

DISTRICT PERMISSIONS CHECKLIST

*Denotes default permissions of Naviance built user roles. Last updated: 08/21/26

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
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	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 PowerBuddy Settings - District level	User can modify PowerBuddy settings for students and staff	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	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	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
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									
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	Automatically granted to any user role with the permission to 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
View district reports	User can review all district reports	Reports	yes	yes	no	no	no	no	none
School Site Administration									
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 account, access staff usage reports	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 PowerBuddy Settings	User can modify PowerBuddy settings for students	Settings > Setup	no	yes	no	no	no	no	none
Administer Staff PowerBuddy Settings	User can modify PowerBuddy settings for staff	Settings > Setup	no	yes	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	yes	no	no	no	no	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
Student Groups									
Add/edit student groups	User can add or edit student groups	Student Groups	no	yes	no	no	yes	no	Does not allow a user to edit student group membership
View Student Records									
View AchieveWorks® Intelligences results	User can review results of student's AchieveWorks® Intelligences and related reports	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 review results of student's AchieveWorks® Learning & Productivity and related reports	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 review 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®
View AchieveWorks® Skills results	User can review results of student's AchieveWorks® Skills assessment and related reports	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 review all letter of recommendation documents and related reports	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	no	no	none
View Career Interest Profile results	User can review results of student's Career Interest Profiler and related reports	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View Career Key assessment results	User can review results of student's Career Key and related reports	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View careers in student list	User can review careers saved to a student's list and related reports	Careers section of student folder	no	yes	no	yes	yes	no	none
View college application data	User can review colleges on student's application list and related reports	Colleges section of student folder	no	yes	no	yes	yes	no	none
View counselor documents (SR,OR,MR,FR forms)	User can review counselor documents and related reports	eDocs section of student folder, eDocs bulk manager	no	yes	no	no	yes	no	none
View course history	User can access the Student Course Data section in the student folder	Student Course Data section of student folder	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
View course plans	User can access the Student Course Data section in the student folder, and the Course Demand Detail, Course Demand Detail, Course Plan Summary, and Student Course Plan Detail reports	Student Course Data section of student folder	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner
View demographics	User can review student's general demographic information	Student Profile section of student folder	no	yes	no	yes	yes	no	Must be enabled to review student photos
View documents	User can review documents attached to the student's folder	Documents section of student folder	no	yes	no	yes	yes	no	none
View GPA and academics	User can review GPA and academic information on the student folder's General section	Student Profile section of student folder	no	yes	no	yes	yes	no	none
View journal	User can review journal entries by student or about student in the folder	Journal section of student folder	no	yes	no	yes	yes	no	User can only view journal entries selected as shared
View Naviance Student as a student	User can review the student's Naviance Student account from the student folder	Student Profile 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 review notes on a student	Student Profile section of student folder	no	yes	no	no	yes	no	none
View parents	User can review parent information in a student folder, parent roster information	Student Profile section of student folder	no	yes	no	no	yes	no	none
View plan and plan milestones	User can review student's plan milestones	Plan section of student folder	no	yes	no	no	yes	no	none
View PowerBuddy chat logs	User can review students chats	Chat log section of the student folder	no	yes	no	no	yes	no	none
View resume	User can review student's resume (generated in Naviance Student)	Resume section of student folder	no	yes	no	yes	yes	no	none
View scholarships	User can review student's scholarship applications and results and related reports	Scholarships section of student folder	no	yes	no	no	yes	no	none
View shared portfolios	User can 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 review results of student's StrengthsExplorer® assessment and related reports	Self-Discovery section of student folder	no	yes	no	yes	yes	no	none
View student group membership information	User can review student group membership	Student Profile section of student folder	no	yes	no	yes	yes	no	none
View student post-grad records	User can review where the student is attending college and how many semesters and related reports they have completed	Post-grad section of student folder	no	yes	no	no	yes	no	none
View student success plan	User can review tasks, et cetera, related to student success plan activity and related reports	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	User can review student responses to surveys	Plan section of student folder	no	yes	no	yes	yes	no	If survey results are turned to anonymous, results are not viewable
View test scores	User can review student test scores and related reports	Scores section of student folder	no	yes	no	yes	yes	no	none
Edit Student Records									
Add student manually	User can add a student to Naviance	Student > Add student	no	yes	no	yes	yes	no	none
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

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
Assign counselors in batch	User can assign students to counselors using a batch method	Assign Counselors page	no	yes	no	no		no	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; updatedemographic 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	Student Profile 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	Student Profile 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	Student Profile section of student folder	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	Student Profile 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	Student Profile 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	Student Profile 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	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
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 course plans (requires View course plans)	User can access the Student Course Plan Manager, approve and reopen student plans, and access to Course Demand Detail, Course Demand Detail, Course Plan Summary, and Student Course Plan Detail reports.	Courses > Student Course Plan Manager	no	yes	no	no	yes	no	Must have an active subscription to Naviance Course Planner
Manage shared portfolios	User can 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, upload, or both the 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 their own 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

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
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 assessment	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 their own 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
Colleges									
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 review 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
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 & RepVisits	Administrator can turn on Counselor community and manage RepVisits	Counselor Community icon	no	yes	no	no	no	no	none
View application history and stats (requires Access main colleges tab (school area))	User can review application history and scattergrams related to a college	Applications and Analysis tabs in College profile	no	yes	no	no	yes	no	none
View Reports									
View the Analytics tab	User can review the Analytics tab and access Reports, Reports Insights, and the Student Readiness	Analytics > Reports, survey reports	no	yes	no	no	yes	no	Must be selected for user to view any reports
View college reports	User can review college-related reports	Analytics > Reports	no	yes	no	no	yes	no	none
View survey reports	User can review reports for surveys	Surveys reports	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
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	Does not give access to the actual recommendation
View all teacher rec. requests	User can review teacher recommendation requests made by students for any teacher	Recommendations Manager	no	yes	no	no	yes	no	none
View my teacher rec. requests	User can view their own 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 review 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
Manage 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 review Work-Based Learning event details	Careers tab > Work-Based Learning	no	no	no	no	no	no	none
View Work-Based Learning documents	Review documents uploaded to Contacts, Organizations, and Engagements	Careers tab > Work-Based Learning	no	no	no	no	no	no	none
Course Administration									
Manage course catalog (requires View course catalog)	User can add and edit courses and access the Course Planner PowerSchool SIS integration	Setup > Data Import, Courses > Course Catalog	no	yes	no	no	no	no	none
View course catalog	User can review the course catalog	Courses > Course Catalog	no	yes	no	no	yes	no	Must be selected for most users who work with course planning
Manage plans of study & specializations (requires View plans of study & specializations)	Users can add, edit, and publish plans of study and specialization areas and access Plan of Study Data and Specialization Area data reports	Courses > Plans of Study or Career Pathways	no	yes	no	no	no	no	none
View plans of study & specializations	User can review plans of study and specialization areas and access Plan of Study Data and Specialization Area data reports	Courses > Plans of Study / Career Pathways	yes	yes	no	no	yes	no	none
Administer course planner	User can review and manage Course Planner configurations	Courses > Configuration	no	yes	no	no	no	no	none
Recommend students for courses (requires View course catalog)	User can review and manage course recommendations	Recommendations page	no	no	no	yes	yes	no	none
Export course planner data	User can access and export Course Planner data through Data Export (CP 2.0)	Setup > Data Export (CP 2.0)	yes	yes	no	no	no	no	none
Success Planner Administration									
Administer Success Plan settings	User can access the configuration menu in the Planner section	Configuration page	no	yes	no	no	yes	no	none
Supplemental Tools									
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	Can be sent to students, parents, and college contacts but not school staff
School Data Management									

Permission (with Dependencies)	Description	Location	*District Analyst	*District Site Manager	Other District Staff	Teacher (D)	Counselor (D)	Other School Staff (D)	Notes
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	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
Peer Groups									
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