eDocs Implementation Planning Workshop

Students

Task	Who?	When?	What/How?
Determine Student Process			**Option 1:** Student will add colleges to 'Colleges I'm Applying To' list and request transcripts from this section **Option 2:** Student will add colleges to 'Colleges I'm Applying To' list. All colleges added to this list will automatically receive transcripts (no additional request required) **Option 3:** Paper Request form and colleges/transcript request added by staff. Student could build out a list of prospective colleges that they are thinking about applying to in the 'Colleges I'm Thinking About' section. Once they decide which colleges they're applying to student will complete the transcript request form and provide completed form to the counselor (in person or via email)
Student Communication Plan (Juniors)		Spring	
Student Communication Plan (Seniors)		Fall	

Approved by Derrick Chau, Senior Executive Director of P-12 Instruction

HOBSONS

Teachers

Task	Who?	When?	What/How?
Determine Teacher Process			1. Do you want your teachers to use Naviance eDocs to submit LOR? 2. Will you allow teachers to submit their own LOR or will a counselor/registrar submit for them?
Review and Update Teacher List			Gear Icon > Setup > Manage Teacher List
Communication to Teachers			
Training Teachers			

HOBSONS

Counseling Staff

Task	Who?	When?	What/How?
Create and turn on Brag Sheet survey			
Activate eDocs		May-June	This only needs to be completed once per year. MUST be completed before September 15th. This will also be the step during which you will choose to opt-in or opt-out of the Common App Integration for your school.
Update Family Connection Welcome Message w/ CA Video & Senior Expectations		Turn on Aug 1st	
Review/Update School Profile and Upload to Naviance		After July 15th	This only needs to be completed once per year
Complete School Information Form		After July 15th	This only needs to be completed once per year

HOBSONS

Counseling Staff Cont.

Task	Who?	When?	What/How?
Prepare Common App School Report and/or NACAC School Report			
Multiple Transcript Upload (for Initial Transcripts)			When is the last day that schedules can be changed?
Submit Initial materials (school profile, SR, transcript)			
Counselor Written Evaluations			• Do counselors write LOR for all of their students? • Should students request LOR from counselors?
Plan for handling colleges that do NOT accept forms electronically			

HOBSONS

End of the Year Planning

Task	Who?	When?	What/How?
Senior Graduation Survey			Will you use the built in survey? Or create a custom graduation survey'?
Uploading Final Transcripts			Which report or tool will you use to determine where to send final transcripts (e.g. Transcript Request Manager, Application Manager, College Matriculation Report, Applications by College/Student, Student Outcome List)?
Preparing Common App Final Year Report			
Submitting Final Documents			

HOBSONS