LAUSD: Naviance eDocs Workbook and Technical Job Aide

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Lesson 1: Naviance eDocs Overview

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

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 2,000 participating colleges and universities – including every member of the Common Application.

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

Hobsons has partnered with the Common Application and Parchment 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.

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.

Student	School	Follow-up
Register with Common App after Aug. 1st	Manage student requests for teacher recommendations and transcripts	Counselor: Prepare and send optional/mid-year materials (if applicable)
Enter high school information, add at least one college, and sign the FERPA Release Authorization on the Common App	Prepare school-level documents (i.e. School Profile, School Information form)	Student: View status of requested materials. Update results and indicate attending college
Complete the Common App Account Matching process in Family Connection	Prepare student-specific documents (school reports, transcripts, teacher recommendations, etc.)	Counselor: Prepare and send final documents to student's attending college
Add colleges to the Colleges I'm Applying To list in Family Connection	Send documents	
Request materials for college applications in Family Connection (teacher recommendations/transcripts)	Track submitted documents	

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?

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.

Document Requests

Students can request the following college application materials:

- Transcript
- Teacher Letter of Recommendation
- Other Documents

Requesting Transcripts

There are different ways a student can request initial transcripts in Family Connection:

- 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 in Family Connection:

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

Note: Students will not request Letters of Recommendation from their Common Application account unless it is for an Outside Recommender.

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 and Colleges tab in 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.

Student Folder – Colleges Tab

From the Colleges tab of the student folder, you can view the colleges the student is applying to as well as their requests for teacher recommendations.

Lesson 4: Preparing 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 documents 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 once per school year and will be available for all students in Naviance.

Note: There can only be one version of each school-level document at a time.

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. Uploading School Profile 1. Open any student folder. 2. Click the eDocs tab. 3. Locate School Profile in the eDocs Options menu. 4. If the document has not been uploaded, click the Upload File button. You can also replace at any time by clicking the Replace or Delete buttons. 5. Click Browse to locate the document to upload. 6. Click Upload File. 7. Once the form has been completed, it will be indicated with a green check mark in the eDocs Options menu.

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 Information Form 1. Open any student folder. 2. Click the eDocs tab. 3. Locate School Information in the eDocs Options menu. 4. If the document has not been prepared, click the Prepare Form button to begin preparing the document. You can replace at any time by clicking the School Information link. 5. Complete the form. 6. Click the Save button. 7. Once the form has been completed, it will be indicated with a green check mark in the eDocs Options menu.

Uploading Multiple Transcripts

To upload multiple transcripts:

1. Export a bulk transcript file that contains your transcripts.
2. Click the Multiple Transcript Manager link in the eDocs Options menu.
3. Click the Upload a New File button.
4. Click the Start Uploading button.
5. Select the transcript type and class year.
6. Either drag-and-drop or upload your transcript file.
7. Once your file says Upload Complete, you will see the option to Begin Matching.
8. Once matching is complete, click the Review Transcripts button to see a high-level summary of matched and unmatched transcripts.
9. Click on any red unmatched transcript to view the details and search for the student.
10. Once matching is complete, click the + Add Matches to eDocs button.

Note: The Multiple Transcript Manager is also accessible on the home page of Naviance under Quick Links.

Student-Specific Documents

When preparing documents that contain information about a single student, you will be working with student-specific documents in Naviance eDocs. There are three categories of student-specific documents: Counselor Documents, Teacher Documents, and Transcripts.

Initial Documents

Counselor Documents
• Common App School Report
• Common App Counselor Recommendation
• 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

Optional Documents

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.

Mid-year Documents

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 Documents

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.

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.

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** student-specific documents:

1. Open a student folder.
2. Click the eDocs tab.
3. Navigate to the Prepare section.
4. Click the Add button for Counselor Documents, Teacher Documents, or Transcript.
5. Click the Upload a File button.
6. Choose All Applications or select a specific college from the Application drop down list
7. Choose a file type from the Type drop down list
8. Click Browse to locate the document to upload
9. Click the Upload File button.
10. Once prepared, the document will appear and be checked off in the checklist. If you need to view, replace, or delete a document, click the corresponding button in the Actions column. Note: If you upload a new document in place of one that is already prepared for the student, the new document will override the existing file.

To **prepare** student-specific documents:

1. Open a student folder.
2. Click the eDocs tab.
3. Navigate to the Prepare section.
4. Click the Add button for Counselor Documents, Teacher Documents, or Transcript.
5. Click the Prepare a Form button.
6. Select the form type from the drop-down list, and then click Prepare Form.
7. Choose All Applications or select a specific college from the Applications.
8. Click Save button.
9. Once prepared, the form will appear and be checked off in the checklist. If you need to view, replace, or delete a form, click the corresponding button in the Actions column.

Lesson 5: Sending 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:

Go to the student folder whose materials you are sending.

1. Click the eDocs tab.
2. 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, Common App requires certain documents to be grouped together. You can view these groupings on the Send Forms page. 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.
3. Click Review and Submit to continue.
4. The Review and Submit Documents page appears. From this page, you can the documents that will be submitted. After you review the materials, click the Submit button to send them.
5. The Submission Status page appears. A history of submissions for the student appears.
6. Materials submitted to electronic destinations will be tracked by an ID number.
   a. Materials submitted to Common Application destinations will be tracked, but will not display an ID number.
   b. Materials for print/mail-only destinations will indicate printed; documents can be printed individually by clicking the view button.

Note: Date of birth is a required field for sending materials electronically.

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 you will find a notification in the Application Manager. 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.

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 section 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: 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.

Lesson 7: 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 Activate - Naviance eDocs section 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 Common Application Settings 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 changes the student makes to their applications on the Common Application.

   Note: 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 be sent through eDocs.

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 Permission	Description	Recommended for...
View all teacher recommendation forms	User can view teacher recommendations created by any user	Admin only
View counselor documents 9SR, OR, MR, FR forms)	User can view counselor documents created by any user	Admin only
View all teacher req requests	User can view all teacher rec requests listed in the Teacher Recommendation Manager.	Counselors, Admin
View my teacher rec requests	User can prepare teacher recommendations	Teachers
Prepare counselor documents (SR, OR, MR, FR forms)	User can prepare counselor documents	Counselors
Upload single transcripts	User can upload a single transcript	Registrars, Counselors
Upload multiple transcripts	User can upload multiple transcripts	Registrars, Counselors
Submit all teacher recommendation forms	User can send teacher recommendations created by any user	Admin only
Submit my teacher recommendation forms	User can send their own teacher recommendations	Teachers
Submit counselor documents (SR, OR, MR, FR forms)	User can send counselor documents created by any user	Counselors

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		
Request Letters of Recommendation	Allows students to request teacher letters of recommendation	☐9 ☐10 ☐11 ☐12 ☐alumni
Common App Account Matching	Allows students to match their Common App account so the school can send documents to Common App via eDocs	☐11 ☐12 ☐alumni
Student Edit Permissions		
Add active applications	Allows students to add applications to their Colleges I'm Applying To list	☐9 ☐10 ☐11 ☐12 ☐alumni
Edit active applications	Allows students to edit applications on their Colleges I'm Applying To list	☐9 ☐10 ☐11 ☐12 ☐alumni
Delete active applications	Allows students to delete applications from their Colleges I'm Applying To list	☐9 ☐10 ☐11 ☐12 ☐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	☐9 ☐10 ☐11 ☐12 ☐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	☐9 ☐10 ☐11 ☐12 ☐alumni

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. Note: It is necessary to select this option when Common App Integration has been turned on, as students will not request Letter for Recommendation from their Common App account.
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.

Lesson 8: 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:

- Counselor Community – collaborate with other Naviance users
- 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.

Miscellaneous

Common App

- If a student adds a Common App destination to their list that is not CA only and does not indicate whether or not he/she is applying via Common App, the default will be CA delivery.

- In order for the CA matching screen to appear in FC, eDocs must be activated, the student assigned to a counselor and the CA Matching feature checked on the Select and Update Optional Features page.

- For CA matching, the student's email does not have to be the same one that they have listed in Naviance. The only requirement is that the email used to register on the CA site is the same as the one that is entered in FC during matching.

- Date of birth must be the same for the student in Naviance and Common App in order to successfully match.

- Requests made for teacher LOR via Family Connection will not display in the student's CA account. Once LOR is submitted via eDocs, students will see the status in CA.

Documents

- All documents uploaded into eDocs have a 500K-size limit.

- Teacher documents can be sent before, after or at the same time as the counselor documents.

- Possible reasons documents are grayed out and unable to be checked: 1) The document has not been uploaded or prepared. 2) The student is missing a date of birth. 3) For CA destinations, there may be a missing required document. 4) For CA destinations, the student has not added the school to their CA list. 5) For CA destinations, the student has not completed the CA matching process.

- Once a document (other than transcript) has been submitted to a college, it cannot be removed in eDocs.