



Appendix F: HWC School Counselor Workbook Instructions

This appendix provides instructions for using the Handle With Care Excel Workbook for School Counselors (HWC School Counselor Workbook). This guidance includes an overview of the workbook, followed by information about initial workbook setup, workbook use, and end-of-year workbook closeout.

Workbook overview

School counselors use the HWC School Counselor Workbook to monitor school counseling and mental health referrals for students identified for HWC support and to collect information to report to the HWC data lead and school team. The workbook consists of a series of labeled worksheets, in order of expected chronological usage.

The first worksheet, the *Instructions* tab, is a view-only tab with guidance on how to use the workbook. The second worksheet, the *Header* tab, is a data-entry tab for setting up the workbook. The third worksheet, the *Summary* tab, is an auto-populate tab that summarizes information from subsequent data-entry tabs about school counseling and mental health referrals; school counselors will share the information from this tab with the HWC data lead and school team. Worksheets 4 through 14 are *Cycle* data-entry tabs for documenting school counseling and external mental health referrals for students identified for HWC support. Depending on the number of cycles programmed in the *Header* tab, there will be between one and eleven *Cycle* tabs, one for each cycle during the school year. Exhibit F-1 summarizes information about each worksheet in the workbook.

Exhibit F-1: HWC School Counselor Workbook tabs

Tab #	Tab Name	Purpose	Description	Action step
1	Instructions	View-only tab	Instructions for how to use the HWC School Counselor Workbook	Data leads and school counselors review the instructions for the HWC School Counselor Workbook at the start of each school year and refer to them throughout the year as needed.
2	Header	Data-entry tab	Data entry for the number and length of cycles for the year	The data lead completes the Header tab before sending the HWC School Counselor Workbook to the school counselor(s) to ensure consistency between the HWC data-monitoring workbooks at the start of the school year.



Tab #	Tab Name	Purpose	Description	Action step
3	Summary	Auto-populate tab	Chart that auto-populates with an overview of data for school counseling and external mental health referrals collected on the Cycle tabs	School counselors share the chart on the Summary tab with the HWC data lead at the end of each cycle.
4-14	Cycle 1 – Cycle 11	Data-entry tabs	Data entry for school counseling and external mental health referral data for students identified for HWC support each cycle	School counselors enter school counseling and external mental health referral data each cycle. Cycle 1 is a required tab. Cycles 2–11 are optional data-entry tabs, depending on the number of data-collection cycles the HWC school team establishes at the start of the school year. The Guide recommends HWC school teams establish at least one data-collection cycle per grading period.

To support ease of use beyond the direct labeling of worksheets and instructions about data entry in cells, the HWC School Counselor Workbook offers a color-coding schema that users may find helpful.

1. A blank white cell indicates that data will auto-populate into the cell (exhibit F-2).

Exhibit F-2. Blank white auto-populate cells

1	Cycle 1				
2	Data entry cells on this tab: B11:G110				
3		Students (HWC) referred to...	This Cycle	Year to Date	Cycle 1
4		School counselor	0	0	<i>Enter dates on Header tab</i>
		External mental health provider	0	0	



- A yellow cell indicates that data entry is required in that cell. You can enter data by selecting an option from a drop-down menu or by typing data directly (exhibit F-3).

Exhibit F-3. Required yellow data-entry cells

Cycle 1						
Data entry cells on this tab: B11:G110		Students (HWC) referred to...		This Cycle	Year to Date	Cycle 1
		School counselor		0	0	Enter dates on Header tab
		External mental health provider		0	0	
Student ID	Date(s) of referral	Referring teacher name(s)	Number of Teacher Referrals for this student this cycle	Number of Counseling Sessions with this student this cycle	Did you refer this student to an external mental health provider (this cycle)?	
[Enter text or number] <i>(required)</i>	[m/d/yy; m/d/yy...] <i>(optional)</i>	[Last, First Initial; Last, First Initial;...] <i>(optional)</i>	[Enter number] <i>(optional)</i>	[Enter number] <i>(optional)</i>	[Select Yes / No] <i>(required)</i>	
Example: P2345	1/2/21; 1/3/21	Smith, J; Jones, B	2	3	Yes	
1						
2						
3						
4						

- An orange cell indicates that data entry is optional in that cell (exhibit F-4).

Exhibit F-4: Optional orange data-entry cells

Student ID	Date(s) of referral	Referring teacher name(s)	Number of Teacher Referrals for this student this cycle	Number of Counseling Sessions with this student this cycle	Did you refer this student to an external mental health provider (this cycle)?
[Enter text or number] <i>(required)</i>	[m/d/yy; m/d/yy...] <i>(optional)</i>	[Last, First Initial; Last, First Initial;...] <i>(optional)</i>	[Enter number] <i>(optional)</i>	[Enter number] <i>(optional)</i>	[Select Yes / No] <i>(required)</i>
P2345	1/2/21; 1/3/21	Smith, J; Jones, B	2	3	Yes

Workbook setup

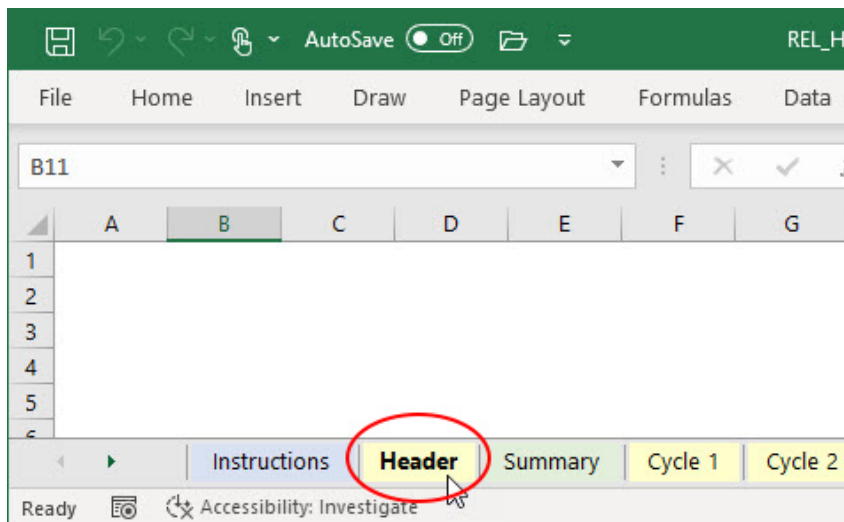
This section outlines the steps required to set up the HWC School Counselor Workbook to monitor school counseling and mental health referrals for students identified for HWC support. The HWC data lead should set up the HWC School Counselor Workbook(s) before sharing the document with school counselor(s) to ensure consistency between all HWC Excel workbooks.

To set up the HWC School Counselor Workbook, first review the *Instructions* tab to familiarize yourself with the workbook content. Refer to the steps in the next section to complete the *Header* tab, which contains the information needed to ensure consistency between the HWC Data Lead and all HWC School Counselor Workbooks.

Completing the Header tab:

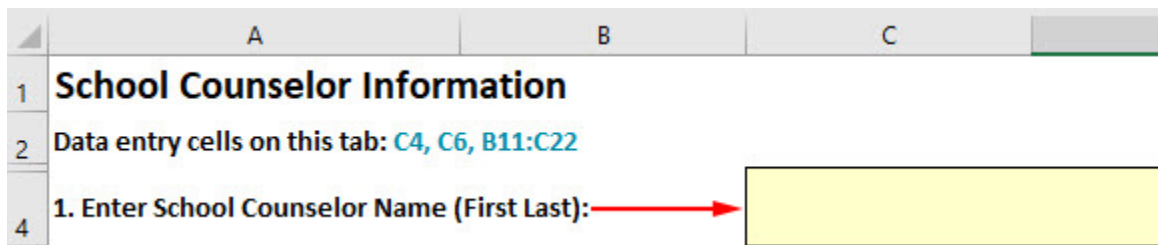
1. Open the HWC School Counselor Workbook and navigate to the Header tab (exhibit F-5).

Exhibit F-5. Navigate to the Header tab



2. Enter the school counselor name in cell C4 (exhibit F-6).

Exhibit F-6. Enter the school counselor name





3. Select the number of cycles planned for the school year in cell C6 (exhibit F-7). Note that this field is optional. If you do not input a number, the workbook will automatically display information for the summer cycle and eleven additional cycles (as shown in the exhibit).

Exhibit F-7. Select the number of cycles

The screenshot shows an Excel spreadsheet with the following content:

- Row 1: **School Counselor Information**
- Row 2: Data entry cells on this tab: C4, C6, B11:C22
- Row 4: 1. Enter School Counselor Name (First Last): [Yellow input box]
- Row 6: 2. How many cycles do you want to display? (optional) [Yellow input box containing '11']
- Row 8: 3. Enter the Start and End Dates for each Cycle starting in cell B11
- Row 10: Table header with columns: Cycles, Start Date, End
- Row 11: Summer *
- Row 12: Cycle 1
- Row 13: Cycle 2
- Row 14: Cycle 3
- Row 15: Cycle 4
- Row 16: Cycle 5
- Row 17: Cycle 6
- Row 18: Cycle 7
- Row 19: Cycle 8
- Row 20: Cycle 9
- Row 21: Cycle 10
- Row 22: Cycle 11

Annotations in the image include:

- A red arrow pointing from the instruction in row 6 to the input box containing '11'.
- A blue arrow pointing from the instruction in row 8 to the 'Start Date' column header.
- A callout box next to the '11' input box with the text: "2. (optional) How many cycles do you want to display? Enter a number between 1 and 11."
- A note on the right side of the spreadsheet: "Note: Wh... re hidde"



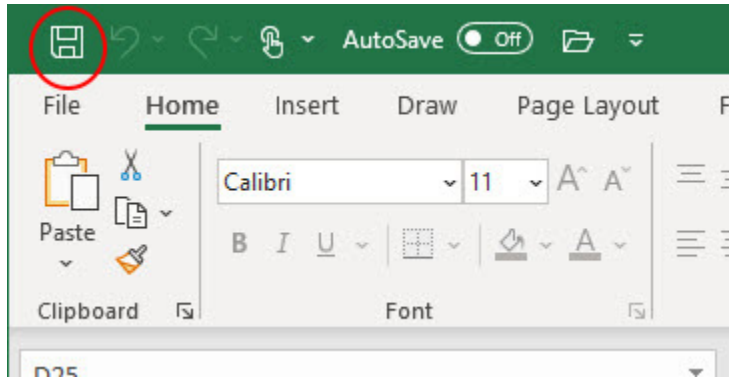
- Enter the start and end date for each cycle, starting in cell B11. Note: Although the HWC Data Lead Workbook includes the option to document HWC notices over the summer, there is no separate tab in the HWC School Counselor Workbook for the summer cycle, because students are not in school to attend counseling sessions. If your school team is monitoring HWC notices over the summer, include the start and end dates for the "Summer Cycle" in the Header tab to ensure the dates for each cycle are consistent across all HWC data-monitoring workbooks (exhibit F-8).

Exhibit F-8. Enter the start and end date for each cycle

	A	B	C
1	School Counselor Information		
2	Data entry cells on this tab: C4, C6, B11:C22		
4	1. Enter School Counselor Name (First Last):	<input type="text"/>	
6	2. How many cycles do you want to display? (optional)	<input type="text"/>	
8	3. Enter the Start and End Dates for each Cycle starting in cell B11		
9			
10	Cycles	Start Date	End Date
11	<i>Summer *</i>		
12	<u>Cycle 1</u>		
13	<u>Cycle 2</u>		
14	<u>Cycle 3</u>		
15	<u>Cycle 4</u>		
16	<u>Cycle 5</u>		
17	<u>Cycle 6</u>		
18	<u>Cycle 7</u>		
19	<u>Cycle 8</u>		
20	<u>Cycle 9</u>		
21	<u>Cycle 10</u>		
22	<u>Cycle 11</u>		

5. Save the workbook and create a copy for each school counselor who will work with students identified for HWC support.¹ Be sure to change the school counselor name before saving each copy² (exhibit F-9).

Exhibit F-9. Save the workbook



Once the HWC data lead has completed the initial workbook setup, the school counselor(s) will use the step-by-step instructions in the next section to monitor school counseling and external mental health referrals and send referral summary data to the HWC data lead after each cycle. Each school counselor who works with students identified for HWC support should maintain their own unique copy of the HWC School Counselor Workbook, as provided by the HWC data lead. Be sure to save the file in a location that adheres to your school's and district's guidance on protecting student privacy.

¹ If student assignments to school counselors change over the course of the school year, the HWC data lead and school counselor(s) should collaborate to ensure proper transfer of responsibilities for service provision and data-collection activities for students identified for HWC support.

² We recommend that each school counselor or the HWC data lead save a copy of each file using a consistent naming convention. For example, save files using a file name that includes the relevant school year and the last name of each counselor, such as "HWC School Counselor Workbook_LastnameCounselor1_2021-22."



Workbook use: Step-by-step instructions

Below are step-by-step instructions for entering data in the HWC School Counselor Workbook.

1. Open the HWC School Counselor Workbook and navigate to the appropriate tab for the current cycle. You can check the start and end dates of each cycle in cell G3 of each Cycle tab (exhibit F-10).

Exhibit F-10. Navigate to the current cycle

	A	B	C	D	E	F	G
1	Cycle 1						
2	Data entry cells on this tab: B11:G110			Students (HWC) referred to...	This Cycle	Year to Date	Cycle 1 (9/1/21 - 9/30/21)
3				School counselor	3	3	Gunther Peterson
4				External mental health provider	1	1	
6							
7	Student ID	Date(s) of referral	Referring teacher name(s)	Number of Teacher Referrals for this student this cycle	Number of Counseling Sessions with this student this cycle	Did you refer this student to an external mental health provider (this cycle)?	
8	[Enter text or number]	[m/d/yy; m/d/yy...]	[Last, First Initial; Last, First Initial;...]	[Enter number]	[Enter number]	[Select Yes / No]	
9	(required)	(optional)	(optional)	(optional)	(optional)	(required)	
10	Example: P2345	1/2/21; 1/3/21	Smith, J; Jones, B	2	3	Yes	
11	1 P1234	8/2/21; 8/10/21	Jacobs, M; Torres, B	2	2	Yes	
12	2 P4578	8/21/21	Rogers, C	1	1	No	
13	3 P3768	8/25/21	Crumm, T	1	2	No	
14	4						
15	5						
	Header	Summary	Cycle 1	Cycle 2	Cycle 3	Cycle 4	Cycle 5

2. On the current Cycle tab, input required data for each school counseling and external mental health referral submitted to you for students identified for HWC support during that cycle. Required data includes the student ID and whether the student was referred to an external mental health provider during that cycle. Enter required data in the cells in columns B and G, using a blank row for each new student, beginning with the first row in the table, in cell B11 (exhibit F-11). If a student receives multiple referrals to school counseling in a single cycle, you do not need to create a new entry row for the student; rather, enter the new date in the date column (column C), separating dates with a semicolon. Be sure to follow the format guidance (for example, m/d/yy) to ensure consistent data entry. If the student is referred by a different teacher, enter the new teacher's name, separating it from the prior teacher's name with a semicolon (column D).

Exhibit F-11. Input required data

	A	B	C	D	E	F	G
Cycle 1							
Data entry cells on this tab: B11:G110			Students (HWC) referred to...	This Cycle	Year to Date	Cycle 1 (9/1/21 - 9/30/21)	
			School counselor	3	3	Gunther Peterson	
			External mental health provider	1	1		
7	Student ID	Date(s) of referral	Referring teacher name(s)	Number of Teacher Referrals for this student this cycle	Number of Counseling Sessions with this student this cycle	Did you refer this student to an external mental health provider (this cycle)?	
8	[Enter text or number]	[m/d/yy; m/d/yy...]	[Last, First Initial; Last, First Initial;...]	[Enter number]	[Enter number]	[Select Yes / No]	
9	(required)	(optional)	(optional)	(optional)	(optional)	(required)	
10	Example: P2345	1/2/21; 1/3/21	Smith, J; Jones, B	2	3	Yes	
11	1 P1234	8/2/21; 8/10/21	Jacobs, M; Torres, B	2	2	Yes	
12	2 P4578	8/21/21	Rogers, C	1	1	No	
13	3 P3768	8/25/21	Crumm, T	1	2	No	



- Consider inputting additional optional data for each student identified for HWC support referred to you each cycle in columns C through F (exhibit F-12). Optional data include date(s) of referral, referring teacher(s), total number of teacher referrals, and total number of school counseling sessions during the current cycle. The optional data may be useful to you over time, particularly in identifying trends in resources required to support students identified for HWC support. These optional data do not affect the summary statistics you report to the HWC data lead.

Exhibit F-12. Input optional data

Cycle 1

Data entry cells on this tab: **B11:G110**

Students (HWC) referred to...	This Cycle	Year to Date	Cycle 1 (9/1/21 - 9/30/21) Gunther Peterson
School counselor	3	3	
External mental health provider	1	1	

Student ID	Date(s) of referral	Referring teacher name(s)	Number of Teacher Referrals for this student this cycle	Number of Counseling Sessions with this student this cycle	Did you refer this student to an external mental health provider (this cycle)?
[Enter text or number]	[m/d/yy; m/d/yy...]	[Last, First Initial; Last, First Initial;...]	[Enter number]	[Enter number]	[Select Yes / No]
<i>(required)</i>	<i>(optional)</i>	<i>(optional)</i>	<i>(optional)</i>	<i>(optional)</i>	<i>(required)</i>
Example: P2345	1/2/21; 1/3/21	Smith, J; Jones, B	2	3	Yes
1 P1234	8/2/21; 8/10/21	Jacobs, M; Torres, B	2	2	Yes
2 P4578	8/21/21	Rogers, C	1	1	No
3 P3768	8/25/21	Crumm, T	1	2	No

- Cells E3, E4, F3, and F4 will auto-populate with the summary information for the cycle (exhibit F-13).

Exhibit F-13. Auto-populate cells

Students (HWC) referred to...	This Cycle	Year to Date	Cycle 1 (9/1/21 - 9/30/21) Gunther Peterson
School counselor	3	3	
External mental health provider	1	1	



Sharing information with the HWC data lead:

At the end of the cycle, find the *Summary* tab. Share the number of students referred for school counseling services and the number of students referred to external mental health services for that cycle (exhibit F-14) with the HWC data lead, using the agreed-upon method consistent with data security and student privacy policies.

Exhibit F-14. Summary tab

	A	B	C	D	E
1	Summary: Referrals to School Counselor and to External Mental Health Provider for each Cycle and Year to Date				
2	Data entry cells on this tab: <i>none</i>				
3	Instructions for School Counselor:				
4	The values in cells C10:D31 are used in the Data Lead Workbook.				
5	Copy the entire chart in cells A9:D31.				
6	Paste the chart into an email or into a separate spreadsheet.				
7	Send the chart to your school's HWC Data Lead using the agreed-upon method consistent with data security and student privacy policies.				
9		<i>Gunther Peterson</i>	This Cycle	Year To Date	
10	Cycle 1	School Counselor	<i>3</i>	<i>3</i>	
11		External Mental Health Provider	<i>1</i>	<i>1</i>	
12	Cycle 2	School Counselor		<i>3</i>	
13		External Mental Health Provider		<i>1</i>	
14	Cycle 3	School Counselor		<i>3</i>	
15		External Mental Health Provider		<i>1</i>	
16	Cycle 4	School Counselor		<i>3</i>	
17		External Mental Health Provider		<i>1</i>	
18	Cycle 5	School Counselor		<i>3</i>	
19		External Mental Health Provider		<i>1</i>	
20	Cycle 6	School Counselor		<i>3</i>	
21		External Mental Health Provider		<i>1</i>	
22	Cycle 7	School Counselor		<i>3</i>	
23		External Mental Health Provider		<i>1</i>	
24	Cycle 8	School Counselor		<i>3</i>	
25		External Mental Health Provider		<i>1</i>	
26	Cycle 9	School Counselor		<i>3</i>	
27		External Mental Health Provider		<i>1</i>	
28	Cycle 10	School Counselor		<i>3</i>	
29		External Mental Health Provider		<i>1</i>	
30	Cycle 11	School Counselor		<i>3</i>	
31		External Mental Health Provider		<i>1</i>	

Workbook Closeout

The HWC program requires that a student's designation as "eligible for HWC support" apply only to the current school year and not be included in that student's permanent record. Therefore, HWC school teams and school counselors will document and monitor school counseling and referrals for external mental health support services for students identified for HWC support for the given school year only. At the end of the school year, delete and/or dispose of any copies of the HWC School Counselor Workbook for that school year.