

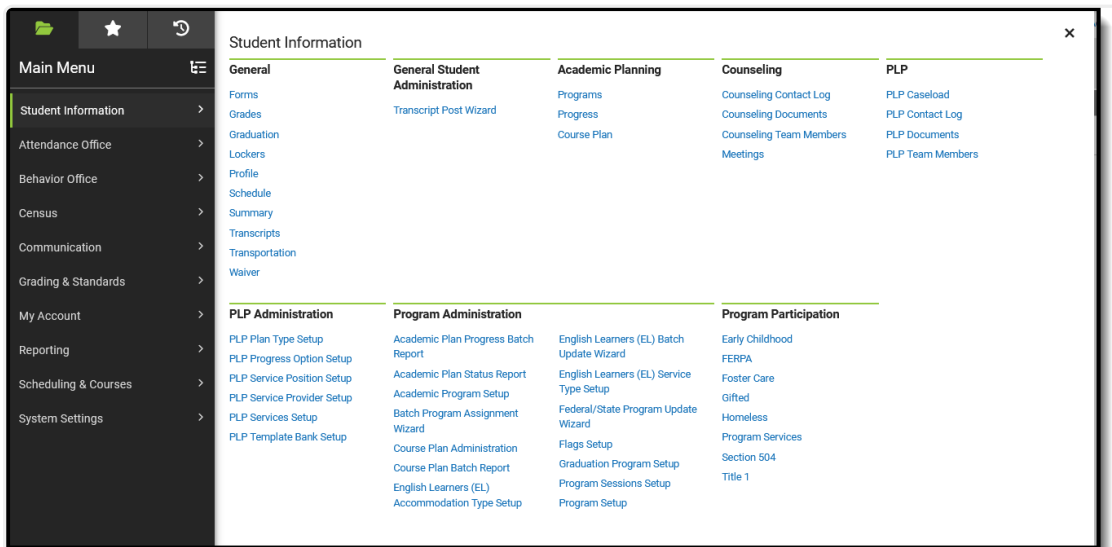
Counselors User Group

Last Modified on 12/14/2025 8:45 pm CST

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

Student Information

[General](#) | [General Student Administration](#) | [Academic Planning](#) | [Counseling](#) | [PLP](#) | [PLP Administration](#) | [Program Administration](#) | [Program Participation](#)



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			

Tool	Read	Write	Add	Delete
Counseling	X	X	X	X
Custom Forms	X	X	X	X
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			

Tool	Read	Write	Add	Delete
Print Picture	X			
State ID	X			
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

Tool	Read	Write	Add	Delete
Custom Forms	X	X	X	X
Lock	X			
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			

Tool	Read	Write	Add	Delete
Document Upload	X	X	X	X
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

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

Program Participation

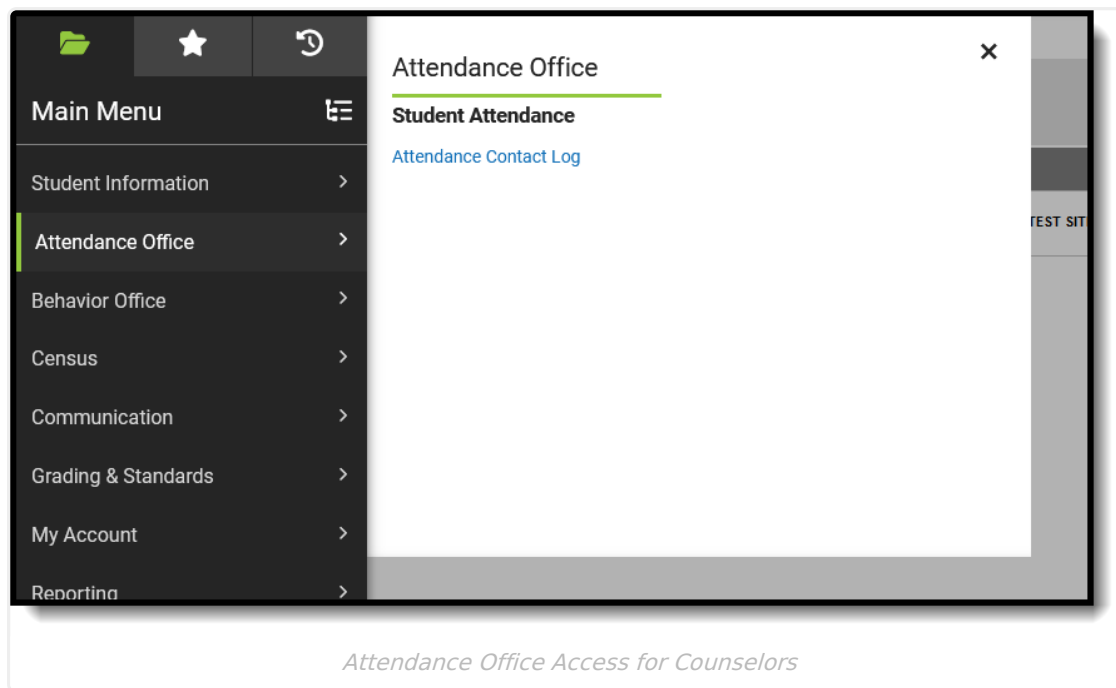
Program Participation tools vary by state. This table captures the most common programs.

► [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

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Attendance Office



Student Attendance

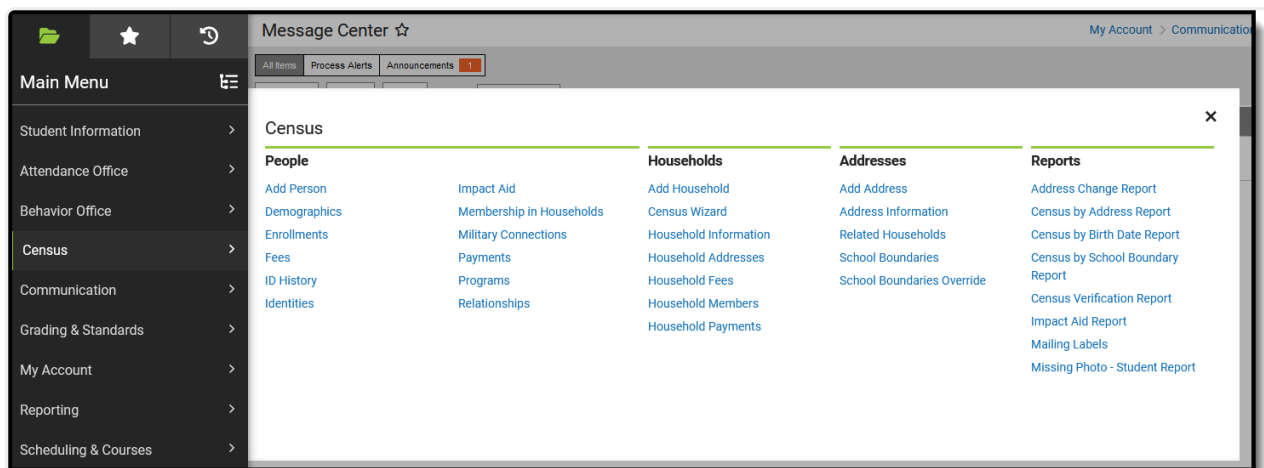
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Tool	Read	Write	Add	Delete
Attendance Contact Log	X	X	X	X
Access to Records Created by Other Users	X			

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Census

[People](#) | [Households](#) | [Addresses](#) | [Census Reports](#)



Census Access for Counselors

People

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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		

Tool	Read	Write	Add	Delete
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
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

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

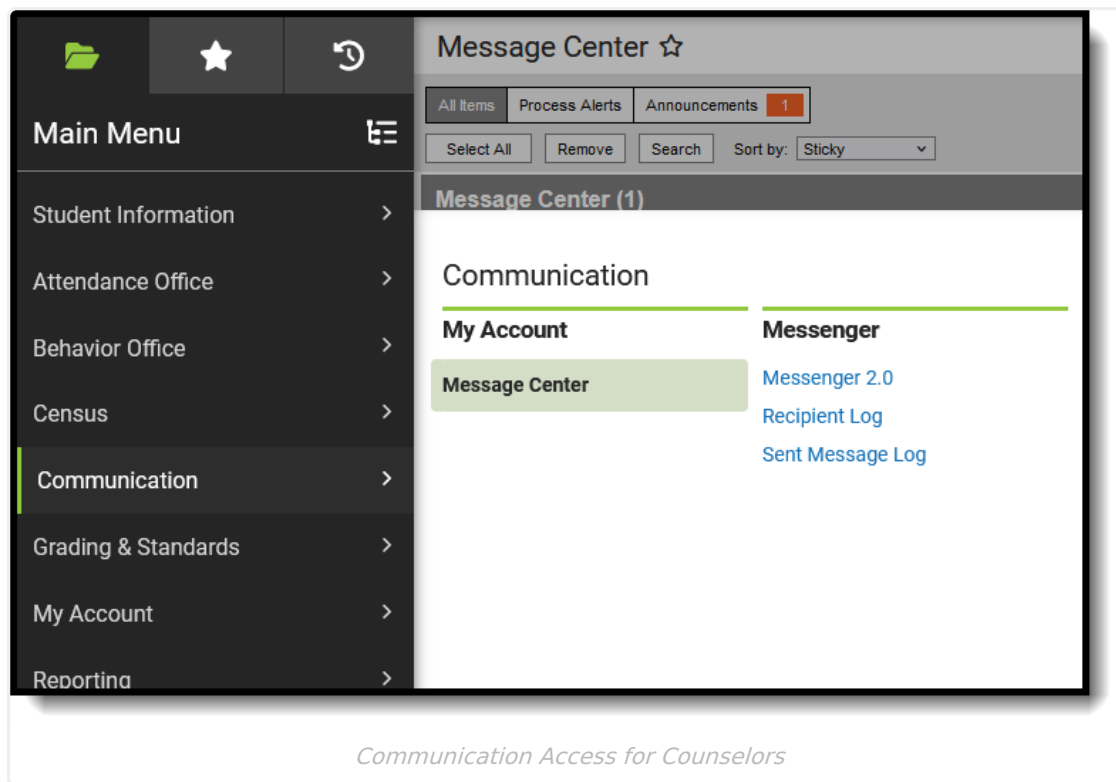
Census Reports

► [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			

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Communication



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			

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Grading & Standards

[Grading Setup](#) | [Standards Setup](#) | [Course Masters](#) | [Grading & Standards Administration](#) | [Grading](#)

& Standards Reports

Message Center ☆

Main Menu				
Student Information >				
Attendance Office >				
Behavior Office >				
Census >				
Communication >				
Grading & Standards >				
My Account >				
Reporting >				
Scheduling & Courses >				
System Settings >				

Grading & Standards			
Grading Setup Assignment Mark Setup Credit Group Setup GPA Calculation Setup Grading Comment Setup Grading Scale Setup Missing Assignment Setup	Standards Setup School Standard Setup Standards Alignment Wizard Standards Bank Standards Replacement Wizard	Course Masters Add Course Master Course Master Information Course Status Assessments Categories Grade Calc Options Grading Tasks Standards	Grading & Standards Administration Auto Grade Wizard Course Catalogs Course Group Setup Grading Window Push All Course Masters Push All Courses
Reports			
Class Rank Report Course Audit Report Course Awaiting Push Report Course Credit Report Course Master Awaiting Push Report Course Standards Report Cumulative Labels	eTranscript Batch Grade Book Usage Report Grades Report Grading Changes Not Pushed Report Missing Assignment Report Report Card Residual Data Report	Section Audit Report Snapshot Comparison Standards Alignment Report Student Credits Report Student Summary Report Term GPA Report Transcript Audit Report Transcript Batch Report	

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

Tool	Read	Write	Add	Delete
Standards Alignment Wizard	X	X	X	X
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			

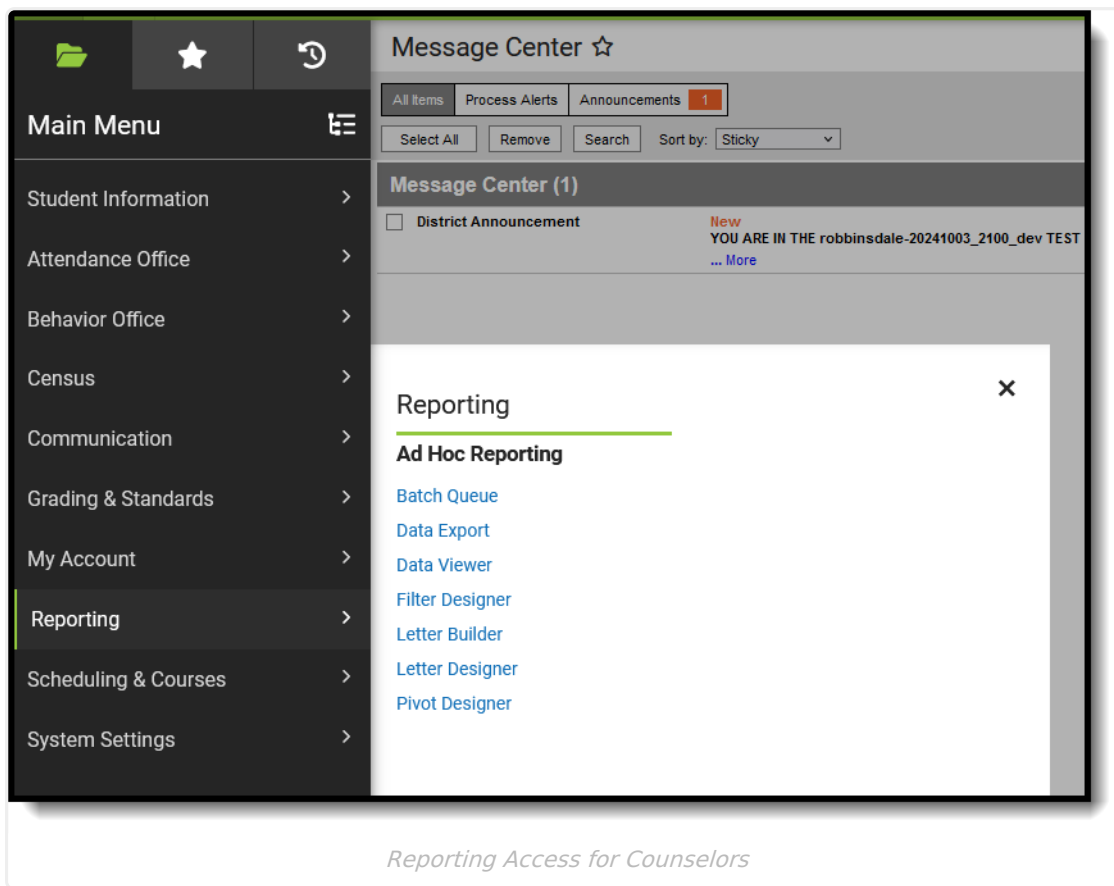
Grading & Standards Reports

► [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			

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Reporting



Reporting Access for Counselors

Ad hoc Reporting

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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			

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Scheduling & Courses

[Scheduling](#) | [Courses](#) | [Build Schedules](#) | [Load Schedules](#) | [Responsive Scheduling](#) | [Section Templates](#) | [Scheduling & Courses Reports](#)

Main Menu	Scheduling & Courses			
Student Information >	Scheduling	Courses	Build Schedules	Load Schedules
Attendance Office >	Scheduling Center	Add Course	Lunch Setup	Fill Counselor Wizard
Behavior Office >	Course Planner	Course Information	Student Constraints Setup	Fill Teams Wizard
Census >	Requests & Rosters	Course Assessments	Team (Scheduling Group) Setup	Schedule Gap Filler
Communication >	Scheduling Board	Course Categories		Student Gap Scheduler
Grading & Standards >	Staff Planner	Course Fees		
My Account >		Course Grade Calc Options		
Reporting >		Course Grading Tasks		
Scheduling & Courses >		Course Rules		
System Settings >		Course Sections		
	Responsive Scheduling	Section Templates	Reports	
	Responsive Schedule Designer	Section Template Information	Course Projections Report	Schedule Batch Report
	Responsive Schedule Section Builder	Generate Section Templates Wizard	Master Schedule Report	Schedule Conflicts Report
		Mass Set Section Template Groups Wizard	Open Rooms Report	Schedule Units Report
			Request Batch Report	Seat Count Report
			Request Conflicts Report	Section Rosters Report
			Request Detail Report	Staff History Report
			Requests Satisfied Report	Teacher Load Report
			Room Usage Report	Teacher Schedule Batch Report

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
Section Grading by Student	X	X	X	X

Tool	Read	Write	Add	Delete
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

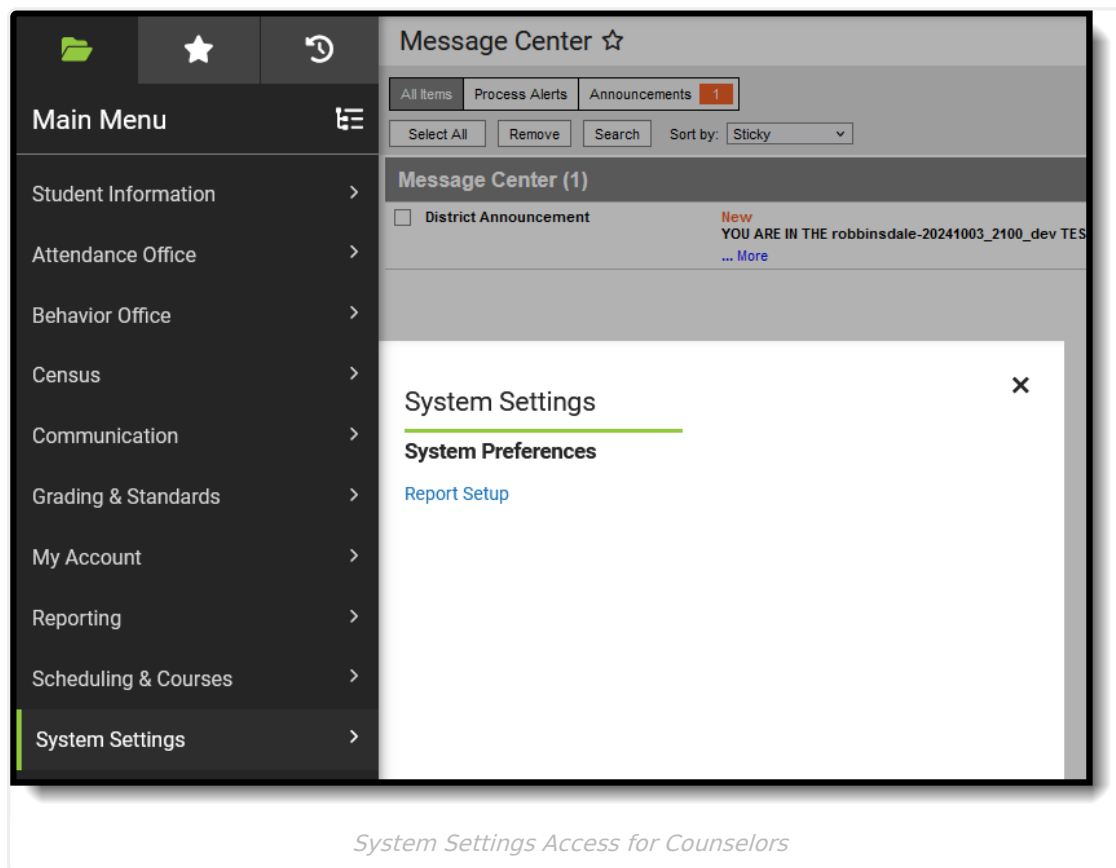
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Tool	Read	Write	Add	Delete
Blended Learning Gap/Overlap Report	X			
Course Projections Report	X			
Master Schedule Report	X			
Open Rooms Report	X			
Request Batch Report	X			
Request Conflicts Report	X			
Request Detail Report	X			
Requests Satisfied 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			

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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