



## How to Associate Coaches to Students

A coach is an educator role that allows them access to one or multiple students, but not all students at a school. This is a common role chosen for a guidance counselor, SPED teacher, or other educator only needing access to a list of students. Coaches cannot associate themselves to students, it must be completed by an educator with a Site Coordinator role.

=> Refer to the document titled, "Genius User Roles and Definitions" for more information on educator roles and definitions available in our system.

You won't be able to complete these steps until the coach is created in our system. Email the following information to your Accountability & Compliance Specialist and they will set them up in the system.

- Name
- Phone Number
- Email Address
- School(s) the coach needs access to as it's referenced in our system.

There are two ways to associate coaches to students, in bulk or per student. Below are step by step instructions for both ways.

### In Bulk

1. Hover your cursor over Students and then click **Bulk Coach**.





2. From the Affiliation drop down, select the school where the students and coach are located (you can only choose one at a time) and then click **Get Data**.
3. Check the boxes next to the students you want to associate to a coach. Once you've selected all students, click **Assign** at the bottom.



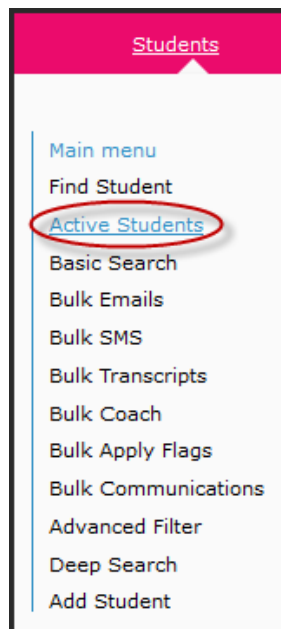
4. From the User Roles drop down, select **EOA K-12 Coach**. Then, select the coach from the Username drop down.

**Note:** if the coach is not listed, contact your Accountability & Compliance Specialist for further assistance.

5. Click **Assign**.

## Per Student

1. Hover your cursor over Students and then click **Active Students**.





2. Click on the student's name.
3. On the left-hand side of the student page, under Actions at the bottom of the page, click **Associate to Coach**.



4. Click **Add New Association**. From the User Roles drop down, select **EOA K-12 Coach**. Then, select the coach from the Username drop down.

**Note:** if the coach is not listed, contact your Accountability & Compliance Specialist for further assistance.

5. Click **Save**.