

# Assigning Counselors to Students Procedural Checklist

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## Change Log

Date	Section Number/Name	Change Description
1/21/22	Entire document	Review and update
4/22/20	Entire document	Review and update







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## Task #1: Verify Staff Members

**Navigation: StudentInformation – Management – Security – View Staff Members**





















See the Security Guide for more detailed instructions on Staff Members. Make sure any Counselors you wish to use have a Staff record. Go to View Staff Members, **Search**, click the **edit pencil** for the appropriate staff member. Scroll down to view the Job Functions list.

School ▲	School Year	Job Function	EZ Query	Active	Actions
Gallon High School	2022-2023	Counselor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2021-2022	Counselor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2020-2021	Counselor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

## Task #2: Add Counselors Job Function to Staff Member

**Navigation: StudentInformation – Management – Security – View Staff Members**

For a staff member to be considered a Counselor, their current school year's Staff Member School entry must include Counselor as a job function. Click on the edit pencil in the Actions column for the appropriate School and School Year, click on the down arrow in the Job Function column to view the list, select Counselor and click on the checkmark in the Actions column to save.

School ▲	School Year	Job Function	EZ Query	Active	Actions
Gallon High School	2022-2023	Counselor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2021-2022	<input type="text" value="Select..."/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2020-2021	SIS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2019-2020	All	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2018-2019	Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2017-2018	Attendance Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2017-2018	Bus Driver	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2016-2017	Cafeteria Worker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2016-2017	Counselor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 
Gallon High School	2015-2016	Curriculum Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

## Task #3: Assign Grade Levels to Counselors

**Navigation:** StudentInformation – Management – School Administration – School Building Administration – Counselors

Once the staff member is a Counselor, on the Counselor Maintenance screen, edit that Counselor's record, and check the boxes next to each grade level the counselor will be working with.

**NOTE:** You can assign non-grade-appropriate Counselors, but the default behavior is to use grade-appropriate Counselors only.

### Counselor Maintenance

From this screen, you can display and change data pertaining to school guidance counselors.

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Counselor Name:

Is Active:

KG
  03
  04
  05
  06
  07





Grade:
  08
  09
  10
  11
  12
  13

23
  GR

---

### Counselor Maintenance

From this screen, you can display and change data pertaining to school guidance counselors.

	First Name	Last Name ▲	Grade	Active
	SHARON	BALL	09	<span style="color: green;">●</span>
	RALPH	COOPER		<span style="color: green;">●</span>
	MARILYN	HAMPTON		<span style="color: green;">●</span>
	BRENT	SIMS		<span style="color: green;">●</span>

Show Active Only

# Task #4: Assigning a Counselor during Registration

Navigation: StudentInformation – SIS – Registration Wizard

**Student Registration Wizard**  
From this screen users can register students

Registration Pre-requisites Possible Matches Complete Registration Family Group EMIS

Hispanic/Latino: N - No, the student is not Hispanic/Latino Local Ethnic Category: W - CAUCASIAN

Racial Group(s):  A-Asian  B-Black or African American  I-American Indian or Alaska Native  P-Native Hawaiian or Other Pacific Islander  W-White

Summative Race:

Citizenship: 04 - United States cr Native Language: ENG Birthplace City:

Birthdate Verified: Admission Date: Home Language: \*\*\*

Student Status: A - ACTIVE RES Building Prog Track: Gallon - Gallon Admission Code:

Attendance Calendar: HS Default (Default) Mother's Maiden Name: Program:

Locker Assignment: Assign Primary Locker Free/Reduced Lunch Status: None Last Name Suffix:

Home room:  Include In Ranking  Include In Honor Roll  Counselor: WEST DALE

Scheduling Priority: 5  Include In GPA Home School IRN:

If you want a single Counselor to be automatically assigned to all students being enrolled in a specific grade level, select that Counselor from the drop-down menu in the **Building Grade Levels Maintenance** screen – **Grade Specific Registration Default Data** section.

**Building Grade Levels Maintenance**  
From this screen, you can display, add, change and delete data pertaining to building grade levels.

Grade Level: 09 - 09

Grade Specific Registration Default Data

Counselor: BALL, SHARON

Scheduling Priority: 1

Include in Honor Roll: Yes

Include in Ranking: Yes

Include in GPA: Yes

Pri. Graduation Rule:

Alt. Graduation Rule:

Save Cancel

## Task #5: Counselor Bulk Assignment by Homeroom

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign Counselors to students by Homeroom, choose the **Homeroom Assignment Method** and select a **Homeroom Term**.

**Counselor Bulk Assignment**  
Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

Assignment Method:  Homeroom    Random    Manual

**i** This assignment method will assign counselors to students by selecting the counselor that is defined as the default counselor for each student's homeroom. In order to assign counselors based on homeroom, you must select a homeroom term to use for looking up homeroom assignments for students.

**i** Students not assigned to homerooms will not get counselor assignments. Students assigned to homerooms without a counselor definition will not get counselor assignments.

Homeroom Term: \* FullYear - Full Year Term ▼

Cancel   Next >

Click **Next** to go to the **Options** tab and choose a Counselor for specific homerooms.

**Counselor Bulk Assignment**  
Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

**i** Changing the counselor for the homeroom will save the counselor permanently for this homeroom. To edit homeroom details further, see the Homeroom Maintenance page.

Homeroom ▲	HR Term	Teacher	Room	Grades	Counselor
C105 - C105	FullYear	OCONNOR	C105 - Special Education		▼
C107 - C107	FullYear	GORDON	C107 - Unassigned		▼
C114 - C114	FullYear	SMITH	C114 - Home Ec		▼
C121 - C121	FullYear	PRATT	C121 - Social Studies		▼
C122 - C122	FullYear	GROSS	C122 - Business	09, 10, 11, 12	▼
C131 - C131	FullYear	WARREN	C131 - Music	09, 10, 11, 12	▼
C206 - C206	FullYear	WEST	C206 - English		▼
C208 - C208	FullYear	CROSS	C208 - Math	09, 10, 11, 12	WEST, DALE ▼

Click **Next** to go to the **Confirmation** tab.

**Counselor Bulk Assignment**  
 Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

Counselor	Previously Assigned	Assignments to be Removed	Assignments to be Made	Total Students to be Assigned
COOPER, RALPH	0	0	0	0
WEST, DALE	0	0	26	26
SIMS, BRENT	0	0	0	0
BALL, SHARON	0	0	0	0
HAMPTON, MARILYN	0	0	0	0

Cancel   < Back   Finish

Click **Finish** to process the Counselor Bulk Assignment by Homeroom. The **Results** tab will show you the students that were assigned a Counselor.

**Counselor Bulk Assignment**  
 Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

Student	Student Number	Grade	Status	Counselor
ABBOTT, AMY	02262429	12	A	
ALFORD, SAMUEL	02278195	09	A	
ALLEN, TROY	02279882	10	A	
ANDREWS, MAE	02280346	09	N	
ATKINSON, DENNIS	02262038	12	J	WEST, DALE

## Task #6: Randomly Bulk Assigning Counselors

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign counselors to students randomly, chose the **Random Assignment Method**.

**Counselor Bulk Assignment**  
Here you can assign a bulk group of students to counselors

Assignment Method   Students   Options   Confirmation   Results

Assignment Method:  Homeroom  Random  Manual

*i* This assignment method will assign counselors to students in a random fashion. You may choose whether or not to respect grade level assignments with the random assignments.

Respect Grade Level Assignments:

Cancel   Next >

Click **Next** to go to the **Students** tab and select students by **Search Criteria, Student IDs, or Ad-Hoc Membership**.

**Counselor Bulk Assignment**  
Here you can assign a bulk group of students to counselors

Assignment Method   **Students**   Options   Confirmation   Results

Select Students By:  Search Criteria  Student IDs  Ad-Hoc Membership

Last Name:  First Name:

Team:  Gender:

Program

** - NOT APPLICABLE	
01 - MULTIPLE DISABILITIES	
02 - DEAF-BLINDNESS	
03 - HEARING IMPAIRMENTS	
04 - VISUAL IMPAIRMENTS	
05 - SPEECH & LANGUAGE IMPAIRMENTS	

Student Status

A - ACTIVE RES	
GO - Grad Only	
I - INACTIVE	
J - JVS FULL T	
L - LEAP	
N - NON-RES	

Grade Level

PS - PS	
KG - KG	
01 - 01	
02 - 02	
03 - 03	
04 - 04	

Cancel   < Back   Next >

Click **Next** to go to the **Options** tab and choose a Counselor for the selected students.

**Counselor Bulk Assignment**  
 Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

Counselors\*

COOPER, RALPH SIMS, BRENT BALL, SHARON HAMPTON, MARILYN	← → ← →	WEST, DALE
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Cancel < Back Next >

Click **Next** to go to the **Confirmation** tab.

**Counselor Bulk Assignment**  
 Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

Counselor	Previously Assigned	Assignments to be Removed	Assignments to be Made	Total Students to be Assigned
WEST, DALE	26	0	1	27

Cancel < Back Finish

Click **Finish** to process the Counselor Bulk Assignment assigning randomly. The **Results** tab will show you the students that were assigned a Counselor.

**Counselor Bulk Assignment**  
 Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | Results

Student	Student Number	Grade	Status	Counselor
SMITH, MARCUS	02281008	11	J	WEST, DALE
SMITH, MICHEAL	02281009	09	L	

Start Over



## Task #7: Manually Bulk Assigning Counselors

Navigation: StudentInformation – Management – Ad-Hoc Updates – Counselor Bulk Assignment – Assignment Method tab

To bulk assign counselors to students manually, chose the **Manual Assignment Method**.

The screenshot shows the 'Counselor Bulk Assignment' form with the 'Assignment Method' tab selected. The 'Assignment Method' section has three radio buttons: 'Homeroom', 'Random', and 'Manual'. The 'Manual' radio button is selected and highlighted with a red box. Below this, a grey information box states: 'Manually assigning counselors allows you to select a single counselor for assignment to the selected students. All students matching the search criteria entered will be assigned to the counselor selected, regardless of grade level assignments.' At the bottom, there are 'Cancel' and 'Next >' buttons.

Click **Next** to go to the **Students** tab and select students by **Search Criteria, Student IDs, or Ad-Hoc Membership**.

The screenshot shows the 'Counselor Bulk Assignment' form with the 'Students' tab selected. The 'Select Students By:' section has three radio buttons: 'Search Criteria', 'Student IDs', and 'Ad-Hoc Membership'. The 'Search Criteria' radio button is selected and highlighted with a red box. Below this, there are input fields for 'Last Name:' (containing 'abbott') and 'First Name:'. There are also dropdown menus for 'Team:' and 'Gender:'. Below these are three sections with list boxes and arrows: 'Program' (listing 01-05), 'Student Status' (listing A-N), and 'Grade Level' (listing PS-04). At the bottom, there are 'Cancel', '< Back', and 'Next >' buttons.

Click **Next** to go to the **Options** tab and choose a Counselor for the selected students.

### Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | **Options** | Confirmation | Results

Counselor: WEST, DALE

Cancel | < Back | Next >

Click **Next** to go to the **Confirmation** tab. Select the students that you wish to assign the Counselor to.

### Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | **Confirmation** | Results

Students selected by default

	Student Name	Student Number	Grade	Status	Counselor
1	ABBOTT, AMY	02262429	12	A	WEST, DALE

Cancel | < Back | Finish

Click **Finish** to process the Counselor Bulk Assignment assigning manually. The **Results** tab will show you the students that were assigned a Counselor.

### Counselor Bulk Assignment

Here you can assign a bulk group of students to counselors

Assignment Method | Students | Options | Confirmation | **Results**

Student	Student Number	Grade	Status	Counselor
ABBOTT, AMY	02262429	12	A	WEST, DALE

Start Over

## Task #8: Assign Counselors Manually

Navigation: StudentInformation – SIS – Student – Edit Profile – Additional tab

If you do not want to use Counselor Bulk Assignment, or if you need to adjust only a few students individually, you can select a Counselor for a single student on the Additional tab of that student's profile. If you need to select a Counselor that has no grade levels set, or has a different grade level set, uncheck the **Show grade appropriate counselors only** checkbox to refresh the list.

The screenshot shows the 'Edit Student Profile' interface with the 'Additional' tab selected. The 'Counselor' dropdown menu is open, displaying a list of names: '-- Select Counselor --', '-- Select Counselor --', COOPER, RALPH, WEST, DALE (highlighted), SIMS, BRENT, BALL, SHARON, and HAMPTON, MARILYN. A red box highlights the dropdown menu and the 'Show grade appropriate counselors only' checkbox, which is currently checked. Other fields visible include 'Primary Building' (Gallon High School), 'Building Progression Track' (Gallon - Gallon), 'Graduation Year' (2020), and 'Scheduling Priority' (5).

## Task #9: View Counselor Assignments

Navigation: StudentInformation – SIS – School – Counselors

To view Counselor Assignments, on the **Student Counselor Assignments** screen, select a **Counselor** from the drop-down menu. The screen will display all students assigned to this Counselor. Click on a student's name to view the student's profile.

Student Counselor Assignment								
From this screen, you can view students assigned to a specific counselor.								
Filter By Counselor: WEST, DALE ▾								
Student ID	Student Name ▲	Student Status	Grade	Gender	Homeroom	Phone Number	Program	Age
02262038	ATKINSON, DENNIS	JVS FULL T	12	M		4195552144	504 PLAN	18
02271330	BRUCE, JOANN	ACTIVE RES	11	F		4195557126		17
02271675	BUCK, PHYLLIS	ACTIVE RES	11	F		4195559649		16
02261877	BUCKNER, SONIA	ACTIVE RES	12	F		4195552055		18