student records, admin, webinar wednesday, video

Counselor Tab: Updated, Remodeled, Robust

2017-03-01_10.05_newly_remodeled_counselor_page.mp4

There are 2 ways to access the Counseling tab for a Student:

- Pathway: From the Student Dashboard, Click on Special Programs/Accomm>Counseling, or
- Click on the Counseling link displayed on the Students Quick-view

12	Blom, Jaco	b Portola	a A	Independent Stu	Milestone Indep	ender
12	Blom, Mir				×	ied
		and the second	Blom, Jac	COD		ider
5	Bowers,	96 P	Grade SSID:	: 12 395993832		- Contraction
6	Bowers,		Local I Enrole	D: 78705	current	ider
5	Bowers,	<u> </u>	Primar	y Teacher: Amy	Gruber	iden
		Search	IS Staff Assoc	Accomm	Add Contact	
9	Boyd, Da	Registration	Classes	Cume		
6	Boyd, Ma	Enromient	Meu	MinaryUCS		
_						_

1. Granting Permission to the new Counselor Tab:

- Go to Admin>Settings>Security>Security
- Click on Define Security Groups
- Look for Counselor Tab Permissions
- Assign this permission groups to all relevant staff members

0	Ocurselor (View Only)	private	staff	base	2 Members	Default Global Group
0	Ocunselor Tab Permissions	private	staff	base	0 Members	Default Global Group
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2. Setting up and customizing the Counselor Tab

The main customizable areas are as follows:

- Domain
- Target Groups/Topics
- Services Provided
- Contact Method

When you first enter the **Counselor** pages, you will only see choices populated in the **Domain** area.

		_	Current Assigned Staff
		Counselor	Adale, Joe *
	Counseling Session Log	Psychologist	Choose *
		Stu	dent Information as of 02/23/2017
E Acade	mic	School	Miestone Academy
Domain 🛛 Caree		Learning Center	Miestone Independent Study Program (Gr
Perso	nalEmotional	Student	Biom, Jacob
Target Groups/TopicsOther:		Special Programs	* *
Services Provided Other:		Supervising Teacher	Gruber, Amy
Session Topic		Contact Specialist	Reeves, LeAnn (leann)
			Related Resources
		Milestone Graduation	Plan
		A-G Requirements	
		-	
Contact Method Choose	e	-	
Contact Method Choos * Date of Session 02/23/20	7		
Contact Method Choos * Date of Session 02/23/20 * Start Time 1.16		-	
Contact Method Choos * Date of Session 02/23/20 * Start Time 1:16 End Time		_	
Contact Method Choo * Date of Session 02/23/20 * Start Time End Time Total Time			

To set up these areas, go to Admin>Settings>Counseling Tab Settings. Here is what you will see:

Counseling Session Log Settings						
Domains	_	Groups/Topics	_	Services	contact Method	
🗷 1 Academic 🚍	+ Add		Save + Add		Save 1 Face-to-Face with Student	≣
Career =					2 Conversation with Parent	≣
3 Personal/Emotional					B 3 Phone visit with Student	≣
+ Add Some					8 4 Email to Student or Parent	Ξ
					+ Add	Save

With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...

Admin Reports Learning Centers	Teachers Portal Help		Type to quick page find	
Counseling Session Log Settings				
Domains	Groups/Topics	Services	Contact Method	_
8 1 Academic	8 1 Senior Advising	8 1 Motivational	Face-to-Face with Student	=
2 Career	🛿 2 High School Goals	Crisis Career Assessment	Conversation with Parent	=
3 Personal/Emotional	8 3 Pregnant/Parent Youth		3 Phone visit with Student	=
+ Add Sove	8 4 Foster Youth	8 4 Sheller	4 Email to Student or Parent	=
	🖲 🗧 Homeless Youth	8 5 Millary	S Direct Contact	=
	8 6 19+ E	8 6 Vocational	8 6 Indirect phone, email, fax	=
	8 7 Re-enroling/Re-Instated	8 7 Mental Health Referral	+ Add	**
	8 B Dual Enrolment	8 8 College/University		
		8 9 Vocational Placement		
	+ Add Save	8 10 Credit Completion		
		8 11 Employment		
		• Add		

An entry is added by clicking on +Add. After adding all the choices you desire in an area - click SAVE.

Things to know:

- You can change the order of the list by clicking on the 3 bars \equiv and doing a drag-and-drop.
- If you no longer want to use an item, just uncheck the box and the choice will turn gray and no longer be available.



3. Using the Counselor tab to record a Counseling Session.

After Setup, your Counselor tab will look something like this:

Search	List	Registration	Grofine	nt Support Staff	IS Staff Assoc	Discipline	Classes	Med	Special Programs/Accomm	TOMS	Sports/Childs	Tests	Transcripts	Curre	Polie	Deshboard			
RTI2	504	SPED/SEIS	BL C	wroeing Work P	lemits														
					Counseling	Session Lo	g								Counselor.	Current Assi Adale, Joe	pned Staff		
			Domain 0	Academic Career Personal/Emotion										PS	School Stud	Miestone Academ	n as of 02/23/20 ny	17	
		Target Group	s/Topics	Academic Goals Senior Advising Pregnant/Parent 1 Foster Youth Homeless Youth her:	U 19+ Re-enroli buth Uual Enro New stud	ng/Re-Instated Iment ents								Special Supervisin Contact	Student: Programs: g Teacher Specialist	Bion, Jacob Reves, LeAnn () Reeves, LeAnn ()	eann)	pan (oraces 5-12)	
		Services P	Provided	Motivational Crisis Career Ass Academic Advisin Shelter Millary Vocational her:	Ment essment Colley Voca Credi Empli	al Health Refen ge/University tional Placement t Completion oyment	ral nt							Milestone (A-G Requit CTE Pathy	Graduation rements rays	Plan	sources		
		Sessio	n Topic				_				_								
		Meetin	g Notes																
		Contact	Method	Choose												Seve	Save and Finis	h Canorl	

- You will record a Session on the left-hand side of the page
- The right-hand table provides a place to identify:
 - The Counselor and/or Psychologist assigned to a Student
 - Links to any Special programs, The AAPor Graduation Plan, A-G Student Page, CTE Student Page, and the Supervising Teacher's Dashboard.

The upper-portion of the Session Log provides details of what is discussed during the session...

RTI2 504 SPEC/SUS EL Courseling Work Permits	
(Session created by LeAnn Reeves on 02/23/2017 2.58pm)	Current Assigned Staff
	Counselor Adale, Joe
Counseling Session Log	Psychologist - Choose *
	Student Information as of 02/23/2017
M Academic	School/Miestone Academy
Domain Career	Learning Center/Milestone Independent Study Program (Grades 9-12
Academic Goals 19+	Storen, Durn, Jacob
Senior Advising Re-enrolling/Re-Instated	Special Programs 24 76
Tamet Groups/Tonics	Supervising Teacher Gruber, Amy
Proster Youth New students	Delated Descurres
Cities toon	Miestone Graduation Plan
determined determined determined	A-G Requirements
Crisis Career Assessment & College/University	CTE Pathways
Academic Advising Vocational Placement	
Services Provided Sheller Credit Completion	
Millary Employment Employment	
Other	
Session Topic Colece Planning	
Jacob is looking at several different college options so we met	
to talk over the requirements for each. Jacob will be eligible	
for the Golden State Merit Award and also for a Cal Grant award.	
He will be taking advantage of both.	
Meeting Notes	

The lower-portion of Session tracks

- The time spent in the session
- Notes any Previous Sessions
- Notes any Legacy Counseling Notes

2025/05/10 05:59	5/6	Counselor Tab: Updated, Remodeled, Robust
Contact Method Face * Date of Session (2023 * Start Time 2:37 End Time 3:25 Total Time 43 * Session Confidentiality Related Document Docu Sine Sine and Finitian Cancel	As-Face with Student * 2017 2017 2017 2017 2017 2017 2017 2017	Supervising Teacher Gruber, Any Contact Specialist Reeven, LeAnn (leann) Related Resources Milestone Graduation Plan A-G Requirements CTE Pathways
Previous Sessions		
Legacy Counseling Notes		

4. Options for Saving a Session

There are various options and warnings available when it comes to SAVING a session.

• If you try to leave the page and forget to SAVE, you will be warned to save your changes BEFORE you leave the page:



• If you are working on several sessions at once and want to **temporarily SAVE** what you have done in the session so far, click SAVE. *This will keep the session open for further input.*



• Once you are satisfied with your session and want to save the entire session, click

SAVE AND FINISH. This fully saves the session and moves you to a blank save page. The session is now moved to the **Previous Session area** of the Counseling Tab.

Last

update: 2019/08/05 15:40

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