

Naviance eDocs Bulk Manager- Need to Prepare

Identify documents for college applications



The "**Need To Prepare**" tab streamlines the document preparation process for students with active college applications. Instead of manually checking individual folders, users now get a **centralized dashboard** that highlights pending tasks, helping them stay organized and meet deadlines more efficiently.

Why It Matters

- **Instant visibility** into which students have incomplete document submissions.
- **Smart filtering** by urgency, checklist status, and document type.
- **Direct navigation** to student details for quick document preparation.

How It Works

1. Access the Prepare Tab

- Go to **Colleges > eDocs Bulk Manager > Prepare Tab**.

2. Apply Filters

- **Narrow your results using filters such as:**
 - **Earliest Deadlines**
 - **Student Checklist**
 - **Application Type**

3. Review Student List

- **View** the dynamically updated list of students with pending documents.

4. Open Student Details

- Click on a student's **name** or **document count** to open the **Application View** tab.

5. Prepare Documents

- Review key student information (e.g., FERPA status, Common App match, parent consent) and begin preparing documents directly from this view.

Find helpful tips and quick links in our [Naviance Toolbox!](#)