

# Naviance CCLR End-of-Year Checklist



This checklist will guide you through the necessary steps to prepare and safeguard student data in Naviance CCLR as the academic year ends. **From scholarship tracking to final document uploads, the checklist helps you make sure every task is complete.**

## Data Management

### MAY - JUNE | Preparing for Rollover



#### TASKS

- If using Clever or SchoolSync:** Pause automated sync prior to students being rolled over in your SIS
- If using PowerSchool SIS integration:** Ensure Students Records (Alumni) is set up in Naviance CCLR for alumni students to continue to have active Naviance CCLR accounts



#### RESOURCES

- [PowerSchool SIS Data Integration](#)
- [Transfer Students](#)
- [Clever Integration](#)



#### CLEVER USERS:

In Naviance CCLR's Clever Student set up wizard, "Sync Settings" menu under "Import Rules", ensure "Keep grade 12 and postgraduate students active in Naviance when removed from Clever" is checked. Those students will be removed from Clever but will continue to have active Naviance CCLR accounts.

### AUGUST | Back-to-School Prep



#### TASKS

- If using Clever, ensure SIS has already rolled over when the nightly import is resumed in Clever
- District/school administrators:** Turn school sync back on and import new grade levels into Naviance CCLR



#### DISTRICT ADMINISTRATORS:

- For districts with multiple school sites, import data at the district level to transition students from middle school to high school.
- The transfer student option is available at the school site level to move entire cohorts to new schools.

## Scholarships and Surveys

### MAY - JUNE | Student Experience



#### TASKS

- Review scholarship list
  - Make sure any scholarships that are recurring are marked as such
  - Add any new scholarships that should be made available for the next school year
- Assign senior survey with the built-in scholarship and college acceptance questions, and FAFSA questions
- Create and assign any additional end of year surveys to capture desired information from students
- Create custom surveys to capture information needed for school/district
- Review statuses of Survey Completions
- Recreate legacy surveys in Surveys New
- Update surveys that are assigned to Success Planner tasks before the next school year



#### RESOURCES

- [Track Scholarships in Naviance CCLR Resources Site](#)
- [Set Up Scholarships Resource Site](#)
- [Use Surveys New Features Naviance CCLR Resource Site](#)
- [Video: Using Surveys to Increase Adoption](#)
- [Video: Uploading and Managing Scholarships](#)



#### PRO TIP:

- Get survey ideas from other Naviance CCLR users in the Shared Survey Library
- Use the pre-built Graduation Survey and customize with your questions to get all of the information you need from your graduating seniors

### JUNE | Telling Your Naviance CCLR Story



#### TASKS

- Review the following data reports:
  - Student Usage Summary
  - Current Task Completion Status
  - College Applications Student Details
  - eDocs Activity Detail
  - Student Outcomes Details
  - Student Outcomes Statistics Summary
  - Scholarship Detail by Student
  - Assessment Status



#### RESOURCES

- [Reports 3.0 Resource Site - Usage Reports and Success Planner Reports](#)



#### PRO TIP:

After reviewing the usage for this year, identify three goals that you would like to track in the new year. For example:

- % of students that applied to 1+ college
- % of students that have a future path/planned outcome identified in Naviance CCLR
- % of students that have completed \_\_\_\_\_ self-discovery assessment

## System Configurations

### MAY



#### TASKS

- RepVisits:** Set up your visit availability so colleges can schedule appointments to meet with students
- Review staff permissions to ensure correct people are able to access/pull reports



#### RESOURCES

- [RepVisits Resource Site](#)

### JUNE - JULY



#### TASKS

- Upload Final Transcripts into Naviance CCLR
- Efficiently send multiple documents using eDocs Bulk Manager



#### RESOURCES

- [Multiple Transcript Manager](#)
- [Video: Multiple Transcript Manager](#)
- [eDocs Bulk Manager](#)



**RECOMMENDATION:** This must be completed by July 24. Naviance CCLR eDocs will be offline July 24-July 31.



#### PRO TIP:

Utilize the **Multi-Transcript Manager** tool to streamline this process, ensuring a seamless experience for graduates requesting transcripts for transfer. Employ **eDocs Bulk Manager** to efficiently submit all transcripts to multiple colleges simultaneously.

### JULY - AUGUST



#### TASKS

- Review and build programs/tasks



#### RESOURCES

- [Path Tasks Resource Site](#)



#### PRO TIP:

Introducing the newly released Success Planner 2.0, featuring a suite of pre-built programs with path tasks tailored to students' chosen future paths. Upon activation, these programs are automatically assigned to students based on their grades and selected paths. Additionally, you can now create custom tasks with enhanced options for creation, editing, and copying, complete with improved task completion triggers.

## What's New in Naviance – Key Updates to Know



### New Career & College Profiles

**EARLY ACCESS AVAILABLE!**

Explore our [redesigned profiles now!](#) Staff can enable early access under setup.



### Reports 3.0

**UNIFIED & SHAREABLE**

Share custom reports across your school or district. All legacy reports are now in Reports 3.0. By Back to School, only the reporting tool will be operational.



### Work-Based Learning

**FIRST RELEASE NOW AVAILABLE**

Start building Contacts, Organizations, and Opportunities. Student-facing features coming soon.



### eDocs Bulk Manager

**FINAL DOCS, MADE EASY**

Quickly send final college documents in bulk from the Colleges tab using our new eDocs Bulk Manager.



### Naviance's Customizable Dashboard Update

**USER-FRIENDLY INTERFACE**

**New dashboard** boosts staff efficiency with a streamlined, customizable interface for quick student data access. It will be the default setting by the start of the new school year.



## Take Action Today

Log in to Naviance to explore these updates, enable early access features, and streamline your end-of-year tasks!

