocs Requirements	Form or Upload?
Initial Documents			
Common App School Report	A secondary school report specific to Common App destinations that includes school information, and academic ability and achievement for the student.	<ul style="list-style-type: none"> Can only be sent to Common App destinations Must be sent with initial documents (initial transcript, written evaluation, and school profile) 	
NACAC School Report	A secondary school report created by the National Association for College Admission Counseling (NACAC) that includes school information, and academic ability and achievement for the student.	<ul style="list-style-type: none"> Can be sent to any electronic destination (non-Common Application) 	
Other School Report	A secondary school report that is provided by the college to which the student is applying.	<ul style="list-style-type: none"> Can be sent to any electronic destination (non-Common Application) 	
Written Evaluation	The <i>counselor's</i> written recommendation for a student.	<ul style="list-style-type: none"> Can be sent to any destination For Common App destinations, must be sent with initial documents (Common Application SR, initial transcript, and school profile) 	
Leaving Exam Results	A document that contains a student's scores and whether they demonstrated proficiency in particular subjects that is used for schools where promotion from grade to grade is based on national exams.	<ul style="list-style-type: none"> Can be sent to any destination For Common App destinations, required if you have indicated that promotion within your school's education system is based on standard leaving exams given at the end of lower and/or senior secondary school by a state or national exams board and must be sent with initial documents. 	
Current Year Courses	A document that contains a list of the student's current year courses, if those courses are not listed on the accompanying transcript.	<ul style="list-style-type: none"> Can be sent to any destination For Common App destinations, required if student's current courses are not included on the initial transcript and must be sent with initial documents. 	

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Counselor Documents (continued)

Document Name	Description	eDocs Requirements	Form or Upload?
Optional Documents			
Common App Optional Report	An optional report specific to Common App destinations that can be sent to provide student information anytime between the initial and final document submissions.	<ul style="list-style-type: none"> ➤ Can only be sent to Common App destinations ➤ Must be sent with the Optional Transcript or Grade Report/Report Card 	
Other Optional Report	An optional school report that is provided by the college to which the student is applying.	<ul style="list-style-type: none"> ➤ Can be sent to any electronic destination (non-Common App) 	
Grade Report/Report Card	A grade report is a report that shows interim grades for courses that are in progress. A grade report is usually sent after the first marking period of the senior year, especially for students who are applying Early Decision or Early Action.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must be sent with the Common App OR 	
OR Explanation of Change	The explanation of change is to accompany the optional school reports if a change in disciplinary history has been indicated on the report. The explanation of change should be used to provide details about the disciplinary history, change of grades, or correction of a transcript.	<ul style="list-style-type: none"> ➤ Can only be sent to Common App destinations ➤ Must be sent with the Common App OR, and either an Optional Transcript or Grade Report/Report Card ➤ Required if a change is indicated on the Common App OR 	
Mid-year Documents			
Common App Mid-year Report	A mid-year report specific to Common App destinations that can be sent to provide student information anytime between the initial and final document submissions.	<ul style="list-style-type: none"> ➤ Can only be sent to Common App destinations after the initial documents have been sent via eDocs ➤ Must be sent with the Mid-year Transcript 	



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Counselor Documents (continued)

Document Name	Description	eDocs Requirements	Form or Upload?
Mid-year Documents			
NACAC Mid-year Report	A mid-year school report created by NACAC that includes school information, and academic ability and achievement for the student.	<ul style="list-style-type: none"> Can be sent to any electronic destination (non-Common App) 	
Other Mid-year Report	A mid-year school report that is provided by the college to which the student is applying.	<ul style="list-style-type: none"> Can be sent to any electronic destination (non-Common App) 	
MR Explanation of Change	The explanation of change is to accompany the mid-year school reports if a change in disciplinary history has been indicated on the report. The explanation of change should be used to provide details about the disciplinary history, change of grades, or correction of a transcript.	<ul style="list-style-type: none"> Required if a change is indicated on the Common App MR Can only be sent to Common App destinations Must be sent with the Common App MR, and a Mid-year Transcript 	
Final Documents			
Common App Final Report	A final report specific to Common App destinations that can be sent to provide final student information after initial documents have been sent.	<ul style="list-style-type: none"> Can only be sent to Common App destinations after the initial documents have been sent via eDocs Must be sent with the Final Transcript 	
Other Final Report	A final school report that is provided by the college to which the student is applying.	<ul style="list-style-type: none"> Can be sent to any electronic destination (non-Common App) 	
FR Explanation of Change	The explanation of change is to accompany the final school reports if a change in disciplinary history has been indicated on the report. The explanation of change should be used to provide details about the disciplinary history, change of grades, or correction of a transcript.	<ul style="list-style-type: none"> Required if a change is indicated on the Common App FR Can only be sent to Common App destinations Must be sent with the Common App FR, and a Final Transcript 	

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Teacher Documents

Document Name	Description	eDocs Requirements	Form or Upload?
Common App Teacher Evaluation	An evaluation form specific to Common App and completed by the teacher making the recommendation for the student.	<ul style="list-style-type: none"> ➤ Can only be sent to Common App destinations 	
Letter of Recommendation	A <i>teacher's</i> written recommendation for a student.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must accompany the Common App Teacher Evaluation 	

Transcripts

Document Name	Description	eDocs Requirements	Form or Upload?
Initial Transcript	An official record of a student's work, showing courses taken and grades achieved.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must accompany the Common App SR 	
Optional Transcript	A transcript that reflects additional work completed by the student after the initial transcript is submitted. An optional transcript might be sent if you sent the student's end of junior year grades as the initial or if your school is trimester based.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must accompany the Common App OR (unless a Grade Report/Report Card is being sent) 	
Midyear Transcript	A transcript that reflects additional work completed by the student after the initial transcript is submitted. A midyear transcript may be optional or required, depending on the application requirements of the college.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must accompany the Common App MR 	
Final Transcript	A final record of a student's work completed the year before the student attends a college.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must accompany the Common App FR and should only be sent to the student's attending college 	
Transfer Transcript	Transcripts from previous schools the student has attended.	<ul style="list-style-type: none"> ➤ Can be sent to any destination ➤ For Common App destinations, must be sent with the initial documents ➤ Maximum: Three transfer transcripts per student 	

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