**StudentInformation**

# Assigning Counselors to Students Procedural Checklist

# 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 |
|---|---|---|---|---|---|
| Galion High School | 2022-2023 | Counselor | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2021-2022 | Counselor | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2020-2021 | Counselor | ☐ | ☑ | ✏ 🗑 |

# 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 |
|---|---|---|---|---|---|
| Galion High School | 2022-2023 | Counselor | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2021-2022 | Select... ⌄ | ☐ | ☑ | ✓ ✗ |
| Galion High School | 2020-2021 | SIS | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2019-2020 | All | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2018-2019 | Attendance | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2017-2018 | Attendance Coordinator | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2016-2017 | Bus Driver | ☐ | ☑ | ✏ 🗑 |
| Galion High School | 2015-2016 | Cafeteria Worker | ☐ | ☑ | ✏ 🗑 |
|  |  | Counselor |  |  |  |
|  |  | Curriculum Coordinator |  |  |  |

# 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.

Counselor Name: SHARON BALL

Is Active: ☑

Grade:
☐ KG ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐ 07
☐ 08 ☑ 09 ☐ 10 ☐ 11 ☐ 12 ☐ 13
☐ 23 ☐ GR

[ Save ]  [ Cancel ]

## 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 | 🟢 |
| ✏ | RALPH | COOPER | | 🟢 |
| ✏ | MARILYN | HAMPTON | | 🟢 |
| ✏ | BRENT | SIMS | | 🟢 |

☑ Show Active Only

# Task #4: Assigning a Counselor during Registration

**Navigation:  StudentInformation – SIS – Registration Wizard**



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.

# 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**.



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

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**.



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

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



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



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

# 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**.



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

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 **Finis**h 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.

# 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 |