student records, admin

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

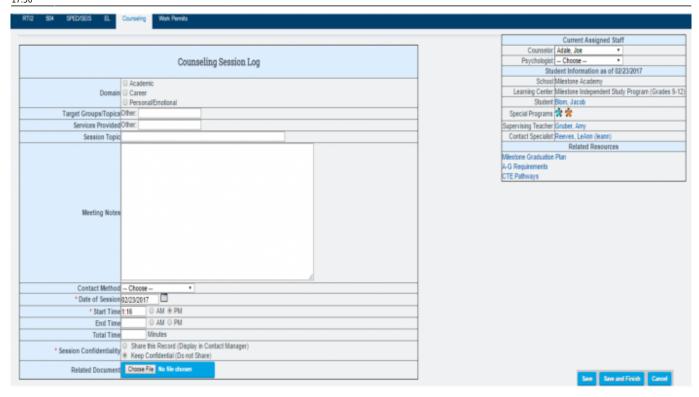


2. Setting up and customizing the Counselor Tab

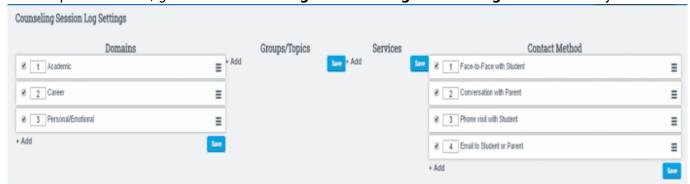
The main customizable areas are as follows:

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

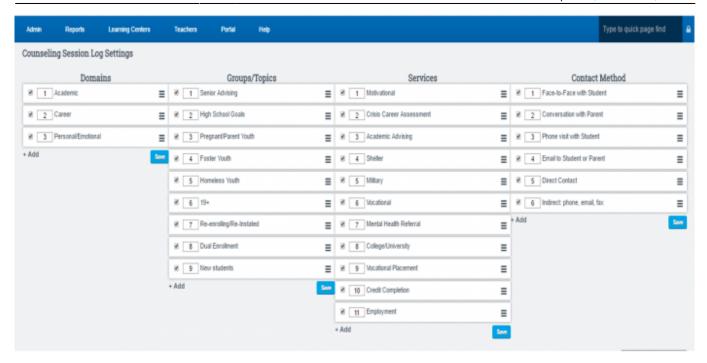
When you first enter the **Counselor** pages, you will only see choices populated in the **Domain** area.



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



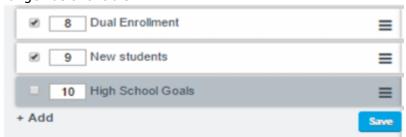
With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...



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

Things to know:

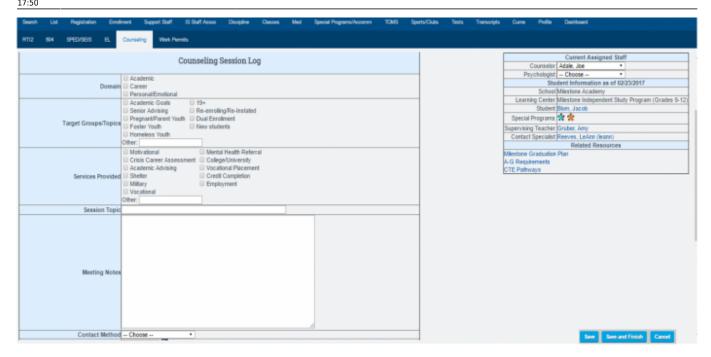
- You can change the order of the list by clicking on the 3 bars ≡ and doing a drag-and-drop.
- If you no longer want to use an item, just uncheck the box and the choice will turn gray and no longer be available.



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

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

 $upaate: \\ 2017/02/27 \ products: admin: registration: counseling_session \ https://schoolpathways.com/knowledgebase/doku.php?id=products: admin: registration: re$



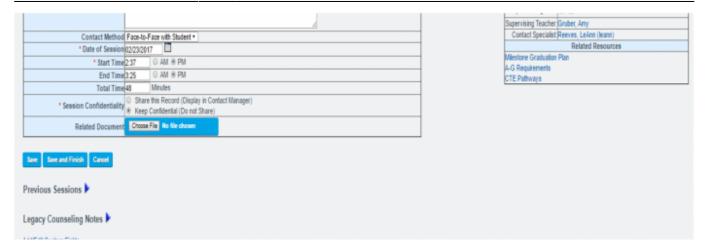
- You will record a Session on the left-hand side of the page
- The right-hand table provides a place to identify:
 - The Counselor and/or Psychologist assigned to a Student
 - Links to any Special programs, The AAPor Graduation Plan, A-G Student Page, CTE Student Page, and the Supervising Teacher's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



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=1488217819

Last update: 2017/02/27 17:50