



Overgrad Use Guidance

Typically we consider the admission cycle in quarters, with the first quarter starting August 1, which corresponds to the rollover of applications, and many schools' in service for staff. The use listed below is based on best practices, and doesn't reflect nuance that exists for different counselors' workflows or systems, which can vary, especially for grades 9-11.

General Use

These users likely use Overgrad to meet specific needs, some of which might be processed based. Their use will typically fluctuate throughout the school year based on priorities at the school and/or district level. Counselors might not have protected time with small groups of students (i.e. present information to all students of a grade level at once) and likely have many additional responsibilities outside of college counseling.

High Cadence Use

These users integrate Overgrad into existing systems and structures within their school; they likely have protected time to meet with students, and potentially have employees with roles solely focused on college/postsecondary advising (college access innovators)

If you're unsure how to implement this guide, start with [our recommended scope & sequence](#).

Quarter 1 (August 1 - October 31)

For Educators

General Use	High Cadence Use
Create student accounts Article Upload student academic data - Uploading GPAs or test scores Create educator accounts Article Import historic application data (<i>first time Overgrad users</i>)	Update Course Offerings - How to set course requirements - Bulk upload courses Create or edit custom fields Article or video Add or edit programs Article Add or edit postsecondary tags Article

For Students

General Use	Might not use Overgrad, especially if using only for match		Complete Big 5 Personality assessment Article Complete career survey Article Add or updating documents in the document locker Article	Sync Common App and Overgrad Account (if using full Pro platform + Common App integration) Article or video Finalize college application plans - Add applications Article - Request letters of recommendation (if applicable) Article - Request additional documents (if applicable) Article
	9 th	10 th	11 th	12 th
High Cadence Use	Introduction to high school, explaining GPA Article Create profile Video Enter current courses in Overgrad Article Complete Big 5 Personality assessment Article	Enter current courses in Overgrad Article Update activities Complete career survey Article Search for extracurricular programs	Enter current courses in Overgrad Article Update activities Update career list How to search or follow Update college list How to search or follow	Enter current courses in Overgrad Article Sync Common App and Overgrad Account (if using full Pro platform + Common App integration) Article or video Finalize college application plans - Add applications and update type Article - Request letters of recommendation (if applicable) Article - Request additional documents (if applicable) Article

Quarter 2 (November 1 - January 31)

For Educators

General Use	High Cadence Use
Submit documents for seniors' applications (if using full Pro platform + Common App integration) - How to upload and send documents - How to upload and automatically send the school profile	Update student academic data Progress monitoring Creating reports and best practices

For Students

	For Students			
	9 th	10 th	11 th	12 th
General Use	Might not use Overgrad, especially if using only for match		Update college list How to search or follow Create a Pathway	Complete college application - Add applications and update type Article - Request additional documents (if applicable) How to request the Optional or Mid Year Report
High Cadence Use	Complete career survey Article Build career interest list How to search or follow Create a Pathway	Update careers following Article Add majors Video Explore college options How to search or follow Apply to programs	Update college list How to search or follow Use "analyze my college list" feature Article explaining Admissions insights	Complete college application - Add applications and update type Article - Request additional documents (if applicable) How to request the Optional or Mid Year Report

Quarter 3 (February 1 - April 30)

For Educators

General Use	High Cadence Use
Add or update student academic data - Using a spreadsheet to bulk upload GPAs - Using a spreadsheet to bulk upload test scores	Update course offerings Editing and deleting courses Add and edit programs How to edit programs

For Students

General Use	Complete course plans Article Follow careers How to search or follow Follow relevant programs How to search and follow programs		Complete course plans Article Update college list How to search or follow Follow relevant programs Article	Update admissions status/decisions Article Enter financial aid award letters How to enter and compare award letters Follow and apply to postsecondary programs Article Review and update Pathways
	9 th	10 th	11 th	12 th
High Cadence Use	Follow careers / editing career list How to search or follow Explore colleges How to search	Build initial college list How to search or follow Review, update, or create new Pathways	Requesting letters of recommendation Article Finalize college lists Add test scores Article	Update admissions status/decisions Article Enter financial aid award letters How to enter and compare award letters Follow and apply to postsecondary programs Article Review and update Pathways

Quarter 4 (May 1 - July 31)

For Educators

General Use	High Cadence Use
- Collect any relevant data for year-end closing - Check in with Overgrad: feedback, support, updates, and more	- End of year data analysis - Goal setting and programmatic updates for upcoming school year - Check in with Overgrad: feedback, support, updates, and more

For Students

General Use				
	9 th	10 th	11 th	12 th
High Cadence Use	Might not use Overgrad, especially if using only for match			Request Final Reports (if needed) Article Complete the senior survey Article
		Update Program(s) status	Finalize personal statement How to upload to document locker Add applications Article Update application type for early action and decision	Request Final Reports (if needed) Article Complete the senior survey Article