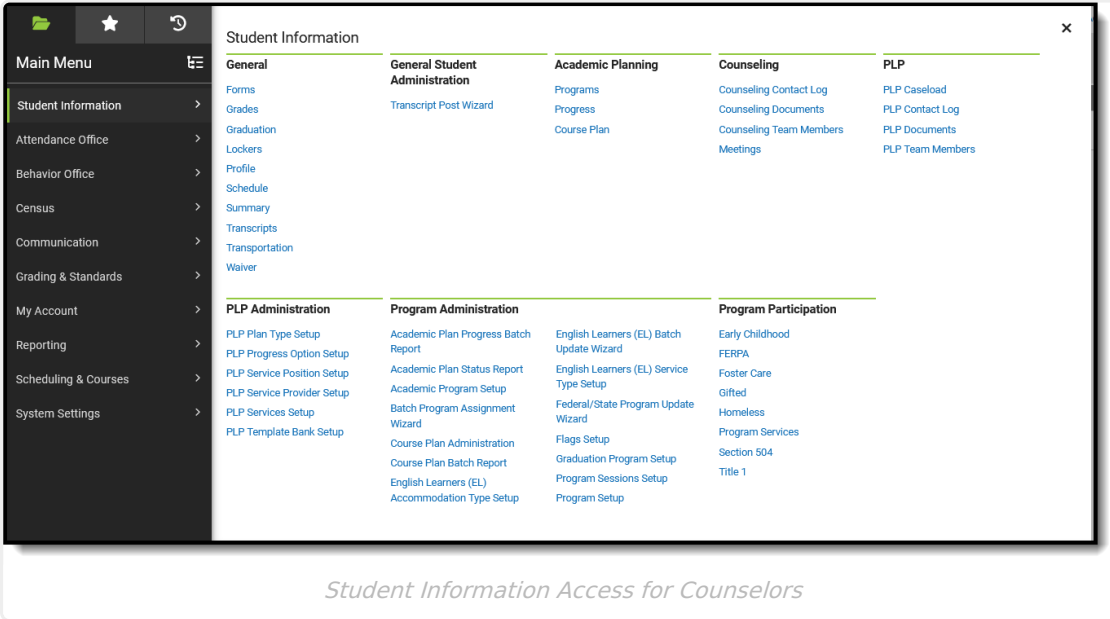# Counselors User Group

Last Modified on 03/28/2025 1:38 pm CDT

The following are suggested tool rights for counselors. Your counselors may need more tool rights or less tool rights depending on their actual job duties. Start with this list and modify rights to meet your school or district needs.

Student Information

Student Information Access for Counselors

General

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Forms		X		
Behavior	X	X	X	X
Custom Forms	X	X	X	X
Unlock	X			
Copy	X			
Blank Forms	X			
Override	X			
Counseling	X	X	X	X
Custom Forms	X	X	X	X

Tool	Read	Write	Add	Delete
Unlock	X			
Copy	X			
Blank Forms	X			
Override	X			
Grades	X			
Grade Book	X			
Additional Enrollment Grades	X			
Graduation	X	X		
Modify Cohort	X			
Modify 9th Grade Start Date	X			
Lockers	X			
Profile	X			
Attendance	X			
Behavior	X			
In-Progress Grades	X			
Todo	X			
Schedule	X	X	X	X
Can Overload Sections	X			
Grade Book	X			
View Attendance	X			
Can Override Strict Student Constraints	X			
Scheduling Messenger	X			
User Group Formats	X			
Additional Enrollment Schedules	X			
Summary	X			
GUID	X			
Print Picture	X			
State ID	X			

Tool	Read	Write	Add	Delete
Ed-Fi ID	X			
Transcript	X	X	X	X
Free Form Entry	X			
Transportation	X			
Waiver	X			

General Student Administration

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Transcript Post Wizard	X	X	X	X

Academic Planning

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Programs	X	X	X	X
Academic Programs	X	X	X	X
Graduation Programs	X	X	X	X
Progress	X			
Course Plan	X	X		

Counseling

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Contact Log	X	X	X	X
Access to Records Created by Other Users	X			
Counseling Documents	X	X	X	X
Custom Forms	X	X	X	X
Lock	X			

Tool	Read	Write	Add	Delete
Copy	X			
Document Upload	X	X	X	X
Lock	X			
Unlock	X			
Counseling Team Members	X	X	X	X
Meetings	X	X	X	X

PLP

▶ Click here to expand...

Tool	Read	Write	Add	Delete
PLP Caseload	X	X	X	X
PLP Contact Log	X	X	X	X
Access to Records Created by Other Users	X			
PLP Documents	X	X	X	X
Plan	X	X	X	X
Lock	X			
Unlock	X			
Copy	X			
DocSections	X	X		X
Progress Report	X	X	X	X
Lock	X			
Unlock	X			
Custom Forms	X	X	X	X
Lock	X			
Unlock	X			
Copy	X			
Document Upload	X	X	X	X

Tool	Read	Write	Add	Delete
Lock	X			
Unlock	X			
PLP Team Members	X	X	X	X

PLP Administration

▸ Click here to expand...

Tool	Read	Write	Add	Delete
PLP Plan Type Setup	X	X	X	X
PLP Progress Option Setup	X	X	X	X
PLP Service Position Setup	X	X	X	X
PLP Service Provider Setup	X	X	X	X
PLP Services Setup	X	X	X	X
PLP Template Bank Setup	X	X	X	X

Program Administration

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Academic Plan Progress Batch Report	X	X	X	X
Academic Plan Status Report	X	X	X	X
Academic Program Setup	X	X	X	X
Batch Program Assignment Wizard	X	X	X	X
Course Plan Administration	X	X	X	X
English Learners (EL) Accommodation Type Setup	X	X	X	X
English Learners (EL) Batch Update Wizard	X	X	X	X
English Learners (EL) Service Type Setup	X	X	X	X
Federal/State Program Update Wizard	X	X	X	X
Flags Setup	X	X	X	X
Graduation Program Setup	X	X	X	X

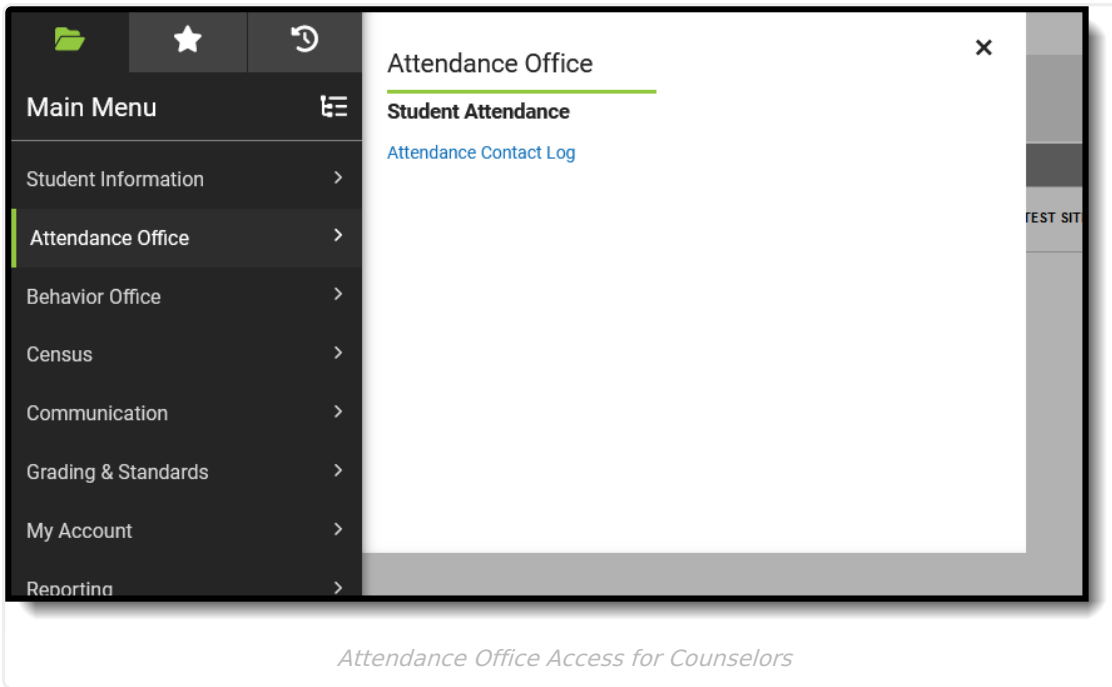| Tool	Read	Write	Add	Delete
Program Sessions Setup	X	X	X	X
Print Session Report	X			
Program Setup	X	X	X	X
Program Detail Report	X			

Program Participation

Program Participation tools vary by state. This table captures the most common programs.

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Early Childhood	X	X	X	X
FERPA	X	X	X	X
Foster Care	X	X	X	X
Gifted	X	X	X	X
Homeless	X	X	X	X
Add & Auto-end Records	X			
Program Services	X	X	X	X
Homeless Services	X	X	X	X
Section 504	X	X	X	X
Title 1	X	X	X	X

Attendance Office

Attendance Office Access for Counselors

Student Attendance

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Attendance Contact Log	X	X	X	X
Access to Records Created by Other Users	X			

^ Back to Top

Census

For specific details on what these rights do, visit the Census Tool Rights articles.

Census Access for Counselors
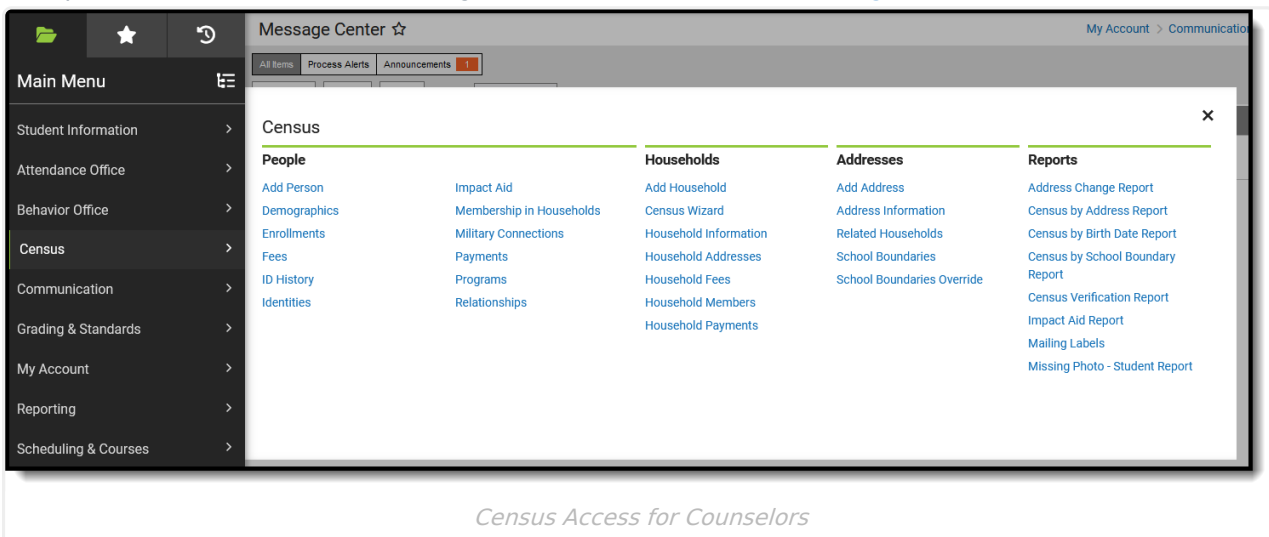
People

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Demographics	X	X	X	X
Staff State ID	X	X	X	
GUID	X			
Student State ID	X	X	X	
Modify Local Staff Number	X			
Modify Local Student Number	X			
Ed-Fi ID	X	X	X	
View Staff Birth Date & Age	X	X	X	
Reset Portal Password	ALL			
Enrollments	X	X	X	X
General Enrollment Information	X	X		
School of Accountability	X			
State Reporting	X	X		
Homeless	X	X		
Meal Status	X	X		
Migrant	X	X		
Ward of State	X	X		
Special Ed	X	X		
Service Hours	X	X		
Service Hrs Percent Reported	X	X		
Enrollment History	X	X	X	X
FutureEnrollment	X	X		
Fees	X	X	X	X
ID History	X			
Identities	X	X	X	X
Legal Name & Gender	X	X	X	X

Tool	Read	Write	Add	Delete
Impact Aid	X	X	X	X
Membership in Households	X	X	X	X
Military Connections	X	X	X	X
Payments	X	X	X	X
Programs	X	X	X	X
Relationships	X	X	X	X

Households

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Add Household	X	X		
Census Wizard	X	X		
Add Address	X	X		
Add Household	X	X		
Add Person	X	X		
Household Information	X	X	X	X
Household Addresses	X	X	X	X
Household Fees	X	X	X	X
Household Members	X	X	X	X
Household Payments	X	X		

Addresses

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Add Address	X	X		
Address Information	X	X	X	X
Related Households	X	X	X	X
School Boundaries	X	X	X	X

Tool	Read	Write	Add	Delete
School Boundaries Override	X	X	X	X

Census Reports

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Address Change Report	X			
Census by Address Report	X			
Census by Birthdate Report	X			
Census by School Boundary Report	X			
Census Verification Report	X			
Impact Aid Report	X			
Mailing Labels	X			
Missing Photo - Student report	X			
Staff Report	X			

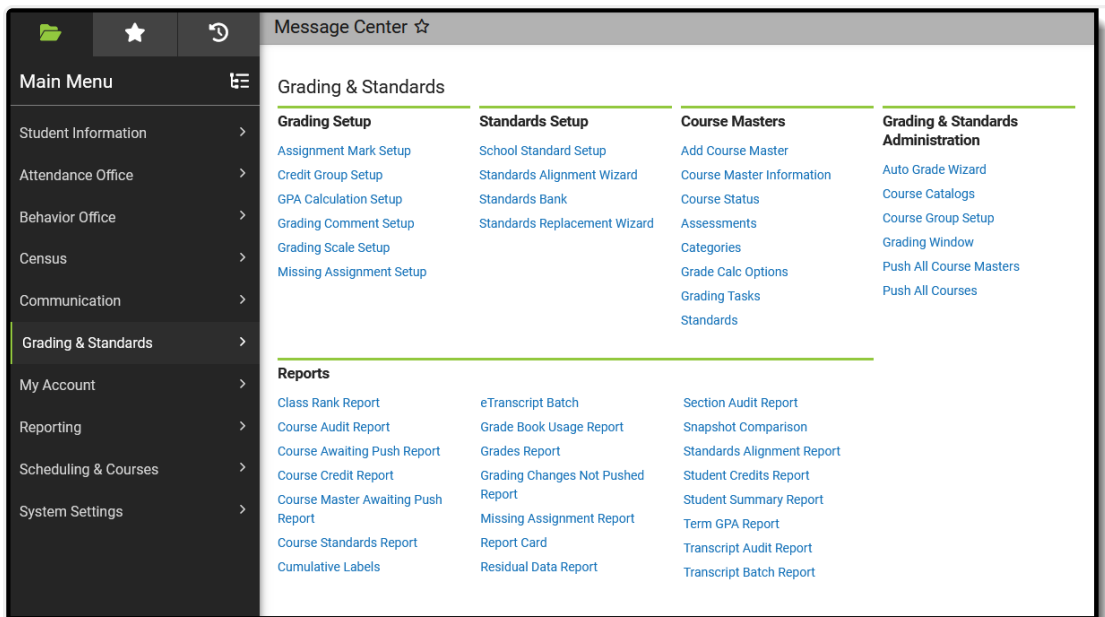# Communication

Communication Access for Counselors
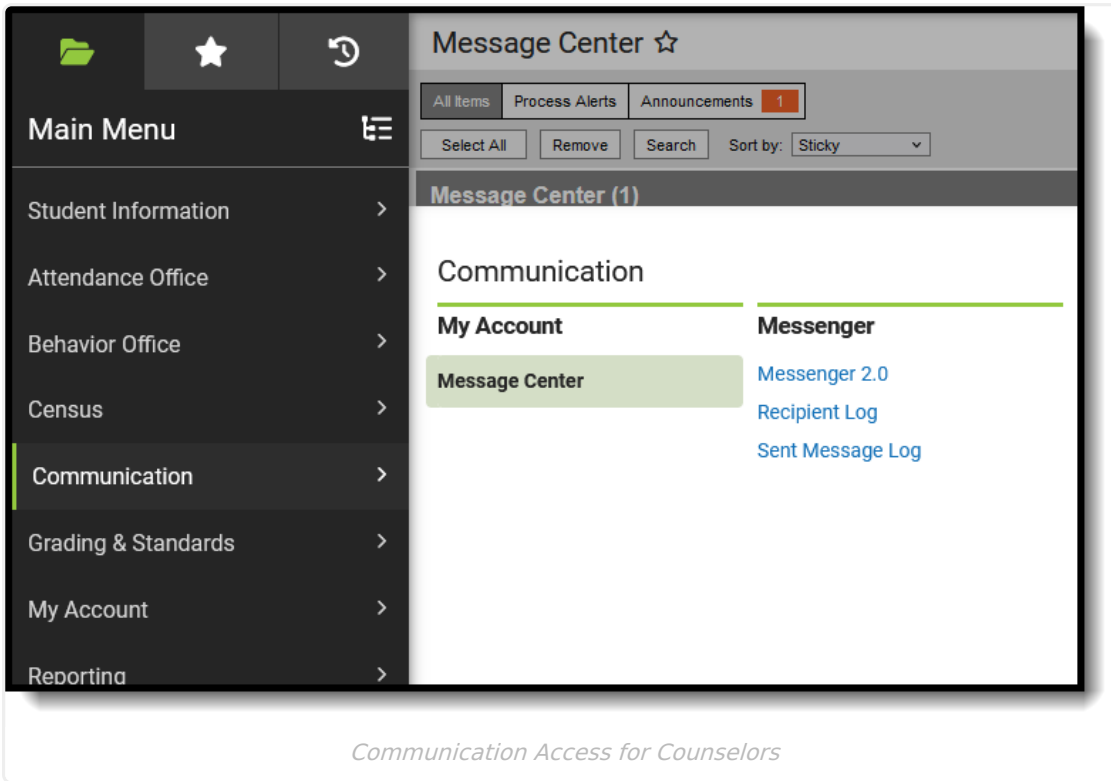
Messenger

▸ Click here to expand...

For the following tool rights, ALL is the only selection available.

Tool	All	Read	Write	Add	Delete
Messenger 2.0	X				
Message Types	X				
General	X				
Priority	X				
Recipient Log		X			
Recipient Campus Fields		X			
Sent Message Log		X			

Grading & Standards

Grading & Standards Access for Counselors

Grading Setup

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Assignment Mark Setup	X	X	X	X
Credit Group Setup	X	X	X	X
GPA Calculation Setup	X	X	X	X
Grading Comment Setup	X	X	X	X
Grading Scale Setup	X	X	X	X
Grading Task Setup	X	X	X	X
Missing Assignment Setup	X	X	X	X
Score Group & Rubric Setup	X	X	X	X

Standards Setup

▶ Click here to expand...

Tool	Read	Write	Add	Delete
School Standard Setup	X	X	X	X
Standards Alignment Wizard	X	X	X	X

Tool	Read	Write	Add	Delete
Standards Bank	X	X	X	X
Standards Import Wizard	X	X	X	X
Standards Replacement Wizard	X	X	X	X

Course Masters

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Add Course Master	X	X	X	X
Course Master Information	X			
Course Status	ALL			
Assessments	X	X	X	X
Categories	X	X	X	X
Grade Calc Options	X	X	X	X
Grading Tasks	X	X	X	X
Standards	X	X	X	X

Grading & Standards Administration

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Auto Grade Wizard	X	X		
Course Catalogs	X	X	X	X
Course Group Setup	X	X	X	X
Grading Window	X	X	X	X
Grading Window Notifications	X			
Push All Course Masters	X			
Push All Courses	X			

Grading & Standards Reports

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Class Rank Report	X			
Course Audit Report	X			
Course Awaiting Push Report	X			
Course Credit Report	X			
Course Master Awaiting Push Report	X			
Course Standards Report	X			
Cumulative Labels	X			
eTranscript Batch	X			
Electronic Release	X			
Grade Book Usage Report	X			
Grades Report	X			
Grading Changes Not Pushed Report	X			
Missing Assignment Report	X			
Report Card	X			
Residual Data Report	X			
Section Audit Report	X			
Snapshot Comparison	X			
Standards Alignment Report	X			
Student Credits Report	X			
Term GPA Report	X			
Transcript Audit Report	X			
Transcript Batch Report	X			

Reporting

▶ Click here to expand...
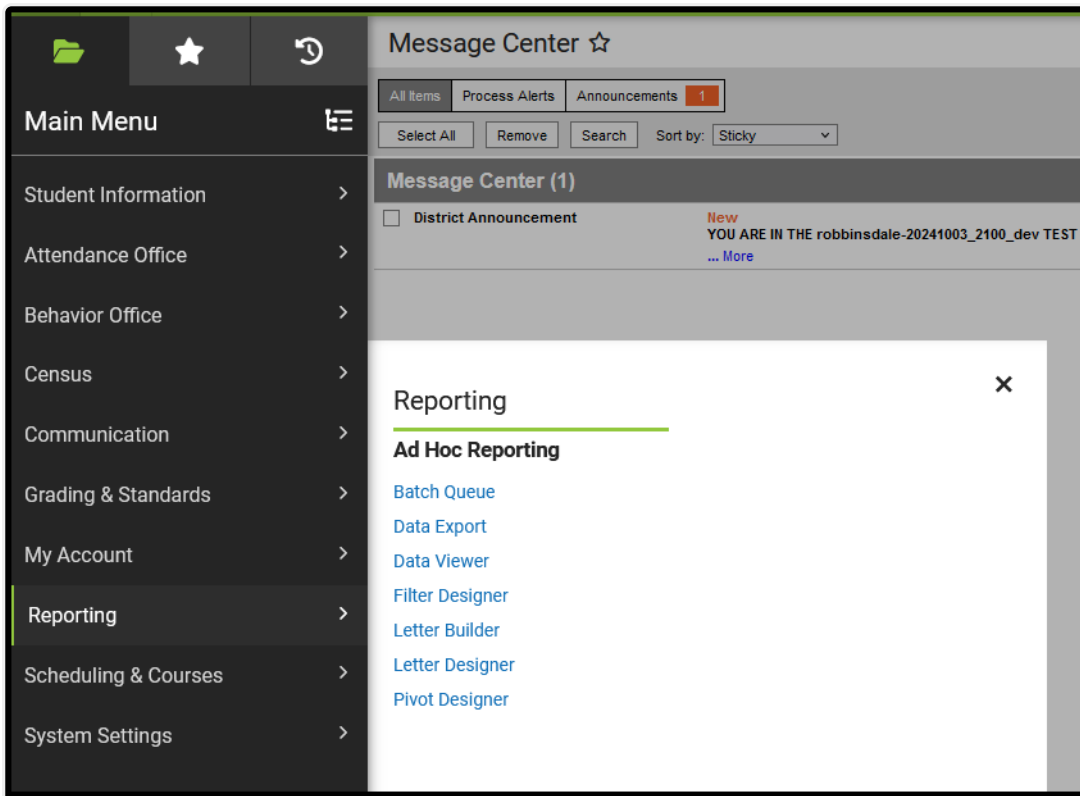
Reporting Access for Counselors

Ad hoc Reporting

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Batch Queue	X	X	X	X
Set Task Expiration	X	X	X	X
Set Task Priority	X	X	X	X
Data Export	X	X	X	X
Data Warehouse: Allow list data as source	X	X	X	X
Data Viewer	X	X	X	X
Filter Designer	X	X	X	X
Data Warehouse: Allow list data as source	X	X	X	X
Pass-through SQL FIlters	X	X	X	X
Query Wizard Filters	X	X	X	X
Selection Editor Filters	X	X	X	X

Tool	Read	Write	Add	Delete
User Group Filters	X	X	X	X
State Owned Filters	X	X	X	X
Export Filters	X	X	X	X
Letter Builder	X	X	X	X
Data Warehouse: Allow live data as source	X			
Letter Designer	X	X	X	X
User Group Formats	X			
Pivot Designer	X	X	X	X
Group Rights	X			
Data Warehouse: Allow live data as source	X			

Scheduling & Courses

Scheduling & Courses Access for Counselors

Scheduling

▸ Click here to expand...

Tool	Read	Write	Add	Delete
Scheduling Center	ALL			
Course Planner	X	X		
Requests & Rosters	X	X		
Modify Rosters	X			
Can Overlad Sections	X			
Can Override Strict Student Constraints	X			
Delete Rosters	X			
Scheduling Board	X	X	X	X
Staff Planner	X	X		

Courses

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Add Course	X			
Course Information	X	X	X	X
Push to Section	X	X		
Course Assessments	X	X	X	X
Course Categories	X	X	X	X
Course Fees	X	X	X	X
Course Grade Calc Options	X	X	X	X
Course Grading Tasks	X	X	X	X
Course Rules	X	X	X	X
Course Sections	X	X	X	X
Course Standards	X	X	X	X
Section Attendance	X	x		
Section Information	X	X	X	X

Tool	Read	Write	Add	Delete
Section Grading by Student	X	X	X	X
Section Grading by Task	X	X	X	X
Section Guest Grade Book	X	X	X	X
Grade Calc Options	X			
Composite Grades	X			
Categories	X			
Section Roster	X	X	X	X
View IEP/Plan Icons	X			
Section Staff History	X	X	X	X
Section Student Detail	X	X	X	X

Build Schedules

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Lunch Setup	X	X	X	X
Student Constraints Setup	X	X	X	X
Team (Scheduling Group) Setup	X	X	X	X

Load Schedules

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Fill Counselor Wizard	X			
Fill Teams Wizard	X			
Schedule Gap Filler	X			
Student Gap Scheduler	X			

Responsive Scheduling

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Responsive Schedule Designer	X			
Responsive Schedule Section Builder	X			

Section Templates

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Section Template Information	X	X	X	X
Generate Section Templates Wizard	X			
Mass Set Section Template Groups Wizard	X			

Scheduling & Courses Reports

▶ Click here to expand...

Tool	Read	Write	Add	Delete
Blended Learning Gap/Overlap Report	X			
Course Projections Report	X			
Master Schedule Report	X			
Open Rooms Report	X			
Request Batch Report	X			
Request Conflicts Report	X			
Request Detail Report	X			
Requests Satisfied Report	X			
Room Usage Report	X			
Schedule Batch Report	X			
Schedule Conflicts Report	X			
Schedule Units Report	X			
Seat Count Report	X			
Section Rosters Report	X			

Tool	Read	Write	Add	Delete
View IEP/Plan Icons	X			
Staff History Report	X			
Teacher Load Report	X			
Teacher Schedule Batch Report	X			

System Settings

System Settings Access for Counselors

▶ Click here to expand...

Tool	Read	Write	Add	Delete
System Preferences	X	X	X	X
Report Setup	X	X	X	X

Additional Access Rights

General

For the following tool right, ALL is the only selection available.

Tool	All
Allow unfiltered search	X