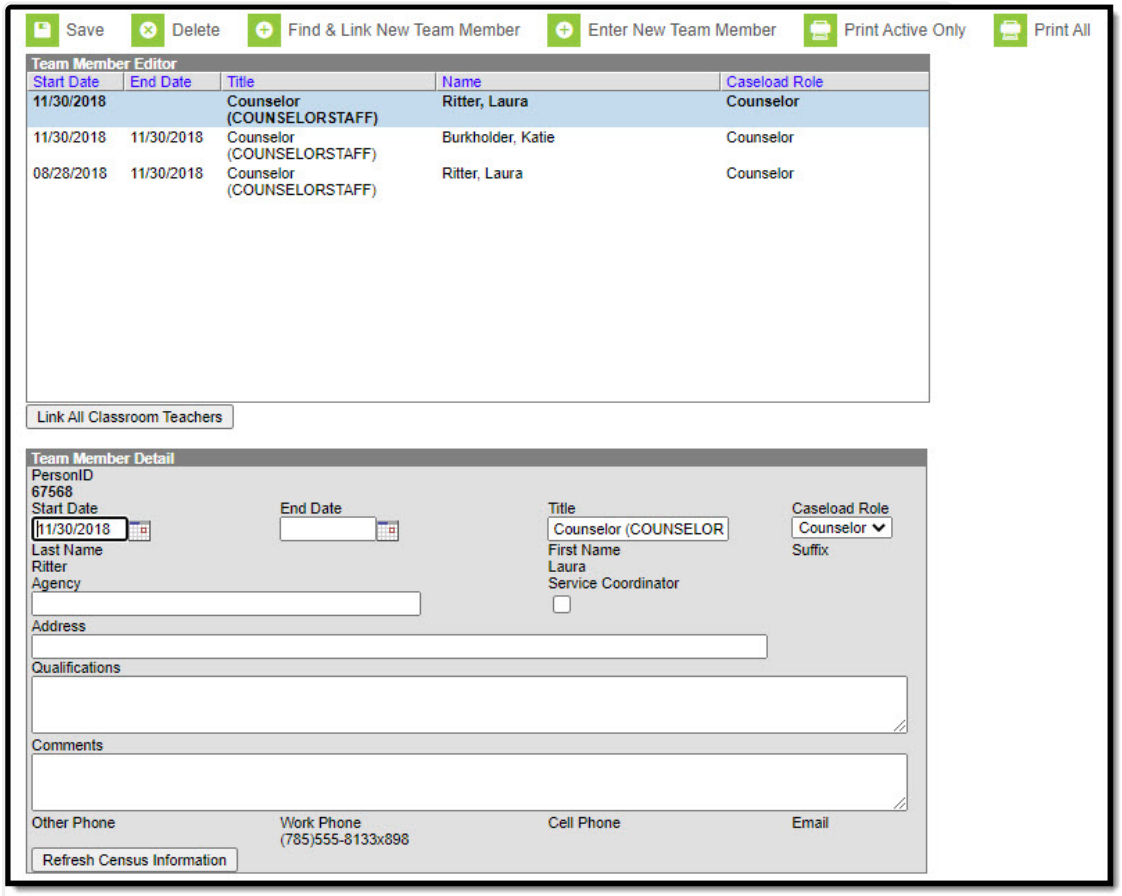
Counseling Team Members

Last Modified on 07/30/2026 10:52 am CDT

Tool Search: Counseling Team Members

The Counseling Team Members tool lists the individuals who are part of a student's education team, including counselors, family, and service providers. The Role assigned to team members indicates their involvement in the student's team. Members can be added either by finding an existing person and linking them or by entering a person without consulting Census.

In order for a staff member's name to print on reports, the staff member must have at least an email address or phone number entered on their Demographics tab. See the Demographics tool document for information on entering personal contact information.



Counseling Team Members

See the Counseling Tool Rights article for information about rights needed to use this tool.

Only those individuals who need access to the student in a counseling context should be added.

Team Member Information in Ad hoc Query Wizard

Use the Student Data Type in the Filter Designer to build reports that include Team Members information. These fields are available in the **Student > Learner Planning > Team Members**.

Team Member Detail Fields

Select an existing Team Member to view the Team Member Detail. This table describes the fields available on the Team Member Detail.

Field	Description	Ad hoc Field Name
Start Date	The first date that the team member record is active.	teamMember.startDate
End Date	The last date that the team member is considered active. Active team members display in bold in the team member list.	teamMember.endDate
Title	The title of the individual in relation to the special education team membership.	teamMember.title

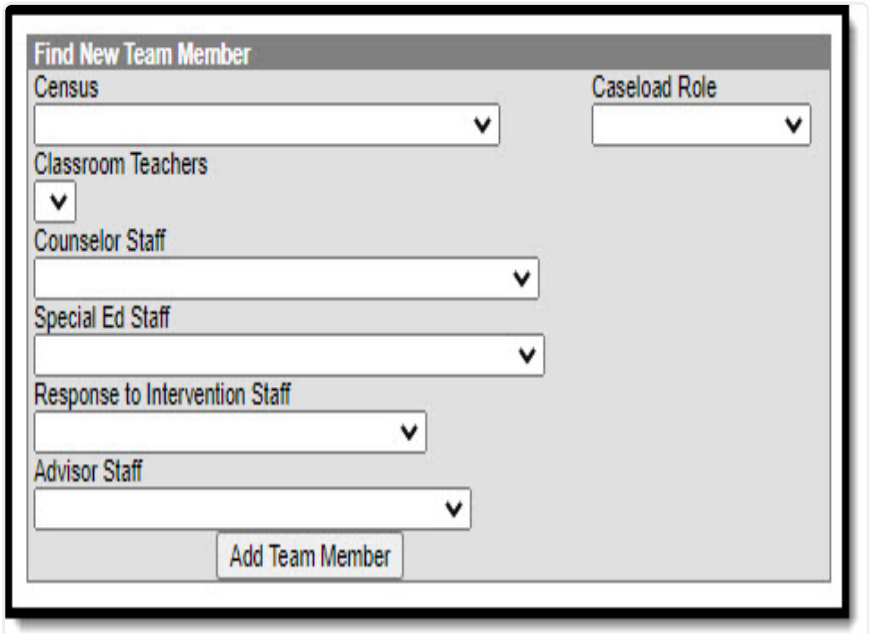
Field	Description	Ad hoc Field Name
Caseload Role *This field varies by module*	**Counseling/ILPA (KY Only)** The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to tool rights. The Role of **Counselor** places the student on the user's Counseling Caseload. **Special Education/Response to Intervention** The role of the member in relation to the team. Options are: • Service Provider • Case Manager Because Entering a New Team Member does not link Census records, Service Provider and Case Member records added this way do not result in students displaying in the team member's Caseload. Use the Find and Link Team Members tool to add students to a Caseload. See the Special Ed Caseload or RTI Caseload articles for additional information. **Personal Learning Plans** The role of the member in relation to the team. The only option is **Service Provider.** Because Entering a New Team Member does not link Census records, Service Provider and Team Member records added this way do not result in students displaying in the team member's Caseload. Use the Find and Link Team Members tool to add students to a Caseload.	teamMember.role
Last Name	The last name of the team member.	teamMember.lastName
First Name	The first name of the team member.	teamMember.firstName
Suffix	The suffix of the team member.	N/A
Service Coordinator	Indicates the team member is responsible for coordinating the services the student receives.	N/A
Agency	The agency the team member is associated with.	teamMember.agency

Field	Description	Ad hoc Field Name
Address	The address associated with the team member, either the home address or the address of the agency.	N/A
Qualifications	The credentials that qualify the individual for team membership.	N/A
Comments	Any comments associated with the team membership.	N/A
Other Phone	Other phone number for contacting the individual.	N/A
Work Phone	The work phone number of the individual.	N/A
Cell Phone	The cell phone number of the individual.	N/A
Email	The email address of the individual.	N/A

Find and Link Team Members

The **Find and Link New Team Members** tool allows user to select new team members from a limited list based on likely candidates, such as those connected to the student in Census, the student's teachers, and other staff members. Existing individuals are then linked to the student and their information provided. See the following table for a description of the fields in this editor.

One new team member can be added at a time. For example, when a selection is made in the Census dropdown, no other selections can be made.



Find and Link Team Members

Special Ed Only

When adding team members, only add those who need access to the student in a special education context. Teachers who only need to know that a student has an IEP and do not need access to read it should not be added to the team. An icon on the roster displays for students with IEPs.

Find New Team Member Fields

Field	Description
Census	This dropdown list is made up of individuals who have a connection of the student though Census, such as members of the student's household, other guardians and emergency contacts. Individuals are listed with their Name (last, first), their status as a guardian of the student (Guard/Non-guard) and their relationship with the student (Mother, Father, etc).
Caseload Role *This field varies by module*	**Counseling/ILPA (KY Only)** The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to tool rights. The Role of **Counselor** places the student on the user's Counseling Caseload. **Special Education/Response to Intervention/Personal Learning Plans** The Role field describes the access this individual has to the student. • **Service Provider** Student displays in the Service Provider section of the team member's Caseload. • **Case Manager** Student displays in the Case Manager section of the team member's Caseload.
Classroom Teachers	This field pulls a list of the student's current teachers, based on the the student's schedule.
Counselor Staff *Counseling/PLP/ILPA only*	This field includes staff members who have a District Assignment of **Counselor**. Individuals are listed with their Name (last, first) and Title.
Special Ed Staff *Special Ed Only*	This field includes staff members who have a District Assignment of **Special Ed**. Individuals are listed with their Name (last, first) and Title.
Response to Intervention Staff *RTI Only*	This field includes staff members who have a District Assignment of **Response to Intervention**. Individuals are listed with their Name (last, first) and Title.

Field	Description
Advisor Staff	This field includes staff members who have a District Assignment of **Advisor**.

Once the desired individual is selected, click **Add Team Member** to add the individual to the student's special education team. Contact information populates from Census and the Start Date of the team membership defaults to the current date. For an explanation of the fields that display for a team member, see the Team Member Fields table below.

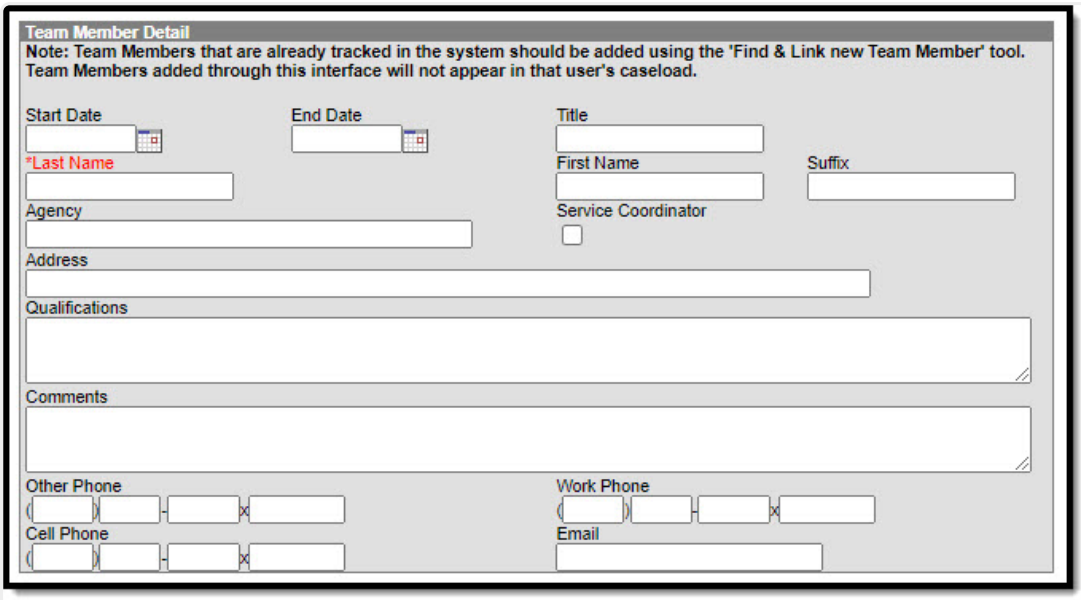
Add Team Members with Find and Link New Team Member

1. Select the **Find and Link New Team Member** button. The **Find New Team Member** editor displays.
2. Select the desired individual from the appropriate dropdown list.
3. Assign that individual a **Caseload Role**.
4. Click the **Add Team Member** button. The person displays in the **Team Member Editor**.

Selecting the newly added individual displays that person's team member detail, noting when the individual was added as a team member to that student, the assigned role, specific qualifications or comments. Certain information in this record is pulled from saved Census data. Use the **Refresh Census Information** button to pull updated information from the Identities tool. Edits can be made to this detail record to add qualifications and comments and to designate the Agency of the team member or to mark them as the Service Coordinator.

Enter New Team Members

Individuals who are not yet entered into Census or who do not have a District Assignment record can be added to a student's team by entering information about the team member. Team Members added in this way only exist as a record for this student; they are not added to Census and are not available to add to any other student's teams.



Team Member Detail

Enter New Team Member Fields

Field	Description	Ad hoc Fields
Start Date	The first date that the team member record is active. Defaults to the current date.	teamMember.startDate
End Date	The last date that the team member is considered active. Active team members display in bold in the team member list.	teamMember.endDate
Title	The title of the individual in relation to the special education team membership.	teamMember.title
Last Name *Required*	The last name of the team member.	teamMember.lastName
First Name *Required*	The first name of the team member.	teamMember.firstName
Service Coordinator	Indicates the team member is responsible for coordinating the services the student receives.	N/A
Agency	The agency the team member is associated with.	teamMember.agency
Address	The address associated with the team member, either the home address or the address of the agency.	N/A
Qualifications	The credentials that qualify the individual for team membership.	N/A

Field	Description	Ad hoc Fields
Comments	Any comments associated with the team membership.	N/A
Other Phone	Other phone number for contacting the individual.	N/A
Work Phone	The work phone number of the individual.	N/A
Cell Phone	The cell phone number of the individual.	N/A
Email	The email address of the individual.	N/A

Add New Team Members with Enter New Team Members

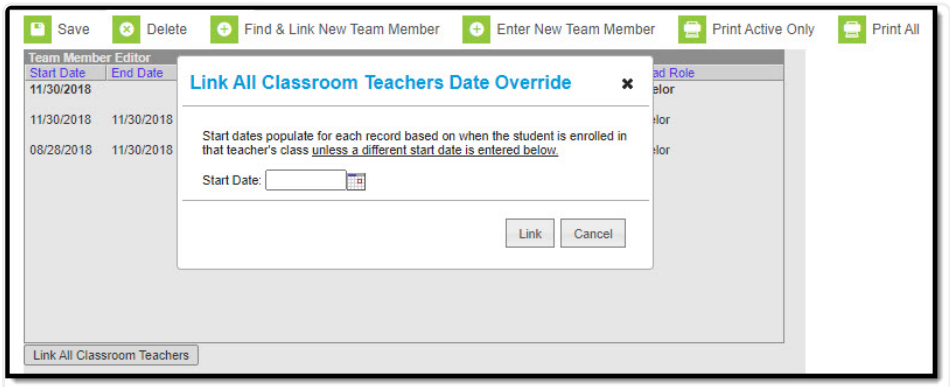
1. Select the **Enter New Team Member** button. A **Team Member Detail** editor displays.
2. Enter all required fields.
3. Optional: enter all desired fields as defined above.
4. Click the **Save** button when finished. The new member displays in the Team Member Editor.

Link All Classroom Teachers

The **Link All Classroom Teachers** button adds all of the student's teachers to their team. This option adds each Primary Teacher assigned to a course section in which the student is scheduled to view the student's education plan. The student's Rostered Dates are used to pull teachers associated with those courses, not the teacher's active Start and End Dates.

The **Link All Classroom Teacher Date Override** dialog displays. Start dates populate for each record based on when the student is enrolled in that teacher's class unless a different start date is entered. Entering a date pulls in teachers with the date entered as the start date.

The option to Link All Classroom Teachers only displays when the Special Ed Preference Enable Team Member List to Populate from Classroom Teachers is set to Yes.



Link All Classroom Teachers

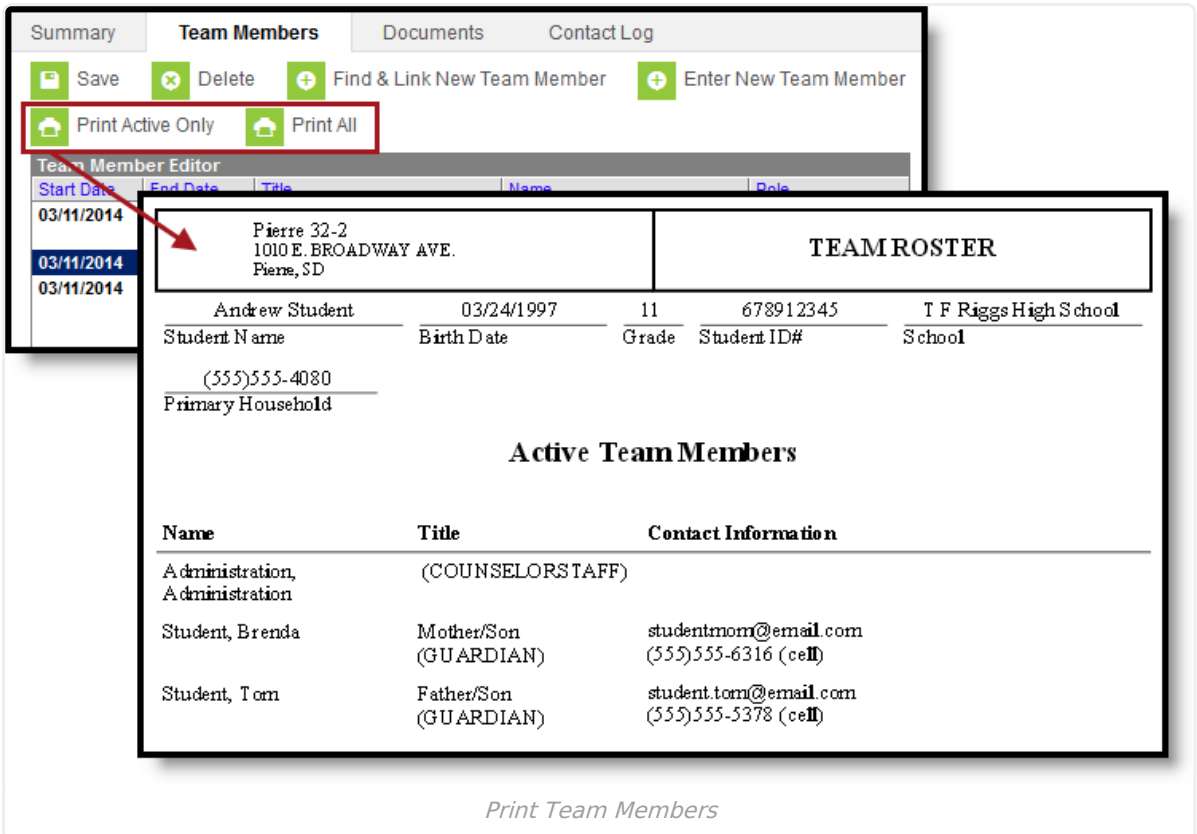
Start and End dates populate for each teacher's record based on when the student is enrolled in that teacher's class. Membership records for teachers in future sections are entered as inactive memberships.

Print

A PDF of all or just active team members can be printed by selecting the Print Active Only or Print All buttons.

To print a list of all active team members, click the **Print Active Only** button. To print all team members, including inactive ones, click the **Print All** button. The list of team members prints in PDF format, sorted by Active and Inactive, with the Name, Title and Contact Information for the team members.

When a team member's contact option is marked as Private on the Demographics tool, that value is hidden from view and does not print.



Print Team Members