

## DISTRICT PERMISSIONS CHECKLIST

\*Denotes default permissions of Naviance built user roles.

**Last updated: 6/17/25**

Permission (with Dependencies)			Description	Location	User Roles					Notes
			*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)		
My Account										
Change my e-mail	User can change the email associated with their Naviance account	My Account	yes	yes	yes	yes	yes	yes	none	
Change my password	User can change their Naviance password	My Account	yes	yes	yes	yes	yes	yes	This permission does not affect the "forgot password" link on the sign-in screen	
Change my profile	User can edit their user profile	My Account	yes	yes	yes	yes	yes	yes	none	
Change my user name	User can change their Naviance user name	My Account	yes	yes	yes	yes	yes	yes	none	
Manage Permissions										
Administer district roles and rights (requires Add/edit district and school user accounts)	User can change the roles and permissions of Naviance users at the school and district level	Manage Roles and Rights	no	yes	no	no	no	no	User can also change their user permissions if access to this section is enabled	
Administer school roles and rights (requires Add/edit school user accounts)	User can change the roles and permissions of other Naviance users	Manage Roles and Rights	no	yes	no	no	no	no	User can also change their user permissions if access to this section is enabled	
District Site Administration										
Add/edit district and school user accounts	User can create and edit Naviance user accounts on school and district levels	User Admin (school and district)	no	yes	no	no	no	no	none	
Administer Curriculum - District	User can choose default of managing curriculum at the school or district level and turn default curriculum on for schools	Naviance Curriculum Link	no	yes	no	no	no	no	Must have an active subscription to Naviance Curriculum	
Administer district settings	User can access and change settings in the Setup menu	Setup	no	yes	no	no	no	no	none	
Administer District-Level Early Access	User can opt-in to product updates and enhancements before the full migration	Settings > Setup	no	yes	no	no	no	no	none	
Administer Student Readiness Indicators	User can activate and manage the dashboard at the district level	Analytics > Student Readiness Indicators	yes	yes	no	no	no	no	Permission is automatically granted to any user role with the permission to View district reports	
Administer Test Prep settings - District Level	User can choose default of managing test prep at the school or district level and turn default test prep programs on for schools	Naviance Test Prep link	no	yes	no	no	no	no	Must have an active subscription to Test Prep	
Sign in to school accounts	User can sign into school accounts and edit settings/perform actions in the account	Enter school site	no	yes	no	no	no	no	none	
District Data Management										
Export district data	User can export data from Naviance for Districts	Data export page	yes	yes	no	no	no	no	Permission gives the ability to export ALL district-level data from Naviance; data file export will be a .csv file	
Import district data	User can import data into Naviance for Districts and the schools within the district	Data import page	yes	yes	no	no	no	no	none	
View student Success Planner 2.0	User can review and export student's Path Task details	Success Planner 2.0 section of the student folder	no	yes	no	no	no	no	none	
District Scholarships										
Add/edit district scholarships	User can add or edit scholarships on the district level	Scholarships	no	yes	no	no	no	no	none	
District Enrichment Programs										
Add/edit enrichment program list (district) (requires Access main colleges tab (district area))	User can add or edit enrichment programs on the district level	Enrichment Programs	no	yes	no	no	no	no	none	
District Surveys										
Add/edit district surveys	User can add or edit surveys on the district level	District Surveys	yes	yes	no	no	no	no	none	
View District Reports										

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
Edit student readiness indicators	User can manually update indicators for a student at the district level	Analytics > Student Readiness Indicators	yes	yes	no	no	no	no	Permission is automatically granted to any user role with the permission to View district reports
View district reports	User can view all district reports	Reports	yes	yes	no	no	no	no	none
<b>District Course Administration</b>									Must have an active subscription to Naviance Course Planner
Add/edit course catalog (requires View course catalog)	User can add and edit courses	Setup > Data Import, Courses > Course Catalog	no	yes	no	no	no	no	none
Manage plans of study and Career Pathways (requires View plans of study and Career Pathways)	Users can add and edit Plans of Study	Courses > Plans of Study or Career Pathways	no	yes	no	no	no	no	none
Publish plans of study and Career Pathways (requires View plans of study and Career Pathways)	User can publish Plans of Study to schools within the district	Publish to Schools tab on Plans of Study Page and Career Pathways pages	no	yes	no	no	no	no	none
View course catalog	User can view the course catalog	Courses > Course Catalog	no	yes	no	no	no	no	none
View plans of study & Career Pathways	User can view plans of study and Career Pathways	Courses > Plans of Study / Career Pathways	no	yes	no	no	no	no	none
<b>School Site Administration</b>									
Add/edit school account subscriptions	User can edit the account subscriptions for a school or sign up for a new subscription	School Account, Manage Subscriptions	no	yes	no	no	no	no	none
Add/edit school user accounts	User can create and edit Naviance user accounts	User Admin	no	yes	no	no	no	no	none
Administer Curriculum - School	User can turn on curriculum at the school level	Naviance Curriculum Link	no	yes	no	no	no	no	Must have an active subscription to Naviance Curriculum
Administer Early Access	User can opt-in to product updates and enhancements before the full migration.	Naviance Homepage	no	yes	no	no	no	no	none
Administer general school settings	User can change account information about school	School Account, Update Account	no	yes	no	no	no	no	none
Administer Naviance Student	User can modify Naviance Student permissions and look and feel	Connections > Naviance Student	no	yes	no	no	no	no	none
Administer Student Readiness Indicators	User can manually update indicators for a student at the school level	Analytics > Student Readiness Indicators	yes	yes	no	no	no	no	Permission is automatically granted to any user role with the permission to View district reports or View the Analytics tab
Administer Test Prep settings - School Level	User can turn on test prep at the school level	Test Prep Link	no	yes	no	no	no	no	Must have an active subscription to Test Prep
Administer transcript settings	User can edit Transcript Request Manager settings	Transcript Request Manager > Settings	no	yes	no	no	no	no	none
Master document administrator	User can create folders, upload and delete documents, and have full access to Document Manager	Document Manager	no	yes	no	no	no	no	none
<b>Student Groups</b>									
Add/edit student groups	User can add or edit student groups	Student Groups	no	yes	no	no	yes	no	This permission does not allow a user to edit student group membership
<b>View Student Records</b>									
View AchieveWorks® Intelligences results	User can view results of student's AchieveWorks® Intelligences	Self-Discovery section of student folder	no	yes	no	yes	yes	no	Must have an active subscription to AchieveWorks®
View AchieveWorks® Learning & Productivity results	User can view results of student's AchieveWorks® Learning & Productivity	Self-Discovery section of student folder	no	yes	no	yes	yes	no	Must have an active subscription to AchieveWorks®
View AchieveWorks® Personality results	User can view results of student's AchieveWorks® Personality assessment	Self-Discovery section of student folder	no	yes	no	yes	yes	no	Must have an active subscription to AchieveWorks®

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
View AchieveWorks® Skills results	User can view results of student's AchieveWorks® Skills assessment	Self-Discovery section of student folder	no	yes	no	yes	yes	no	Must have an active subscription to AchieveWorks®
View all teacher rec. forms	User can view all letter of recommendation documents	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	no	no	none
View Career Interest Profile results	User can view results of student's Career Interest Profiler	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View Career Key assessment results	User can view results of student's Career Key	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View careers in student list	User can view careers saved to a student's list	Careers section of student folder	no	yes	no	yes	yes	no	none
View college application data	User can view colleges on student's application list	Colleges section of student folder	no	yes	no	yes	yes	no	none
View counselor documents (SR,OR,MR,FR forms)	User can view counselor documents	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	yes	no	none
View course history	User can view student course history and current enrollment	Self-Discovery section of student folder	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner
View course plans	User can view student course plans	Careers section of student folder	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner
View demographics	User can view student's general demographic information	Colleges section of student folder	no	yes	no	yes	yes	no	This permission must be enabled to view student photos
View documents	User can view documents attached to the student's folder	eDocs section of student folder	no	yes	no	yes	yes	no	none
View GPA and academics	User can view GPA and academic information on the student folder's General section	Student Course Data page of Courses section of student folder	no	yes	no	yes	yes	no	none
View journal	User can view journal entries by student or about student in the folder	Courses section of student folder	no	yes	no	yes	yes	no	User can only view journal entries elected as shared
View Naviance Student as a student	User can view the student's Naviance Student account from the student folder	General section of student folder	no	yes	no	no	yes	no	Allows access to ALL student data enabled in Naviance Student, whether or not user has those view permissions
View notes	User can view notes on a student	Documents section of student folder	no	yes	no	no	yes	no	none
View parents	User can view parent information in a student folder, parent roster information	General section of student folder	no	yes	no	no	yes	no	none
View plan and plan milestones	View student's plan milestones	Plan section of student folder	no	yes	no	no	yes	no	none
View PowerBuddy chat logs	View students chats	Chat log section of the student folder	no	yes	no	no	yes	no	none
View resume	View student's resume (generated in Naviance Student)	Resume section of student folder	no	yes	no	yes	yes	no	none
View scholarships	View student's scholarship applications and results	Scholarships section of student folder	no	yes	no	no	yes	no	none
View shared portfolios	Review portfolios for which students have created a share link	Portfolio section of the student folder	no	no	no	no	yes	no	none
View StrengthsExplorer® results	User can view results of student's StrengthsExplorer® assessment	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View student group membership information	User can view student group membership	General section of student folder	no	yes	no	yes	yes	no	none
View student post-grad records	User can view where the student is attending college and how many semesters they have completed	Post-grad section of student folder	no	yes	no	no	yes	no	none

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
View student success plan	View tasks, et cetera, related to student success plan activity	Success Plan section of student folder	no	yes	no	yes	yes	no	none
View student Success Planner 2.0	User can review and export student's Path Task details	Success Planner 2.0 section of the student folder	no	yes	no	no	no	no	none
View surveys	View student responses to surveys	Plan section of student folder	no	yes	no	yes	yes	no	User can only view survey results that are not anonymous. If survey results are turned to anonymous, results are not viewable
View test scores	View student test scores	Scores section of student folder	no	yes	no	yes	yes	no	none
<b>Edit Student Records</b>									
Add student manually	User can add a student to Naviance	Student > Add student	no	yes	no	yes	yes	no	none
Add/edit course plans (requires View course plans)	User can view and approve a student course plan	Courses section of student folder	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner
Add/edit documents (requires View documents)	User can add a document to a student folder	Documents section of student folder	no	yes	no	no	yes	no	none
Add/edit journal entries (requires View journal)	User can add or edit a journal entry related to the student	Journal section of student folder	no	yes	no	no	yes	no	none
Assign counselors in batch	User can assign students to counselors using a batch method	Assign Counselors page	no	yes	no	no		no	This gives access to all batch assign options
Assign student plan tasks	User can assign students tasks and programs from the Planner library	Success Plan section of student folder, Planner menu	no	yes	no	no	yes	no	School staff cannot assign goals
Change active status of student	User can make a student active or inactive	Student Folder actions	no	yes	no	no	yes	no	Inactivating a student is not recommended
Delete student manually	User can delete a student from Naviance	Student Folder actions	no	yes	no	no	yes	no	Deleting a student is not recommended
Edit application data (requires View college application data)	User can add or edit applications in a student folder	Colleges section of student folder	no	yes	no	no	yes	no	none
Edit demographics (requires View demographics)	User can edit demographic profile information of a student	Student folder action	no	yes	no	no	yes	no	If demographic data is updated, it will not update in SIS. We recommend updating demographic data in the SIS as it is the main record keeping system
Edit Naviance Student account	User can edit a student or parent's Naviance Student account information	General section of student folder	no	yes	no	no	yes	no	User can register a student or parent manually with this permission and reset passwords
Edit notes (requires View notes)	User can add notes about a student	General section of student folder	no	yes	no	no	yes	no	Notes can be added by clicking "Edit Profile"
Edit parent information (requires View parents)	User can add or update parent information	General section of student folder; Parent Roster	no	yes	no	no	yes	no	none
Edit student academics (requires View GPA and academics)	User can add or edit academic information in student profile	General section of student folder	no	yes	no	no	yes	no	Information will be updated by clicking "Edit Profile"
Edit student group membership (requires View student group memberships)	User can edit student group membership	General section of student folder	no	yes	no	no	yes	no	none
Edit student photos (requires View demographics)	User can upload or change a student photo	General section of student folder	no	yes	no	no	no	no	none
Edit student plan and milestones (requires View plan and plan milestones)	User can update milestones and edit post-graduation path	Plan section of student folder	no	yes	no	no	no	no	none
Edit student readiness indicators	User can manually update indicators for a student at the district level	Analytics > Student Readiness Indicators	yes	yes	no	no	no	no	Permission is automatically granted to any user role with the permission to View district reports or View the Analytics tab
Edit student scholarships (requires View scholarships)	User can add a scholarship application or edit existing ones in student folder	Scholarships section of student folder	no	yes	no	no	yes	no	none

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
Edit student surveys (requires View surveys)	User can re-open or delete a student survey	Plan section of student folder	no	yes	no	no	yes	no	none
Edit test scores (requires View test scores)	User can add or update test scores manually	Scores section of student folder	no	yes	no	no	yes	no	none
Manage shared portfolios	Inactivate, reactivate, and delete shared portfolios	Portfolio section of the student folder	no	no	no	no	no	no	none
Prepare Counselor Documents (SR, OR, MR, FR forms)	User can prepare and/or upload SR, OR, MR, and FR forms into eDocs	eDocs section of student folder	no	yes	no	no	yes	no	none
Prepare my teacher rec forms	User can prepare and upload <i>their own</i> teacher recommendations into eDocs	eDocs section of student folder, Teacher Desk	no	yes	no	yes	yes	no	Does not allow a teacher to submit forms electronically
Reset AchieveWorks® Intelligences (requires View AchieveWorks® Intelligences )	User can reset results of AchieveWorks® Intelligences	Self-Discovery section of student folder	no	yes	no	no	yes	no	none
Reset AchieveWorks® Learning & Productivity (requires View AchieveWorks® Learning & Productivity)	User can reset results of AchieveWorks® Learning & Productivity	Self-Discovery section of student folder	no	yes	no	no	yes	no	none
Reset AchieveWorks® Skills (requires View AchieveWorks® Skills)	User can reset results of AchieveWorks® Skills	Self-Discovery section of student folder	no	yes	no	no	yes	no	none
Reset Career Interest Profiler (requires View Career Interest Profiler results)	User can reset results of Career Interest Profiler	Self-Discovery section of student folder	no	yes	no	no	yes	no	none
Reset Career Key assessment (requires View Career Key assessment results)	User can reset results of Career Key	Self-Discovery section of student folder	no	yes	no	no	yes	no	none
Submit all teacher rec. forms	User can submit letters of recommendation to all colleges	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	yes	no	none
Submit counselor documents (SR,OR,MR,FR forms)	User can send SR, OR, MR, FR (and connected transcripts) using Naviance eDocs	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	yes	no	none
Submit my teacher rec forms	User can send <i>their own</i> teacher recommendations using eDocs	eDocs section of student folder, Teacher Desk	no	no	no	yes	no	no	none
Update batches of college applications or transcripts	User can update batches of college applications	Application Manager, Transcript Request Manager	no	yes	no	no	yes	no	none
Update batches of scholarship applications	User can batch update student scholarship applications	Scholarship Manager	no	yes	no	no	yes	no	none
Upload multiple transcripts	User can upload bulk transcripts	Multiple Transcript Manager	no	yes	no	no		no	none
Upload single transcripts	User can upload single transcripts	eDocs section of student folder	no	yes	no	no	yes	no	none
<b>Colleges</b>									
Access Counselor Community	User can access counselor community	Counselor Community icon	no	yes	no	no	yes	no	none
Access main colleges tab (district area)	Users can view college information on the colleges tab in district Naviance	Colleges tab	no	yes	no	no	no	no	none
Access main colleges tab (school area)	Users can view college information on the colleges tab	Colleges tab	no	yes	no	yes	yes	no	none
Add/edit college contacts (requires Access main colleges tab (school area))	Users can add or edit college contacts	Colleges > Contacts	no	yes	no	no	yes	no	none
Add/edit college groups (requires Access main colleges tab (school area))	User can create or edit college groups	Colleges > Groups	no	yes	no	no	yes	no	none
Add/edit college visit calendar (requires Access main colleges tab (school area))	User can add or edit college visits	Colleges > College Visits	no	yes	no	no	yes	no	none
Add/edit enrichment program list (requires Access main colleges tab (school area))	User can add or edit an enrichment program at the school level	Colleges > Enrichment Programs	no	yes	no	no	yes	no	none

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
Add/edit notes about colleges (requires Access main colleges tab (school area))	User can add notes on a college for other counselors	College profile	no	yes	no	no	yes	no	none
Add/edit quicklist (requires Access main colleges tab (school area))	User can add or edit college quicklist or quicknames	Colleges > Quicklist or Quicknames	no	yes	no	no	no	no	none
Administer Counselor Community	Administrator can turn on Counselor community	Counselor Community icon	no	yes	no	no	no	no	none
View application history and stats (requires Access main colleges tab (school area))	User can view application history and scattergrams related to a college	Applications and Analysis tabs in College profile	no	yes	no	no	yes	no	none
View Reports									
Email and schedule reports (requires View Analytics tab)	User can email reports or schedule report to be emailed	Analytics > Reports, various reports	no	yes	no	no	yes	no	none
View alumni tracking reports (requires View Analytics tab)	User can view alumni tracking reports	Analytics > Reports 2.0	no	yes	no	no	yes	no	none
View the Analytics tab	User can view the Analytics tab	Analytics > Reports, survey reports	no	yes	no	no	yes	no	Must be selected for user to view any reports
View career reports (requires View Analytics tab)	User can view career reports	Analytics > Reports, Career reports	no	yes	no	no	yes	no	none
View college reports (requires View Analytics tab)	User can view college reports	Analytics > Reports, College reports	no	yes	no	no	yes	no	none
View planner reports (requires View Analytics tab)	User can view planner report	Analytics > Reports, Planner reports	no	yes	no	no	yes	no	none
View scholarship reports (requires View Analytics tab)	User can view scholarship reports	Analytics > Reports, Scholarship reports	no	yes	no	no	yes	no	none
View student reports (requires View Analytics tab)	User can view student reports	Analytics > Reports, Student reports	no	yes	no	no	yes	no	none
View survey reports (requires View Analytics tab)	User can view survey report data	Report link in various surveys	no	yes	no	no	yes	no	none
View test score reports (requires View Analytics tab)	User can view test score reports	Analytics > Reports, Score reports	no	yes	no	no	yes	no	none
Teacher recommendations (college)									
Administer recommendation settings (requires View all recommendations)	User can set the correct settings for Recommendation Request Manager	Recommendations Manager	no	yes	no	no	no	no	none
Edit list of teachers preparing recs for student	User can add or remove teacher from the recommendation list in a student folder	Colleges section of student folder	no	yes	no	no	yes	no	This permission does not give access to the actual recommendation
View all teacher rec. requests	User can view teacher recommendation requests made by students for <i>any teacher</i>	Recommendations Manager	no	yes	no	no	yes	no	none
View my teacher rec. requests	User can view <i>their own</i> teacher recommendation requests made by students	Recommendations Manager, Teacher Desk	no	yes	no	yes	yes	no	none
Manage Scholarships									
Add/edit scholarships (requires View scholarships)	User can add or edit the scholarship database	Scholarships section	no	yes	no	no	yes	no	none
View scholarships	User can view the scholarship database	Scholarships section	no	yes	no	yes	yes	no	none
Careers									
Access careers section	User can view the Careers tab in Naviance and information contained within	Careers tab	no	yes	no	yes	yes	no	none
Add/Edit/Cancel/Delete Work-Based Learning	User can manage Work-Based Learning event details	Careers tab > Work-Based Learning	no	no	no	no	no	no	none
View Work-Based Learning	User can view Work-Based Learning event details	Careers tab > Work-Based Learning	no	no	no	no	no	no	none
Course Administration									

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (b)	Counselor (D)	Other School Staff (D)	Notes
Add/edit course catalog	User can import course catalog	Setup > Data Import	no	yes	no	no	no	no	
View course catalog	User can view the course catalog	Courses > Course Catalog	no	yes	no	yes	yes	no	Must be selected for most work with course planning
View plans of study & Career Pathways	User can view plans of study and Career Pathways		no	yes	no	no	no	no	This includes managing General Settings and Total Potential Course Rigor, not Grade Codes
<b>Course Recommendations</b>									
Recommend students for courses (requires View course catalog)	User can recommend a course to a student	Recommendations page	no	yes	no	yes	yes	no	none
View course recommendations	User can view all course recommendations	Recommendations page	no	yes	no	no	yes	no	none
<b>Success Planner Administration</b>									
Administer Success Plan settings	User can access the configuration menu in the Planner section	Configuration page	no	yes	no	no	yes	no	none
<b>Supplemental Tools</b>									
Access document manager	User can access the document manager tool and add or remove documents	Documents	no	yes	no	no	yes	no	none
Access journal manager	User can access journal dashboard and add entries from there	Journals	no	yes	no	no	yes	no	none
Add/edit school surveys	User can create and edit surveys	Survey Builder	no	yes	no	no	yes	no	none
Generate mailing labels/envelopes	User can create mailing labels and envelopes using Naviance	Mailing Manager	no	yes	no	no	yes	no	none
Send group emails	User can send emails to a group from Naviance	Email page of Connections menu	no	yes	no	no	yes	no	Group emails can be sent to students, parents, and college contacts but not school staff
<b>School Data Management</b>									
Administer Alumni Tracker	User can send alumni data to the National Student Clearinghouse® for any school in the district using Alumni Tracker.	Setup > Alumni Tracker	no	yes	no	no	no	no	none
Export school data	User can export data from Naviance for Districts	Data Export page	no	yes	no	no	no	no	Permission gives the ability to export all data from Naviance; data file export will be a .csv file
Import school data	User can import data into Naviance	Data Import page	no	yes	no	no	no	no	none
Remove imported school data (requires Import school data)	User can undo data import	Data Import History page	no	yes	no	no	no	no	none
Transfer student records	User can initiate and review a student transfer	Transfer Student page	no	yes	no	no	no	no	none
<b>Peer Groups</b>									
Administer peer data sharing	User gains access to the Naviance Network menu	Peer Data Sharing page	no	yes	no	no	no	no	User will be unable to map GPA from the Naviance Network page if appropriate permission is not also added