Counselor Tab: Updated, Remodeled, Robust

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



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

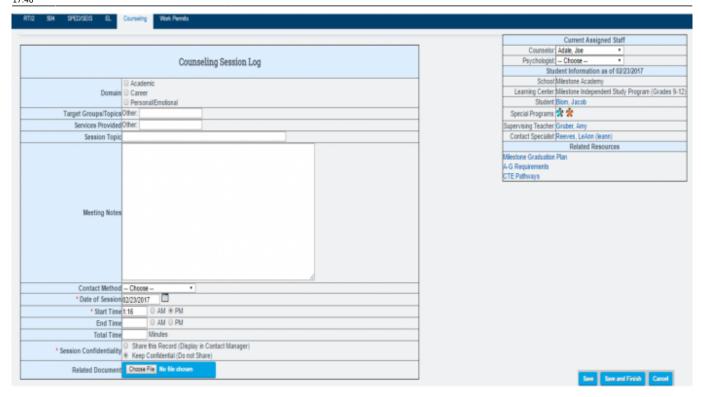


2. Setting up and customizing the Counselor Tab

The main customizable areas are as follows:

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

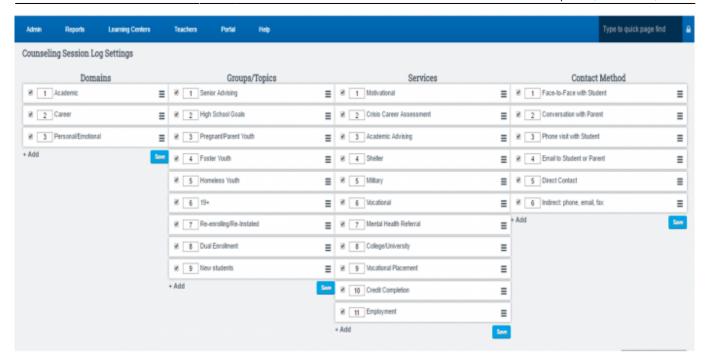
When you first enter the **Counselor** pages, you will only see choices populated in the **Domain** area.



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



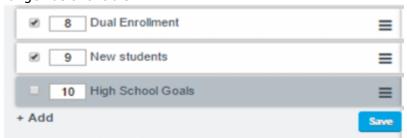
With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...



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

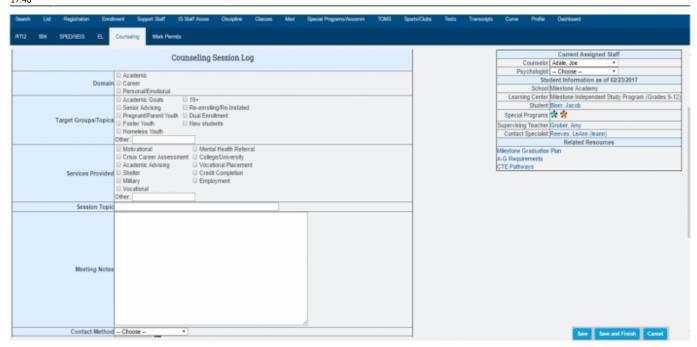
Things to know:

- You can change the order of the list by clicking on the 3 bars ≡ 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:



- 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...



The lower-portion of Session tracks

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

	A	Supervising Teacher Gruber, Arny
Contact Method	Face-to-Face with Student *	Contact Specialist Reeves, LeAnn (leann)
* Date of Session	02/23/2017	Related Resources
* Start Time	2.37 ○ AM ® PM	Milestone Graduation Plan A-G Requirements
End Time	3.25 0 AM ® PM	CTE Pathways
Total Time	48 Minutes	and the same of th
* Session Confidentiality	Share this Record (Display in Contact Manager) Keep Confidential (Do not Share)	
Related Document	Choose File No file chosen	
Save Save and Finish Cancel		
Previous Sessions		
Legacy Counseling Notes		
LATER COLOR PLAN		

4. Coming Soon:

- We will be adding a Notifications capability such as now exists in Contact Manager
- We will also be adding a Counseling Session Log Report that is comprehensive and can be filtered to display in several different ways.

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Last update: 2017/02/27 17:48