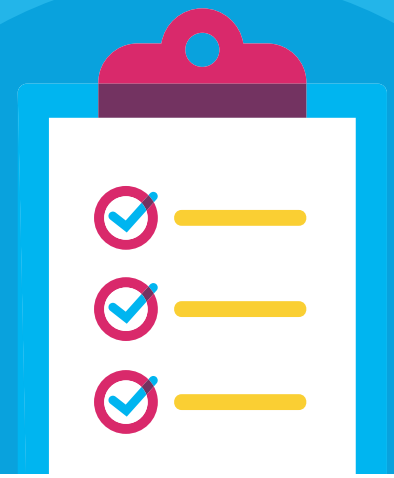
PowerSchool

Naviance CCLR Back to School Checklist



To help you gear up for the new school year, our experts have put together a checklist of essential steps to ensure everything is in place for your students to achieve their college, career, and life goals.

These steps will guide you through managing data, updating settings, and preparing for a successful year ahead.



Data Rollover

Manage school year rollover and alumni records and access

- Work with your IT department to reactivate Clever and SchoolSync to keep alumni records active.
- Refer to the Alumni Management Guide and this Help Center article for more information.
- Confirm all students have valid passwords to log in!

PowerSchool Integration

Integrate with other PowerSchool products with Naviance

- PowerSchool SIS users can integrate student, alumni, staff, parent, and Course Planner data with Naviance for turnkey data management.
- eSchoolPlus users can set up student data integration.
- Naviance users with any additional PowerSchool products can set up App Switcher to access all PowerSchool products with the click of a button.

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Access and Permissions

Review and update permissions for staff accounts

- Review all staff user accounts.
- Add, delete, and update permissions as needed.
- Refer to the school or district permission checklist.
- Make sure permissions for school and district staff align with their role in supporting students.

eDocs and Common App Integration

eDocs subscribers: Activate Naviance eDocs in early August and choose whether to opt-in to the Common App Integration

- eDocs rolled over on August 1 and is now ready for use.
- If eDocs was active during the prior school year, it will remain active, and you do not need to reactivate it.
- If you were opted into the Common App integration during the prior school year, you will remain opted in.
- If you are new to eDocs, the deadline for each school site to opt into eDocs and the Common App integration is September 15.

Update Messaging

Add or update welcome messages, new bulletins, and email templates

- Create a welcome message for each grade level.
- Update news bulletins for this year's events and activities.
- Review all email templates in Naviance, customize them as needed, or create new templates to communicate to students effectively.
- Reference this Help Center page for more information on customizing Naviance Student.

Customize Content

Add or update custom HTML pages and custom links

- Update any custom pages that explain school processes or create new pages for new processes.
- Update any links you share with students in Naviance.
- Review this Help Center page for more information on updating pages and links.

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Scholarship Updates

Add or update local and regional scholarships

- Review the current scholarship list in your District or School accounts.
- Use the new Scholarship features to update accordingly (including active and inactive status).
- Add new scholarships in bulk via the import template.

RepVisits Settings

Review and update RepVisits settings and availability for the new school year

- Update your school's in-person visit availability for this coming school year.
- Virtual college visit scheduling is also available via RepVisits, so students don't miss a beat.
- Refer to the Revisits Help Center page to get all the details!

Additional Updates

Update relevant surveys, staff access, and student group membership

- Update or rebuild surveys using the new Survey builder.
- Review permissions for staff members and update any counselor assignments for students.
- Make sure student groups are up-to-date.

Scope and Sequence

Update Scope and Sequence and assign to students

- Review current activities, tasks, goals, and programs and update accordingly for each grade level.
- Assign tasks and programs to students for the new school year.

Standardized Tests

Monitor test dates for standardized tests and have students register

- Add a monthly reminder to your calendar to import test scores into Naviance.
- Help students develop a study plan and stick to it so they are ready on test day.

College Research

Have rising Juniors and Seniors continue their college research during the school year

- Use SuperMatch to explore best-fit institutions, explore colleges via virtual tours and events, and support students in finalizing their college list!
- Leverage the new Match by Concourse integration to help students create an anonymous profile within Naviance, be discovered by universities that align with their interests and financial needs, and receive admission and scholarship offers without submitting a traditional application.
- Use these student assets to help students take advantage of Naviance college search tools, including SuperMatch and Match by Concourse.

Resources and Support

Take advantage of expert-led webinars, deep-dive trainings, and resources for best practices

- Attend the Back-to-School webinar series, which covers Naviance best practices to help you prepare for the upcoming school year.
- Participate in PowerUps sessions, designed to offer you practical, hands-on experience to make the most of the tools available.
- Meet with experts to address your specific questions and challenges during dedicated Support Hours.
- Visit the PowerSchool Community page to access all these resources.



For a full list of our upcoming product updates, please see our roadmap in the PowerSchool Community.

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