

Moving Students from One Counselor to Another

1. Log-in to Naviance & go to the **Setup** menu.

NAVIANCE Students Planner Scholarships Colleges Careers Connections Reports Search for Student

Naperville North High School :: Naperville, IL :: U.S.

Class of 2015 Snapshots
Students with submitted applications

Category	Percentage
Applied	38.2%
Not applied	61.8%

Naviance Market
Boost student success with powerful third

Naviance Professional Development Courses
Visit the [Naviance Professional Development Resources Page](#) in the Naviance Network to access the course catalog, course workbooks, public course schedule, and detailed information regarding professional development offerings.

To register for public web-based courses using your Naviance coupon code or a credit card, visit our [Naviance Public Course Registration Site](#).

Coupon codes are located in the *Naviance Professional Development: Next Steps* email sent to primary account contacts.

For help registering for public courses or to schedule private training sessions, email training@naviance.com.

Naviance Updates
Support Services Closing Early 10/9 (Oct 1, 2014) **NEW**

Quick Links
[Application Manager](#)
[Transcript Request Manager](#)
[Document Manager](#)
[Scholarship Application Manager](#)
[Teacher Recommendations](#)
[Journal Dashboard](#)
[Mailing Manager](#)

Account Settings
[School Account](#)
[My Account](#)
[Manage Subscriptions](#)
[Setup](#)

Current Services
Naviance 7/15/15
eDocs
Naviance 7/9/15

2. Within the new page, select the **Assign Counselors** option.

NAVIANCE Students Planner Scholarships Colleges Careers Connections Reports Search for Student

Setup
[My Account](#)
[School Account](#)
[User Admin](#)
[Preferences](#)
[Assign Counselors](#)
[Manage Teacher List](#)
[Single Sign-In Options](#)
[NavAPI Options](#)
[Data Import](#)
[Data Export](#)

Naviance Setup

My Account
Update your name, title, job function, contact information, e-mail address or password.

School Account
Manage your school's account profile and service subscriptions.

User Admin
Create new Naviance user accounts for your school or update the settings for existing users.

Preferences
Customize Naviance options such as how rank and decile are handled, change range options for scattergrams, create or modify custom flags or load your school logo to be displayed on printer-friendly pages.

Assign Counselors
Assign each of your students to their Naviance counselor all at once using our batch assignment utilities.

Manage Teacher List
Manage your list of teachers.

Single Sign-In Options
Configure options for single sign in.

NavAPI Options
Configure options for NavAPI.

Moving Students from One Counselor to Another

3. Choose the option titled **Switch all students from one counselor to another**

NAVIANCE Students Planner Scholarships Colleges Careers Connections Reports Search for Student

Setup

- My Account
- School Account
- User Admin
- Preferences
- Assign Counselors
- Manage Teacher List
- Single Sign-In Options
- NavAPI Options
- Data Import
- Data Export

Assign Counselors

Click one of the options below to assign groups of students to active counselors.

- ▶ **Assign all students in a class to a single counselor**
Use this option if you have only one counselor per graduating class and you want to assign all students to that person.
- ▶ **Assign each counselor by alphabet**
Use this option to assign each of your counselors based on the first letter of the last name of each of your students. (e.g. Counselor 1 is assigned to A through E, Counselor 2 is assigned to F through J, etc.)
- ▶ **Assign students by home room**
Use this option to assign all students in a particular home room to a single counselor.
- ▶ **Assign students by group**
Use this option to assign all students in a particular student group to a single counselor.
- ▶ **Assign each counselor to an arbitrary student**
Use this option to see the entire list of students and arbitrarily assign a counselor to each student
- ▶ **Switch all students from one counselor to another**
Use this option to switch all students from their current counselor to a new counselor.
- ▶ **View current counselor assignments for a class**
Use this option to view the total number of students assigned to each counselor in a class or to see the specific students that are assigned to a counselor in a class.

4. On the new page, you'll have to pick the individual class, the current counselor & the counselor the students are transferring to. (You'll have to do this separate for each class. And to reverse the process, follow the same process when the regular counselor returns).

NAVIANCE Students Planner Scholarships Colleges Careers Connections Reports Search for Student

Setup

- My Account
- School Account
- User Admin
- Preferences
- Assign Counselors
- Manage Teacher List
- Single Sign-In Options
- NavAPI Options
- Data Import
- Data Export

Switch all students from one counselor to another

Grade/Class: class of 2015 (grade 12) ▼

Current Counselor: Brian La Porte ▼

New Counselor: Brian La Porte ▼

Cancel Switch Counselors

Copyright © 2014, Hobsons Inc. | Terms of Service | Privacy
Signed in as Brian La Porte from Naperville North High School

HOBSONS