

Welcome to the Naviance
PowerSchool PowerUp!



PowerUPs

August 21st, 2024

Today's Agenda

- Welcome and Overview
 - PowerUp Overview & Introductions
 - PowerSchool Community
 - Help Center and IDEAS
- Getting your Naviance Site Ready
 - How to update student configuration
 - How to update welcome messages
 - How to clean up staff accounts
- eDocs
 - Review preferences
 - Key best practices to kick-off the school year
- Reports 3.0
 - Overview & Key Features
- Q&A



Education Impact Consultants (EICs)



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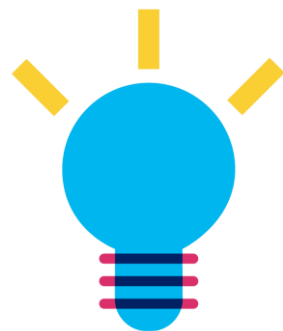
What are PowerUps?

Naviance by PowerSchool Webinars led by the EIC team

PowerSchool PowerUps



**Recurring meeting with
PowerSchool Education
Impact Consultants**



**Learn about recent
product releases,
roadmap, & integrations**



**Hear from PowerSchool
experts on seasonal,
best practice topics**



**Collaborate, network,
and share best practices
with other
PowerSchool districts**

PowerUp Communication through PowerSchool Community

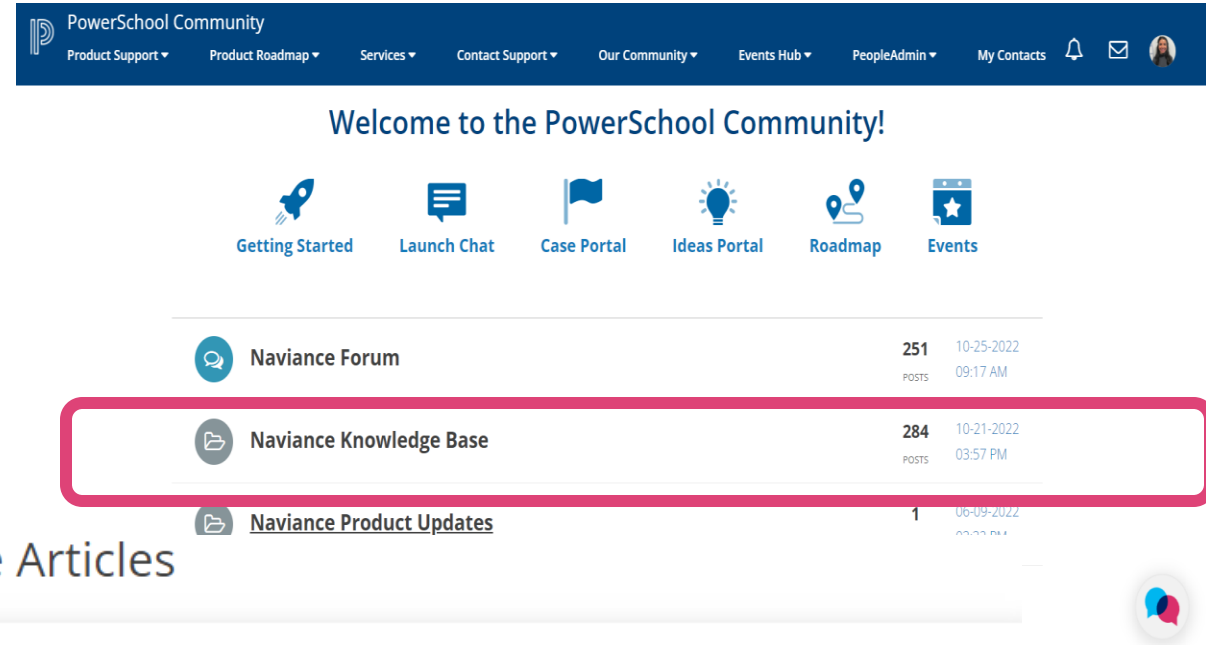
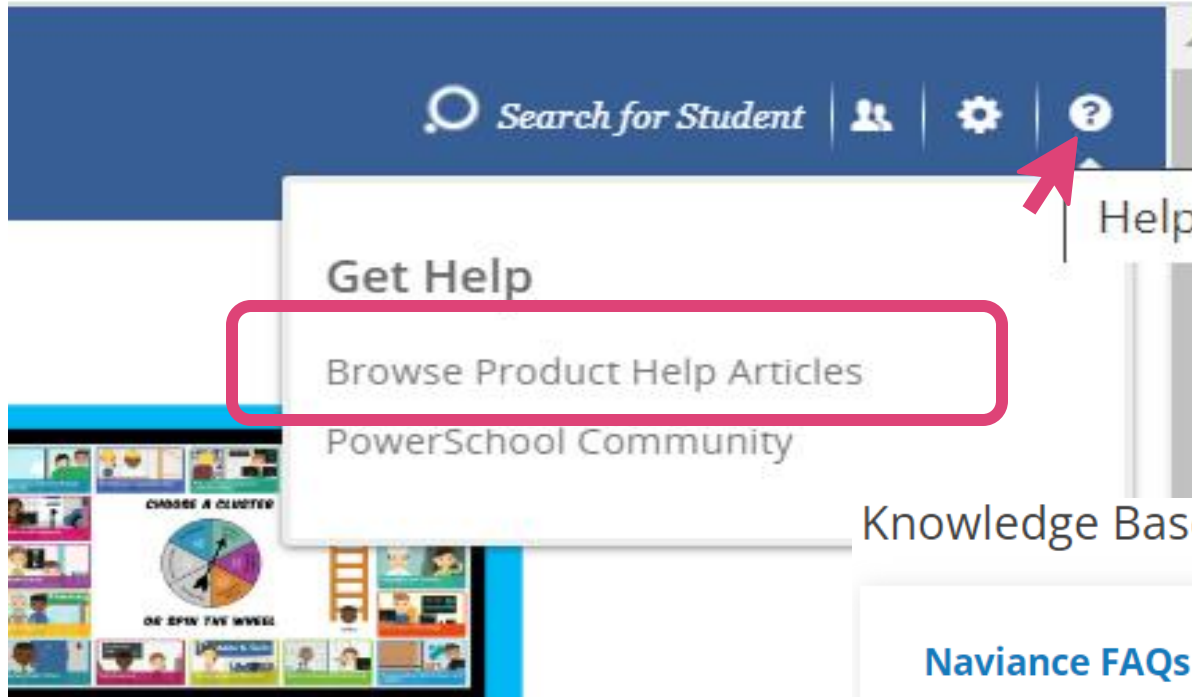
PowerSchool Community Page

- Shared EIC resources
- Post updates
- Access Recordings
- Register for other PowerSchool PowerUp events



PowerUp Communication through PowerSchool Community

- **Naviance Forum** in PowerSchool Community



Knowledge Base Articles

Naviance FAQs (30 Articles)

Applications were submitted successfully...

[Q&A: Staff can not access the Counselor...](#)

[Q&A: Students not have a college listed...](#)

[Q&A: NSC File Delivery Timeline](#)

[Q&A: Data Fields in NCS File That...](#)

Naviance Webinars (47 Articles)

[Register Now for Naviance PowerUps:...](#)

[Register Now for Naviance Fall 2023...](#)

[Client Office Hours on Surveys 3/23/23](#)

[Watch Now! Naviance Spring 2023...](#)

[Watch Now! Naviance PowerUps - 2023](#)

Contacting Support, Help Center, & Other Resources

- **Help Center**

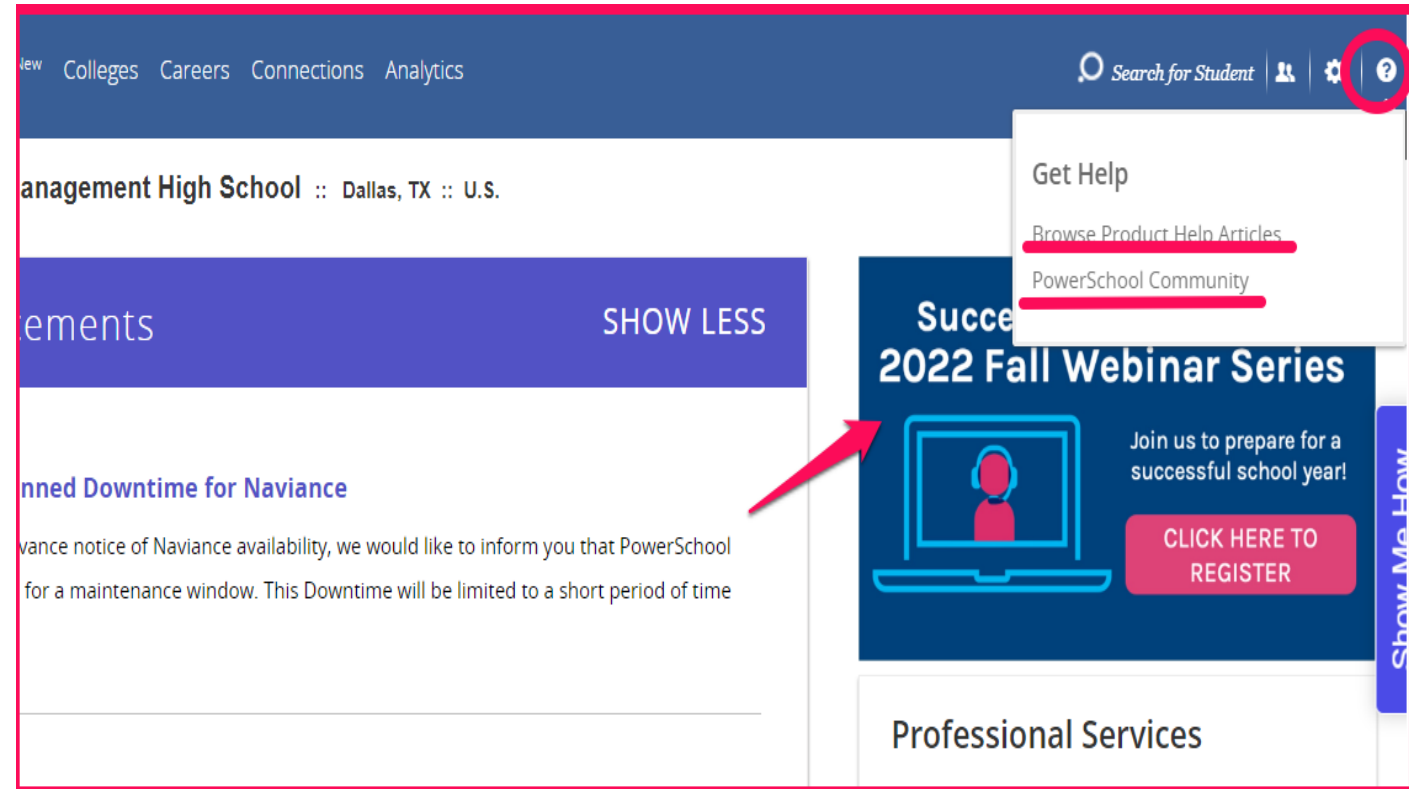
- Question mark in top right >> Browse Product Help Articles
- Videos, how-to documents, student-facing materials, webinar recordings, etc.

- **PowerSchool Support**

- Open a case or CHAT live within the PowerSchool Community
- 866-337-0080 option 2

- **Webinars**

- PowerUps
- Free Webinars – register within your Naviance Accounts



Professional Services

PowerSchool professional services offerings are designed to help you make the most of your PowerSchool solutions and increase your efficiency so that your staff can remain focused on student outcomes.



Services

Dedicated experts guide you through the collaborative implementation process to cater a plan that fits your school or district's needs and provide recommendations based on implementations at similar schools or districts.



Customer Education

Naviance Professional Development offers teachers, counselors, principals, and administrators the knowledge and skills needed to fully realize the value of Naviance. Services are delivered via a proven training curriculum, catered to the modules being deployed, in digestible and flexibly scheduled lessons to increase command and flatten the learning curve.

Interested in optimizing the *Course Planner* tool?

- **Part A for Site Administrators**

- 2-hour Exclusive Remote course for up to 20 individuals
- \$650 (\$325 per hour)
 - Learn to confirm Course Planner settings by:
 - Managing user permissions
 - Preparing the course catalog
 - Managing plans of study and career pathways
 - Managing student course data

- **Part B for Counselors**

- 2-hour Exclusive Remote course for up to 20 individuals
- \$650 (\$325 per hour)
 - Explore the course planning process in Naviance and Naviance Student
 - Learn to manage and customize the course planning process for students:
 - Configuring course settings
 - Approving student plans
 - Exporting course plans for analysis

? Contact ServicesSolutions@powerschool.com for details

Permissions and Access for Reports 3.0

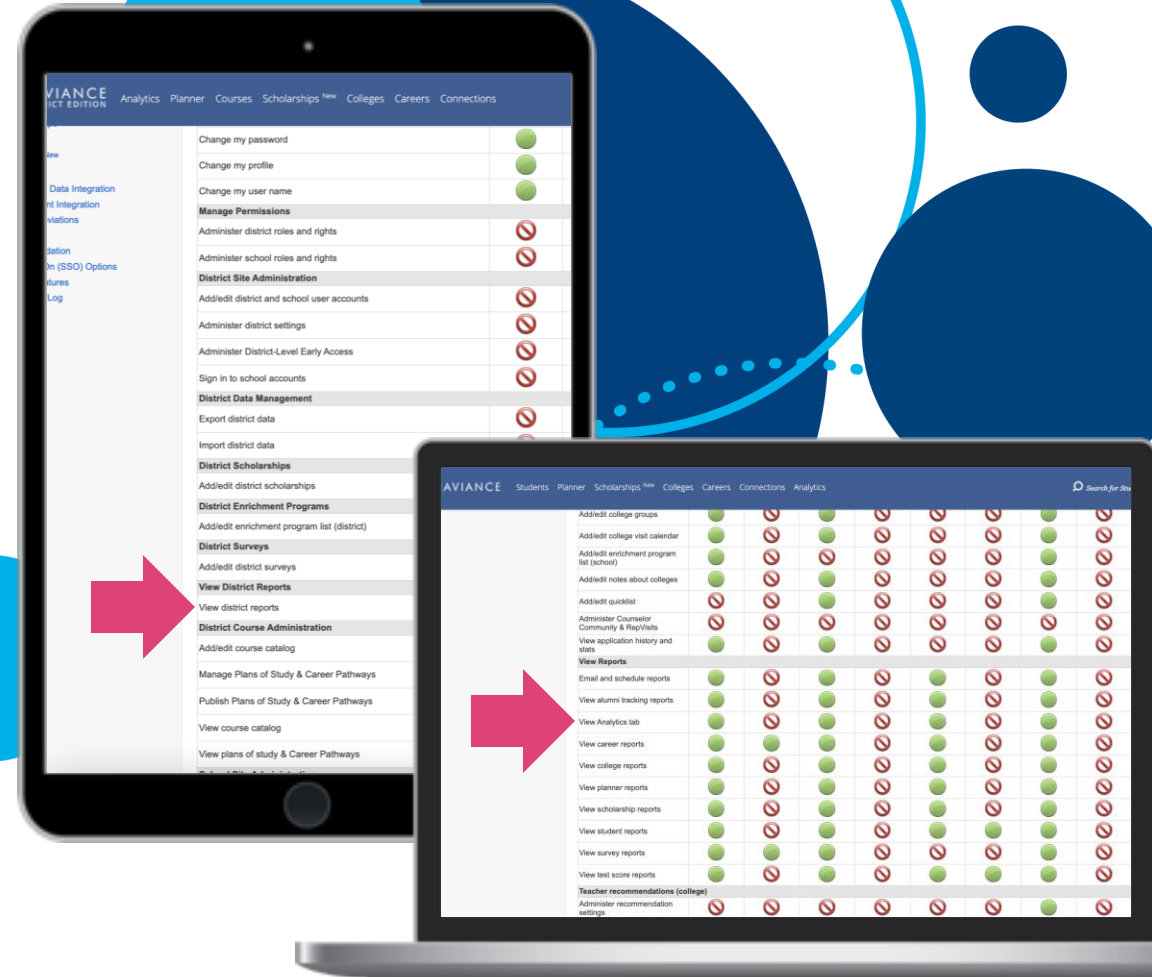
Permissions

For district users to access Reports 3.0:

- Enable *View district reports* permission for user role(s)

For school users to access Reports 3.0:

- Enable *View Analytics tab* permission for user role(s)



Access

To access Reports 3.0:

- Hover over *Analytics* tab in the top navigation
- Select **Reports 3.0** from the menu options

The screenshot displays the NAVIANCE BY POWERSCHOOL web application. The top navigation bar includes tabs for Students, Planner, Courses, Scholarships, Colleges, Careers, Connections, and Analytics. A search bar is located to the right of the navigation bar. On the left side, there is a Filters panel with various checkboxes. The main content area is titled 'Reports 3.0' and contains a table of reports. A dropdown menu is open over the 'Analytics' tab, with a red arrow pointing to the 'Reports 3.0' option.

Naviance Report Name	Category	Description
Student Data	General	Detailed student information.
Parent Data	General	Detailed parent information.
Task Data	Planning	District- and school-level tasks.
Task Completion Summary	Planning	Aggregate student completion data by task.
Task Activity Summary by Student	Planning	Aggregate task completion data by student.
Student Task Activity Detail	Planning	Detailed information for assigned tasks.
Students with No Tasks	Planning	Students without assigned tasks.
Programs Data	Planning	District- and school-level programs.
Program Completion Summary	Planning	Aggregate student completion data by program.
Program Summary by Student	Planning	Aggregate program completion data by student.
Student Program Activity Detail	Planning	Detailed information for assigned programs.
Students with No Programs	Planning	Students without assigned programs.

Reports 3.0



Reports 3.0

- Reports 3.0 provides access to all data currently available across Naviance's 4 reporting solutions in **one centralized reporting solution**
- It features **simplified data** in a table format with easy exportability
 - No visuals, charts or graphs
 - Desired data points within a single report can be accessed with a single click
- Simplified **filtering** options
- Clean and **easy to navigate** report formatting
- **Aggregate and student-level** data visibility.

Phase 1 – Already Released Features!

- Success Planner Reports
- College and eDocs Reports
- User Information and Usage





Phase 2 – Already Released Features!

- Assessment Reports
- Plans & Outcomes Reports
- Scholarship Reports
- Course Planner Reports
- Careers Reports

★ Users also can save user-specific custom reports!

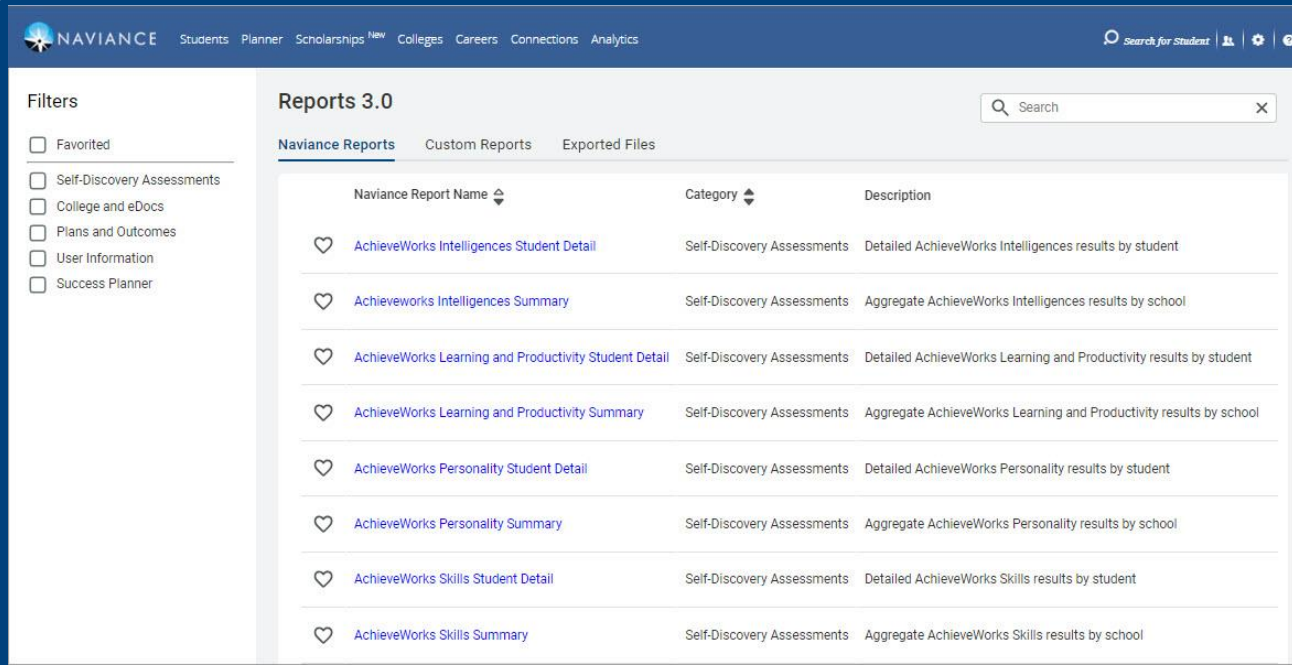
Let's Dive In – Reports 3.0: Recent Updates

- **Introducing Custom Reports**
- **Creating Custom Reports**
- **Review and Manage Custom Reports**

Introducing Custom Reports

○ Goal:

- Streamline future reporting using Custom Reports in Reports 3.0



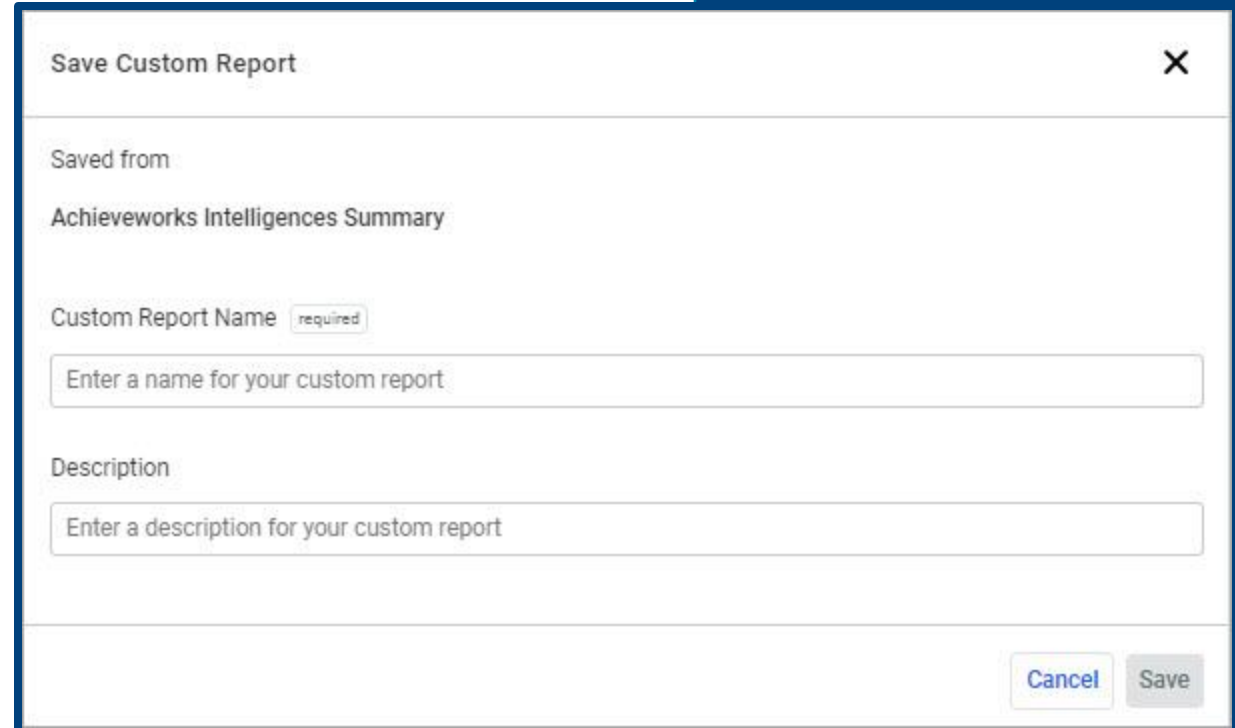
The screenshot displays the NAVIANCE Reports 3.0 interface. The top navigation bar includes links for Students, Planner, Scholarships, Colleges, Careers, Connections, and Analytics. A search bar is located in the top right corner. On the left side, there is a 'Filters' panel with several checkboxes: Favorited, Self-Discovery Assessments, College and eDocs, Plans and Outcomes, User Information, and Success Planner. The main content area is titled 'Reports 3.0' and features a search bar. Below this, there are three tabs: 'Naviance Reports', 'Custom Reports', and 'Exported Files'. The 'Custom Reports' tab is active, showing a table of reports. A pink arrow points to the right side of the table.

Naviance Report Name	Category	Description
AchieveWorks Intelligences Student Detail	Self-Discovery Assessments	Detailed AchieveWorks Intelligences results by student
AchieveWorks Intelligences Summary	Self-Discovery Assessments	Aggregate AchieveWorks Intelligences results by school
AchieveWorks Learning and Productivity Student Detail	Self-Discovery Assessments	Detailed AchieveWorks Learning and Productivity results by student
AchieveWorks Learning and Productivity Summary	Self-Discovery Assessments	Aggregate AchieveWorks Learning and Productivity results by school
AchieveWorks Personality Student Detail	Self-Discovery Assessments	Detailed AchieveWorks Personality results by student
AchieveWorks Personality Summary	Self-Discovery Assessments	Aggregate AchieveWorks Personality results by school
AchieveWorks Skills Student Detail	Self-Discovery Assessments	Detailed AchieveWorks Skills results by student
AchieveWorks Skills Summary	Self-Discovery Assessments	Aggregate AchieveWorks Skills results by school

Creating Custom Reports

○ Goal:

- Choose your report and tailor it to your needs by applying filters and managing the data columns.
- Then, select “Save Custom Report,” name your report, and save for future use



The screenshot shows a dialog box titled "Save Custom Report" with a close button (X) in the top right corner. The dialog contains the following fields:

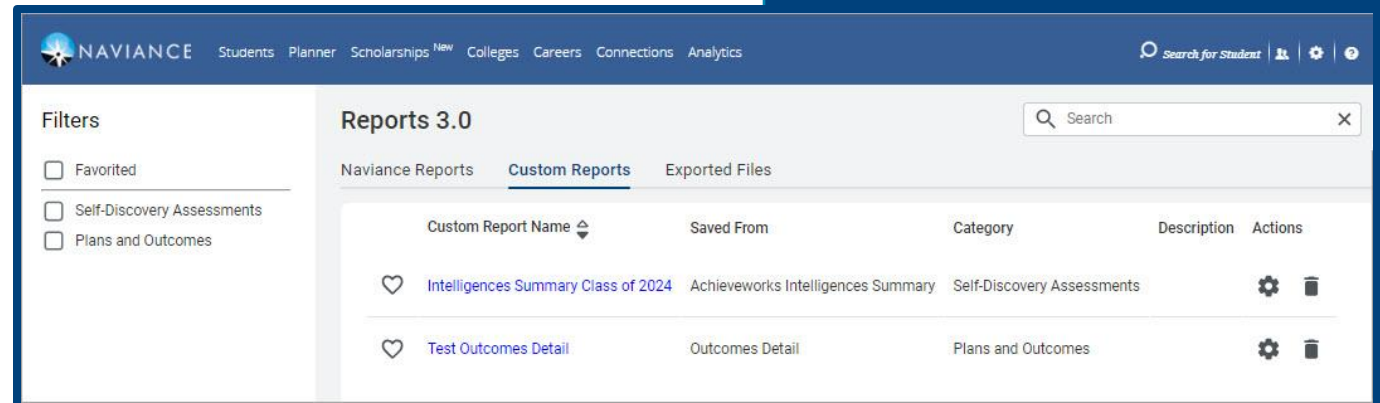
- Saved from:** Achieveworks Intelligences Summary
- Custom Report Name:** A text input field with a "required" label. The placeholder text is "Enter a name for your custom report".
- Description:** A text input field with the placeholder text "Enter a description for your custom report".

At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Review and Manage Custom Reports

○ Goal:

- From Reports 3.0, select “Custom Reports” and choose a report to review the latest data.
- Another option: Use actions to rename or delete a report

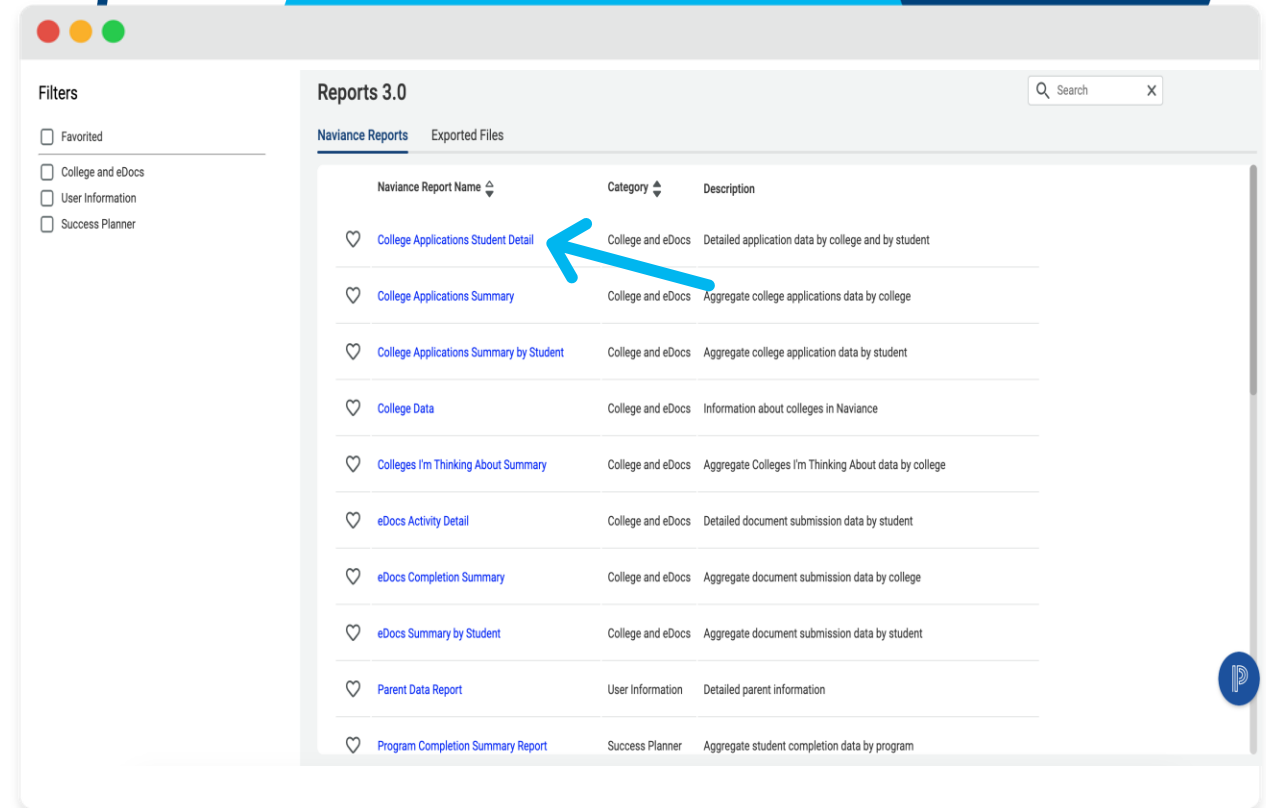


Exporting Reports

Exporting Reports

1. Choose your report

-For this example, I have chosen the **College Application Student Detail Report**



The screenshot shows the 'Reports 3.0' interface with a search bar and two tabs: 'Naviance Reports' and 'Exported Files'. A list of reports is displayed with columns for 'Naviance Report Name', 'Category', and 'Description'. A blue arrow points to the 'College Applications Student Detail' report.

Naviance Report Name	Category	Description
College Applications Student Detail	College and eDocs	Detailed application data by college and by student
College Applications Summary	College and eDocs	Aggregate college applications data by college
College Applications Summary by Student	College and eDocs	Aggregate college application data by student
College Data	College and eDocs	Information about colleges in Naviance
Colleges I'm Thinking About Summary	College and eDocs	Aggregate Colleges I'm Thinking About data by college
eDocs Activity Detail	College and eDocs	Detailed document submission data by student
eDocs Completion Summary	College and eDocs	Aggregate document submission data by college
eDocs Summary by Student	College and eDocs	Aggregate document submission data by student
Parent Data Report	User Information	Detailed parent information
Program Completion Summary Report	Success Planner	Aggregate student completion data by program

Exporting Reports

2. Choose your columns and filters

- Columns are located on the right and filters are on the left

This screenshot shows the 'College Applications Student Detail' report in the Naviance system. On the left side, there is a 'Filters' panel with a list of dropdown menus: Student Group, Current Grade Level (2 Filter(s) selected), Class Year, Ethnicity, Gender, Student Home Room Name, Student Name, FERPA Status, Common App Match Status, and College Name. A blue arrow points to the 'Filters' header. The main area displays a 'Report Preview' with a 'Column Selection' button in the top right. Below the preview, there is a message: 'Click Apply Filters or Export Data to review the data. Apply filters to customize the report.' An 'Export Data' button is located in the bottom right corner.

This screenshot shows the 'Column Selection' dialog box overlaid on the report preview. The dialog has a title bar with a close button (X) and a blue arrow pointing to it. The list of columns includes: Select All (18 of 78 selected), District Name, District ID, School Name (checked), School ID, School District Assigned ID, School Level, Student Name (checked), Student First Name, Student Last Name, Student Naviance Assigned ID (checked), Student School Assigned ID (checked), Student State Assigned ID, Student Current Grade Level (checked), Student Class Year, Student Ethnicity, Student Gender, Student Email, Student Rank, Student GPA, Student GPA Weighted, Student AP Honors Count, Student Decile, and Student Highest SAT. An 'Apply' button is at the bottom right.

Exporting Reports

3. Populate a Preview OR Export

You can populate a preview of your data by clicking the "apply filters" button at the bottom of the page or just export your data or both!

Filters

5 of 319 selected [Clear Filters](#)

- Student Group
- Current Grade Level (2 Filter(s) selected)
- Class Year
- Ethnicity
- Gender
- Student Home Room Name
- Student Name
- FERPA Status
- Common App Match Status
- College Name

College Applications Student Detail

Reports > College Applications Student Detail

Review detailed application data by college and by student

Current Grade Level | 11 | Current Grade Level | 12 | College Status | Active | Application Status | Active | Application Deleted Status | False

Report Preview [Column Selection](#)

Click **Apply Filters** or **Export Data** to review the data
Apply filters to customize the report.

Apply Filters **Export Data**

Exporting Reports

From any report:

- An **Export Data button** will provide ability to generate an export file
- **Confirmation email and on-page notification** will inform when file is ready for download
- Direct access to export file tab within reports by clicking on **Exported Files** button

The screenshot displays the 'Reports / Task Completion Summary' page. On the left, there is a 'Filters' sidebar with various dropdown menus for filtering data. The main content area shows a 'Task Completion Summary' report with a 'Report Preview' table. The table has columns for Student Name, Student ID, Student School ID, Student Email, Grade Level, Class Year, Task Requirement Type, and Task Status. A notification box is overlaid on the table, stating 'Data Export Processing' and 'You will receive an email and an in-product notification when your report is ready.' At the bottom of the report, there is an 'Export Data' button and a 'Save as Custom Report' button.

Student Name	Student ID	Student School ID	Student Email	Grade Level	Class Year	Task Requirement Type	Task Status
Beethoven, Ludwig	123456	121212	lb@east.edu	Grade 12	2023	Required	Complete
Beethoven, Ludwig	123456	121212	lb@east.edu	Grade 12	2023	Required	Complete
Beethoven, Ludwig	123456	121212	lb@east.edu	Grade 12	2023	Recommended	Complete
Koning (DND), Natalie	654321	567567	nk@east.edu	Grade 12	2023	Required	Complete
Koning (DND), Natalie	654321	567567	nk@east.edu	Grade 12	2023	Required	Complete
Koning (DND), Natalie	654321	567567	nk@east.edu	Grade 12	2023	Required	Complete
		121212	da@east.edu	Grade 12	2023	Required	Complete
		121212	da@east.edu	Grade 12	2023	Required	Complete
		567567	nn@east.edu	Grade 12	2023	Required	Complete
		567567	nn@east.edu	Grade 12	2023	Required	Complete

Exported Files Page

NAVIANCE BY POWERSCHOOL

Students Planner Courses Scholarships Colleges Careers Connections Analytics

Search for student

Categories

- Favorited
- Alumni Tracker
- Careers
- Colleges & eDocs
- Course Planner
- Curriculum
- Plans & Outcomes
- Scholarships
- Self-Discovery Assessments
- Success Planner
- Test Scores
- User Info & Usage

Reports 3.0

Naviance Reports Exported Files

File Name	Report Name	Category	Created On	Actions
StudentDataReport_04291989_122322.csv	Student Data Report	User Info	10/01/23	Download
ParentDataReport_04291989_122322.csv	Parent Data Report	User Info	09/28/23	Download
ParentDataReport_04291989_122322.csv	Parent Data Report	User Info	08/28/23	Download

From within Reports 3.0:

- Exported Files page allows access to all **previously exported files**
 - Files are **user-specific**
- Each exported file can be reviewed and **downloaded** from Exported Files

Getting your Naviance Site Ready for Back-to-School

Let's Dive In – Naviance Site

- **Review your Preferences!**
 - Student access to resources
 - Student ability to edit/update account
- **Update or create welcome messages**
- **Review/edit automatic reminders**
- **Review/update RepVisits and Counselor Community**
- **Clean up staff accounts for the new year**

Naviance Student Configuration

Connections > Naviance Student > Select & Update optional features

- Review visibility and edit access by grade level for your school for the following tools:
 - Self-Discovery Assessments
 - College Profiles
 - Common App Integration & LORs
 - Career Exploration
 - Student edit permissions – profile settings, and college processes
 - Scattergram options

Section/Feature	4	5	6	7	8	9	10	11	12	Alumni
Home Page	Manage Home page features using the options below									
Contact Me	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketplace->2VOL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self Discovery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AchieveWorks® Intelligences	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AchieveWorks® Learning & Productivity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AchieveWorks® Personality	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AchieveWorks® Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Career Interest Profiler	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Career Key	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Career Cluster Finder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
StrengthsExplorer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Courses Section	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View and edit course plans	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Colleges Section	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Request Letters of Recommendation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Application Milestones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Expected Application Difficulty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Profiles	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Search	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SuperMatch™ College Search	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
College Statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Match - Admission History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
College Match - Universal Overlaps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Match - ActiveMatch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Compare and Academic Match	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
College Maps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Naviance Student Welcome Messages

- **Connections > Naviance Student > Customize Welcome Message**
 - Update welcome messages by grade level
 - Welcome message now appear on the right-hand corner of the student landing page
 - This is a great to customize the homepage for students and share key details for the upcoming year

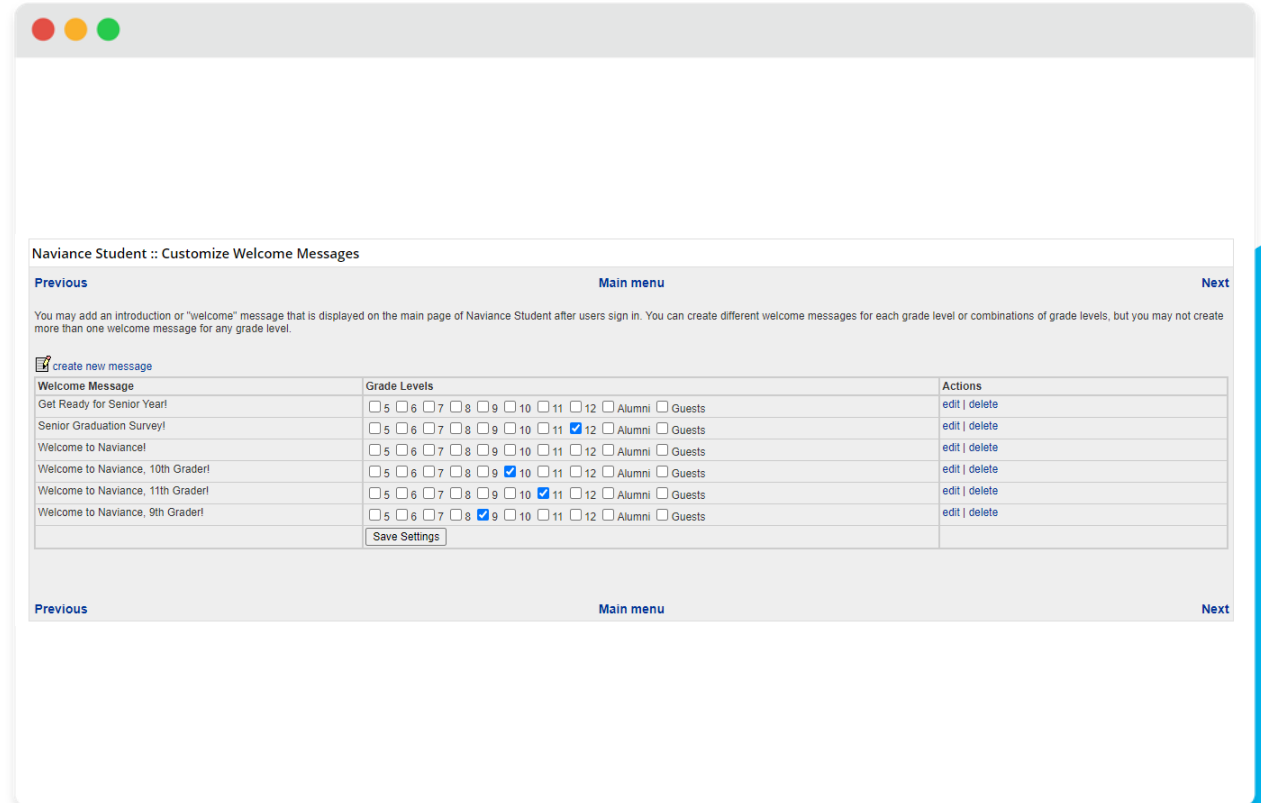
Welcome to Naviance

Welcome students to [Naviance!](#) We will be using Naviance for Career and College exploration! If you would like to setup a meeting with your teacher or counselor, please schedule a meeting using [Calendly here](#). 🙌👏



Let's connect on social!

Additional Information from Your School



Naviance Student :: Customize Welcome Messages

[Previous](#) [Main menu](#) [Next](#)

You may add an introduction or "welcome" message that is displayed on the main page of Naviance Student after users sign in. You can create different welcome messages for each grade level or combinations of grade levels, but you may not create more than one welcome message for any grade level.

create new message

Welcome Message	Grade Levels	Actions
Get Ready for Senior Year!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete
Senior Graduation Survey!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input checked="" type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete
Welcome to Naviance!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete
Welcome to Naviance, 10th Grader!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete
Welcome to Naviance, 11th Grader!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input checked="" type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete
Welcome to Naviance, 9th Grader!	<input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input checked="" type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> Alumni <input type="checkbox"/> Guests	edit delete

[Previous](#) [Main menu](#) [Next](#)

Naviance Student - Reminders

- **Connections > Naviance Student > Reminders**
 - Setup automatic reminders for Colleges visits scheduled via RepVisits or those manually entered – include students that have signed up for the visit as well as students who like the college/plan to apply
 - Setup automatic reminders for tasks if using the Planner > Tasks/Programs

The screenshot shows the 'Reminders' settings page in the Naviance Student interface. The page has a navigation bar with 'New', 'Colleges', 'Careers', 'Connections', and 'Analytics'. The main content is divided into two sections: 'Automated College Visit Reminders' and 'Automated Task Reminders'. In the 'Automated College Visit Reminders' section, there are two toggle switches: 'Remind students who have signed up on Naviance Student' (set to 'Off') and 'Remind students who have colleges in their active/prospective lists' (set to 'Off'). Below these is a 'Send notice' dropdown menu set to '24 hours (1 day)' ahead of time, and an 'Update Setting' button. The 'Automated Task Reminders' section has a 'School-wide task reminders are:' dropdown set to 'on'. Underneath, there are three radio button options for 'Send': 'weekly digest of all tasks due in the next 7 days', 'daily digest of all tasks due in the next day', and 'individual emails for each task that is approaching its due date; send 24 hours (1 day) before due date' (which is selected). There is also a checkbox for 'also email counselors to remind them when their self-assigned tasks are due' and an 'Update Task Reminders' button.

Naviance Staff Update - RepVisits

- **RepVisits Calendar SY24-25**
 - Update availability & settings – start & end dates for visits & publish calendar
 - Review Naviance Settings
 - Review/update access to RepVisits: **Gear Icon > Setup > User Admin > Manage Roles & Rights > Access Counselor Community & Administer Counselor Community & RepVisits**

The screenshot shows the Naviance RepVisits calendar interface. At the top, there are navigation tabs: Overview, Calendar (selected), Availability & Settings, College Fairs, Contacts, and Notifications & Tasks. Below the tabs, a message states: "Availability is currently **unpublished** and higher education representatives cannot see your high school in search results. **Publish?**".

The main content area displays the calendar for August 2024. On the left, there is a sidebar with a "VISIT" button and a small calendar grid. The main calendar grid shows the days of the month, with the current date (Today) highlighted. The calendar is currently set to "Month" view, with "Day" and "Week" options also visible. The calendar shows the following dates: 28 (Sunday), 29 (Monday), 30 (Tuesday), 31 (Wednesday), 01 (Thursday), 02 (Friday), 04 (Sunday), 05 (Monday), 06 (Tuesday), 07 (Wednesday), 08 (Thursday), and 09 (Friday). The days 03, 06, and 07 are shaded grey, indicating they are not available for visits.

At the bottom of the interface, there is a copyright notice: "© 2024 PowerSchool Group LLC. All Rights Reserved." and a link to "Terms of".

Naviance Staff Update – Counselor Community

- **Colleges > Counselor Community & Contacts**
 - Update/create your RepVisits profile
 - Connect with existing contacts part of Counselor Community
 - Add new college admission contacts

The screenshot displays the Naviance Counselor Community interface. At the top, there is a navigation bar with tabs for Overview, Calendar, Availability & Settings, College Fairs, Contacts, and Notifications & Tasks. Below the navigation bar, a message states: "Availability is currently unpublished and higher education representatives cannot see your high school in search results. Publish?". The main content area features a "Rep VISIT" section on the left and a calendar for August 2024 on the right. The calendar shows dates from 28 to 09, with the current date "Today" highlighted. The calendar interface includes navigation arrows, an "EXPORT" button, and view options for "Day", "Week", and "Month". At the bottom of the page, there is a copyright notice: "© 2024 PowerSchool Group LLC. All Rights Reserved." and a link to "Terms of".

Clean up staff accounts

- Make sure to remove staff: Teachers/Counselors that are no longer part of the school staff.
- Gear Icon > Setup > User Admin > Edit > Status: Inactive > Uncheck list of teachers/counselors > Update User
- Districts with Clever Staff Sync or PowerSchool SIS Staff integration active will **NOT** have to do this manually

Edit User

PERSONAL INFORMATION

Prefix: N/A

First Name: Maria (required)

Last Name: Arrazola (required)

Job Title: Teacher

Job Function: Teacher (required)

Federation ID:

Employee Id:

ACCOUNT INFORMATION

Status: Active

User Name: 15ce8f443

Naviance ID: a@hobsons.com

E-mail: maria.arrazola@hobsons.com (required)

Confirm E-mail: maria.arrazola@hobsons.com (required)

Permissions Role: Teacher IMPORTANT

Include in teacher list: User should appear in list of teachers

Include in counselor list: User should appear in list of counselors

Student View: User can view data for all students
 User can view data for assigned students only

When a user is in the counselor list and the option "User can view data for assigned to them. Students can be assigned to counselors in the counselor

Cancel Update User

eDocs Updates and Reminders

Let's Dive In - eDocs

- **Review your Preferences!**
 - Dates
 - Upload School Information Form & Profile
- **Key best practices**
- **Updated workflow for students no longer in the district**
- **Reminder – Previous Years Tab**

Preferences in Naviance

- Navigate to the gear icon
- Go to Setup
- Preferences
- eDocs
 - Customize Preferences for:
 - Common App Integration – *all schools actively using the integration will have this setting already ON*
 - First time users will have to turn on in BEFORE September 15th
 - You can turn off integration before October 15th
 - Student Recommendations
 - Transcripts


eDocs Best Practice #1

Common App *Update Active Applications List Status* = ON

- Gear Icon in top right >> Setup >> Preferences >> eDocs
- You can update this at any time.
- Without this turned on, students' lists of CA colleges may not be 100% accurate (materials send from CA to new schools once you've submitted materials to CA)
- Takes burden away from counselor.


Common App Integration

Common App must be turned ON by **Sep. 15 to opt-in**. Once on, you can turn the Common App integration off **one time** prior to **Oct. 15 to opt-out**.

Common App Integration Status: **ON** 

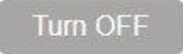
Not updated

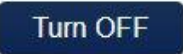
You are currently set up to track and send supporting documents for applications to Common App schools via Naviance eDocs.

Update Active Applications List Status: **ON** 

Not updated

Turning this setting ON will automatically add colleges from a student's Common App account to their active applications list in Naviance. You must have common app integration turned ON to turn on this feature.

Turn OFF 

Turn OFF 

Common App One-and-Done

- One-and-done is **specific to Common App**
- Documents that only need to be **submitted once** and are available to all **colleges student applied to**:
 - School Report
 - Counselor Recommendation
 - Fee Waiver
 - Midyear Report
 - Optional Report
 - Optional Report 2

The screenshot shows a user profile for Leonard Padilla "Leo" (2022, Grade 11, ID: RYH887290) with an active account. The interface includes a "Send Documents" section with a "View Key of Status Symbols" link and a "Print Documents" button. Below this is a "Common App" section with a "Submit Documents" button. The "Match Status" is "Matched" (checked), with CAID: 12293841 and FERPA Waiver: Waived. A "Refresh CA Data" button is also present. The "Documents Submitted to All Common Apps" section includes a "Fee Waiver Sign Waiver" link and a list of document types: School Report, Counselor Rec, Fee Waiver, and Mid-Year Report. The "Dr. Doolittle School of Medicine" section shows a "Regular Decision : Mar 01" deadline, "Teacher Recs: 0 min | 3 max", and "Required: Counselor Rec, Mid-Year Report". The "Submit Documents" button is highlighted in orange.

Each college will clearly state what documents are required – Counselor Rec and/or Mid-Year Report

Leonard Padilla "Leo"

2022 (Grade 11) ID

Assigned Counselor:

ent: [l.padi](#)

- Staff will see the 'one and done' documents that only need to be submitted once!
- Transcripts are automatically attached to corresponding Common App forms.

Documents

of Status Symbols

App

Matched  CAID: 12293841


ted to All Common Apps

mitted once for all Common Apps, but not delivered
ts.


the student's Common App List

App errors that need to be resolved before

School of Medicine

 School R

 Cour

 Teacher Rec

 Teach

When general requests are enabled:

Any teacher LOR that has been uploaded will show as available to submit (if there is not a specific request for that teacher, it will be noted with a 'Not Requested' indicator)

 Close




Submit Selected

Documents Available to Submit

Common App documents are "one and done" so you only need to submit them once. The exception to this are teacher letters of recommendation, the final report and early decision agreement.

[? Why are some documents unavailable for submission?](#)

Documents Sent to All Common Applications

Document	Recipients
<input checked="" type="checkbox"/> School Report	All Common App
 School Profile	
 Initial Transcript	
<input checked="" type="checkbox"/> Counselor Recommendation	All Common App
 Written Eval	

Teacher Recommendations

[Collapse All](#)

<input checked="" type="checkbox"/> Dr. Doolittle School of Medicine	0 submitted 1 required 3 allowed
<input type="checkbox"/> Teacher Name A	
<input type="checkbox"/> Teacher Name B	
<input type="checkbox"/> Teacher Name C	
<input type="checkbox"/> Teacher Name D	<u>Not Requested</u>
<input type="checkbox"/> Teacher Name E	
<input checked="" type="checkbox"/> Maves College	0 submitted 1 required 3 allowed
<input type="checkbox"/> Teacher Name A	
<input type="checkbox"/> Teacher Name C	

eDocs Best Practice #2

When completing the Counselor Rec ...

- There will be an **'I will not be sending an evaluation'** checkbox
 - When selected, will be presented with an open text field to provide additional details (if desired)
 - When **NOT** selected, will be required to attach a written evaluation
- **Best Practice: If not ready to send written evaluation when submit Counselor Rec, submit as attachment with Optional Report**

Leonard Padilla "Leo"
2022 (Grade 11) ID: RYH887290
Account Active
View as student

Assigned Counselor: Counselor Name Contact Student: lpadilla@school.com

Common App Counselor Recommendation

Personal Impressions

How long have you known this student and in what context? * 0 / 100

How do you know this student? How long have you known them?

What are the first words that come to your mind to describe this student? * 0 / 150

How would you describe this student?

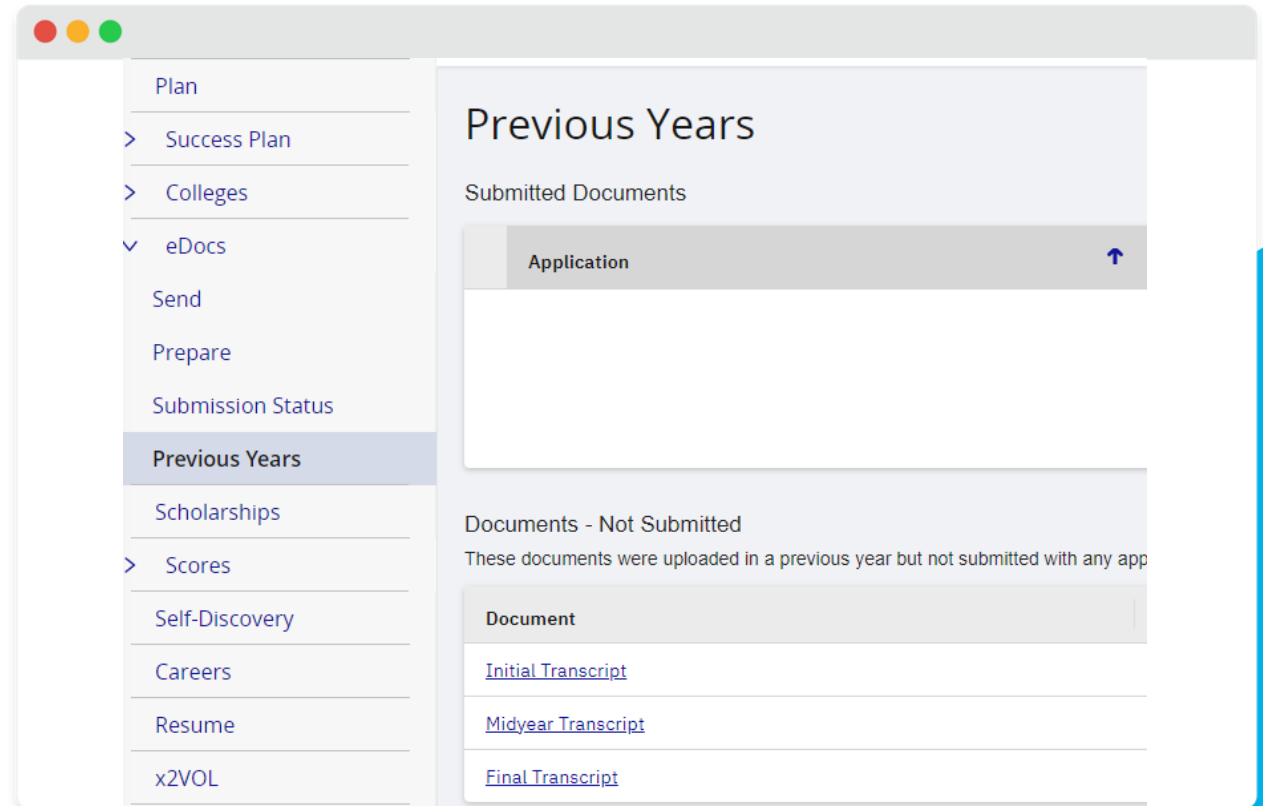
Counselor evaluations often provide invaluable context to a student's application. We recognize, however, that you may not be able to provide one. If you will not be providing a personal written evaluation, please check the box below to inform our member institutions that you will not supply a written evaluation. Note: You may substitute another school official's evaluation in place of one from you personally.

I will not be sending evaluation for this student

Counselor Rec is One-and-Done: Once submitted, CANNOT attach an evaluation and re-submit

Reminder: Previous Years Tab

- **eDocs > Previous Years Tab**
 - Review documents already submitted for students that graduated between 2020-2024.
 - Review documents uploaded but not submitted - such as final transcripts - for students that graduated between 2020-2024.
 - Review any document uploaded PRIOR to the Naviance rollover July 25th including current graduating class.



Common App Workflow Update

If a student transfers from a Naviance school to a non-Naviance school and the student updates their Common App account with the new school, any additional submissions the user attempts to send in Naviance from the previous school will fail. All submissions moving forward will need to take place at the student's new school. Failed submissions will fail with error code 422.116.

eDocs

Double check ...

- Make sure eDocs is turned ON, that CA sync is ON, Update Active Applications is ON, & Recommendations are set to "Specific" (Setup >> Preferences >> eDocs).
- Ensure all teachers have accounts for LOR purposes (Setup >> User Admin).
- Check that seniors can match with CA, add active applications, & make LOR requests (Connections >> Naviance Student >> Select & Update Optional Features).
- Utilize **Power School Community** for student- & teacher-facing how-to videos & handouts. Embed how-to videos into Welcome Message for students.
- Utilize **Multiple Transcript Manager** to mass upload transcripts (under Quick Links on school homepage).
- Be sure your process is clearly articulated to staff, students, and parents/guardians!

Next Steps

Next Steps

- 1) Are there any updates that you plan to make to your Naviance Staff or Student sites?
- 2) Are there any eDocs preferences or configurations you need to update for the 2024/ 2025 school year?
- 3) Have you logged into the PowerSchool Community and registered for upcoming webinars?
- 4) Have you considered Clever Data Integration, PowerSchool Integration, or Single-Sign On ?

PowerUps Schedule

Wednesdays @ 11 a.m. EST and 2 p.m. EST

8/7 *Best Practices & Setting Up for Back-to-School*

8/21 *Best Practices & Setting up for Back-to-School Q&A & Reports 3.0*

9/11 *Work-Based-Learning (WBL) & Career Exploration Tools*

10/9 *eDocs & the College Application Process*

Log into Naviance > Question Mark in top right > PowerSchool Community > Naviance Knowledge Base > Naviance Event Announcements > Register Now for Naviance PowerUps: 2024 - 25



PowerSchool