

## SCHOOL PERMISSIONS CHECKLIST

\*Denotes default permissions of Naviance built user roles.

Last updated: 02/09/25

Permission (with Dependencies)	Description	Location	*School Site Manager	*Editor	*Reviewer	*School Data Importer	*Other	Teacher	Notes
<b>My Account</b>									
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
<b>Manage Permissions</b>									
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	yes	no	no	yes	no	no	User can also change their user permissions if access to this section is enabled
<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	yes	no	no	no	no	no	none
Add/edit school user accounts	User can create and edit Naviance user accounts, access staff usage reports	User Admin	yes	no	no	no	no	no	none
Administer Curriculum - School	User can turn on Curriculum at the school level	Naviance Curriculum Link	yes	no	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	Settings > Setup	yes	no	no	no	no	no	none
Administer general school settings	User can change account information about school	School Account, Update Account	yes	no	no	no	no	no	none
Administer Naviance Student	User can modify Naviance Student permissions and look and feel	Connections > Naviance Student	yes	no	no	no	no	no	none
Administer PowerBuddy Settings	User can modify PowerBuddy settings for students and staff.	Settings > Setup	yes	no	no	no	no	no	none
Administer Student Readiness Indictors	User can manually update indicators for a student at the school level	Analytics > Student Readiness Indicators	yes	no	no	no	no	no	Permission is automatically granted to any user role with the permission to View the Analytics tab
Administer Test Prep settings - School Level	User can turn on Test Prep at the school level	Test Prep Link	yes	no	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	yes	no	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	yes	no	no	no	no	no	none
<b>Student Groups</b>									
Add/edit student groups	User can add or edit student groups	Student Groups	yes	yes	no	no	no	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 and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	Must have an active subscription to AchieveWorks®
View AchieveWorks® Learning & Productivity results	User can view results of student's AchieveWorks® Learning & Productivity and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	Must have an active subscription to AchieveWorks®
View AchieveWorks® Personality results	User can view results of student's AchieveWorks® Personality assessment and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	Must have an active subscription to AchieveWorks®
View AchieveWorks® Skills results	User can view results of student's AchieveWorks® Skills assessment and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	Must have an active subscription to AchieveWorks®
View all teacher rec. forms	User can view all letter of recommendation documents and related reports	eDocs section of student folder, eDocs bulk manager	yes	yes	no	no	no	no	none
View Career Interest Profile results	User can view results of student's Career Interest Profiler and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	none
View Career Key assessment results	User can view results of student's Career Key and related reports	Self-Discovery section of student folder	yes	yes	yes	no	no	yes	none



Permission (with Dependencies)	Description	Location	*School Site Manager	*Editor	*Reviewer	*School Data Importer	*Other	Teacher	Notes
Add/edit course plans (requires View course plans)	User can view and approve a student course plan	Courses section of student folder	yes	yes	yes	no	no	no	Must have an active subscription to Naviance Course Planner
Add/edit course requests									
Add/edit documents (requires View documents)	User can add a document to a student folder	Documents section of student folder	yes	yes	no	no	no	yes	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	yes	yes	no	no	no	yes	none
Assign counselors in batch	User can assign students to counselors using a batch method	Assign Counselors page	yes	no	no	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	yes	yes	no	no	no	yes	School staff cannot assign goals
Change active status of student	User can make a student active or inactive	Student Folder actions	yes	yes	yes	no	no	no	Inactivating a student is not recommended
Delete student manually	User can delete a student from Naviance	Student Folder actions	yes	yes	yes	no	no	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	yes	yes	no	no	no	no	none
Edit demographics (requires View demographics)	User can edit demographic profile information of a student	Student folder action	yes	yes	no	no	no	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	yes	yes	no	no	no	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	yes	yes	no	no	no	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	yes	yes	no	no	no	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	yes	yes	no	no	no	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	yes	yes	no	no	no	no	none
Edit student photos (requires View demographics)	User can upload or change a student photo	General section of student folder	yes	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	yes	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 the Analytics tab. Only available in AL, CO, IN, OH, PA, TX, and WA.
Edit student scholarships (requires View scholarships)	User can add a scholarship application or edit existing ones in student folder	Scholarships section of student folder	yes	yes	no	no	no	no	none
Edit student surveys (requires View surveys)	User can re-open or delete a student survey	Plan section of student folder	yes	yes	no	no	no	no	none
Edit test scores (requires View test scores)	User can add or update test scores manually	Scores section of student folder	yes	yes	no	no	no	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	yes	yes	no	no	no	no	none
Prepare my teacher rec forms	User can prepare and upload <i>their</i> own teacher recommendations into eDocs	eDocs section of student folder, Teacher Desk	yes	no	no	no	no	yes	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	yes	yes	no	no	no	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	yes	yes	no	no	no	no	none

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Reset AchieveWorks® Skills (requires View AchieveWorks® Skills)	User can reset results of AchieveWorks® Skills	Self-Discovery section of student folder	yes	yes	no	no	no	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	yes	yes	no	no	no	no	none
Reset Career Key assessment (requires View Career Key assessment results)	User can reset results of Career Key	Careers section of student folder	yes	yes	no	no	no	no	none
Submit all teacher rec. forms	User can submit letters of recommendation to all colleges	eDocs section of student folder, eDocs bulk manager	yes	no	no	no	no	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	yes	yes	no	no	no	no	none
Submit my teacher rec forms	User can send <i>their own</i> teacher recommendations using eDocs	Teacher's desk homepage, eDocs section of student folder	no	no	no	no	no	yes	none
Update batches of college applications or transcripts	User can update batches of college applications	Application Manager, Transcript Request Manager	yes	yes	no	no	no	no	none
Update batches of scholarship applications	User can batch update student scholarship applications	Scholarship Manager	yes	yes	no	no	no	no	none
Upload multiple transcripts	User can upload bulk transcripts	Multiple Transcript Manager	yes	yes	no	no	no	no	none
Upload single transcripts	User can upload single transcripts	eDocs section of student folder	yes	yes	no	no	no	no	none
<b>Colleges</b>									
Access Counselor Community	User can access counselor community	Colleges > Counselor Community and Contacts	yes	yes	yes	no	no	no	none
Access main colleges tab	Users can view college information on the colleges tab	Colleges tab	yes	yes	yes	yes	no	yes	none
Add/edit college contacts (requires Access main colleges tab)	Users can add or edit college contacts	Colleges > Contacts	yes	yes	no	no	no	no	none
Add/edit college groups (requires Access main colleges tab)	User can create or edit college groups	Colleges > Groups	yes	yes	no	no	no	no	none
Add/edit college visit calendar (requires Access main colleges tab)	User can add or edit college visits	Colleges > College Visits	yes	yes	no	no	no	no	none
Add/edit enrichment program list (requires Access main colleges tab)	User can add or edit an enrichment program at the school level	Colleges > Enrichment Programs	yes	no	no	no	no	no	none
Add/edit notes about colleges (requires Access main colleges tab)	User can add notes on a college for other counselors	College profile	yes	yes	no	no	no	no	none
Add/edit quicklist (requires Access main colleges tab)	User can add or edit college quicklist or quicknames	Colleges > Quicklist or Quicknames	yes	yes	no	no	no	no	none
Administer Counselor Community & RepVisits	Administrator can turn on Counselor community and manage RepVisits	Counselor Community icon	yes	yes	no	no	no	no	none
View application history and stats (requires Access main colleges tab)	User can view application history and scattergrams related to a college	Applications and Analysis tabs in College profile	yes	yes	no	no	no	no	none
<b>View Reports</b>									
View the Analytics tab	User can view the Analytics tab and access Reports, Reports Insights, and the Student Readiness Report	Analytics	yes	yes	yes	no	no	no	Must be selected for user to view any reports
View college reports	User can review college-related reports	Analytics > Reports	yes	yes	yes	no	no	no	none
View survey reports	User can review reports for surveys	Surveys reports	yes	yes	yes	no	no	no	none
<b>Teacher recommendations (college)</b>									
Administer recommendation settings (requires View all recommendations)	User can set the correct settings for Recommendation Request Manager	Recommendations Manager	yes	no	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	yes	yes	yes	no	no	no	This permission does not give access to the actual recommendation

Permission (with Dependencies)	Description	Location	*School Site Manager	*Editor	*Reviewer	*School Data Importer	*Other	Teacher	Notes
View all teacher rec. requests	User can view teacher recommendation requests made by students for <i>any teacher</i>	Recommendations Manager	yes	yes	yes	no	no	no	none
View my teacher rec. requests	User can view <i>their own</i> teacher recommendation requests made by students	Recommendations Manager	yes	yes	yes	no	no	yes	none
<b>Manage Scholarships</b>									
Add/edit scholarships (requires View scholarships)	User can add or edit the scholarship database	Scholarships tab	yes	no	no	no	no	no	none
View scholarships	User can view the scholarship database	Scholarships tab	yes	yes	yes	yes	no	yes	none
<b>Careers</b>									
Access careers section	User can view the Careers tab in Naviance and information contained within	Careers tab	yes	yes	yes	no	no	yes	none
Add/Edit/Cancel/Delete Work-Based Learning	User can manage Work-Based Learning event details	Work-Based Learning	yes	no	no	no	no	no	none
View Work-Based Learning	User can view Work-Based Learning event details	Work-Based Learning	yes	yes	yes	no	no	no	none
<b>Course Administration</b>									
Add/edit course catalog	User can import course catalog	Data Import	yes	no	no	no	no	no	
Add/edit plans of study & career pathways	Add and edit the plans of study and career pathways.	Courses > Plans of Study / Career Pathways	yes	no	no	no	no	no	Must be selected for most work with course planning
View course catalog	User can view the course catalog	Courses > Course Catalog	yes	yes	no	yes	no	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 and related reports	Courses > Plans of Study / Career Pathways	yes	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	yes	yes	yes	no	no	no	none
View course recommendations	User can view all course recommendations	Recommendations page	yes	yes	yes	no	no	no	none
<b>Success Planner Administration</b>									
Administer Success Plan settings	User can access the configuration menu in the Planner section	Configuration page	yes	no	no	no	no	no	none
<b>Supplemental Tools</b>									
Access document manager	User can access the document manager tool and add/remove documents	Documents	yes	yes	no	no	no	yes	none
Access journal manager	User can access journal dashboard and add entries from there	Journals	yes	yes	no	no	no	yes	none
Add/edit school surveys	User can create and edit surveys	Survey Builder	yes	yes	no	no	no	yes	none
Generate mailing labels/envelopes	User can create mailing labels and envelopes using Naviance	Mailing Manager	yes	yes	yes	no	no	yes	none
Send group emails	User can send e-mails to a group from Naviance	Email page of Connections menu	yes	yes	yes	no	no	yes	Group e-mails 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	Alumni Tracker	yes	no	no	yes	no	no	none
Export school data	User can export data from Naviance	Data Export page	yes	no	no	yes	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	yes	no	no	yes	no	no	none
Remove imported school data (requires Import school data)	User can undo data import	Data Import History page	yes	no	no	yes	no	no	none
Transfer student records	User can initiate and review a student transfer	Transfer Student page	yes	no	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	yes	no	no	no	no	no	User will be unable to map GPA from the Naviance Network page if appropriate permission is not also added