



Rollover Reset: Your Scoir Checklist

Gear up for the new cycle. Check off each item to confirm your Scoir account is ready for a successful admission season.

✓ Review User Access and Permissions

- ☐ Scoir Admin: Review and update the [user list and permissions](#) for this cycle
- ☐ Assign your Application Manager (AM)

Pro tip: We recommend assigning one AM per organization to avoid confusion

✓ Set up your App Rounds and Document Delivery

- ☐ Set your deadlines and application requirements for the upcoming cycle using App Rounds. [Here's how.](#)

Pro tips:

- Your deadlines appear on your Scoir profile page for student and counselor planning
- To help you save time, you can copy your application rounds from the current cycle to the upcoming one

- ☐ Enable document delivery so your team can receive [application documents](#) (like transcripts and recommendation letters) directly from high schools via Scoir.

Apply Coalition with Scoir partners: Updates and instructions for the upcoming year are on the way—keep an eye out!

Pro tips:

- There's no cost to receive documents through Scoir—just enable delivery and you're set
- Choose the delivery method that fits your process: automated ([Slate Integration](#) or [SFTP](#)) or manual download. [Learn more.](#)

Not receiving docs through Scoir yet? It's free! Get started [here](#).

✓ Plan and schedule fall travel with Scoir Visits+

- ☐ Use the new [Visits+ experience](#) (with updated map and table views) to identify high schools with students who match your recruitment goals and show real interest in what you offer
- ☐ Apply new filters to narrow down your best-fit schools, check visit availability, and start scheduling

NEW Visits+ Premium : Get early access to Visits+ Premium by joining the Pioneer program. You'll unlock powerful new features—like advanced data filters, view customizations, and CRM-ready exports—while helping shape future updates. [Learn more.](#)

✓ Activate the Scoir Audience Integration with Slate

- ☐ Follow the [setup guide](#) to start syncing your Scoir inquiries to Slate

Pro tip: Connect Scoir with Slate to gain deeper insights into your stealth audience and improve source tracking. [Watch this webinar](#) to learn more.

✓ Optimize your Premium Presence Content**

- ☐ Review and refresh your current [content cards](#)
- ☐ Click through your [content card](#) links to confirm they work and point to the right place
- ☐ Add or update [tags](#) to improve discoverability

Pro tips:

- Not sure which tags to use? Reach out to your [Customer Success Manager](#) for insight and support
- Make sure your [Premium Presence](#) highlights what students care about most—majors, campus life, and affordability—so it resonates and drives engagement
- Repurpose your best-performing content to maximize impact

****Scoir Managed Partners:** Your Engagement Strategist will handle most of these tasks for you—feel free to reach out anytime with questions!

✓ Refine your messaging strategy**

- ☐ Review your [Automated Messages](#) and layer in segmented outreach to promote specific programs
- ☐ Schedule targeted messages to your Followers and their linked parents/guardians through December to keep your funnel active

Insider Insight: Scoir Messages outperform traditional email—don't miss the chance to stay top-of-mind

Pro tips:

- [Segment messages](#) by location, interests, or student attributes (like first-gen status) to make them more relevant for students
- Use our [copy message action](#) to quickly create additional email versions for your Matches
- Keep a steady messaging rhythm by scheduling monthly updates to keep students and their linked parents/guardians engaged as they make decisions
- **Using Slate?** You can message your Scoir inquiries directly from Slate using Slate Credits. [Learn more.](#)

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Need a Hand? We're Here!

Your [Scoir Customer Success Manager](#) (or Engagement Strategist) is just a message away! Reach out anytime for tips, guidance, or help making the most of your Scoir account this school year.

Feeling overwhelmed? Let us handle it!

From setup to strategy, we offer services designed to take tasks off your plate. Contact your [Scoir Customer Success Manager](#) to learn more.