

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

	Counselor (View Only)	private	staff	base	2 Members	Default Global Group
	Counselor Tab Permissions	private	staff	base	0 Members	Default Global Group
	Permission Characterize	private	staff	base	2 Members	Default Global Group

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.

Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input type="checkbox"/> Personal/Emotional
Target Groups/Topics/Other:	
Services Provided/Other:	
Session Topic	
Meeting Notes	
Contact Method	-- Choose --
* Date of Session	02/23/2017
* Start Time	1:16 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time	<input type="radio"/> AM <input type="radio"/> PM
Total Time	Minutes
* Session Confidentiality	<input type="checkbox"/> Share this Record (Display in Contact Manager) <input checked="" type="checkbox"/> Keep Confidential (Do not Share)
Related Document	<input type="button" value="Choose File"/> <input type="button" value="No file chosen"/>

Current Assigned Staff

Counselor: **Adale, Joe**

Psychologist: -- Choose --

Student Information as of 02/23/2017

School: **Milestone Academy**

Learning Center: **Milestone Independent Study Program (Grades 9-12)**

Student: **Blom, Jacob**

Special Programs:

Supervising Teacher: **Gruber, Amy**

Contact Specialist: **Reeves, LeAnn (leann)**

Related Resources

Milestone Graduation Plan

A-G Requirements

CTE Pathways

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

Counseling Session Log Settings

Domains

- ☒ 1 Academic
- ☒ 2 Career
- ☒ 3 Personal/Emotional

+ Add

Groups/Topics

+ Add

Services

+ Add

Contact Method

- ☒ 1 Face-to-Face with Student
- ☒ 2 Conversation with Parent
- ☒ 3 Phone visit with Student
- ☒ 4 Email to Student or Parent

+ Add

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:

Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth <input type="checkbox"/> Foster Youth <input type="checkbox"/> Homeless Youth <input type="checkbox"/> 19+ <input type="checkbox"/> Re-enrolling/Re-instated <input type="checkbox"/> Dual Enrollment <input type="checkbox"/> New students <input type="text"/> Other:
Services Provided	<input type="checkbox"/> Motivational <input type="checkbox"/> Crisis Career Assessment <input type="checkbox"/> Academic Advising <input type="checkbox"/> Shelter <input type="checkbox"/> Military <input type="checkbox"/> Vocational <input type="checkbox"/> Mental Health Referral <input type="checkbox"/> College/University <input type="checkbox"/> Vocational Placement <input type="checkbox"/> Credit Completion <input type="checkbox"/> Employment <input type="text"/> Other:
Session Topic	
Meeting Notes	
Contact Method	-- Choose --

Current Assigned Staff

Counselor: **Adale, Joe**

Psychologist: -- Choose --

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Related Resources

[Milestone Graduation Plan](#)

[A-G Requirements](#)

[CTE Pathways](#)

- 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...

Counseling Session Log	
Domain	<input checked="" type="checkbox"/> Academic <input type="checkbox"/> Career <input type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input checked="" type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth <input type="checkbox"/> Foster Youth <input type="checkbox"/> Homeless Youth <input type="checkbox"/> 19+ <input type="checkbox"/> Re-enrolling/Re-instated <input type="checkbox"/> Dual Enrollment <input type="checkbox"/> New students <input type="text"/> Other:
Services Provided	<input type="checkbox"/> Motivational <input type="checkbox"/> Crisis Career Assessment <input type="checkbox"/> Academic Advising <input type="checkbox"/> Shelter <input type="checkbox"/> Military <input type="checkbox"/> Vocational <input type="checkbox"/> Mental Health Referral <input checked="" type="checkbox"/> College/University <input type="checkbox"/> Vocational Placement <input type="checkbox"/> Credit Completion <input type="checkbox"/> Employment <input type="text"/> Other:
Session Topic	College Planning
Meeting Notes	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.

Current Assigned Staff

Counselor: **Adale, Joe**

Psychologist: -- Choose --

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[A-G Requirements](#)

[CTE Pathways](#)

The lower-portion of Session tracks

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

Contact Method	Face-to-Face with Student *
* Date of Session	02/23/2017
* Start Time	2:37 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time	3:25 <input type="radio"/> AM <input checked="" type="radio"/> PM
Total Time	48 Minutes
* Session Confidentiality	<input type="radio"/> Share this Record (Display in Contact Manager) <input checked="" type="radio"/> Keep Confidential (Do not Share)
Related Document	<input type="button" value="Choose File"/> No file chosen

[Previous Sessions ▶](#)
[Legacy Counseling Notes ▶](#)

Supervising Teacher	Gruber, Amy
Contact Specialist	Reeves, LeAnn (leann)
Related Resources	
Milestone Graduation Plan	
A-G Requirements	
CTE Pathways	

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.

From:

<https://schoolpathways.com/knowledgebase/> - **School Pathways Knowledge Base**

Permanent link:

https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling_session&rev=1488217717

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