



## Assigning Counselors to Students Procedural Checklist

### Change Log

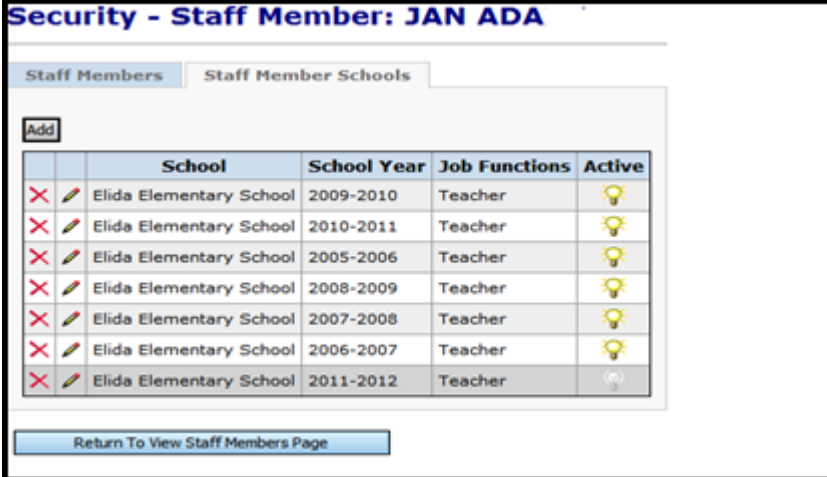
| Date     | Section Number/Name        | Change Description  |
|----------|----------------------------|---|
| 10/27/14 | Entire document            | Update screenshots and breadcrumb trail                                 |
| 10/22/13 | Task #4                    | 14.1.0 Updates – Update screenshot of Building Grade Levels Maintenance |
| 6/24/09  | Assign Counselors Manually | Updated screenshot  |
| 6/19/09  | Title Page                 | Update Logo   |

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## Task #1: Verify Staff Members

See the Security Procedural Checklist for more detailed instructions on Staff Members. Make sure any counselors you wish to use have a Staff record. Click the magnifying glass to view their Staff Member details.




The screenshot shows the 'Security - Staff Member: JAN ADA' page. It has two tabs: 'Staff Members' and 'Staff Member Schools'. The 'Staff Member Schools' tab is active. Below the tabs is an 'Add' button. A table lists the staff member's schools and job functions. The table has columns for 'School', 'School Year', 'Job Functions', and 'Active'. Each row has a red 'X' icon in the first column and a lightbulb icon in the 'Active' column. Below the table is a 'Return To View Staff Members Page' button.

|   | School                  | School Year | Job Functions | Active    |
|---|-------------------------|-------------|---------------|-----------|
| X | Elida Elementary School | 2009-2010   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2010-2011   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2005-2006   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2008-2009   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2007-2008   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2006-2007   | Teacher       | Lightbulb |
| X | Elida Elementary School | 2011-2012   | Teacher       | Lightbulb |

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

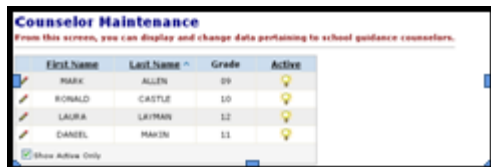
When viewing a staff member's details, click the Staff Member Schools tab. For a staff member to be considered a counselor, their current school year's Staff Member School entry must include Counselor as a job function.



The screenshot shows the 'Security - Staff Member: JAN ADA' page with the 'Staff Member Schools' tab active. It features a 'School' dropdown menu set to '--Select a School--' and a 'School Year' dropdown menu set to '--Select a School Year--'. There are checkboxes for 'Allow Staff Member to view all Students in EZ Query:' and 'Is Active:'. Below these are two columns: 'Available Job Functions' and 'Selected Job Functions'. The 'Available Job Functions' list includes: All, Teacher, Principal, Superintendent, Secretary, Media Specialist, EMS Coordinator, Technology Coordinator, Curriculum Coordinator, and Bus Driver. There are 'Save' and 'Cancel' buttons at the bottom left, and a 'Return To View Staff Members Page' button at the bottom.

### Task #3: Assign Grade Levels to Counselors

Once the staff member is a counselor, you will need to go to the Counselor Maintenance screen. Edit that counselor's entry, and check the boxes next to each grade level the counselor will be working with. (You can assign non-grade-appropriate counselors, but the default behavior is to use grade-appropriate counselors only.)



### Task #4: Assigning a Counselor during Registration



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's Registration Defaults section.



## Task #5: Counselor Bulk Assignment by Homeroom

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: **Homeroom** | Students | Options | Confirmation | Results

Assignment Method:  Homeroom |  Random |  Manual

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.

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  
 -- Select Homeroom Term --  
 FullYear - Full Year Term

Cancel | Next >

Click Next to go to 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

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 |
|-------------|----------|---------|---------------------|--------------------|-----------|
| AUT - AUT   | FullYear | RADLER  | 117 - COUNTY AUTISM | 09, 10, 11, 12, 23 | ROSS, ANN |
| IND0 - IND0 | FullYear | BROOKS  | 108 - MRS. BROOKS   | 09, 10, 11         | ROSS, ANN |
| IND1 - IND1 | FullYear | SOLARIK | 324 - DRAWING ROOM  | 09                 | ROSS, ANN |
| IND2 - IND2 | FullYear | MOORE   | 106 - MRS. MOORE    | 09                 | ROSS, ANN |
| IND3 - IND3 | FullYear | KYLER   | 111 - MRS. KYLER    | 09                 |           |

Click Next to go to 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 |
|-------------|---------------------|---------------------------|------------------------|-------------------------------|
| ALLEN, MARK | 0                   | 0                         | 1                      | 1                             |

Cancel | < Back | Finish

Click Finish to process the Counselor Bulk Assignment by Homeroom.

## Task #6: Randomly Bulk Assigning Counselors

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:  Homeroom  Random  Manual

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:

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:  Homeroom  Random  Manual

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

Last Name:   First Name:

Team:  Gender:

**Program**

|                       |                          |  |
|-----------------------|--------------------------|--|
| JAB - Jr Auto Body    | <input type="checkbox"/> |  |
| JAG - Jr AG Mechanics | <input type="checkbox"/> |  |
| JCOS - Jr Cosmetology | <input type="checkbox"/> |  |
| SAB - Sr Auto Body    | <input type="checkbox"/> |  |
| SAG - Sr AG Mechanics | <input type="checkbox"/> |  |
| SCOS - Sr Cosmetology | <input type="checkbox"/> |  |

**Student Status**

|                              |                          |  |
|------------------------------|--------------------------|--|
| A - ACTIVE RES               | <input type="checkbox"/> |  |
| D - DELETED                  | <input type="checkbox"/> |  |
| I - INACTIVE                 | <input type="checkbox"/> |  |
| JVS - Student Attending JVS  | <input type="checkbox"/> |  |
| O - OFF NGRRES               | <input type="checkbox"/> |  |
| Open - Open Enrolled Student | <input type="checkbox"/> |  |

**Grade Level**

|         |                          |  |
|---------|--------------------------|--|
| 09 - 09 | <input type="checkbox"/> |  |
| 10 - 10 | <input type="checkbox"/> |  |
| 11 - 11 | <input type="checkbox"/> |  |
| 12 - 12 | <input type="checkbox"/> |  |
| GR - GR | <input type="checkbox"/> |  |
| 23 - 23 | <input type="checkbox"/> |  |

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

Click Next to go to Confirmation tab.

| Counselor        | Previously Assigned | Assignments to be Removed | Assignments to be Made | Total Students to be Assigned |
|------------------|---------------------|---------------------------|------------------------|-------------------------------|
| VOGLE, MRS. E.   | 178                 | 0                         | 10                     | 188                           |
| WILLART, MRS. L. | 178                 | 0                         | 11                     | 189                           |

Buttons: Cancel, < Back, Finish

Click Finish to process the Counselor Bulk Assignment assigning randomly.

| Student           | Student Number | Grade | Status | Counselor   |
|-------------------|----------------|-------|--------|-------------|
| CONTRARY, MARY M. | 00005001       | 10    | A      | ALLEN, MARK |

Button: Start Over

## Task #7: Manually Bulk Assigning Counselors

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

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

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

Assignment Method:  Homeroom  Random  Manual

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.

Buttons: 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

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

Last Name:  First Name:   
Team:  Gender:

**Program**

|                       |  |
|-----------------------|--|
| JAB - Jr Auto Body    |  |
| JAG - Jr AG Mechanics |  |
| JCOS - Jr Cosmetology |  |
| SAB - Sr Auto Body    |  |
| SAG - Sr AG Mechanics |  |
| SCOS - Sr Cosmetology |  |

**Student Status**

|                              |  |
|------------------------------|--|
| A - ACTIVE RES               |  |
| D - DELETED                  |  |
| I - INACTIVE                 |  |
| JVS - Student Attending JVS  |  |
| O - OTH NONRES               |  |
| Open - Open Enrolled Student |  |

**Grade Level**

|         |  |
|---------|--|
| 09 - 09 |  |
| 10 - 10 |  |
| 11 - 11 |  |
| 12 - 12 |  |
| GR - GR |  |
| 23 - 23 |  |

Buttons: 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:  Homeroom  Random  Manual

Counselor: ALLEN, MARK

Buttons: Cancel, < Back, Next >

Click Next to go to 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

|   | <input type="checkbox"/>            | Student Name     | Student Number | Grade | Status | Counselor   |
|---|-------------------------------------|------------------|----------------|-------|--------|-------------|
| 1 | <input checked="" type="checkbox"/> | Banana, Hannah   | 48652258       | 10    | A      | ALLEN, MARK |
| 2 | <input checked="" type="checkbox"/> | Contrary, Jesse  | 48652281       | 10    | A      | ALLEN, MARK |
| 3 | <input checked="" type="checkbox"/> | EYE, CORY ROBERT | 00006001       | 10    | A      | ALLEN, MARK |
| 4 | <input checked="" type="checkbox"/> | EYE, PRIVA       | 00122445       | 10    | A      | ALLEN, MARK |

Cancel | < Back | Finish

Click Finish to process the Counselor Bulk Assignment assigning manually.

**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   |
|------------------|----------------|-------|--------|-------------|
| Banana, Hannah   | 48652258       | 10    | A      | ALLEN, MARK |
| Contrary, Jesse  | 48652281       | 10    | A      | ALLEN, MARK |
| EYE, CORY ROBERT | 00006001       | 10    | A      | ALLEN, MARK |
| EYE, PRIVA       | 00122445       | 10    | A      | ALLEN, MARK |

Start Over



- **Assign Counselors Manually** – If you don't want to use Counselor Bulk Assignment, or if you need to adjust 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, un-check the "Show grade appropriate counselors only" checkbox to refresh the list.

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

**Edit Student Profile**  
From this screen, you can display and change information regarding a students profile.

General | **Additional** | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation

Save | Cancel Last Modified: 10/24/2014 3:50 PM by User: Amy

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**Primary Building:** HIGH SCHOOL

**Special Ed:** 0  **Country of Origin:** US - United States Of America

**Citizenship:** 04 - United States citizen

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**Building Progression Track:** - District Track  **Graduation Year:**

**New School:**

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**Pri. Graduation Rule:**  **Alt. Graduation Rule:**

**Counselor:** SCHUMMET, MARY JO (\*)  **Scheduling Priority:** 5

Show grade appropriate counselors only **Locker Assignments:**

---

**Team:**  **Homeroom:** H137  OR

Choose from drop down or click Auto-Assign which will randomly assign an available grade-level appropriate homeroom to the student.

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**Include in Honor Roll:**  **Flags:** 1  2  3  4  5

**Include in Ranking:**

**Include in GPA:**

- **View Counselor Assignments** – Navigate to this screen and 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.

**Navigation: StudentInformation – SIS – School - Counselors**

**Student Counselor Assignment**  
 From this screen, you can view students assigned to a specific counselor.

Filter By Counselor: CASTLE, RONALD

| Student ID | Student Name ^                          | Student Status | Grade | Gender | Homeroom | Phone Number | Program | Age |
|------------|---|----------------|-------|--------|----------|--------------|---------|-----|
| 00007001   | <a href="#">CONTRARY, JASON WILLIAM</a> | ACTIVE RES     | 10    | M      |          |              |         | 16  |
| 00001224   | <a href="#">LEE, HARPER</a>             | ACTIVE RES     | 10    | F      |          | 4193452345   |         | 16  |
| 00007002   | <a href="#">PERRY, RICHARD MATTHE</a>   | ACTIVE RES     | 10    | M      |          |              |         | 17  |
| 00007003   | <a href="#">RING, NICOLE SUZANNE</a>    | ACTIVE RES     | 10    | F      |          |              |         | 17  |
| 00007004   | <a href="#">SARGENT, LEANN JEAN</a>     | ACTIVE RES     | 10    | F      |          | 4195559876   |         | 16  |
| 00007005   | <a href="#">WILLIAMSON, RYAN SETH</a>   | ACTIVE RES     | 10    | M      |          |              |         | 16  |