Counselor Manual

Welcome to the MyCoalition Counselor Manual! Here you will find step-by-step instructions for every counselor interaction with MyCoalition technology. Why is the Coalition providing this resource? While the system is highly intuitive, sometimes it is great to have instructions available. This manual is available as an HTML document on the MyCoalition website (http://www.coalitionforcollegeaccess.org/cmanual-home.html) in addition to this downloadable PDF. You can also find companion demonstration videos on MyCoalition at http://www.coalitionforcollegeaccess.org/resources-video.html.

Table of Contents

Part 1: Getting Started
Section 1.1: Creating a Counselor Account  1
Section 1.2: Inviting Students onto the Coalition Platform  5
Section 1.3: Creating Your Account Avatar  8
Section 1.4: Updating Your Account Information  11

Part 2: Working with Students
Section 2.1: Accepting Student Contact Requests  14
Section 2.2: Collaborating with Students  17
    (Reviewing Shared Locker Items)
Section 2.3: Accepting Academic Recommendation Requests  20
    2.3 A: Providing Contact Information  21
    2.3 B: Completing the Student Assessment  23
    2.3 C: Uploading the Teacher Recommendation Letter  24
Section 2.4: Accepting Counselor Recommendation and Transcript Requests
Section 2.5: Using the Documents Page and Counselor Recommendation Form
    2.5 A: Uploading Transcripts  29
    2.5 B: Starting the Counselor Recommendation Form  31
    2.5 C: Providing Contact Information  32
    2.5 D: Completing the School Report  33
    2.5 E: Completing the Student Assessment  35
    2.5 F: Uploading the Counselor Recommendation Letter  36
PART 1: GETTING STARTED

Section 1.1: Creating a Counselor Account
This section will demonstrate how to create a MyCoalition counselor account.

1. Go to mycoalition.org.

2. Click the Create Account link at the bottom of the page (or select the Create Account tab at the top of the page)

3. Fill out the Account Email/Username and Password portion of the form, first entering an email address and then creating and confirming your password.
4. Fill out the **Personal Information** portion of the form, entering your first name, last name and date of birth

5. Click **Create Account**

6. You’ll be asked to verify your email address:
   a. Log in to the email account you used to create your account
   b. Retrieve the Coalition email
c. Follow the verification instructions in the email

7. Once verified, log in to your account to complete the setup.

8. After logging in, you get the choice to select a Student or Support account. Select a Support account and click the Continue button.
9. A list of support types will open. Select the kind of support you provide and click **Continue**.

**What is your support role?**
You can pick more than one.

- Counselor
  - High School Counselor, College Counselor
- Mentor
- Parent/Guardian
- Recommender
- Teacher
- Other
  - Independent Education Consultant, counseling assistant, aunt or uncle

9. A list of support types will open. Select the kind of support you provide and click **Continue**.

10. Congratulations! You have successfully created a MyCoalition counselor account.
Section 1.2: Inviting Students to Join MyCoalition
This section will illustrate how to invite students to work with you using MyCoalition tools.

If there are students you would like to work with using the MyCoalition online tools, you don’t have to wait for them to set up an account and invite you to be a Coalition mentor. Instead, you can invite your students to join MyCoalition and establish a counselor relationship with them.

1. To get started, log in to your account at mycoalition.org

Or, if you are already logged in, go to your account Overview

Welcome to the Coalition platform! From this page, you can:

- Manage your profile on the system.
- Specify your organization (such as a high school).
- View and add students associated with your school.
- Invite contacts, and send and receive messages with them.

This system is under development, and new features and tools will be added regularly. In the future, you’ll be able to do much more, such as:

- Help your students manage their application requirements.
- Upload documents, such as letters.
- See an overview of how a group of students is doing on applications, by grade level or any other grouping you determine.

2. The bottom half of the Overview page gives you a list of tasks.

Add your Organization
Tell us what organization or school you’re associated with (for example, as a school employee or the parent of a student).

Invite Students
Add students to your school, and help them collaborate on their application process.

Select the Invite Students task
3. Click the **Invite New Contact** button at the top of the page.

4. The student contact invitation form opens. Enter the student’s email address and select your support role from the list. The roles are pretty standard: high school counselor, registrar, teacher, etc. If your role isn’t listed (like neighbor, pastor, coach) select **New Relationship** to specify.

5. Click **Invite**. The system informs you the invitation was sent. If the student already has a MyCoalition account, a simple contact request will be sent. If the student doesn’t have an account, the email will invite the student to create an account and you will be created as a contact as soon as the student does so.
6. You will receive a notification when the student accepts your invitation. The student will also appear on your My Student Contacts list.
Section 1.3: Creating Your Account Avatar

This section will illustrate how to add an avatar image to your account. (Your avatar will be displayed every time you communicate with a student.)

When you first create a MyCoalition account, you give the system the most basic information: your name, email address, and date of birth. You can add more by editing your account information. The simplest but most visible edit is to add an avatar image to your account.

1. Log in to your account at mycoalition.org

   ![mycoalition.org](image)

   Or, if you are already logged in, go to your account Overview

   ![Overview](image)

   Welcome to the Coalition platform! From this page, you can:
   
   - Manage your profile on the system.
   - Specify your organization (such as a high school)
   - View and add students associated with your school.
   - Invite contacts, and send and receive messages with them.

   This system is under development, and new features and tools will be added regularly. In the future, you’ll be able to do much more, such as:
   
   - Help your students manage their application requirements.
   - Upload documents, such as letters.
   - See an overview of how a group of students is doing on applications, by grade level or any other grouping you determine.

2. Click the circle containing your initials in the upper right corner of the screen.

3. Select **Account Settings** from the drop-down list.

   ![Account Settings](image)
4. In the top task bar you have the option to **Edit Account Info** or **Change Your Photo**. Click the **Change Your Photo** button.

5. Click the **Select an Image File** button. A window opens to allow you to search your hard drive for your desired image.

6. Double-click your desired image to open it in the photo selection tool.
7. To fine-tune the image, place your cursor in the center of the bright selection circle and drag to move the circle onto the area of the image you would like to select as your avatar picture. If the selection circle is too small, place your cursor on the enlargement square on the upper right corner of the circle and drag to the right to make the circle larger. Use the “updated photo” image at the bottom to see the results of your effort.

8. Once you have selected your image, click the Save Photo button. Your chosen avatar image is added to your account.
Section 1.4: Updating Your Account Information
In this section, we will tour the Edit Account Info page and add a work address to a counselor account.

When you first open a MyCoalition account, you give the system minimal information: your name, email address, and date of birth. You can add more info like extra email addresses or a work address by editing your account information.

1. Log in to your account at mycoalition.org

Or, if you are already logged in, go to your account Overview

Welcome to the Coalition platform! From this page, you can:
- Manage your profile on the system.
- Specify your organization (such as a high school)
- View and add students associated with your school.
- Invite contacts, and send and receive messages with them.

This system is under development, and new features and tools will be added regularly. In the future, you’ll be able to do much more, such as:
- Help your students manage their application requirements.
- Upload documents, such as letters.
- See an overview of how a group of students is doing on applications, by grade level or any other grouping you determine.

2. Click your account avatar in the upper right corner of the screen: it’s either a circle with your initials or an actual avatar image.

3. Select Account Settings from the drop-down list.
4. In the top task bar you have the option to **Edit Account Info** or **Change Your Photo**. Click the **Edit Account Info** button.

![Edit Account Info and Change Your Photo](image)

5. On this page you can change or add to your profile information. It opens with an **Overview** of all your information displayed.

![Overview of Profile Information](image)

6. Use the links in the left navigation to choose your action.
   a. **Personal Info**: select to add or change personal information like name and gender
   b. **Username/Email**: select to change your account email address
   c. **Password**: select to change your password
   d. **Contact Info**: select to edit or add email, phone, and address information
   e. **Preferences**: select to authorize text notifications or to delete your account
7. In this exercise we will select **Contact Info** to add a work address.

As you can see, this page enables you to edit, add, and delete all types of contact information.

8. To add an address, simply select the **Add Address** button and fill in the form. Then select the appropriate **Address Type** from the drop-down list and click **Save**.

9. Select **Go to Coalition Platform** to return to your account Overview.
PART 2: WORKING WITH STUDENTS

Section 2.1: Accepting Student Contact Requests

If your students want to connect with you for feedback and advice prior to submitting an application, they will send you a contact request. The request will come as an email and as a notification in your MyCoalition account. In this section, we will illustrate how to accept a contact request from a student. Note that this tutorial covers the contact request for the counselor who already has a MyCoalition account. (If you don't already have an account, the student's contact request will include an invitation to create an account. See the “Creating an Account” section in the Getting Started portion of this manual for more information.)

1. Log into your account at mycoalition.org.

Or if you are already logged in, go to your account Overview.

Welcome to the Coalition platform! From this page, you can:

- Manage your profile on the system.
- Specify your organization (such as a high school)
- View and add students associated with your school.
- Invite contacts, and send and receive messages with them.

This system is under development, and new features and tools will be added regularly. In the future, you’ll be able to do much more, such as:

- Help your students manage their application requirements.
- Upload documents, such as letters.
- See an overview of how a group of students is doing on applications, by grade level or any other grouping you determine.
2. Click the notification icon next to your account avatar in the upper right corner of the screen. (When your notifications are brand-new, the icon displays a red dot to alert you.) You will see your notifications. Click the New contact request from your student to open the Contacts page.

3. Click the Accept button to accept the request. (Note that you can also Delete or Postpone the request.)

4. Identify the contact as your student by selecting “Student” in the roles list and click Confirm.
5. The student is added to your list of **Active Contacts**.
Section 2.2: Collaborating with Students (Reviewing Shared Locker Items)

Once a student has added you as a counselor contact, the student can share items from their Locker with you in order to seek your feedback. Like a student contact request, you’ll receive notification of a shared item via email and a notification in your account.

1. Log into your account at mycoalition.org.

Or if you are already logged in, go to your account Overview.

2. Click the notification icon next to your account avatar in the upper right corner of the screen. (When your notifications are brand-new, the icon displays a red dot to alert you.) You will see a drop-down list of your notifications. Click the New shared document alert from your student to open the Contacts page. (If you have a mix of student and professional contacts on MyCoalition, it may be more convenient to select the Students drop-down, then My Students to see a list of only your student contacts.)
3. Select the 1 item(s) shared link for your student. All of the Locker items this student has shared with you will be available for you to view and give feedback on in the Collaboration Space.

4. Click a shared item to open it.

As it opens you can click the sidebar message from your student. (You might want to counsel your students to always give a reason for sharing their Locker items with you.)
5. In the lower half of the sidebar, there is a reply box for you to provide feedback. Just type your comments and click **Send**.

6. The student will receive a notification when you reply. The two of you can continue to collaborate on this item until the student un-shares it.
Section 2.3: Accepting Academic Recommendation Requests
The process for responding to teacher academic recommendation requests is similar to the student contact request process.

The requests will arrive by email as well as a notification directly in your MyCoalition account. To accept the request:

1. Click the View Request button in the student’s email. The MyCoalition login/create account screen at mycoalition.org will open in your default browser.
2. Log into your account. (If you don’t yet have a MyCoalition account, use the Create Account link to open one and then follow the instructions below. See “Section 1.1 Creating an Account” in this manual for more information.)
3. The student email takes you directly to the Documents page. (Note: if you are already working in your MyCoalition account, another way to get to the Documents page is to click Documents in the top navigation and select Home from the drop-down list.)
The Documents page lists all of the application document requests—and their status—that you have received in the current admissions cycle. It can be sorted ascending or descending by type, status, request date, student name, or student email. You can also use the search box to find the request you are looking for.

4. Find your student in the list and click the Start button for the Academic Rec document type. (If you are also the student’s counselor, you might also receive a Counselor Rec request from the student. See “Section 2.4 Accepting Counselor Recommendation and Transcript Requests” for instructions on completing those types of requests.)

5. The Academic Recommendation form is divided into three sections:
   a. Contact Information for adding your professional information
   b. Student Assessment for detailing the course name(s) and grade level(s) in which you taught the student. You will also find (optional) sliders for rating student qualities like maturity, confidence, and reactions to setbacks.
   c. Recommendation for uploading the written teacher evaluation.

The remaining instructions in this section step through the process of filling out the Academic Recommendation form.

Section 2.3 A: Providing Contact Information

1. Enter your (and your school’s) official contact information including your title, office number and preferred work email. You will only need to fill in this information once. The system will pre-populate it on subsequent recommendations. If you added your high
school organization to your account before beginning this form, some of this information will pre-populate.

2. You do not have to complete the form in one session: the system auto-saves during periods of inactivity or when you close the page. If you need to return later to complete a form, you would find it on the Documents page list and select its Continue button to resume.

3. When you finish click Save (or let the system auto-save).

4. Click the Student Assessment button at the bottom of the page to move to the next section.
The student assessment section contains student specific questions about what course(s) and what year(s) you taught the student.

1. The first two questions are required. You cannot move beyond this page without completing them.
2. This section also includes optional questions and ratings sliders for your impressions of a student’s academic and personal qualities. (You will be able to upload a letter on the student’s behalf on the next page of the form.)
3. Click the **Recommendation** button at the bottom of the page to move to the next section.
Section 2.3 C: Uploading the Teacher Recommendation Letter

The **Recommendation** section is where you upload your written evaluation. If you are brand-new to this process, the instructions on this page give you great guidelines for generating a strong evaluation letter.

When you are ready to upload your letter:

1. Click the **Upload** button to open the document upload tool
2. Drag and drop your written evaluation onto the cloud icon or click the Select File button to find the document on your hard drive. Note that file uploads are restricted to 50MB.

3. Click the Add Documents button to upload the written evaluation.

4. Click the Preview Submission button at the bottom of the page to review your entire Academic Recommendation prior to final submission.

5. Scroll through the Academic Recommendation Final Review. In particular, check the bottom of the document to ensure you have uploaded and attached the correct written evaluation.

6. If you need to make changes, click the Edit Recommendation button to make changes. If you are satisfied with the Academic Recommendation, click the Submit Recommendation button.
Section 2.4: Accepting Counselor Recommendation and Transcript Requests

The process for responding to counselor recommendation and transcript requests is similar to the student contact request process.

The requests will arrive by email as well as notifications directly in your MyCoalition account. To accept a request:

1. Click the View Request button in the student's email. The MyCoalition login/create account screen at mycoalition.org will open in your default browser.
2. Log into your account. (If you don’t yet have a MyCoalition account, use the Create Account link to open one and then follow the instructions below. See “Section 1.1 Creating an Account” in this manual for more information.)
3. The student email takes you directly to the Documents page.

The Documents page lists all of the application document requests—and their status—that you have received in the current admissions cycle. It can be sorted ascending or descending by type, status, request date, student name, or student email. You can also use the search box to find the request you are looking for. (Note: if you are already working in MyCoalition, another way to get to the Documents page is to click Documents in the top navigation and select Home from the drop-down list.)

4. Find your student in the list and click the Start button of a Counselor Rec document type to begin a counselor recommendation or click an Upload button to fulfill a transcript.
request. See “Section 2.5 Using the Documents Page and Counselor Recommendation Form” in this manual for detailed information about completing the Counselor Recommendation Form and uploading transcripts.
Section 2.5: Using the Documents Page and Counselor Recommendation Form

The Documents page is your home-base for tracking all of your counselor recommendation, recommendation, and transcript requests. You can access it via the top navigation bar on every page of MyCoalition. Just select Documents and then Home from the drop-down list.

The Documents page lists all of the recommendation and transcript requests—and their status—that you have received in the current admissions cycle. It can be sorted ascending or descending by type, status, request date, student name, or student email. It also has a search box to help find the request(s) you are looking for.

To satisfy counselor recommendation requests, you will use the Counselor Recommendation Form. The form consists of four sections:
1. **Contact Information** for adding your professional information
2. **School Report** for uploading or recording school profile and school report information
3. **Student Assessment** for detailing rank, GPA, diploma type and other specific quantitative information about the student. You will also find (optional) sliders for rating student qualities like maturity, confidence, and reactions to setbacks.
4. **Documents & Recommendation** for uploading the counselor recommendation and submitting all of the student’s uploaded documents for inclusion in Coalition applications.

The remaining instructions in this section look closely at the document request-fulfilling aspects of the Documents page and the Counselor Recommendation Form.

### 2.5 A: Uploading Transcripts

Colin Johnson has requested a current transcript from you

[VIEW REQUEST]

If a student is submitting an application that requires a transcript, the student will send you a transcript request. To respond to the request:

1. If you have a MyCoalition account;
   a. Click the **View Request** button in the student’s transcript request email. The button will take you to the login screen at mycoalition.org. Log in to your account.
b. Once logged in, you will start at the Documents page. (Alternatively, you can reach the Documents page by clicking **Documents** in the top navigation bar and selecting **Home** from the drop-down list.)

2. If you don’t have a MyCoalition account, click the **View Request** button in the student’s email to take you to the login/create account screen. Click the **Create Account** link to open an account. Once created, follow the directions above. (See “Section 1.1 Creating an Account” in this manual for more information.)

3. Transcript requests appear in the Documents list with an Upload button. Click the **Upload** button to engage the document upload tool.

![Add Media](image)

4. Either drag and drop the transcript file onto the cloud icon or click **Select File** to search your hard drive for the file.

5. Once the file is selected/dropped, click **Add Documents** to upload the transcript.

6. If you want to double-check the uploaded document, simply click its **View** button on the Documents page.
2.5 B: Starting the Counselor Recommendation Form

Cameron Boden has requested a counselor recommendation from you

1. If you have a MyCoalition account;
   a. Click the View Request button in the student’s recommendation request email. The button will take you to the login screen at mycoalition.org. Log in to your account.
   b. Once logged in, you will start at the Documents page (Alternatively, you can reach the Documents page by clicking Documents in the top navigation bar and selecting Home from the drop-down list.)
2. If you don’t have a MyCoalition account, click the View Request button in the student’s email to take you to the login/create account screen. Click the Create Account link to open an account and then follow the directions above. (See “Section 1.1 Creating an Account” in this manual for more information.)
3. Counselor recommendation requests appear on the Documents page as document type “Counselor Rec.” Click the Start button of a counselor recommendation request to open the first section of the Counselor Recommendation Form: the Contact Information page.
5. Counselor recommendation requests appear on the Documents page as document type “Counselor Rec.” Click the Start button of a counselor recommendation request to open the first section of the Counselor Recommendation Form: the Contact Information page.

6. Enter your (and your school’s) official contact information including your title, office number and preferred work email. You will only need to fill in this information once. The system will pre-populate it on subsequent recommendations. If you added your high school organization to your account before beginning this form, some of this information will pre-populate.

7. You do not have to complete the form in one session: the system auto-saves during periods of inactivity or when you close the page. If you need to return later to complete a form, you would find it on the Documents page list and select its Continue button to resume.

8. When you finish click Save (or let the system auto-save).

9. Click the School Report button at the bottom of the page if you would like to continue on with the School Report. Or you can select one of the other sections of the form using the left-sidebar navigation.
2.5 D: Completing the School Report

On the School Report portion of the form, you can upload your school’s profile (not required), upload a school report or fill out the school report form by hand. If you choose to fill out the form, you will only need to do it once.

To upload a school profile (optional):

1. Click the Upload button to open the document upload tool.
2. Drag and drop your school’s profile onto the cloud icon or click the Select File button to find the file on your hard drive. Note that file uploads are restricted to 50MB.
3. Click the Add Documents button to upload the profile.

To upload a school report form:
If your school has an official school report--like a NACAC school report form--you can upload it here.

- I will upload our version of the information below. This can be the NACAC school report.

Please upload

1. Click the checkbox. A document upload button will appear.
2. Click the **Upload** button to open the document upload tool.
3. Drag and drop your school report form onto the cloud icon or click the **Select File** button to find the file on your hard drive. Note that file uploads are restricted to 50MB.
4. Click the **Add Documents** button to upload the school report.

If you decide to complete the school report form by hand:

1. You will note that the form allows for a lot of variance in high school systems. Answer the questions in the way that best fits your school.
2. If your school has an official document that further explains how admissions counselors should assess the performance of your students--like an IB curriculum statement--you can upload it here.

Please upload a document that will allow assessment of student performance. (optional)

- Click the **Upload** button to open the document upload tool
- Drag and drop your school’s assessment guide onto the cloud icon or click the **Select File** button to find the file on your hard drive. Note that file uploads are restricted to 50MB.
- Click the **Add Documents** button to upload the assessment guide.
The student assessment section contains student specific questions including optional ratings sliders for your impressions of a student’s academic and personal qualities. You will be able to upload a letter on the student's behalf on the next page of the form.
2.5 F: Uploading the Counselor Recommendation Letter

The Documents & Recommendations section is where you upload your counselor recommendation. If you are brand-new to this process, the instructions on this page give you great guidelines for generating a strong recommendation letter. (Note: you can also indicate your inability to write on the student’s behalf.)

When you are ready to upload your letter:

7. Click the Upload button to open the document upload tool
8. Drag and drop your recommendation onto the cloud icon or click the Select File button to find the file on your hard drive. Note that file uploads are restricted to 50MB.
9. Click the Add Documents button to upload the counselor recommendation.

After uploading the recommendation letter and the other official documents the student requested, you need to complete the submission process.
Simply click the Submit button to make all of the documents available for inclusion with a student’s application. **Note:** the student will **not** be able to view any of these documents.